

National Retrofit Plan

Quarterly Progress Report
Quarter 3, 2023



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Sustainable Energy Authority of Ireland

SEAI is Ireland’s national energy authority investing in, and delivering, appropriate, effective, and sustainable solutions to help Ireland’s transition to a clean energy future. We work with the public, businesses, communities, and the Government to achieve this, through expertise, funding, educational programmes, policy advice, research, and the development of new technologies.

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1. Introduction

SEAI is designated as the National Retrofit Delivery Body. In this role, the SEAI operates as the lead agency in driving the delivery of our retrofit targets. The responsibilities of the SEAI in this capacity include:

- Driving delivery of our retrofit targets.
- Promoting retrofit uptake through marketing campaigns.
- Enhancing the appeal of the retrofit supports and improving the customer journey.
- Setting standards for and developing and registering One Stop Shops.
- Increasing the number of BER assessors.
- Monitoring and managing the quantum and quality of retrofit service provision.
- Supporting the retrofit supply chain.

Report Overview

This quarterly report details progress by SEAI on delivery against targets in the Government's National residential Retrofit Plan as well as the Government's Climate Action Plan (CAP). The format of the report is to provide an overview of delivery against key metrics including, the numbers of property upgrades, B2 BER ratings achieved, and heat pumps installed.

Schemes covered in this report include:

- **Individual Energy Upgrade Grants** through the Better Energy Homes and Solar PV schemes
- **One Stop Shop Service under the National Home Energy Upgrade Scheme.**
- **Fully Funded Energy Upgrades** through Better Energy Warmer Homes Scheme and the Warmth and Wellbeing Scheme
- **Community Energy Grants**

[More detailed descriptions of these schemes are included in the Appendices to this report.]

The report should be read in conjunction with the final quarterly report for the preceding year which includes details of prior achievements against annual targets. See [2022 Full Year Report](#) here.

Full datasets and analysis for all schemes from 2015 onwards are available to view [here](#).

SEAI continuously reviews and refines the reporting methodology and definition of key metrics to improve the accuracy and quality of insights. In some instances, this may result in minor adjustments to previously reported figures. Where appropriate, these will be highlighted as additional notes in the main body of the report.

2. Review of Quarter 3, 2023

Headline Outcomes for Quarter 3, 2023

- SEAI processed more than 46,850 grant applications across all schemes to end Q3, up one-third on the same period in 2022.
- 34,083 property upgrades were completed to end Q3, more than double the number completed over the same period in 2022.
- 12,117 homes were upgraded to a BER B2 or higher to end Q3, more than two and half times the number of B2s at the same point in 2022.
- 4,204 property upgrades were completed through programmes focussed on households at risk of energy poverty to end Q3, up 34% on the same period in 2022.
- 10,966 attic and 8,671 cavity wall measures supported.
- Expenditure across all schemes to the end of Q3 2023 was €209m, an increase of 96% on the same period last year.
- The progress being reported here suggest that we are currently tracking well towards achieving the majority of the key year end targets.
- On the supply side, the registration of five additional one stop shops this year, along with the growth in contractors across the home energy upgrade schemes points to continued strong interest in the longer-term economic opportunities offered. Overall, we anticipate the increased supply to further drive demand and competitiveness.
- SEAI also added seven new contractors on the Warmer Homes Scheme, bringing the total to 36, thereby increasing capacity for works on vulnerable energy poor homes.

Major market or economic factors in this quarter

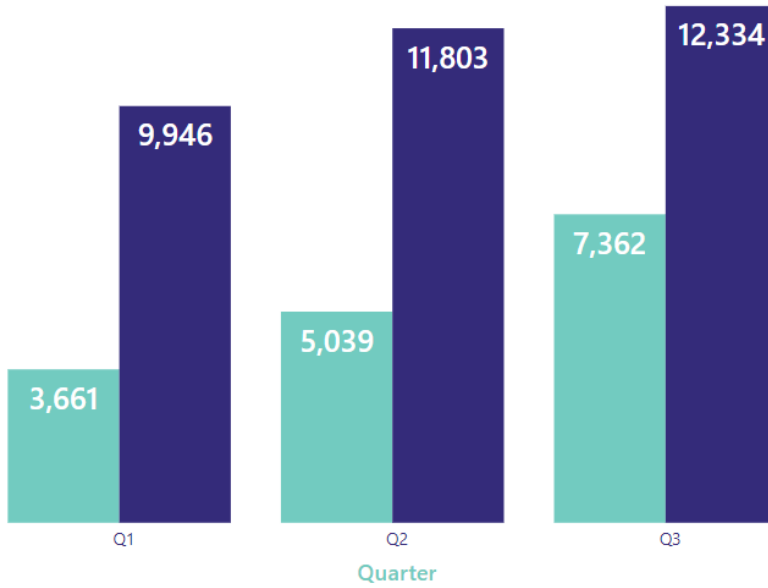
- Property upgrades, B2s and total expenditure have all increased between Q2 and Q3, however the rate of increase has moderated.
- The number of applications received to the Better Energy Homes scheme increased marginally this quarter and at a lower rate than in 2022. Given the timeline to complete energy upgrade works, the number of applications gives some sense of the strength of the future pipeline of work. The fall in applications may impact on completions in a future period. SEAI is continuing national and regional communications campaigns to build awareness and increase applications.
- The Solar PV scheme has seen both the number of upgrades and applications increase significantly between Q2 and Q3 and between the comparable periods in 2022. This may point to homeowners choosing to install solar PV over energy efficiency measures supported in the Better Energy Homes programme.
- The supply chain is continuing to grow through 2023 with five new One Stop Shops, seven new contractors on WHS (bringing the total to 36), 1,384 registered contractors for energy upgrades (insulation, heat pumps, etc.) with 181 new first-time registrations in 2023 and over 300 registered solar PV companies.

While there has been a significant increase in the number of heat pumps installed in Q3 relative to the same period in 2022 there has been some reduction between Q2 and Q3. SEAI will continue to monitor this issue in order to identify how heat pump uptake can be increased. Anecdotal evidence suggests that the cost of

electricity is a key factor in homeowner decision making.

2023 Property Upgrades (to end Q3)

● 2022 Property Upgrades ● 2023 Property Upgrades



34,083

2023 Property Upgrades (to end Q3)

16,062

2022 Property Upgrades (to end Q3)

+112%

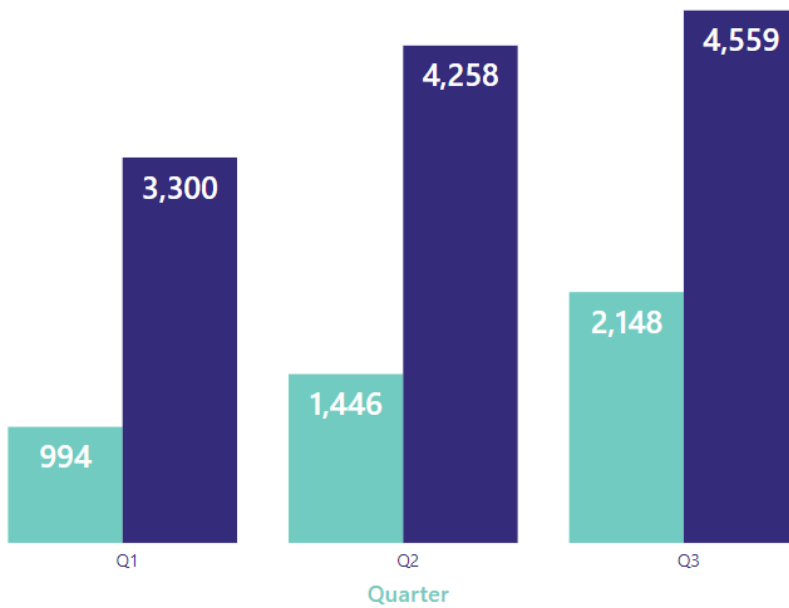
Year on Year Change

37,181

2023 Property Upgrade Target

2023 B2s Achieved (to end Q3)

● 2022 B2s achieved ● 2023 B2s achieved



12,117

2023 B2s achieved (to end Q3)

4,588

2022 B2s achieved (to end Q3)

+164%

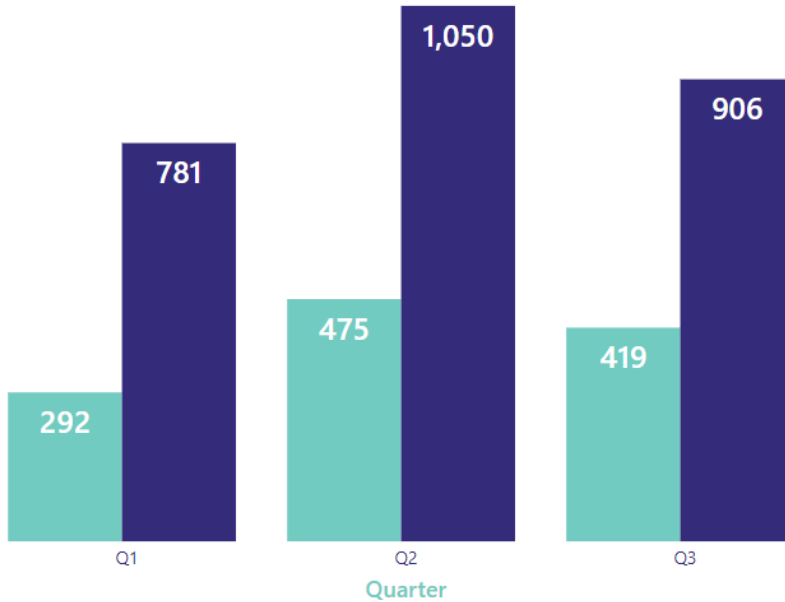
Year on Year Change

13,846

2023 B2s or Better Target

2023 Heat Pumps Installed (to end Q3)

● 2022 Heat Pumps ● 2023 Heat Pumps



2,737

2023 Heat Pumps (to end Q3)

1,186

2022 Heat Pumps (to end Q3)

+131%

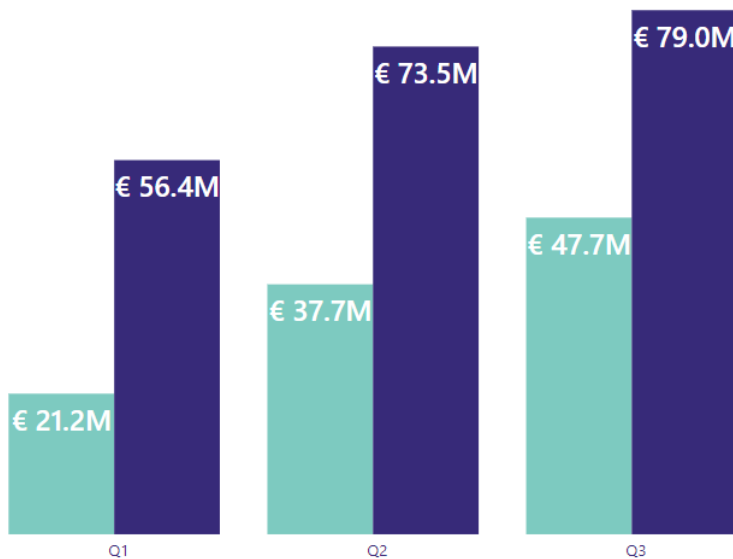
Year on Year Change

5,734

2023 Heat Pumps Target

Total Capital Expenditure (to end Q3)

● 2022 Capital Expenditure (to end Q3) ● 2023 Capital Expenditure (to end Q3)



€ 209.0M

2023 Capital Expenditure (to end Q3)

€ 106.6M

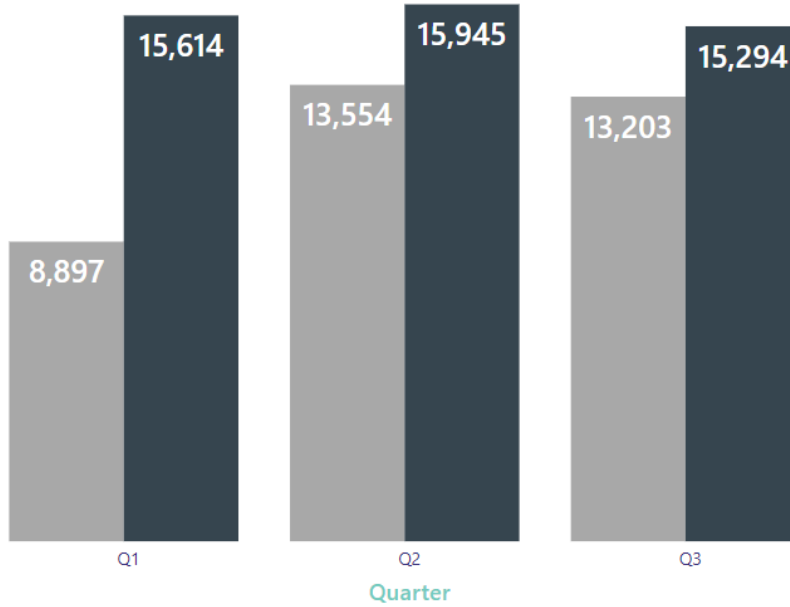
2022 Capital Expenditure (to end Q3)

+96%

Year on Year Change

2023 Applications Received (to end Q3)

● 2022 Applications ● 2023 Applications



46,853

2023 Applications (to end Q3)

35,654

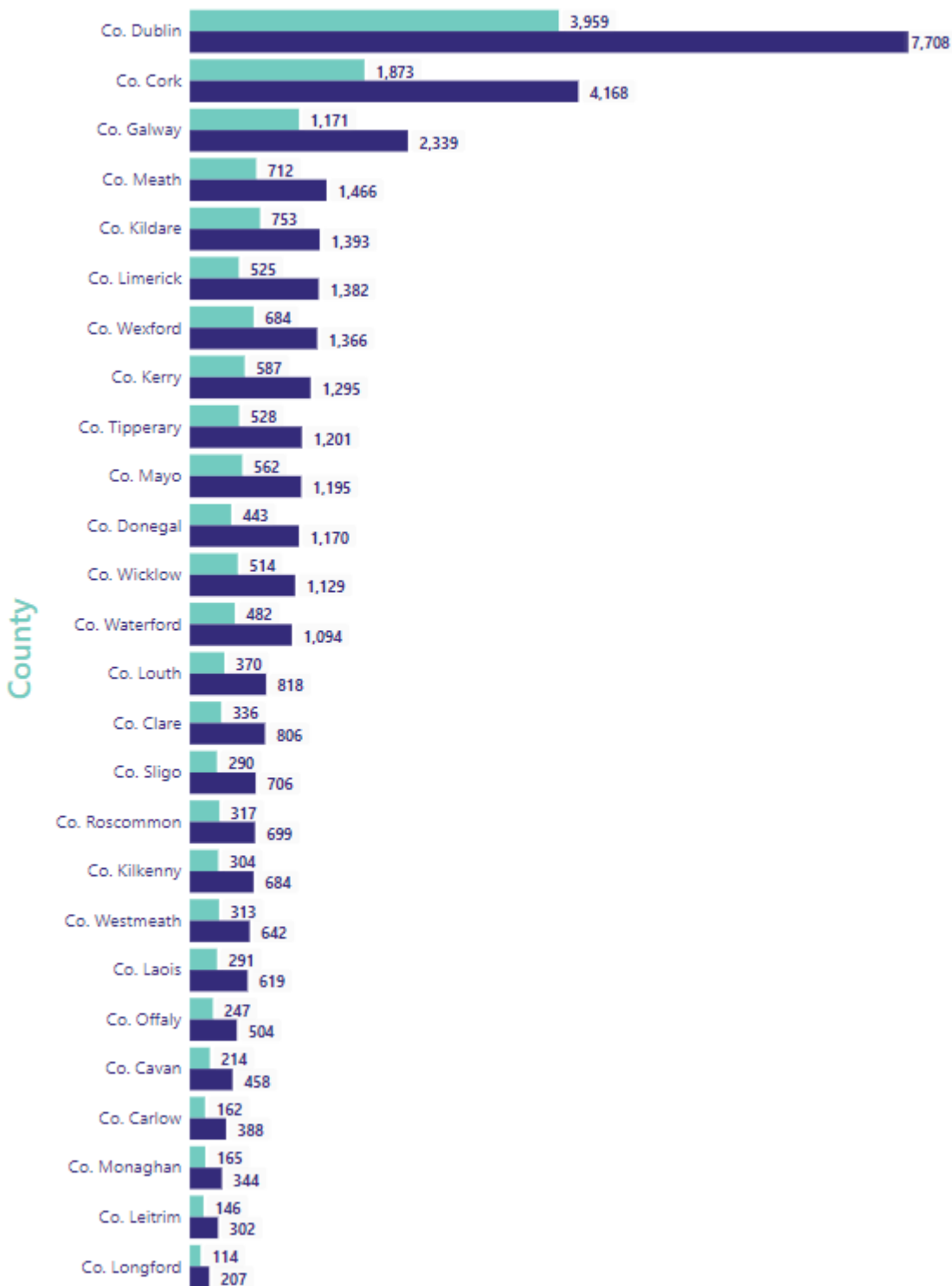
2022 Applications (to end Q3)

+31%

Year on Year Change

Number of Property upgrades by county (to end Q3)

● 2022 Property Upgrades ● 2023 Property Upgrades



Note: Appendix 1 to this report contains a table with county volumes by scheme.

3. Programme Reviews

3.1 One Stop Shop Service (National Home Energy Upgrade Scheme)

Key insights

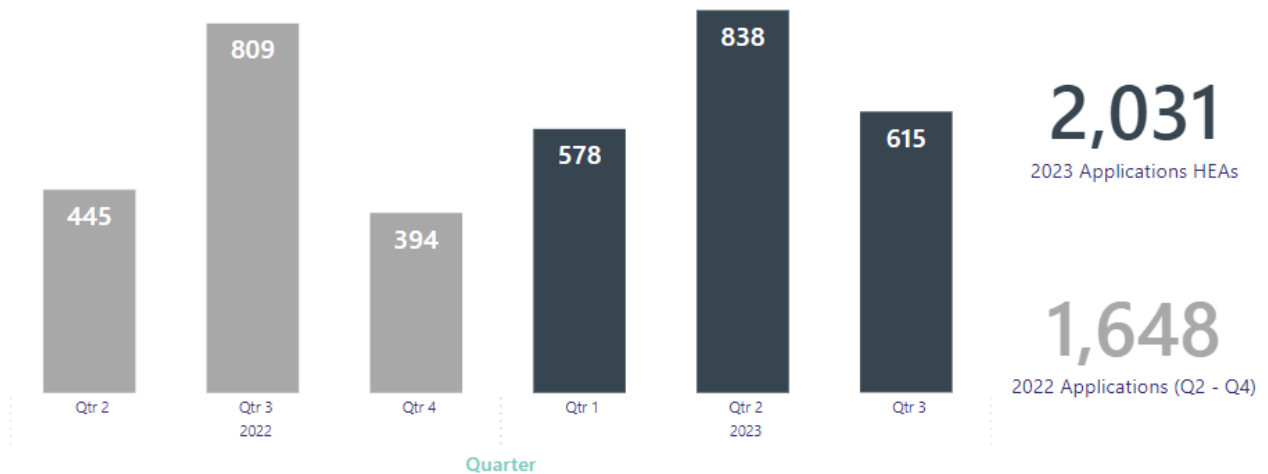
- There are 17 registered One Stop Shop service providers, an increase of five this year.
- SEAI has started a pilot project to explore the scope for installing heat pumps in homes with a higher heat loss than the current guidelines advise. The first monitoring systems have been installed in homes over the summer.

Demand pipeline

- Between September and November, SEAI is running phase two of demand generation campaigns for 2023. This comprises a combination of broad national awareness promotion and more targeted regional campaigns in seven centres identified on basis of demographics and socioeconomics.
- Since the establishment of the new scheme, there have been 3,679 Home Energy Assessment (HEA) applications. To date, about one-third of these have converted to energy upgrade works being carried out. With the balance representing the near-term pipeline of applications. It is noteworthy that HEAs are not mandatory, and many Approved Housing Bodies complete a HEA for a representative sample of homes only.
- SEAI are working on refinements to the HEA, making it more portable between one stop shop service providers should a homeowner wish to do so.

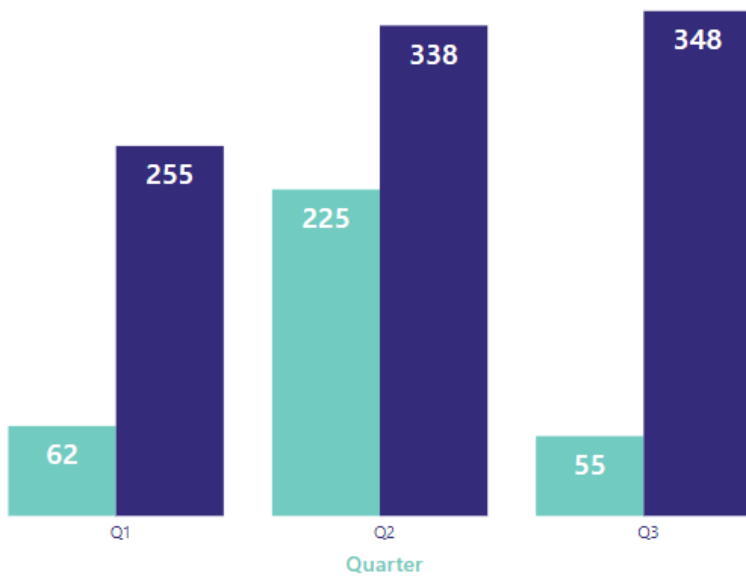
HEA Applications Received

● 2022 Applications ● 2023 Applications



2023 Property Upgrades (to end Q3) - One Stop Shop Service

● 2022 Property Upgrades ● 2023 Property Upgrades



941

2023 Property Upgrades (to end Q3)

566 | 375
AHB* | Private

342

2022 Property Upgrades (to end Q3)

226 | 116
AHB* | Private

+175%

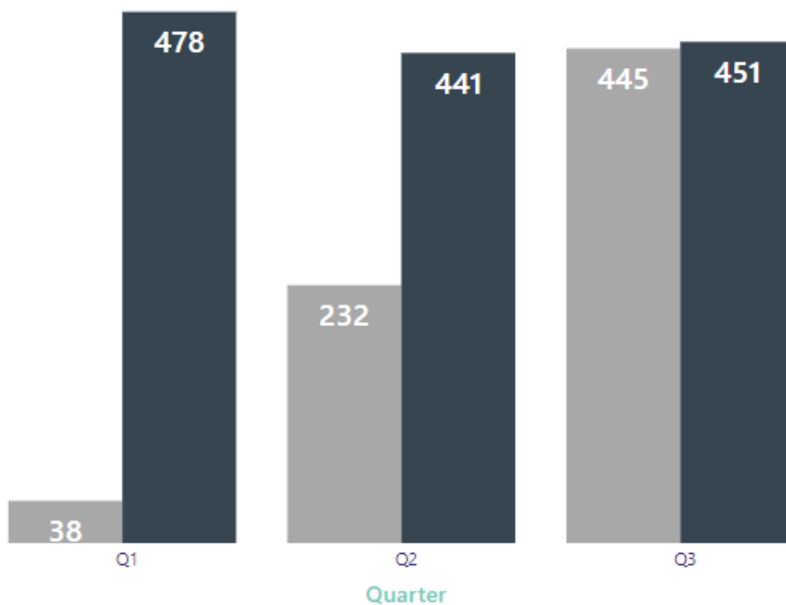
Year on Year Change

*AHB = Approved Housing Body Home

Note: Some completions in 2022 relate to remaining homes completed under the two One Stop Shop precursor pilot schemes, whereas those in 2023 relate to homes completed under the full One Stop Shop scheme.

2023 Works Applications Received (to end Q3) - One Stop Shop Service

● 2022 Applications ● 2023 Applications



1,370

2023 Applications (to end Q3)

715

2022 Applications (to end Q3)

Note: Applications in Q1 of 2022 relate only to applications under one of the two pilot schemes, whereas those in 2023 relate solely to applications under the full One Stop Shop scheme as launched in February 2022.

3.1.1 One Stop Shop works cost and BER analysis

SEAI has completed analysis of the average cost of works, average grant received and average BER uplift for all homes completed through the One Stop Shop scheme, since commencement to end Q3 2023. The data is presented in the two tables below, for private homes and for homes belonging to Approved Housing Bodies.

Private Homes

Dwelling Type	No. of Upgrades	Avg. Works Cost	Avg. Grant	Avg. Cost to Homeowner	Avg. Pre BER	Avg. Post BER
Apartment	4	€41,773	€15,025	€26,748	G	A3
Mid Terrace	45	€53,700	€19,171	€34,530	E2	A2
Semi-Detached /End Terrace	141	€59,249	€21,536	€37,713	E1	A2
Detached	264	€65,374	€24,020	€41,310	E1	A2
	454	€62,099	€22,689	€39,388	E1	A2

Homes belonging to Approved Housing Bodies

Dwelling Type	No. of Upgrades	Avg. Works Cost	Avg. Grant	Avg. Cost to Homeowner	Avg. Pre BER	Avg. Post BER
Apartment	233	€27,005	€11,221	€15,784	D1	A3
Mid Terrace	192	€28,974	€16,110	€12,864	C2	A3
Semi-Detached /End Terrace	399	€29,640	€17,867	€11,761	C3	A3
Detached	7	€35,466	€20,929	€14,537	D1	A3
	831	€28,795	€15,623	€13,169	C3	A3

3.2 Individual Energy Upgrade Grants (Better Energy Homes and Solar PV)

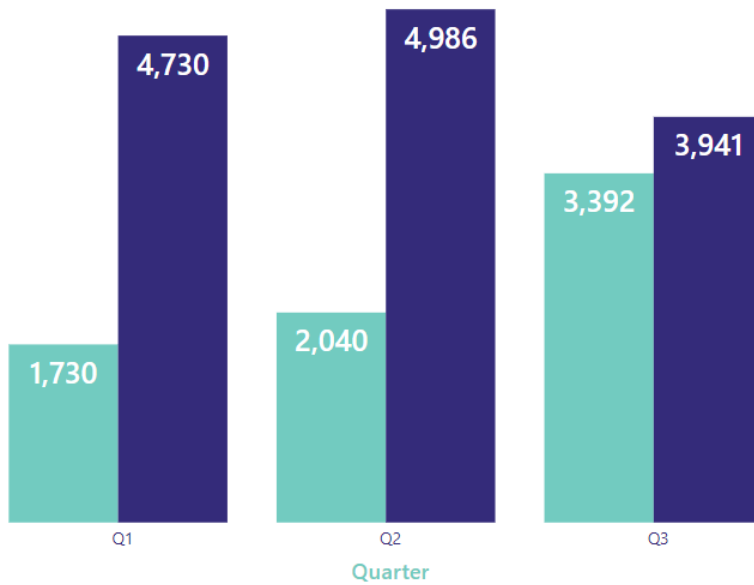
Key insights

- Home energy upgrades in these schemes are up considerably on the same period last year.
- The cumulative number of applications to the Better Energy Homes Scheme is slightly higher than the same point last year. There was a marginal increase between Q2 and Q3 this year but the number of applications is below the total number received in Q2 and Q3 last year. This indicates a possible softening of the pipeline and reduced future output for the scheme. The recent promotional campaign should help build the pipelines again.

- On solar PV, both the application rate and the number of homes completed continue their upward trajectory, with considerable year on year and quarter on quarter growth. The expectation is that this trend will remain in Q4.

2023 Property Upgrades (to end Q3) - Better Energy Homes

● 2022 Property Upgrades ● 2023 Property Upgrades



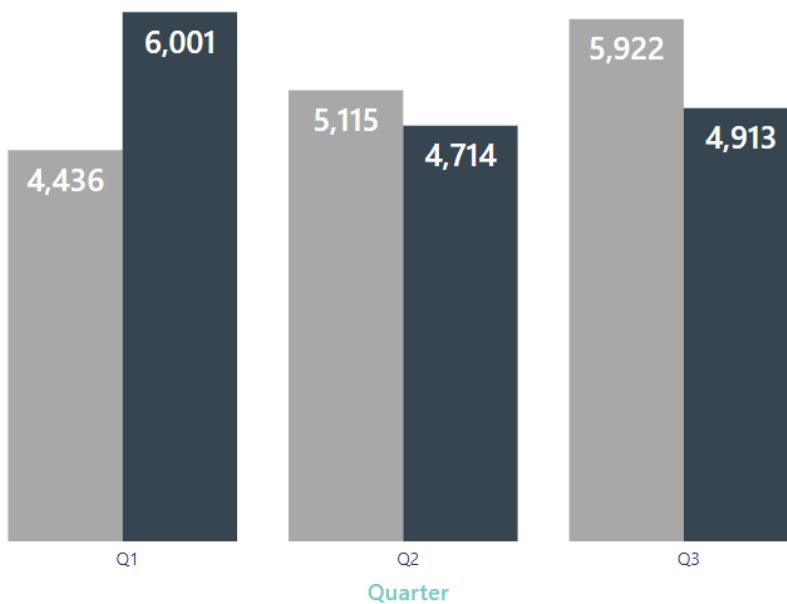
13,657
2023 Property Upgrades (to end Q3)

7,162
2022 Property Upgrades (to end Q3)

+91%
Year on Year Change

2023 Applications Received (to end Q3) - Better Energy Homes

● 2022 Applications ● 2023 Applications



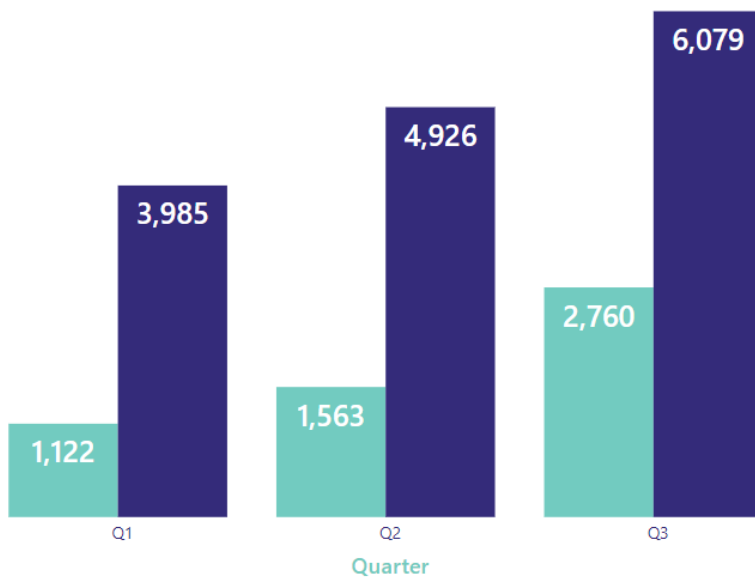
15,628
2023 Applications (to end Q3)

15,473
2022 Applications (to end Q3)

+1%
Year on Year Change

2023 Property Upgrades (to end Q3) - Solar PV

● 2022 Property Upgrades ● 2023 Property Upgrades



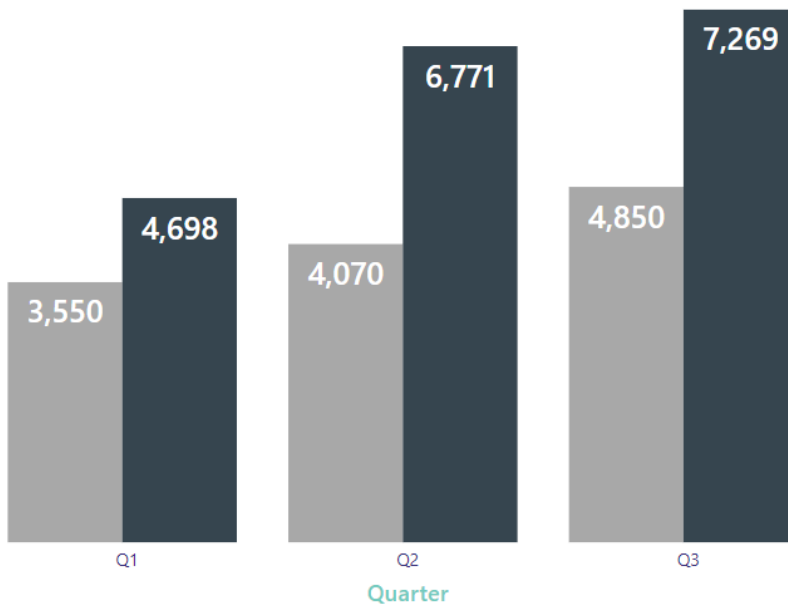
14,990
2023 Property Upgrades (to end Q3)

5,445
2022 Property Upgrades (to end Q3)

+175%
Year on Year Change

2023 Applications Received (to end Q3) - Solar PV

● 2022 Applications ● 2023 Applications



18,738
2023 Applications (to end Q3)

12,470
2022 Applications (to end Q3)

+50%
Year on Year Change

3.2.1 Individual measures cost analysis

The tables below provide an overview cost analysis of the average cost of works and the average grant paid for homes upgraded through the individual measures schemes.

Average Costs of works and grant paid by programme (to end Q3, 2023)

Programme	Average Cost of Upgrade Works*	Average Grant Paid
Better Energy Home	€ 6,883	€ 2,935
Solar PV	€ 11,838	€ 2,344

*This is the cost of works as declared by the homeowner and may, in certain instances, include costs outside of the subject home energy upgrades. To reflect more accurate averages, obvious cost outliers have been excluded from this analysis.

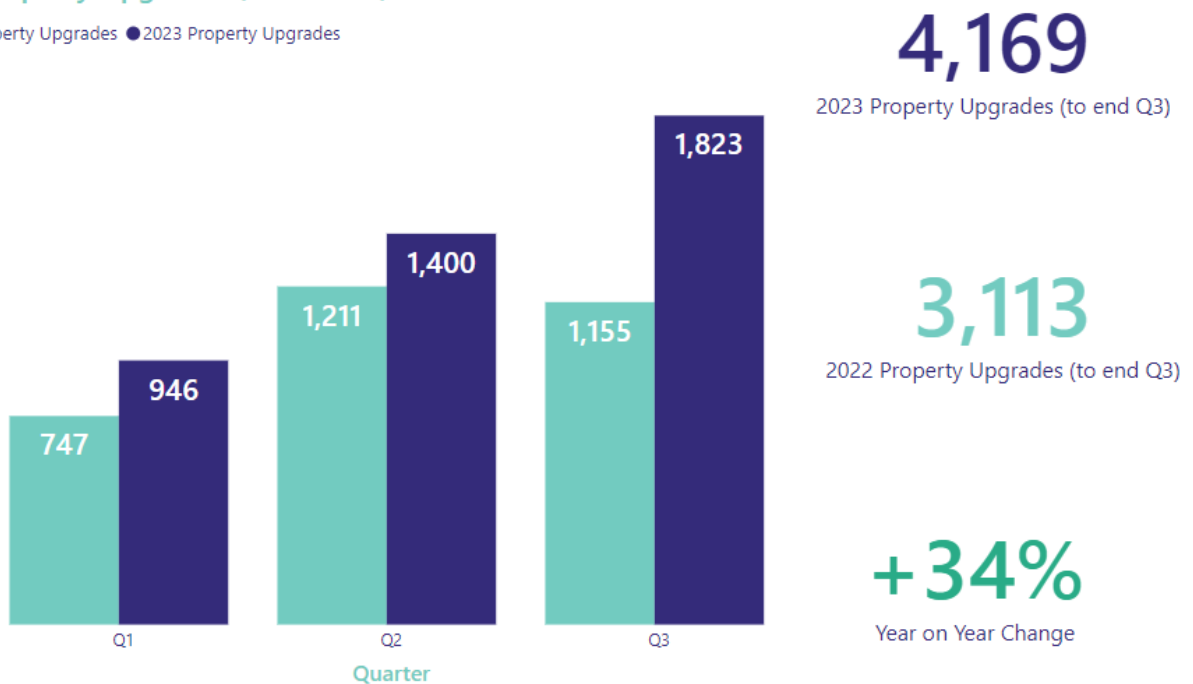
3.3 Fully Funded Energy Upgrades (Warmer Homes and Warmth and Wellbeing Schemes)

Key insights

- Output continues to build strongly with homes completions up one third on the same period in 2022.
- Demand for Warmer Homes remained high during Q3.
- The average cost of works for homes upgraded and fully paid in Quarter 3 was €25,600.
- Average waiting time, for upgrades completed in Q3 was just under 20 months. This is measured as the time from application to the time of completing the upgrade works.

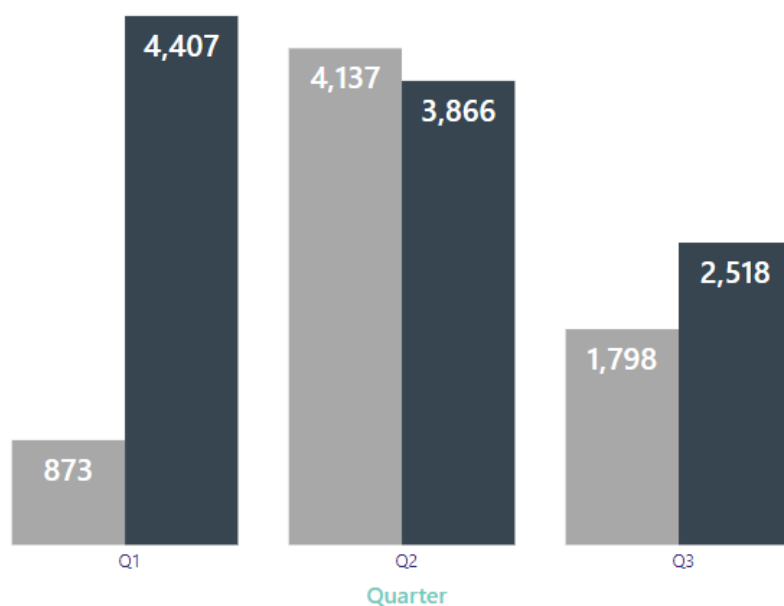
2023 Property Upgrades (to end Q3) - Warmer Homes

● 2022 Property Upgrades ● 2023 Property Upgrades



2023 Applications Received (to end Q3) - Warmer Homes

● 2022 Applications ● 2023 Applications



10,791

2023 Applications (to end Q3)

6,808

2022 Applications (to end Q3)

+59%

Year on Year Change

3.4 Community Energy Grants

Community Energy Grants run differently to the other primary schemes in that large scale projects, comprised of residential and non-residential properties, are aggregated, and upgraded by a small number of specialist project coordinators.

Key insights

- 220 non-domestic projects are complete in 2023.
- Projects with a total works value of €55 million has been approved for delivery in 2023 and 2024.

Key Statistics	2023
Total home upgrades completed (Of which, were households at risk of energy poverty)	326 (35)
Non-residential upgrades completed	220

Appendix 1: 2023 Scheme volumes by county, to end Quarter 3

	Community Energy Grants		Fully Funded Energy Upgrades		Individual Energy Grants		One Stop Shop Service	
	2022*	2023	2022	2023	2022	2023	2022	2023
Co. Carlow		3	26	56	135	327	1	2
Co. Cavan			48	59	165	360	1	39
Co. Clare		5	54	53	277	737	5	11
Co. Cork		108	276	409	1508	3,605	89	46
Co. Donegal		41	129	167	313	898	1	64
Co. Dublin		19	1125	1410	2,733	6,032	101	247
Co. Galway		12	111	170	1043	2,117	17	40
Co. Kerry		10	111	106	471	1167	5	12
Co. Kildare		1	90	170	641	1198	22	24
Co. Kilkenny		2	37	53	263	618	4	11
Co. Laois			23	60	268	495		64
Co. Leitrim			39	38	105	264	2	
Co. Limerick		64	97	101	425	1192	3	25
Co. Longford			38	31	76	161		15
Co. Louth		10	47	92	307	710	16	6
Co. Mayo		6	113	160	437	1006	12	23
Co. Meath			133	207	573	1234	6	25
Co. Monaghan		1	32	63	132	267	1	13
Co. Offaly		2	57	71	189	427	1	4
Co. Roscommon		6	70	84	246	568	1	41
Co. Sligo		1	37	62	231	636	22	7
Co. Tipperary		19	76	114	434	968	18	100
Co. Waterford		13	91	100	380	967	11	14
Co. Westmeath		1	83	94	229	545	1	2
Co. Wexford		2	99	110	585	1158		96
Co. Wicklow			71	129	441	990	2	10
Total		326	3,113	4,169	12,607	28,647	342	941

*County breakdown for homes completed through the community energy grants in 2022 were all reported in the final quarter of that year, hence the empty column.

Appendix 2: Home Energy Upgrade Scheme Overviews

SEAI offers a comprehensive range of Government funded financial supports, suiting a variety of circumstances, to help homeowners achieve their home energy upgrade ambitions.

- **Individual Energy Upgrade Grants** (comprising Better Energy Homes and Solar PV): Homeowners or private landlords apply for the grants, select energy upgrade measures, select their preferred SEAI registered contractor, manage the project, and pay for the full costs of works and claim the grant afterwards. The measures supported include attic and wall insulation, heating system upgrades and renewable energy technologies.
- **One Stop Shop Service:** A fully project managed service that provides grant support to private homeowners, private landlords and Approved Housing Bodies that want to upgrade their homes to a BER B2 or better. The service is delivered by registered One Stop Shops that assess the home, provide advice to the homeowner on suitable options, apply for the grant, complete the works, and then claim the grant from SEAI. The value of the grant is discounted upfront from the cost to the homeowner. [Note: The report includes homes completed under earlier proof of concept pilot schemes which informed the national roll-out of the One Stop Shop Scheme)
- **Fully Funded Energy Upgrade** (comprising Better Energy Warmer Homes Scheme and the Warmth and Wellbeing Scheme): A fully managed solution for qualifying homeowners in receipt of certain Department of Social Protection payments to upgrade their home with measures identified from a home energy survey. SEAI manage the whole upgrade process from home survey, through contractor works, and follow up BER.
- **Community Energy Grants:** The Communities Energy Grant supports the upgrading of a wide variety building stock and facilities to high standards of energy efficiency and renewable energy usage, thereby reducing fossil fuel usage, energy costs and greenhouse gas emissions. By supporting project structures that can be replicated, the Communities Energy Grant showcases retrofit project models that can be implemented without SEAI support in the future.

Appendix 3: Glossary

Term	Definition
Property upgrade	Refers to a retrofit at a property related to a single application on any of the SEAI residential retrofit programmes. The upgrade is counted as completed when a SEAI grant is fully paid, or on first payment of the 75% stage payment for fully funded energy upgrades (in these instances the works are complete). A property can have multiple property upgrades if they avail of SEAI grant programmes multiple times.
B2 or better home	A home counts as having achieved a B2 or better BER rating when a property upgrade achieves a post works BER rating of B2 or better. The 'B2' is allocated to the retrofit programme that first achieves the rating. Thus, a home will only be counted once as a B2 or better in all reporting context.
Heat Pump home	A home counts as a heat pump home when a property upgrade includes the installation of a heat pump. The home is allocated to the retrofit programme that installed a heat pump for the first time, regardless of subsequent energy upgrades on the same or other retrofit programmes where a replacement heat pump is installed. Thus, a home will only be counted once as a heat pump home in all reporting context.
Applications received	An application received for an energy upgrade for an individual home on any of the retrofit programmes. Multiple applications can be made for a home within or across programmes, depending on the specific rules on the programme. This is an indicator of demand for SEAI programmes. Not all applications will result in a property upgrade.
Capital Expenditure	Includes the grant expenditure plus overheads such as outsourced grant administration service costs, survey costs, inspection costs, and IT costs for supporting systems. All the above expenditure is on a cash basis in line with Government accounting. SEAI's published annual report incorporating year-end financial statements is on an accruals basis in line with financial reporting standards.



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