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SHDF Wave 2.1

PAS2035 Retrofit Project

February 2024 Case Study









Project Summary







Client	Sovereign
Industry	Social Housing
Project Scale	1000 homes
Project Type	Retrofit
Location	South England
Pre-Construction	March – Dec 2023
Construction	2024 – March 2025
Contractor	LivGreen, Everwarm

Key Metrics

1000 homes provided with

-  An individual Retrofit Assessment
-  A bespoke Medium Term Improvement Plan
-  A specific Retrofit Design
-  Low and Zero Carbon Technologies
-  A Sero BEE
-  A digital Building Passport

Project Parameters

-  Following PAS2035
-  Retrofitting EPC D and E homes
-  Delivering a minimum of EPC C
-  Delivering a maximum of 90kWh/m2/yr Space Heating Demand

Costs and Carbon

£12.6M

Co-funding from Sovereign Network Group

£9.4M

Funding from the Department for Energy Security and Net Zero (DESNZ) Social Housing Decarbonisation Fund (SHDF) Wave 2.1

£2,408

Average annual bill reduction for an individual home, as a result of the retrofit

7,081,056kWh

Total expected annual energy savings from project

The Challenge

Partner's Objectives

Sovereign have a well-established Homes & Place Standard, that they are committed to delivering against. This raises current priorities for both Sovereign and their tenants, and sets performance targets to be met over the coming years. The SHDF project was aligned with the standard and SNG priorities, alongside the required SHDF target outcomes.

As general principles, the project looked at:

- Electric homes (i.e. those without gas central heating)
- No regrets measures
- Capturing learnings for future projects
- This being a first step towards the whole Sovereign portfolio reaching EPC C by 2035, EPC A by 2048 and Net Zero by 2050

Project Challenges



Cost

fuel poverty
maintenance and repair
retrofit project costs
energy grid dependency



Comfort

warm homes
indoor air quality
draughts
damp and mould



Carbon

EPC targets
Net Zero targets
Renewable generation and storage

SHDF Objectives

- Improve fuel poor homes
- Deliver cost effective carbon savings
- Improve comfort and well-being of tenants
- Deliver value for money
- Install no-regrets measures
- Ensure quality retrofits
- Enable retrofits at scale
- Support growth of Green Economy



Department for
Business, Energy
& Industrial Strategy

Sero's Solutions

We are currently just under halfway through the delivery element of this programme. The project is therefore still in progress and too early to assess successful completion of any installations. However, delivery of the early stages has been successful in meeting programme, cost and quality expectations, and to date over 970 Medium Term Retrofit Plans (MTIP's) have been completed and provided to the Client and Retrofit Designers to progress to installation stage.

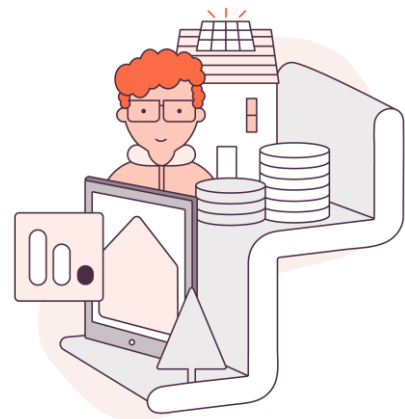
Bid preparation

- Project scoping
- Bid writing
- Portfolio analysis
- Cost data
- Data driven technical expertise



Project Planning

- Enhanced Retrofit Assessment scope
- Retrofit advice
- Programme planning
- Detailed RA quality assurance
- Integrate with Asset Management



Retrofit Coordination

- Qualified Retrofit Coordinators
- Technical expertise
- Quality assurance
- Portfolio Passport

MTIP's

- Bespoke, PAS2035 compliant MTIP's
- Semi-automated for speed of delivery
- Pdf and online Passport platform
- Adapted to Sovereign requirements

Monitoring and Operation

- Sero BEE
- Smart meters
- Environmental monitoring
- Assets and maintenance integration
- Ongoing data analysis
- Customer Service

Progress to Net Zero

- Whole life planning
- Building Passport
- Portfolio Passport
- Project Learning
- Whole home solutions

The Results

We are currently just under halfway through the delivery phase of this programme. The project is therefore still in progress and too early to assess successful completion of any Energy Efficiency Measures (EEM) installations. Delivery of the early stages has been successful in meeting programme, cost and quality expectations.

Project Passport

The full project of 1000 homes has an online Passport created to show the total costs of the retrofits, the targets set and met through the project, the impacts of the measures.

Medium Term Improvement Plans

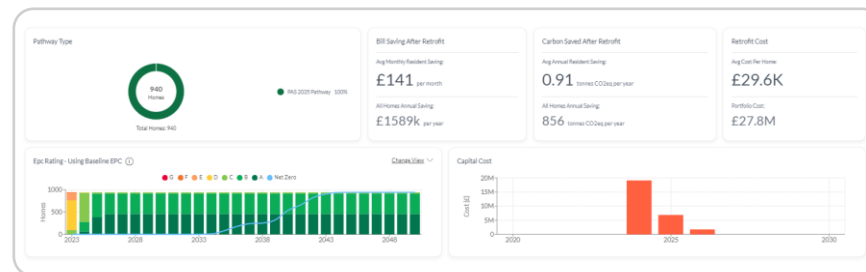
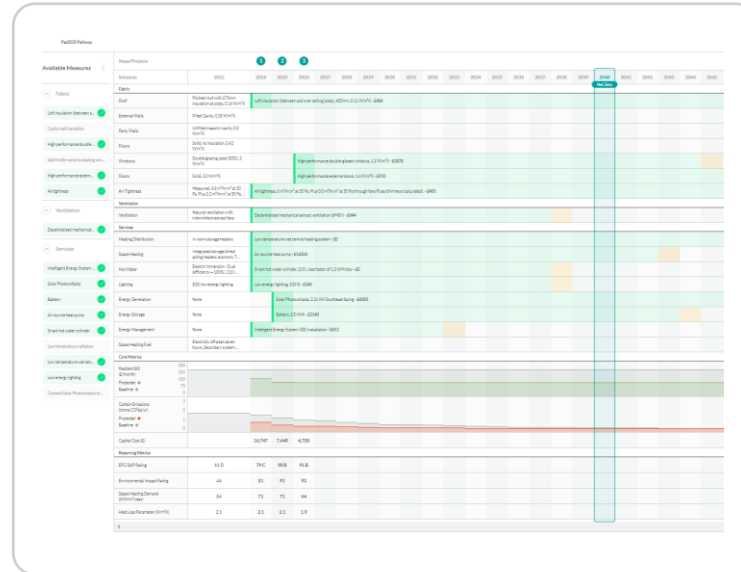
MTIP's provided for all successfully completed Retrofit Assessments. MTIP's show methodology to achieve EPC C within this project and Net Zero by 2050

Individual Home Passports

Each home now has an individual Passport, recording its current condition and journey to net zero, which can be updated as further

EEM Installations

EEM's include cavity wall insulation, photovoltaics, in-home batteries, air source heat pumps, new windows and doors



In Numbers

970+

Medium Term Improvement Plans issued to the client to date

1000+

Retrofit Assessments completed by the RA and reviewed and approved for quality and content by the RC

250+

Retrofit Assessments lodged to Trustmark by the RC

2

Retrofit Contractors appointed to cover discrete geographical areas

2025

On track for completion in March 2025

Need further information?

Have a similar project?

Get in touch

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