



22nd April 2024

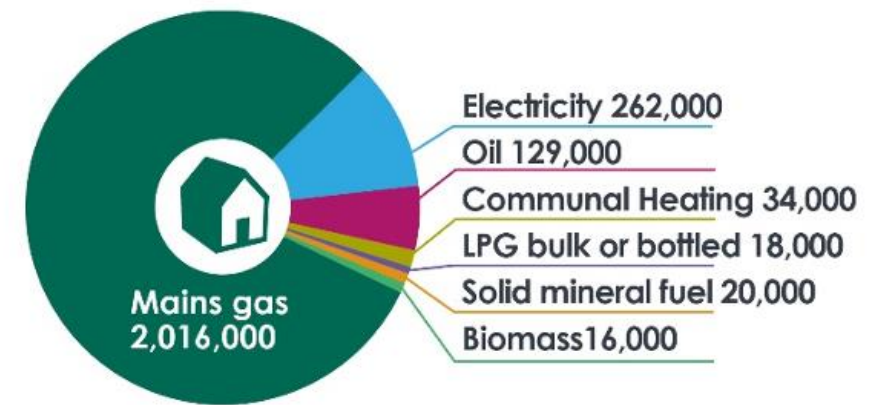
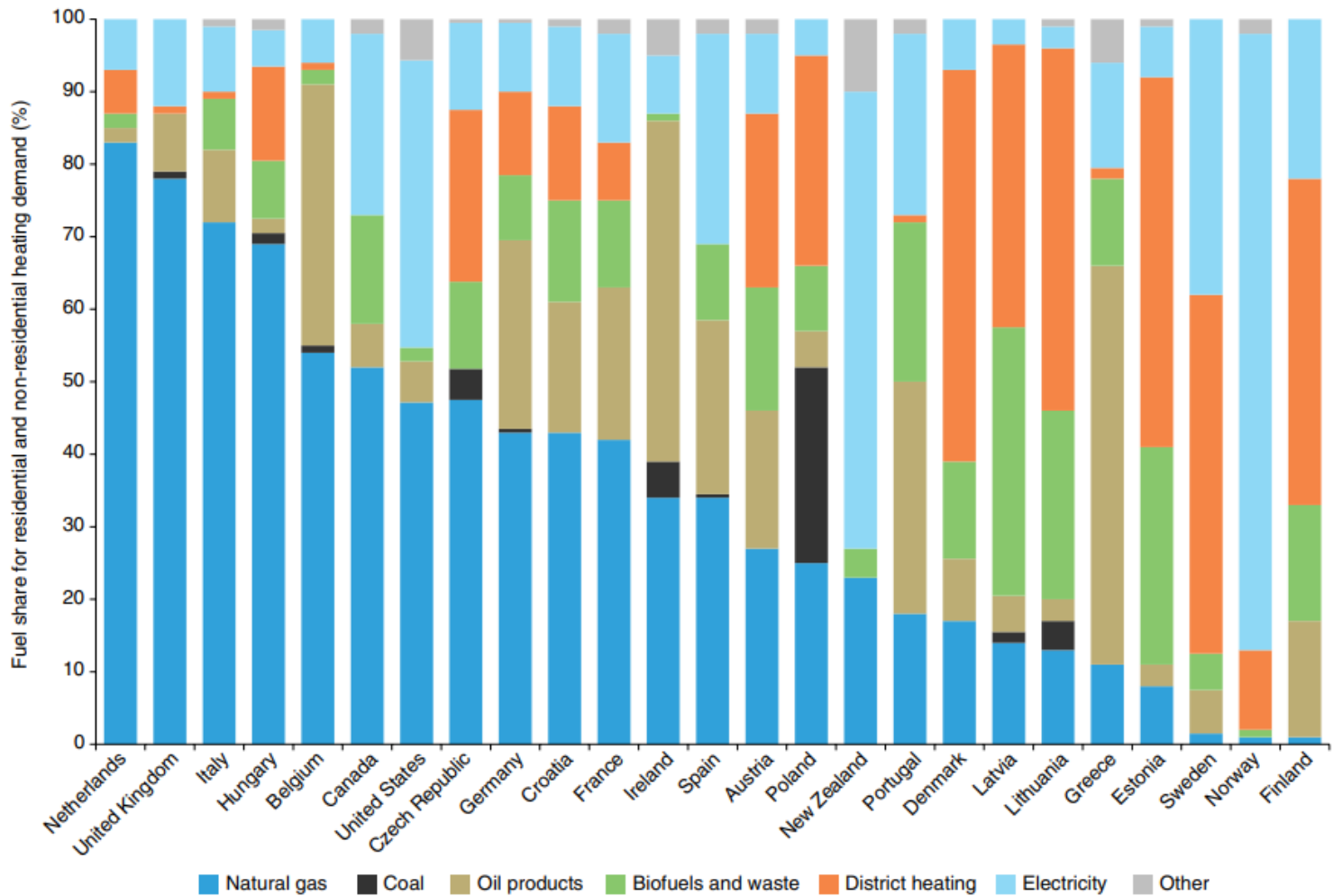
Scotland's Housing and Net Zero: The International Context



University
of Exeter

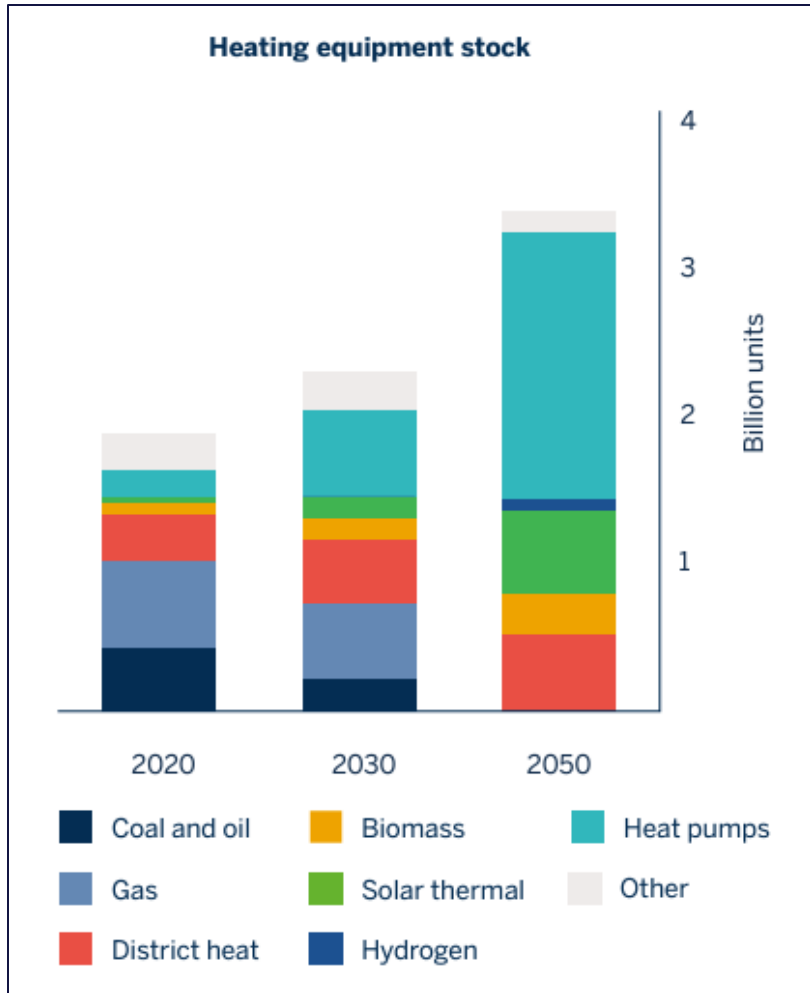
Scottish Parliament Futures Forum

Dr Richard Lowes
rlowes@raponline.org



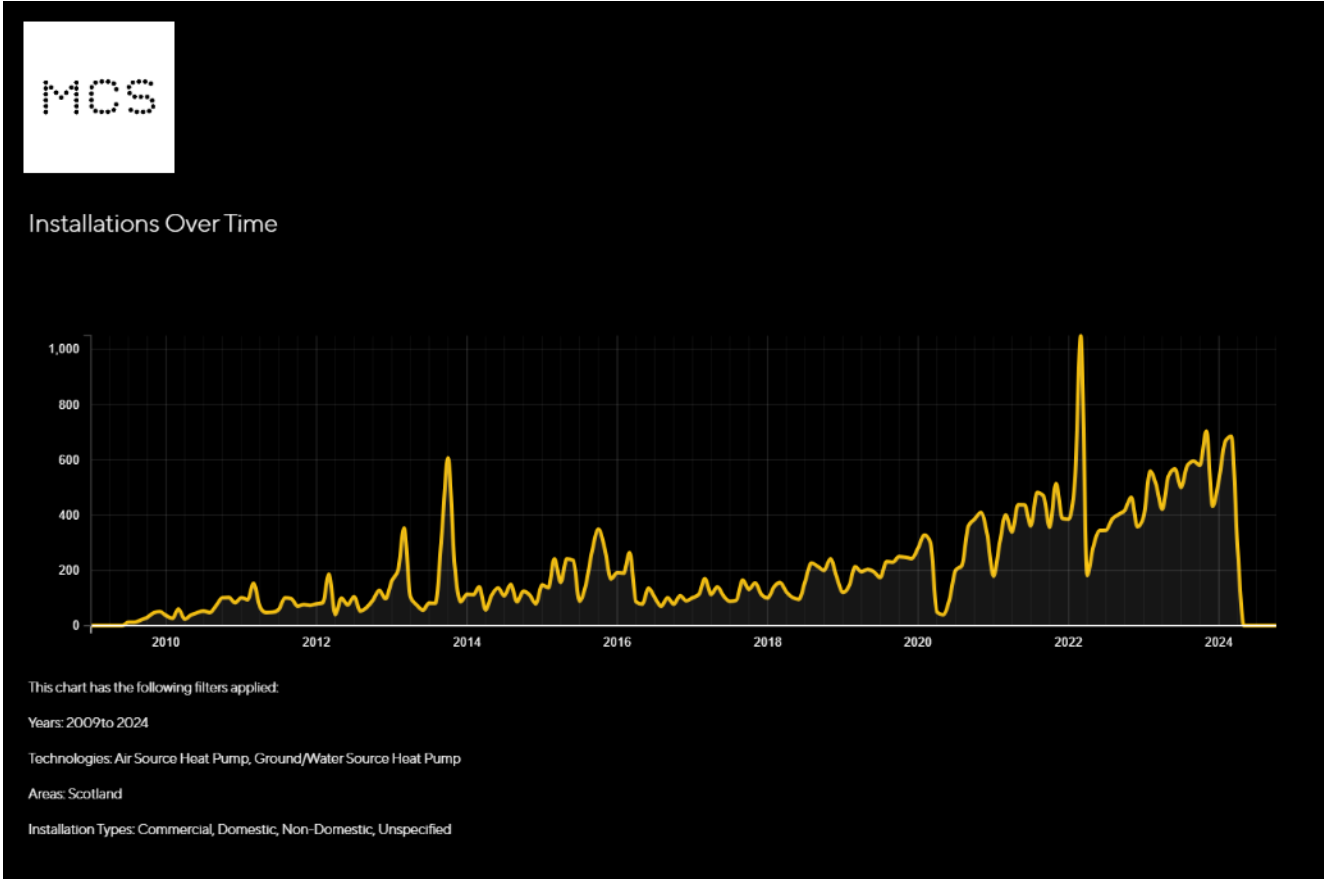
Gross and Hanna, 2019

Heat pumps, heat networks and efficiency are central to the global buildings transition



- This is reflected in Scottish energy policy.
- Heat pumps and heat networks are prioritised.
- Risks over bioenergy and hydrogen are recognised.

Heat pump deployment in Scotland is growing.....but not fast enough





The Netherlands

- 36% market growth in heat pump market growth in 2023.
- A decade of clear communication.
- From 2026, gas only heating systems to be banned – hybrid heat pumps allowed.
- Industry on-board.
- Supportive energy prices.
- And supportive people.

Letter to Parliament about the scope of standards for heating installations

Parliamentary piece | 01-05-2023

Minister De Jonge (Public Housing and Spatial Planning) informs the House of Representatives about the scope of the heating installation standards.



Germany

- Originally a plan to ban all standalone fossil fuel appliances from January 2024 (65% rule).
- Now
 - Only new developments from 2024.
 - For existing buildings, only when municipalities have presented a 'plan' in 2026 or 2028 otherwise.
 - 2045 backstop for no fossil fuel heating.

UK NEWS WEBSITE OF THE YEAR
The Telegraph News Sport Money Travel Business Health Opinion General election Ukraine Royals Life & Style

Alex Economy Companies Markets Tech

COMMENT

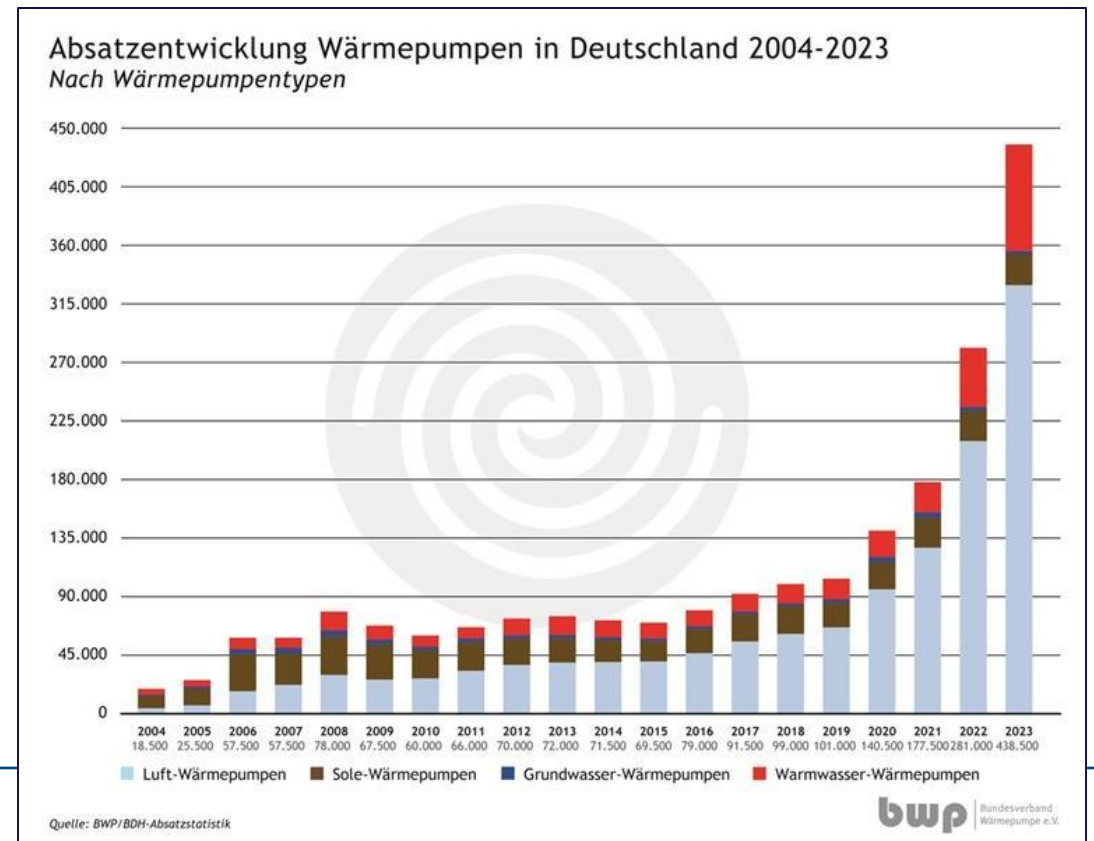
Boilergeddon could topple Germany's heat pump-loving leaders

Germans are in open revolt against the 'heat hammer' – Britain must take note



JEREMY WARNER

31 May 2023 · 10:41am

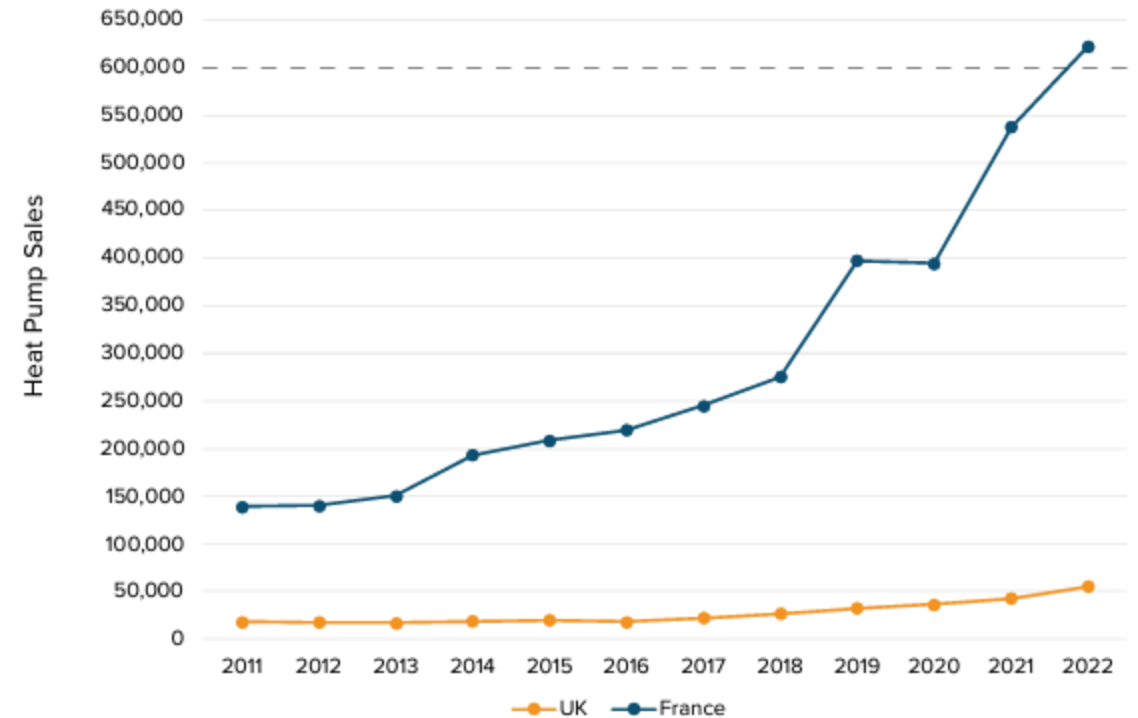


France

- Already at 600,000 heat pump installs per annum.
- Smaller gas grid.
- Oil heating ban from 2022.
- Reasonable balance between electricity and fossil fuel prices.
- Major government investment plans.

Overview

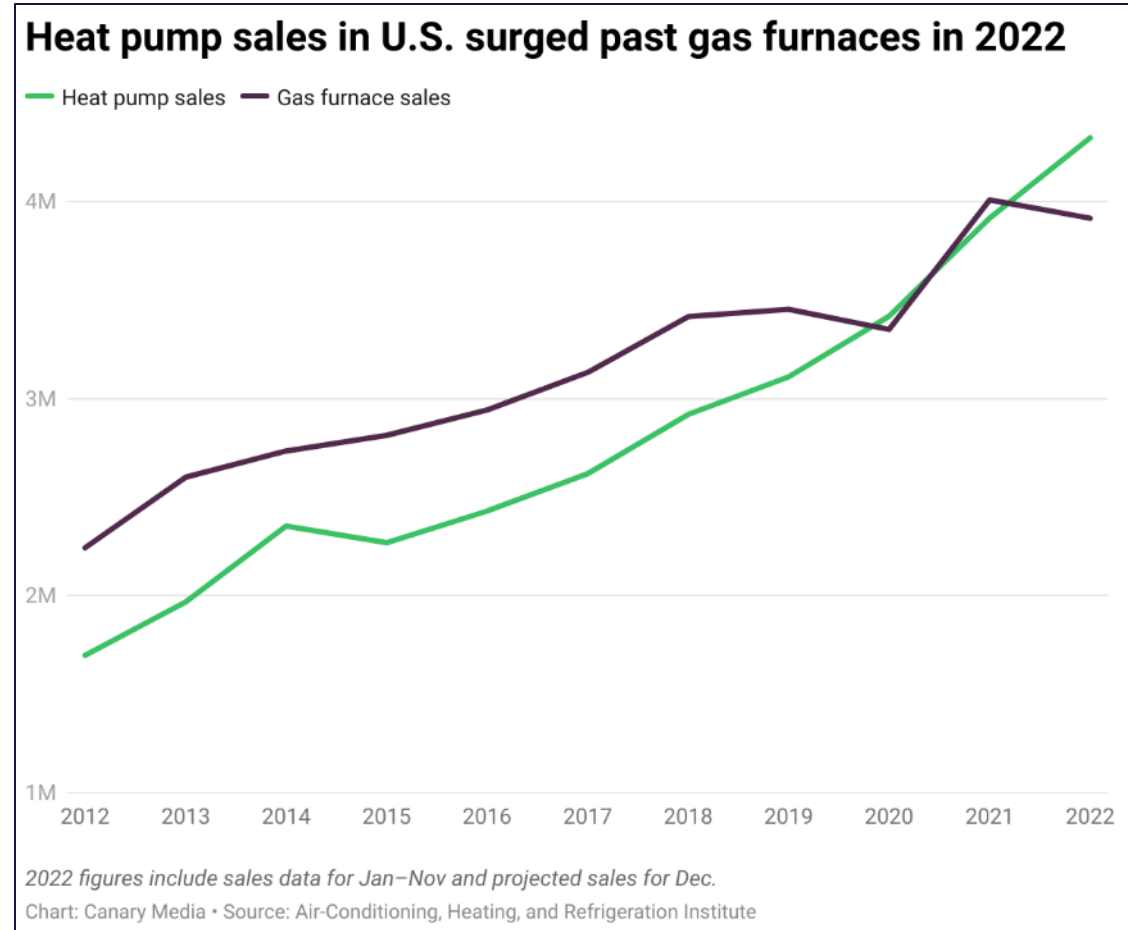
Heat Pump Sales 2011-2022: France and the UK



MCS Foundation, 2023

United States

- Gas grids not everywhere.
- Air blown heating more common and more suitable for heat pumps.
- Heat pumps given further boost by the Inflation Reduction Act.



Heat and buildings increasingly recognized as an issue, globally.

- Global interest is growing.
- Annual ministerials planned alongside possible direct reference to heating in NDCs.
- Thanks to Scottish Government for support with the Clean Heat Forum.



Final words

- Global focus on heating is growing, buoyed by increasingly favourable economics of green electricity.
- Scotland is not unique but has been generally progressive.
- A step-change is needed for Scotland to become a global leader on sustainable buildings.
- Progress on the rebalancing of energy bills is vital.



About RAP

Regulatory Assistance Project (RAP)[®] is an independent, global NGO advancing policy innovation and thought leadership within the energy community.

Learn more about our work at raponline.org