

# Focus: Refurbishment

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# Trends – Drivers for the refurbishment market



URBANISATION

SUSTAINABILITY

ECONOMY

Transformation of old siloes into new sustainable offices

# Drivers for Consumer Customers (BtC)

- Reduce energy consumption
- In-door climate
- Quality living (design, indoor/outdoor living)
- Social relations and integration
- Personal security



# Drivers for Private Customers (BtB)

- **Return on investment**
- **Securing property value**
- **Reduce energy consumption**
- **Performance Guarantee (costs)**
- **Sustainable certification**
- **In-door climate – efficiency**
- **Sustainable brand**



# Drivers for Public Customers (BtP)

- Return on investment
- Securing property value
- Reduce energy consumption
- Performance Guarantee (costs)
- In-door climate – efficiency
- Social and cultural balance
- Ghetto transformation
- Local employment and education
- Political demands for sustainable cities



# There is a need!

- **More than 475.000 “almene boliger” in Denmark build before year 2000 – need for Ghetto transformation and better integration**
- **Millionprogrammet” in Sweden**
- **Approx. 10-15 % of residentials in Norway and Finland are public financed – and refurbishment is needed!**
- **Most other buildings older than 10 years don’t fit future demands**



# Totale refurbishment market 2015-2020

**+ 300 BNSEK**



# The question is finance!

- **Housing Association Equity**
- **Energy savings transformed to rent**
- **Public finance support**
- **Increase of rent for tenants**
- **Performance guarantee contracts**
- **New models**





# Why is Contractors important?

**BtP:**

- **More for less!**
- **Industrial performance!**
- **Virtual Design Construction!**
- **Superior sustainable solutions**
- **Performance guarantee contracts!**



# Why is Contractors important?

- **BtB:**
- **Development skills!**
- **Efficient and healthy business solutions!**
- **Performance guarantee contracts!**
- **Value and Brand Protection Contracts!**
- **Risk sharing**



# Why is Contractors important?

- **Society:**
- **Employment - often local workforce**
- **Possibility to graduate trainees**
- **Possibility to integrate long-term unemployed from the local community**
- **More for less!**



# NCC's vision

*"To renew the industry and provide superior sustainable solutions!"*

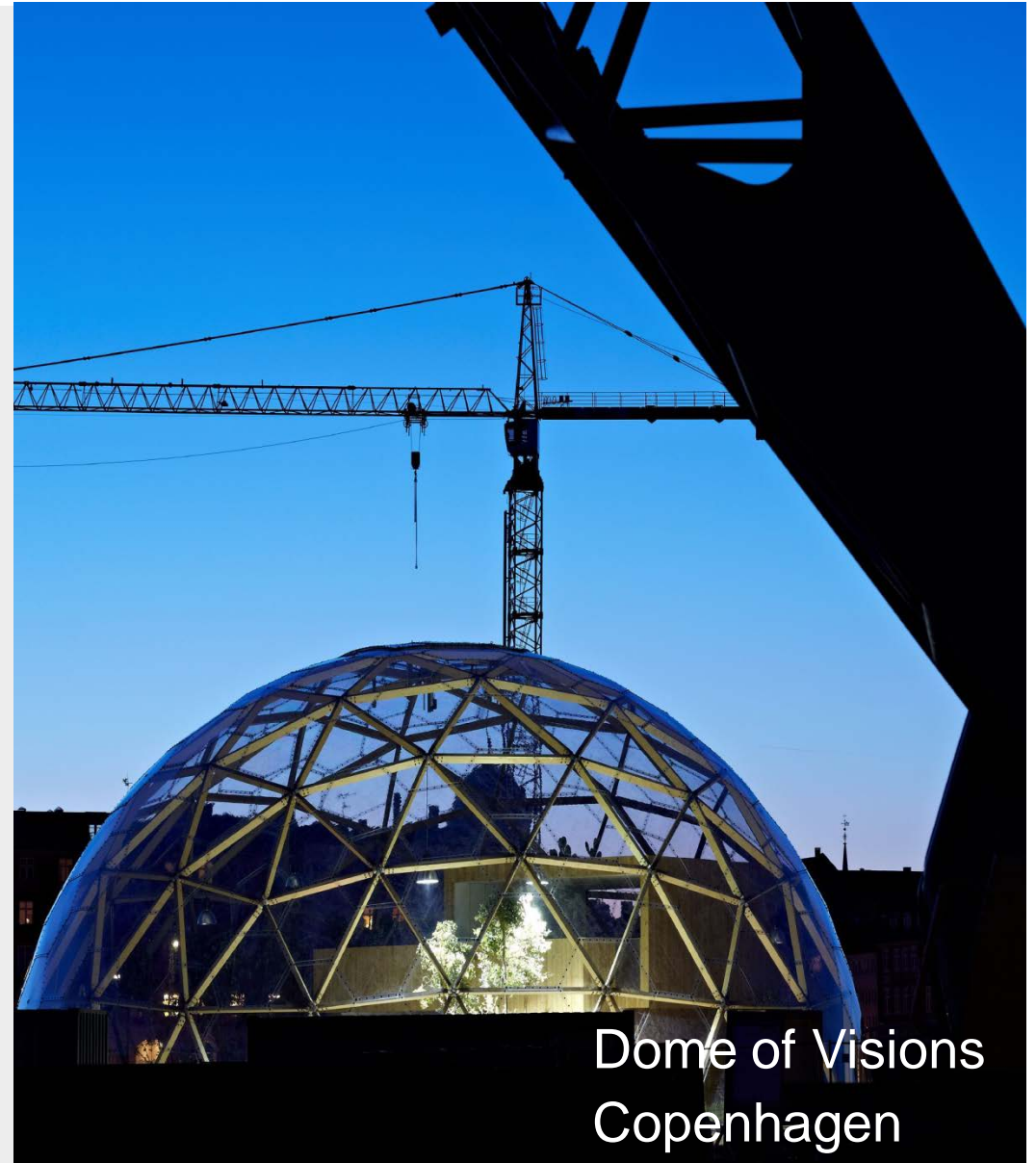
# What do NCC do?

- **NCC is focusing on;**
- **Competencies to steer large projects**
- **Competencies within VDC and digital design and build**
- **Competencies within sustainability**
- **Competencies within co-creation and Partnering**
- **Relationship with habitants and society**



# What do NCC do?

- NCC is focusing on;
- **Documentation of quality and sustainability**
- **Documentation of energy savings**
- **Developing Performance guaranteed contracts**
- **Co-create with suppliers regarding indoor climate strategies**
- **Co-create with municipalities regarding sustainable solutions in-door and out-door.**



# Focus on Refurbishment

- **There is a need for refurbishment**
- **Need for reduction of energy consumption and CO2**
- **Demands for a sustainable future**
- **Contractors is a part of the solution**
- **To succeed we need to co-create**



