

RENOVATE2RECOVER: HOW TRANSFORMATIONAL ARE THE NATIONAL RECOVERY PLANS FOR BUILDINGS RENOVATION?

NATIONAL PARTNER:



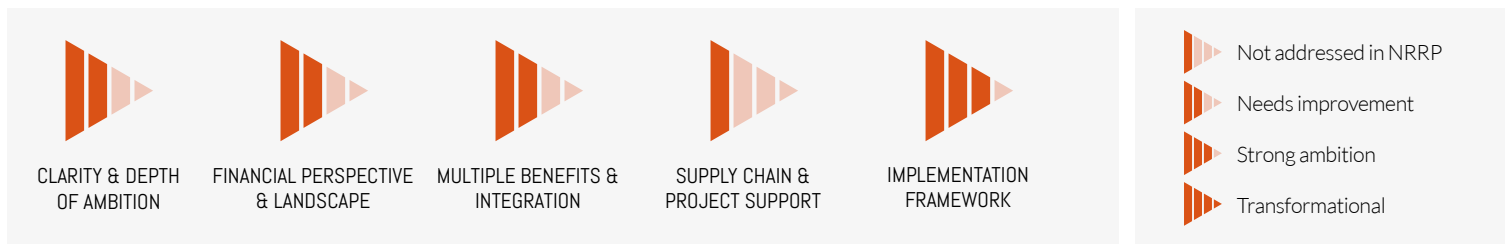
COUNTRY:



OVERVIEW:



France's Country Profile is based on information provided by the French association [Mur Manteau](#) and the [Rénovons](#). The Country Profile focuses on the buildings elements of France's National Recovery and Resilience Plan (NRRP) endorsed by the Commission in June 2021. The NRRP allocates significant funding to energy efficiency improvements. It can benefit from strengthening delivery through further supply chain and project support and strengthening requirements for deeper renovations. The NRRP is not sufficient to reach stated goals and will be completed by the low carbon 2050 strategy with clear goals and actions as well as with the Loi Climat et Résilience which has just been voted into law.

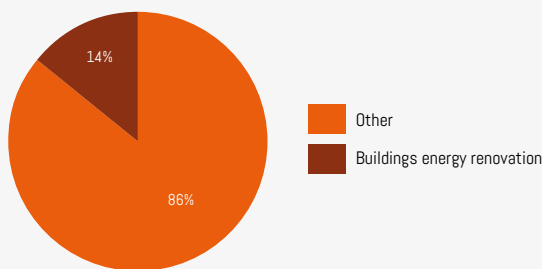


BUILDINGS IN THE CONTEXT OF THE PLAN

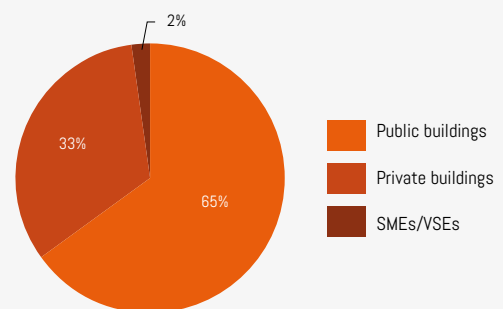


The NRRP builds on 'France Relance', a large €93.4bn recovery package drawing on funding from both the domestic and EU budgets presented in September 2020. Around 42% of 'France Relance' funding (€39.4bn) is included in the [NRRP](#). A total of €6.7bn are allocated to building renovation within the "France Relance" package (7.2%), of which €5.8 bn is financed through the [NRRP](#) (14% of NRRP funding). The largest amount allocated is to schools & public administration (€4 bn, of which €3.8bn NRRP), followed by private housing (€2bn, of which €1.4bn NRRP), social housing (€0.5bn, all NRRP) and businesses (€0.2bn, of which €0.12bn NRRP). Further measures to support cultural sectors and heritage renovation (€0.08bn), and medico-social establishments ('PAI immobilier' or Real Estate Investment Support Plan part, €1.3bn) are included in other parts of the Plan where the primary objective is not energy renovation.

Share of NRRP funding for buildings energy renovation (%)



Energy renovation by sub-sector (%)



National Challenges

A [study for the EC](#)¹ estimates that based on floor area only 1% of residential sector renovations were of medium depth and 0.2% deep renovations. Only 1.4% of energy renovation in non-residential buildings were medium, and 0.2% deep. Rénovons highlights the fragmentation of the funding landscape and the complexity of navigating different funding schemes, as some of the key challenges for accelerating the depth of renovation in France. Upskilling and attracting sufficient labour force are also an obstacle.

¹ [Comprehensive study of building energy renovation activities and the uptake of nearly zero-energy buildings in the EU - Publications Office of the EU \(europa.eu\)](#)

Renovation plan details

CLARITY AND DEPTH OF AMBITION



Delivery targets are set in terms of number of renovated properties for private and social housing sectors, and public sector buildings. All measures, apart from those for SMEs, are tagged as contributing 100% towards the target of 37% climate funding and should therefore deliver at least 30% energy savings. There is, however, no clarity on the metrics used to monitor achieved depth of renovation, and no quantification of the total energy savings or emission reduction that the Plan aims to achieve; although France's [LTRS](#) targets are mentioned. The flagship initiative in the private sector MaPrimeRénov' programme is open to all co-owners and landlords regardless of income, with varying degrees of aid intensity. An additional one-off payment is available to some dwellings with co-ownerships if projects achieve at least 35% energy savings. Bonuses are also available for deeper renovations with energy gains of at least 55%, or focus on 'energy sieves' (labels F and G), or if they reach the most efficient labels (A or B). In the public sector, by far the largest renovation component, projects across state-owned and local authority buildings would be selected based on economic impact (i.e. rapid delivery) and energy and environmental impact. For SMEs, the targets relate to the number of companies benefiting from energy renovation tax credits and/or receiving support with applications.

FINANCIAL LANDSCAPE AND PERSPECTIVE



France's National Energy and Climate Plans estimates the investment need for buildings at €15-25 billion annually for the period 2019-2032. The measure of green budgeting will be generalised from the 2021 budgetary plan onwards to monitor the impact of the NRRP on climate and the environment. The Plan does not draw clear links or distinctions to other sources of public funding. For the buildings sector focus is on grant funding rather than financial instruments to leverage private finance. The intervention for very small and small and medium enterprises however is based on a tax credit mechanism charged against income or corporate tax. It is capped at €25,000 per undertaking.

MULTIPLE BENEFITS AND INTEGRATION



The plan aims at addressing **energy poverty** through the renovation of social housing and higher aid intensity for low-income households. Separate policies in place encourage heat decarbonisation, with plans to ban the installation of oil-fired boilers (fuels with GHG emissions greater than or equal to 250 gCO₂eq/kWh PCI) initially in new buildings and later in existing ones. **Heat decarbonisation measures** like heat pumps installations are also financeable under the MaPrimeRénov' programme, however, there are no requirements to apply the Energy Efficiency First Principle, and energy renovation is not directly linked to trigger points such as boiler replacement. There are **no specific digitalisation** measures for the buildings sector within the Plan (e.g. investment in smart systems, improvement in buildings stock data collection and repositories, or building renovation passports). Renovations also partially support the realisation of **wider benefits** – e.g. higher support available for condominiums qualified as "fragile" or located in urban areas under renewal, or improvements in accessibility for medico-social establishments. Climate change adaptation, use of sustainable resources for construction or circularity are not systemically addressed.

SUPPLY CHAIN AND PROJECT SUPPORT



The upskilling of energy and construction professionals and the potential to encourage digitalisation tools in buildings are not directly addressed within the NRRP. Limited funding is provided for technical assistance for households who require support from a consultant or project management support to carry out energy renovation work (envisaged as flat rate grant of €150). Other technical assistance measures (e.g. one-stop-shops) are not foreseen, although some are already supported through other programmes – e.g. Public Service for Housing Energy Performance, with further measures under discussion at national level.

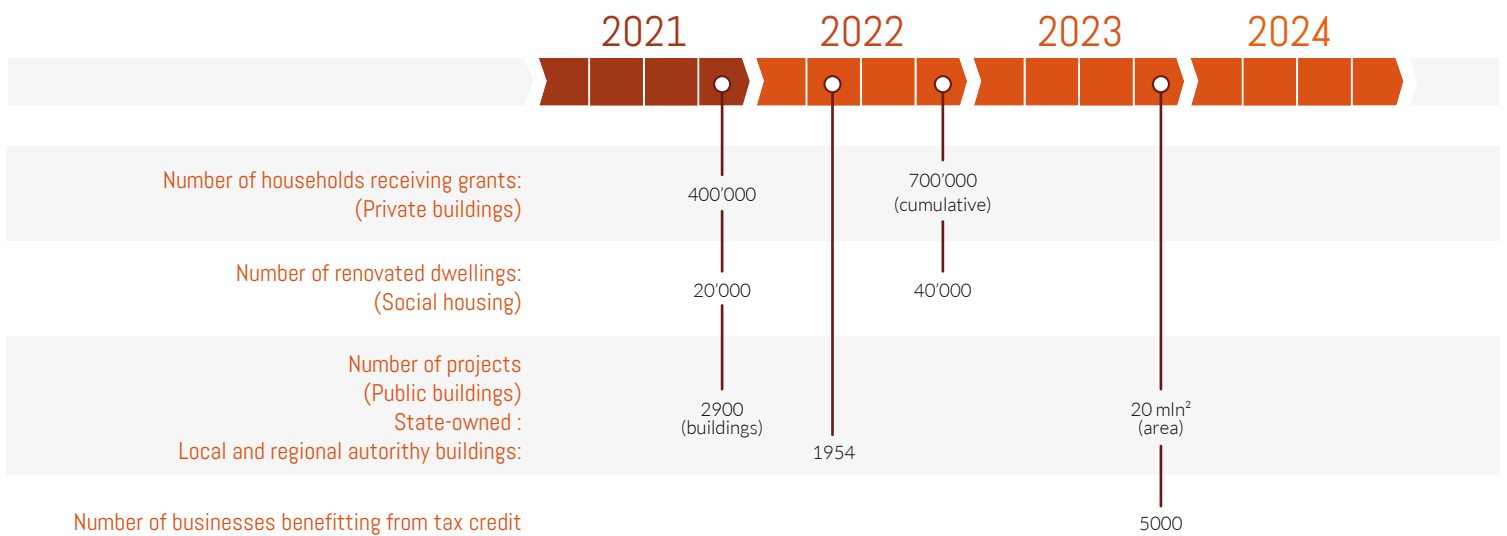
IMPLEMENTATION FRAMEWORK



The Minister of Economy, Finance and Recovery (MEFR) and the "Secrétariat Général France Relance" attached to the Prime Minister have overall responsibility for monitoring the Plan. National budget and audit systems would be used to audit the Plan although a tailored strategy is still to be developed. The ministry responsible for implementation of the renovation components is the Ministry of Ecological Transition. France has also set up an Energy Renovation Observatory that will monitor all components of public policy on energy renovation of buildings in the country. The Observatory is expected to present first results in the 2nd half of 2021. Intermediate milestones are set for the majority of programmes.



TRACKING/ TIMELINE TO 2026



RECOMMENDATIONS FOR IMPROVEMENT DURING IMPLEMENTATION

The NRRP provides significant volumes of funding for the renovation of public and residential properties and makes positive steps towards increasing the rate of renovation in the immediate term. Further steps are needed to ensure that the planned activities support deep renovation and allow the integration of different programmes and development of long-term supply chains to set France on a sustained pathway for decarbonisation of its buildings. Some of the areas for further improvement include:

- ▶ Set measurable energy and emissions saving targets for measures in the Plan and monitor the achieved energy savings to ensure they meet the requirements, shifting delivery towards deep renovations if monitoring evidence suggest insufficient uptake.
- ▶ Ensure technical support resources are sufficient to upscale renovation, particularly in the area of one-stop shop mechanisms and access to finance, and deploy public or private information and assistance support lines.
- ▶ Develop and invest in a long-term strategy for skills and professional development (e.g. through qualification schemes or continuous learning opportunities, as well as certification and labelling schemes) to ensure supply chains adapt to deliver integrated and reliable deep renovations and seize digital and other emerging opportunities.

Relevant extracts from the Commission Staff Working Document and the Council Implementing Decision for the French NRRP

This Annex is to be read as a supporting document to the Country Profile. While the Country Profile centres more specifically on the renovation-related investments, the Annex is more broad and covers the climate-related reforms and investments of interest to buildings.

Measure/Sub-Measure Name	Budget (EUR million)	Deadline	Instalment	Milestone/ target
COMPONENT 1: Buildings renovation				
<p>According to its National Energy and Climate Plan and in order to reach the 20% reduction of energy consumption by 2030 (in comparison with 2012, which is the national objective set for 2030), France needs to invest annually an additional EUR 15 to 25 billion until 2030 into the renovation of buildings, by increasing both the rate and depth of renovation.</p> <p>This component of the French recovery and resilience plan concerns investments and reforms aiming at improving energy efficiency of all types of buildings: public buildings and private ones, including private and social housing as well as buildings belonging to companies. The reforms supporting investments consist (i) in complementing the reform of the housing policy initiated by the "ELAN" Law adopted in 2018 in order to increase the efficiency of public expenditure through the revision of three existing schemes (APL, Pinel and PTZ) and (ii) adopting a revised thermal regulation of new buildings (RE2020).</p> <p>Investments under this component are key to achieving the energy efficiency objective, as buildings stock represents circa 25% of greenhouse gas (GHG) emissions in France and 45% of final energy consumption.</p>				
Reform 1 (C1.R1): Housing policy				
<p>The measure includes two distinct objectives that shall be implemented in two steps.</p> <ul style="list-style-type: none"> - The revision of the calculation modalities for the APL ("aides personnelles au logement"): the amount of aid shall be calculated, from 1 January 2021 onwards, on the basis of the current income of the beneficiary household, instead of the income of the penultimate year. Such revision shall allow the system to adapt more quickly to the income variations of beneficiaries, with a view to improve social fairness. In addition, the amount of aid shall be recalculated every quarter, allowing for a gradual taking into account of recent changes in income. -The Pinel scheme is an income tax credit scheme for owners investing in new or rehabilitated dwellings in view of renting them. The decision should be taken in 2023 to end the Pinel scheme by the end of 2024 – the Pinel scheme would be later replaced by new provisions to foster mid-range accommodations financed by institutional investors in order to improve its impact on housing supply where the needs are the greatest, for instance by reducing incentives for new constructions in areas where the housing market is not under strain. This shall be complemented by changes in the way so-called zero-rate loans ("PTZ") are provided, in particular the eligibility of applicants shall be assessed on the basis of the current incomes in order to limit windfall effects that currently exist. 				
		Q1 2021	1	Entry into force of the legislative changes to review the calculation modalities of APL to reflect current income of the households.
		Q1 2023	3	Entry into force of the legislative changes to the Pinel tax credit to improve its efficiency in view of increasing housing offer in areas where the market is under strain, and adoption and entry into force of the legislative changes to the PTZ scheme.
Reform 2 (C1.R2): Revised thermal regulation RE2020				
<p>On 1st January 2022, the revised thermal regulation of new buildings shall replace the existing thermal regulation of buildings that entered into force in 2012. The main objectives of the revision of thermal rules for new buildings are:</p> <ul style="list-style-type: none"> • The improvement of energy sobriety and the decarbonisation of the energy consumed: introduction of stricter thresholds for (i) the bioclimatic need of housing (lowering the maximum threshold by 30% in comparison to current regulation RT 2012), (ii) non-renewable primary energy consumption, and (iii) GHG from energy consumption (4kgCO₂/m²/year for a single-family house, and 14 kgCO₂/m²/year for collective housing until 2024 and 6,5 kg after 2024). • The reduction of the carbon impact of new building: the carbon impact shall take into account the entire life cycle of the building, from its construction phase to its demolition, which represent between 60 to 90% of the buildings' carbon impact over 50 years. Such considerations shall lead to enhancing the use of more carbon neutral construction materials, such as wood and bio-based building materials (i.e. those that store carbon and emit very little during their production). • The adaptation of new buildings to climate change: the new regulation RE2020 shall (i) take into account the cooling of constructions in the calculation of the energy needs of a building, (ii) provide a summer comfort indicator calculated during the design of the building, and (iii) set a maximum high threshold of 1250 DH (degree-hour) and a minimum low threshold of 350 DH from which penalties shall apply in the calculation of energy performance. 				
		Q1 2022	2	Entry into force of legislative changes included in the new RE2020 in order to reduce GHG emissions of new constructions, improve the energy performance of new buildings and adapt new buildings to climate change.
Investment 1 (C1.I1): Energy renovation of private housing, including energy sieves				
<p>The French recovery and resilience plan will finance a grant scheme, called 'MaPrimeRenov' (MPR), which will be allocated to owners in order to contribute to financing insulation, heating, ventilation or energy audit works for single-family house or apartments in collective housing. All the MPR financed by the plan will be notified to owners for eligible renovation projects before the end of 2022. In order to guarantee quality standards of the works supported, the renovation works are carried out by companies with the RGE label ("recognized as guarantors of the environment").</p>				

Measure/Sub-Measure Name	Budget (EUR million)	Deadline	Instalment	Milestone/ target
<p>The amount of the premium varies depending on the eligible materials, equipment and works performed, up to a ceiling of EUR 20 000 for a period of maximum 5 years.</p> <p>Since October 2020, MPR is open to all owners, regardless of their income. However, the aid intensity varies according to household income (for modest households, the aid may go up to 90% of the amount of estimated works). In addition, MPR may benefit owners who rent their apartment/house to a tenant.</p> <p>The grant may also support works carried out in the common areas of a condominium with "MPR copropriétés": this is a one-off aid paid to the syndicate of co-owners to finance the overall renovation works with a minimum energy gain of 35%. All condominiums consisting of at least 75% of houses (i.e. not undertakings) are eligible to this MPR, with a ceiling of EUR 3 750 per dwelling. A bonus may be allocated for condominiums with F or G labels (up to EUR 500 per dwelling), as well as for condominiums qualified as "fragile" or located in urban areas under renewal (up to EUR 3 000 per dwelling).</p> <p>The level of aid varies according to the energy savings obtained by the renovation works. In order to support the most energy-intensive homes to meet the ambitions set by the Energy and Climate Law adopted in 2019, an additional bonus to MPR shall benefit owners who undertake renovation works to bring their home out of the status of energy sieves (labels F and G). Another bonus will be distributed to owners who carry out renovations that allow the home to reach the most efficient labels (A or B). These bonuses shall reach EUR 1 500 for the poorest households, EUR 1 000 for middle-income households, and EUR 500 for the wealthiest ones. In addition, in order to incentivise more efficient energy renovation (i.e. beyond renovation "gestures"), the measure provides the creation of a global renovation aid subject to the achievement of at least 55% of energy savings: the envelope shall vary between EUR 3 500 and EUR 7 000 for middle to high income households. Overall, the energy renovation works carried out in private housing has an objective to achieve at least 30% of energy savings on average.</p>				
	1404.5	Q4 2021 Q4 2022	1/2	400.000 households by Q4 2021 and 700.000 households (baseline is 400.000) by Q4 2022 which have been granted a MPR.
<p>Investment 2 (C1.I2): Energy renovation and major rehabilitation of social housing</p> <p>This measure consists in supporting social housing organisations ("offices HLM - Habitation à Loyer Modéré" are offices in charge of low-income housing) and local authorities operating social housing in order to support deep renovation of buildings. The ambition is to reach highest standards such as BBC renovation label, and gradually eliminate energy sieves. The grant shall be allocated provided that existing schemes (such as écoPLS and CEE), which may be combined with this new aid, are not sufficient to finance the operations of renovation.</p> <p>The measure shall also deploy industrial solutions for energy renovation in social housing buildings in order to achieve zero or positive net energy balance. First operations are expected to start in Q2 2021, and the financial envelope shall be allocated by State services at regional and local levels, on the basis of a survey identifying the needs. The selection of projects shall be done either through a call for projects launched in 2020 or through subsidies managed by decentralized State services or local authorities. Operations are intended to be committed in 2021 and 2022, and to be completed by the end of 2024.</p>				
	500	Q4 2021/ Q4 2022	1/2	20.000 by Q4 2021 and 40.000 (baseline 20.000) by Q4 2022 dwellings within the category of social housing receiving a grant for renovation, with an objective of achieving at least 30% of energy savings on average.
<p>Investment 3 (C1.I3): Thermal renovation of public buildings</p> <p>The renovation works of public buildings have to comply with the decree adopted in application of article 175 of the ELAN Law , which imposes a reduction in energy consumption by 40% by 2030 (compared to 2010) to tertiary buildings. For public buildings belonging to the State, two types of calls for projects were organised:</p> <ul style="list-style-type: none"> • One concerning higher education and research buildings and universities, which has been launched and is supervised by the Ministry of Higher Education, Research and innovation; • Another for all other buildings belonging to the State or its operators, which has been launched and is supervised mainly by the DIE (Direction de l'Immobilier de l'Etat). <p>The first two calls for projects were launched in autumn 2020, and more than 4 000 projects have been selected in December 2020.</p> <p>For buildings belonging to local and regional authorities, specific mechanisms are in place:</p> <ul style="list-style-type: none"> • For buildings owned or operated by regional authorities (mainly high schools), "credit delegations" shall be allocated by the State, and the regions shall be in charge of project selection; • For buildings belonging to infra-regional authorities (mainly schools and primary colleges), investment grants shall be allocated by the State. <p>The projects are selected based on two main criteria: the maturity (and rapid implementation) and on the energy performance and impact on energy consumption, with the objective to achieve at least 30% of energy savings on average. For all public buildings, the objective is to have all contracts notified by the end of 2021, and completed by the end of 2024.</p>				

Measure/Sub-Measure Name	Budget (EUR million)	Deadline	Instalment	Milestone/ target
Investment 4 (C1.I4): Energy renovation of very small enterprises (VSEs) and small and medium sized enterprises (SMEs)				
<p>This investment is part of a plan launched by the government in June 2020 to accompany very small and medium-sized enterprises in the ecological transition. To support thermal renovation of their buildings, two support mechanisms are in place under this investment:</p> <p>The main support scheme is a tax credit amounting to 30% of the expenses of eligible actions (such as insulation of roofs, attics, walls; collective solar water heater and heat pumps), and capped at EUR 25 000 per undertaking. This scheme is open for expenses incurred from 1 October 2020 until 31 December 2021. The tax credit is charged against income tax or corporate tax due by the taxpayer for the calendar year in which the eligible expenditure was incurred (i.e. 2020 or 2021).</p> <p>The second support scheme shall finance accompanying measures to support artisans, small traders and self-employed people in their renovation works. The envelope shall be spent through Chambers of trades and crafts (CMA) and Chambers of Commerce and Industry (CCI), in four steps:</p> <ul style="list-style-type: none"> • Awareness: this step aims to make business leaders aware of the challenges of the energy renovation of buildings in the context of ecological transition; this action shall include a national communication campaign and local actions, in conjunction with local authorities and professional organizations. • Diagnosis: an energy audit shall be carried out by an advisor from the CMA or the CCI, in order elaborate an action plan to start renovation works, on the basis of the ecological maturity of each company. • Implementation: an expert shall help implementing the action plan through technical and financial assistance (such as setting up the grand applications). • Promotion: actions undertaken by companies in the field of renovation of buildings shall be promoted to different audiences, such as consumers, companies and local authorities. 				
	120	Q4 2023	3	5.000 companies benefiting from the tax credit for the energy renovation of VSEs and SMEs buildings of tertiary use and/or support from chambers of trade and crafts (CMA) and chambers of commerce and industry (CCI).
COMPONENT 4: Green energies and technologies				
Investing in key sustainable technologies shall contribute to put the French industry in a favourable position vis-à-vis emerging green markets.				
	500	Q4 2021 Q4 2022	1/2	20.000 by Q4 2021 and 40.000 (baseline 20.000) by Q4 2022 dwellings within the category of social housing receiving a grant for renovation, with an objective of achieving at least 30% of energy savings on average.
Investment 1 (C4I1): Innovate for the green transition				
<p>This investment shall finance innovation projects, building on seven 'acceleration strategies' on the green transition:</p> <ul style="list-style-type: none"> • Sustainable cities and innovative buildings. Aiming to reduce urban sprawl to the detriment of agricultural land and natural spaces, and to make cities more resource-efficient, resilient, inclusive and productive, this strategy shall support innovative and replicable territorial demonstrators, with a focus in particular on the definition of tools and methods to promote the large-scale deployment of energy renovation of buildings; structuring the wood and geo-sourced materials sector with a view to carbon neutrality; and the digital transition of cities and artificial intelligence. 				
		Q4 2021	1	7 'acceleration strategies' validated
		Q4 2022	2	Launch of calls for proposals or calls for interest.
		Q4 2023	3	Award of the contracts – implementing decision of the Prime Minister.
COMPONENT 7: Digitalisation of State, territories, enterprises, Culture				
The support measures to the cultural sectors aim at the recovery of a severely hit sector via targeted investments in renovation, heritage, employment in the field of arts and modernisation of training, cinema, press, and book sectors, with a focus on climate transition and youth.				
Investment 11 (C7.I11): Support for cultural sectors and heritage renovations				
<p>The investment shall support cultural heritage renovations, promote the performing arts, consolidate French major cultural economic sectors and put in place a strategy for cultural and creative industries. The investment shall support three sub-measures: investment in cultural heritage to renovate historic monuments, in order to ensure their lasting viability and as such contribute to promoting local tourism eco-systems; investment for employment and training modernization and investment for cultural strategic sectors.</p> <p>The investment for artistic employment and training modernization shall support three actions:</p> <ul style="list-style-type: none"> • a modernization plan for cultural higher education establishments which shall invest in energy retrofitting, support training, and strengthen their digitalization through the modernization of their teaching tools and their IT infrastructures; <p>The investment in strategic sectors shall support three distinct actions, each corresponding to a strategic sector: the Press Sector plan, the Book Sector plan, the Cinema Sector Plan.</p> <p>The Press Sector Plan shall support the following five sub-actions:</p> <ul style="list-style-type: none"> • support in the modernization of broadcasters who wish to renovate their sales area or optimize their management of press products; • a fund for ecological transition to finance research and development projects aimed at reducing the carbon footprint of the sector and at offering innovative solutions to support the transition of the sector; <p>The Book Sector Plan shall fight against the most lasting effects of the health crisis and support the necessary changes in the sector. It shall support three sub-actions.</p> <ul style="list-style-type: none"> • Finally, the general library decentralization allocation shall be temporarily reinforced in order to extend opening hours and make structural investments. These investments shall finance in particular the renovation work and the upgrading of the buildings' thermal and energy standards. 				

Measure/Sub-Measure Name	Budget (EUR million)	Deadline	Instalment	Milestone/ target
Modernisation plan for cultural higher education establishments (renovation part)	64.4	Q4 2024	4	13 art and architecture schools renovation works completed.
Press Sector Plan - climate part	16	Q4 2022	2	The Press Sector Plan shall support the following (out of five sub-actions): <ul style="list-style-type: none"> • support in the modernization of broadcasters who wish to renovate their sales area or optimize their management of press products; • a fund for ecological transition to finance research and development projects aimed at reducing the carbon footprint of the sector and at offering innovative solutions to support the transition of the sector; Report to be provided by the French Government providing evidence of completion.
Book Sector Plan - renovation part		Q4 2022	2	The Book Sector Plan : Report to be provided by the French Government providing evidence of completion.

COMPONENT 9: Research, Health and Dependence, Territorial cohesion

The component includes investments in the health sector across the territory, including modernisation and renovation of infrastructures and the digitalisation of health.

Investment 2 (C9I2): Modernisation and restructuring of hospitals and health care supply

As announced in the Health Segur plan, the government has committed to increasing investment support for hospitals and health care facilities. A part of these investments concerns the complete renovation and the modernisation of hospital buildings, also with a view to increasing their energy efficiency (improved insulation of buildings to improve thermal comfort, better performance of technical installations reducing consumption). Other investment projects concern the construction of outpatient facilities and the modernisation of medical infrastructure and equipment (such as the equipment of surgical rooms and the development of outpatient services).

The Regional Health Agencies shall be responsible for identifying and examining the investment needs of hospitals with regard to the specific needs of their territories.

('investissements structurants'-50%)	1250	Q1 2023/ Q4 2025	3/5	800 by Q1 2023 and 1000 by Q4 2025 establishments to which the ARS (Regional Health Agency) has allocated credits investments in technical installations, equipment or light renovation. Cumulative calculation: number of different health care institutions that received these credits.
		Q4 2024/ Q2 2026	4/5	20 by Q4 2024 and 30 (baseline 20) by Q2 2026 establishments for which the ARS (Regional Health Agency) has validated support investments project in the construction, energy renovation and modernization of medical establishments, for an amount exceeding EUR 20 000 000. Cumulative calculation.

Investment 3 (C9I3): Renovation of medico-social establishments.

This investment is aimed at the renovation, transformation and equipment of the French medico-social sector, in particular Establishments for Dependent Elderly Persons (EHPAD) over the period 2021-2025, in order to increase their accommodation and care capacity in anticipation of future demographic changes and to contribute to the ecological transition through energy efficient projects.

This measure shall consist of supporting investments in the medico-social sector for the renovation or reconstruction of the most obsolete EHPAD, mainly in the public sector. Examples of investments include renovation and extension projects for public EHPADs, including the construction or renovation of individual rooms and individual sanitary facilities, the development of reception areas, the upgrading of facilities to accessibility standards, and the creation of facilities adapted to people with cognitive disorders.

('PAI immobilier' part)	1250	Q2 2026	5	36.000 accommodation units built or renovated in EHPAD, or homes for the elderly or dependent persons.
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EXPLANATORY DOCUMENT TO ACCOMPANY COUNTRY PROFILES

READ THE FULL STUDY ON WWW.RENOVATE-EUROPE.EU

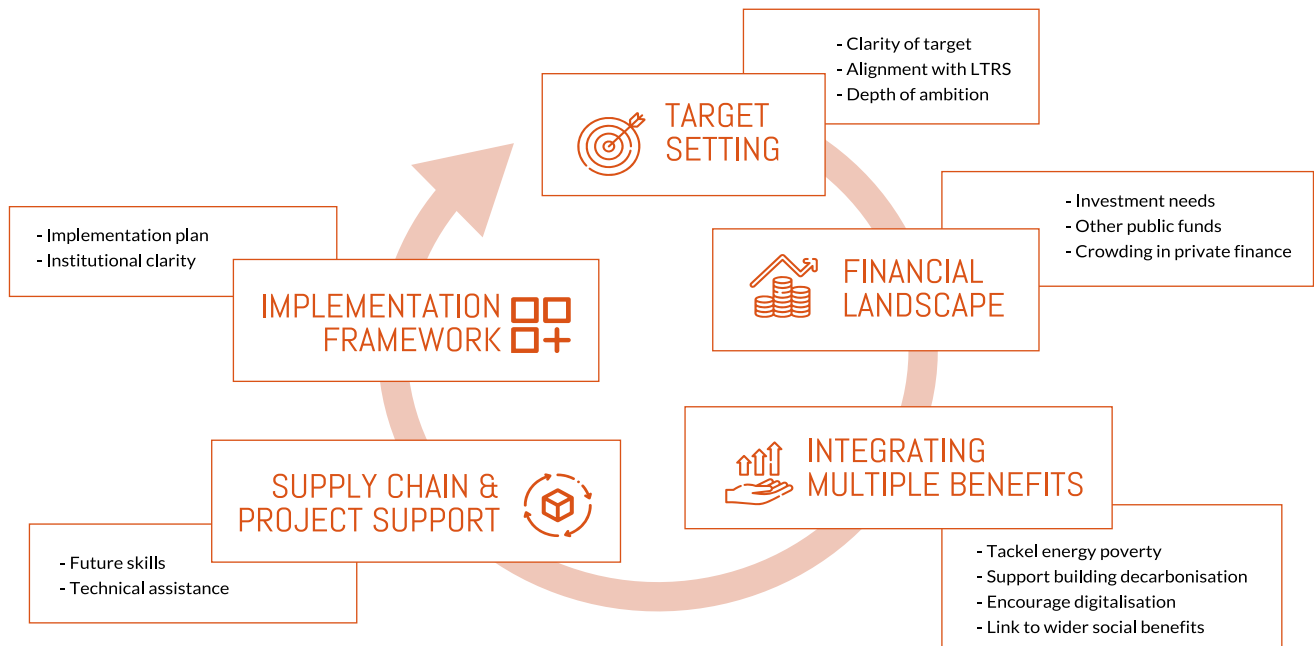
ABOUT THIS STUDY

This Study assesses the buildings-related elements of the National Recovery and Resilience Plans (NRRPs) in 18 Member States¹: Austria, Belgium, Bulgaria, Croatia, Czechia, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Poland, Romania, Slovakia, Slovenia and Spain². The aim is to understand whether NRRPs position countries to achieve longer-term targets for more and deeper renovation, and whether NRRPs have the potential to be **'transformational'** on the path to achieving national goals set out in Long Term Renovation Strategies and EU goals set out in the Renovation Wave strategy.

The Country Profiles in this Study centre on the **investment measures** for energy renovation in the NRRPs. The aim is to identify where investments will flow, what types of energy renovation will be supported, and to offer guidance to support and improve the quality of investments to maximise their impact and scalability. The Study does not assess the reform measures included in NRRPs due to their uniqueness for individual countries.

ASSESSMENT METHODOLOGY AND SCOREBOARD

The Study was developed by E3G, bringing its experience of working on the Green Recovery Tracker, and was delivered in close cooperation with Renovate Europe's National Partners and Campaign Office. In each Country Profile, the Plans are assessed against five overarching criteria, each comprising several sub-criteria (summarised below). The assessment is **qualitative**. Each Country Profile is accompanied by an annex that sets out, in more detail, the various programmes and reforms that each Member State includes in its NRRP with extracts drawn from the European Commission's assessment of the NRRPs and the European Council's Implementing Decision for each NRRP.



1 Note: summary data here excludes Greece as the study is not complete yet

2 Renovate Europe has National Partners in 17 of these Member States, and cooperated on a separate basis with Mur Manteau and Renovons initiative in France. Renovate Europe's 18th National Partner (in the Netherlands) was unable to participate in this Study as the Dutch NRRP has not yet been published.

SCORING METHODOLOGY

For each of the five criteria, the NRRPs are provided with an aggregate score. The aggregate score is based on the sum of points of individual sub-criteria. The points were allocated as follows: 1 point - not addressed; 2 points – needs improvement; 3 points – strong; 4 points - transformational. The aggregated score is reflected in the ‘play button’ infographic for each of the criteria at the top of the country profiles. Those are summarised below.

Normalised* points range	Score	“Play button” Infographic
2.5 – 4.0	“Not addressed”	
4.1 – 6.3	“Needs improvement”	
6.4 – 8.5	“Strong”	
8.6 – 10	“Transformational”	

* The five criteria have a different set of sub-criteria, and as a result have different minimum and maximum points. The scores have been normalised to a base of 10 points. This still leaves some variation within the ranges, so comparison between criteria and countries should be treated with caution.

A UNIQUE OPPORTUNITY TO GET RENOVATION ON TRACK

National Recovery and Resilience Plans (NRRPs) present a unique opportunity to accelerate the delivery of deep renovation across the EU. The analysis of the NRRPs in this Study demonstrates that significant renovation activity is planned and will be made possible through the successive disbursements of the Recovery Funding. But these renovations must be done properly, and the money must be spent well. This unprecedented additional injection of public funds must set the EU building stock firmly on the path to achieving its Renovation Wave goals to 2030 and meeting the 2050 climate targets.

For NRRPs to be transformational towards achieving these goals, two key aspects need to be strengthened:

- 1. Ensure funding delivers a step change towards realising deep (or staged deep) renovations, going well beyond the 30% minimum energy saving recommendation set by the European Commission.**
- 2. Invest in the right enabling framework, including leverage of private finance, to create sustainable renovation markets that will grow beyond 2026**

UNDERPINNING A STRONG FIT-FOR-55 PACKAGE FOR BUILDINGS

This Study demonstrates significant interest in investing in building renovation, which can contribute to a strong outcome for the **Fit-for-55 legislative proposals**, all of which would enter into force while NRRP funding is being invested. The strength of the overall package is critical for delivering on renovation, with individual elements playing pivotal roles. For example, the introduction of mandatory **Minimum Energy Performance Standards (MEPS)** under the EPBD would send a strong signal to the whole renovation value chain, from institutional investors to building users.

Done right, NRRP investment can ease agreement on, and the implementation of, a more ambitious legislative package for buildings – a virtuous cycle between ambition and deliverability that can drive the creation, investment in, and sustained growth of renovation markets across the EU. To unlock this, it will be critical to establish a positive feedback loop between EU institutions (in supporting effective deployment of NRRP funds) and Member States (in backing a strong legislative outcome from Fit-for-55 negotiations) that delivers a significantly improved building stock for citizens. Informed by the assessment below, Renovate Europe and its National Partners will work to support this outcome.

RENOVATE² RECOVER

NINE RECOMMENDATIONS TO MEMBER STATES TO MAKE THEIR RECOVERY PLANS TRANSFORMATIVE

AMBITION

1. Prioritise deep renovations and scalability in the design and implementation of schemes
2. Accompany each funded building project with a Renovation Roadmap to 2050

3. Improve scheme longevity and impact by crowding in private finance

FINANCING

MULTIPLE BENEFITS

4. Integrate renovation with heat decarbonisation and apply Energy Efficiency First Principle consistently
5. Embed renovation alongside wider political and socio-economic priorities

6. Strengthen Technical Assistance at regional and local levels
7. Fund further One-Stop-Shops and information centres to support customers, exchange best practice
8. Upskill the workforce through reliable accreditation systems

SUPPORT

IMPLEMENTATION

9. Engage in better monitoring and aggregation of data to measure impact