

Securing Ambition on Energy Renovation in the CEE Region



SECURING AMBITION ON ENERGY RENOVATION IN THE CEE REGION

Leveraging National Building Renovation Plans to boost deep renovation rates

OCTOBER 7 | 10.00 – 11.15 | WEBINAR



Microsoft Teams



Central & Eastern European Energy Efficiency Forum 2027

The graphic is a promotional poster for the C4E Forum 2027. It features a large 'X' shape in the center, formed by two overlapping triangular images. The left triangle shows a scenic view of a historic town with red-roofed buildings and a stone tower situated on a small island in a calm river. The right triangle shows a conference setting with an audience seated in green chairs, facing a stage where two men are speaking. A large screen in the background displays the event's logo and details. To the left of the 'X', the text 'C4E Forum' is displayed with a blue horizontal line above it and 'via Renovate Europe' in a small orange box below it. Below this, the full name of the forum is written in bold blue letters. Further down, a calendar icon is next to the dates '18-21 MAY 2027' in red and the location 'MARIBOR, SLOVENIA' in blue. At the bottom, a dark blue banner contains the website 'www.c4eforum.org', the hashtag '#C4EForum2027', and the slogan '#NotYourAverageConference' in white.

C4E
Forum
via Renovate Europe

**CENTRAL & EASTERN EUROPEAN
ENERGY EFFICIENCY FORUM**

 **18-21 MAY 2027**
MARIBOR, SLOVENIA

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Securing Ambition on Energy Renovation in the CEE Region

AGENDA

Introduction

Adrian Joyce, Director, Renovate Europe Campaign

Peter Robl, Representative, RenoCEE

The EPBD implementation challenge and progress to date

Pau Garcia Audi, Team Leader, DG ENER, European Commission

Analysis of submitted NBRP's – focus on the CEE Region

Quentin Jossen, Associate Partner, CLIMACT

Q&A

Facing the EPBD implementation challenge – national approaches to the preparation of NBRPs

Anca Ginavar, Ministry of Development, Public Works, and Administration, Romania

Irena Križ Šelendić, Ministry of Physical Planning, Construction, and State Assets, Croatia

Q&A and Conclusions

The EPBD implementation challenge and progress to date



Pau Garcia Audi

European Commission

Team Leader at DG ENER



State of Play

EPBD implementation

Draft national building renovation plans

Pau GARCIA AUDÍ
DG ENERGY
Unit B3

Renovate Europe : Securing Ambition on Energy Renovation in the CEE Region

7 October 2026

1.a EPBD – Implementation

- 1st General transposition deadline was **29 May 2026**
- Most Member States have notified **at least one** national transposition measure
- Several MS have so far **failed to notify any** transposition measures at all
- By the deadline, **no MS had declared to the Commission that it had completely transposed** the EPBD at national level
 - Since then, 1 MS has declared full transposition
- As per standard procedure: **infringement proceedings** were opened by the Commission on 15 July 2026 **for all MS** for failure to fully transpose into national law the provisions of the Directive
- Commission will **closely monitor transposition**, in two distinct phases : initially **completeness** and subsequently **conformity** of national transposition and implementing measures with the EPBD provisions, following their adoption and notification to the Commission.



1.b NBRP – Submission and assessment

- **Two-stage submission:**
 - **1st Draft plan** due by **31 December 2025**
 - Assessment & feedback from the Commission – supported by the JRC – **deadline 6 months after submission**
 - **Final version** of the plan due by **31 December 2026**



1.b NBRP State of play - Submission

19 complete draft NBRPs submitted :

- 6 by the deadline :
 - ES, BE-Wallonia, HR, BG, FI, RO.
- 13 after :
 - DE, PT, LT, SI, DK, CY, AT, NL, FR, SE, EE, EL, LV.
- Published on the [NBRP webpage](#)

10 pending draft NBRPs :

- BE-BCR and BE-FLA, CZ, HU, IE, IT, LU, MT, PL, SK.

Of 11 CEE Member States, EC has received draft NBRPs from **7 CEE Member States**

This is only a slightly lower rate than from the **16 non-CEE Member States**

7/11 CEE = 63%

11/16 non-CEE = 68%



1.b NBRP State of play - Assessment

Assessment and feedback to MS:

- Assessment with JRC support
- Feedback:
 - No formal recommendation (decision from CAB/Commissioner)
 - Instead, **Commissioner letter** with **feedback** in annex to ensure timely feedback

Timeline:

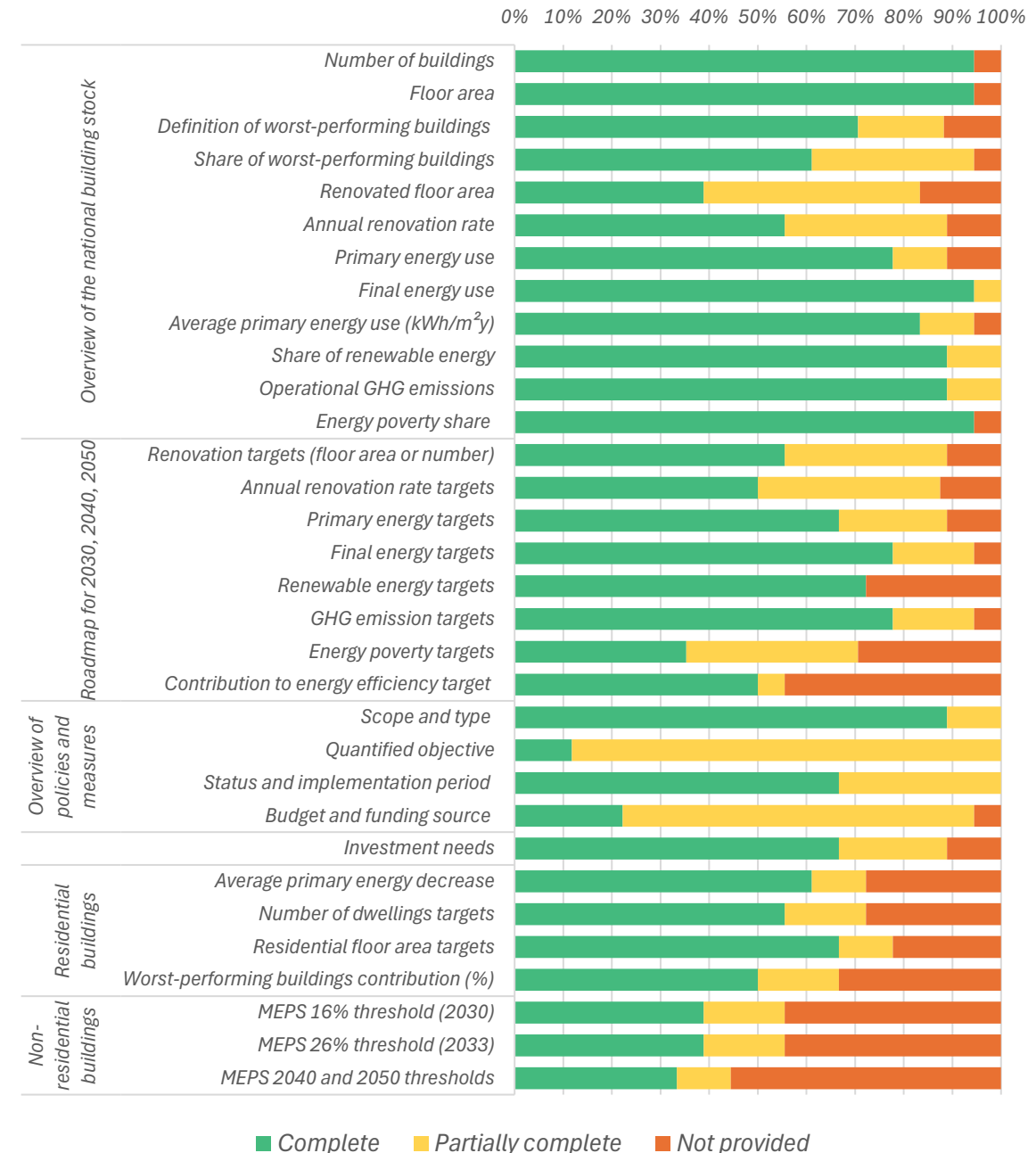
- 1st batch of submissions (16 draft plans) - [assessments](#) published 14 July (DE, PT, ES, BE-Wallonia, HR, BG, FI, RO, LT, SI, DK, CY, AT, NL, FR, SE)
- 2nd batch of submissions (**EE, EL, LV**) - assessments to be published in October
- Later submissions – case by case



Completeness

- **18 draft plans assessed**, 1 assessment ongoing
- **High completeness** for **baseline indicators**, such as floor area, energy use, GHG emissions and energy poverty
- Energy and GHG emission targets are generally well covered
- Renovation rates, energy poverty targets are less complete
- **Largest gaps** concern **new** or more **detailed reporting requirements** (i.e., MEPS and quantified impact of policies and measures)

Completeness rates across the **18 draft plans**



1.b NBRP State of play – Infringements

- Commission opened [infringements](#) on 11 March 2026
- Infringements have been **closed** for MS who subsequently submitted a draft plan
- Infringements remain **open** for **10 Member States** and will be pursued, as appropriate
- Importance to receive a draft → we continue engaging with MSs for submission of the missing draft and preparation of the final plan



Examples of feedback by the EC

In view of the submission of the final version of the plan by 31 December 2026:

- **Complete missing indicators**/targets/funding
- Ensure an appropriate level of **ambition** to reach an EE and decarbonised building stock
- Provide a credible and effective roadmap towards the **decarbonisation of heating** with a view to the **phase out of boilers** powered by **fossil fuels**
- Ensure that **energy poverty is** adequately addressed
- **Quantify** the **impacts** of policies and measures in energy savings/GHG emissions
- Clarify **inconsistency**, plausibility between renovation targets, greening of the grid and reduction in energy consumption / GHG emissions
- Conduct a more comprehensive and **inclusive public consultation**



Key findings 1/2

- The **18** assessed draft plans are **mostly complete** despite a few gaps
- **Improved completeness and greater homogeneity** compared with the **LTRS**, with good consistency across other reporting exercises (NECPs, NECPRs and national cost-optimal reports)
- A solid understanding of the building stock and energy performance baseline, and **encouraging levels of ambition**:
 - **Primary energy** consumption **reductions of 20% to 73% by 2050**
 - Commitment to **decarbonisation**, with around half draft plans targeting GHG emission **reductions above 90% by 2050**
 - **Renewable energy deployment**, with 2030 shares ranging from **40% to 90%** in the draft plans providing targets
 - Comprehensive packages of policies and measures, covering **broad range of policy areas**

Key findings 2/2

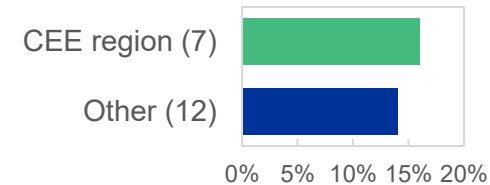
- **Investment needs** identified in 16 draft plans, ranging from 200 €/m² to more than 500 €/m²
- This data is a useful source for the future **NRPP negotiations mandates**, NBRP = **building investment plans**
- At the same time, the assessment identifies **elements for further improvement and refinement**:
 - Clearer and more complete targets, particularly for **renovation rates** and **energy poverty reduction**
 - Further development of new **EPBD requirements**, such as trajectories for residential building renovation and MEPS for non-residential buildings
 - More systematic **quantification of the impacts of policies and measures** to demonstrate their contribution towards achieving the targets
 - Greater emphasis on **mobilisation of private financing**, essential to scaling up renovation

Key findings CEE region 1/3

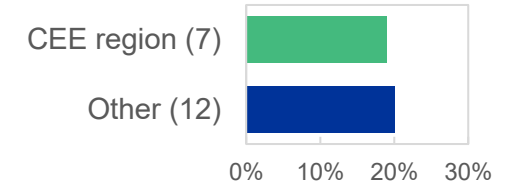
Bulgaria, Croatia, Estonia, Latvia, Lithuania, Romania, Slovenia

- **2030 targets**
- **Similar final and primary energy reduction targets**
- Considerably **lower GHG emission reduction** (**17%** vs **46%**)
- Lower annual renovation rate targets
- The energy – GHG gap also reflect differences in assumption on **energy system decarbonisation**

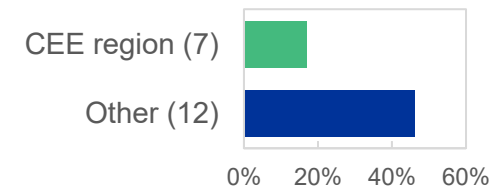
Final energy reduction by 2030



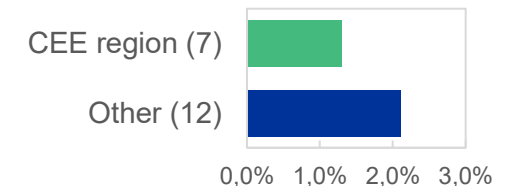
Primary energy reduction by 2030



GHG emission reduction by 2030



Annual renovation rate by 2030



Energy and GHG reductions calculated from aggregated baseline and target values for countries with available data; renovation rates represent medians.

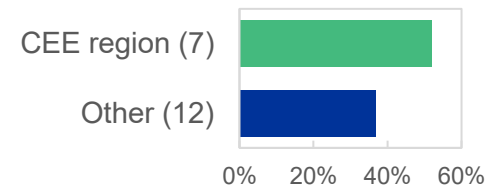


Key findings CEE region 2/3

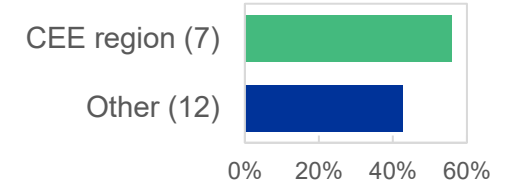
Bulgaria, Croatia, Estonia, Latvia, Lithuania, Romania, Slovenia

- **2050 targets**
- **Higher final and primary energy reduction targets**
- **GHG emission reduction** remains considerably **lower**
- Annual renovation rate gap narrow
- **Limited consideration of energy system decarbonisation** partly explains the energy - GHG gap.

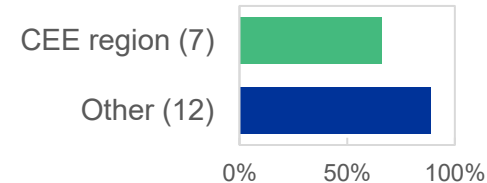
Final energy reduction by 2050



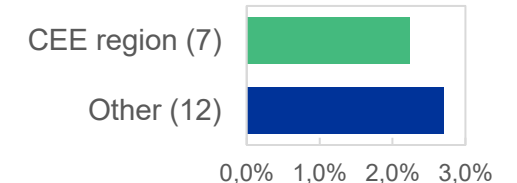
Primary energy reduction by 2050



GHG emission reduction by 2050



Annual renovation rate by 2050



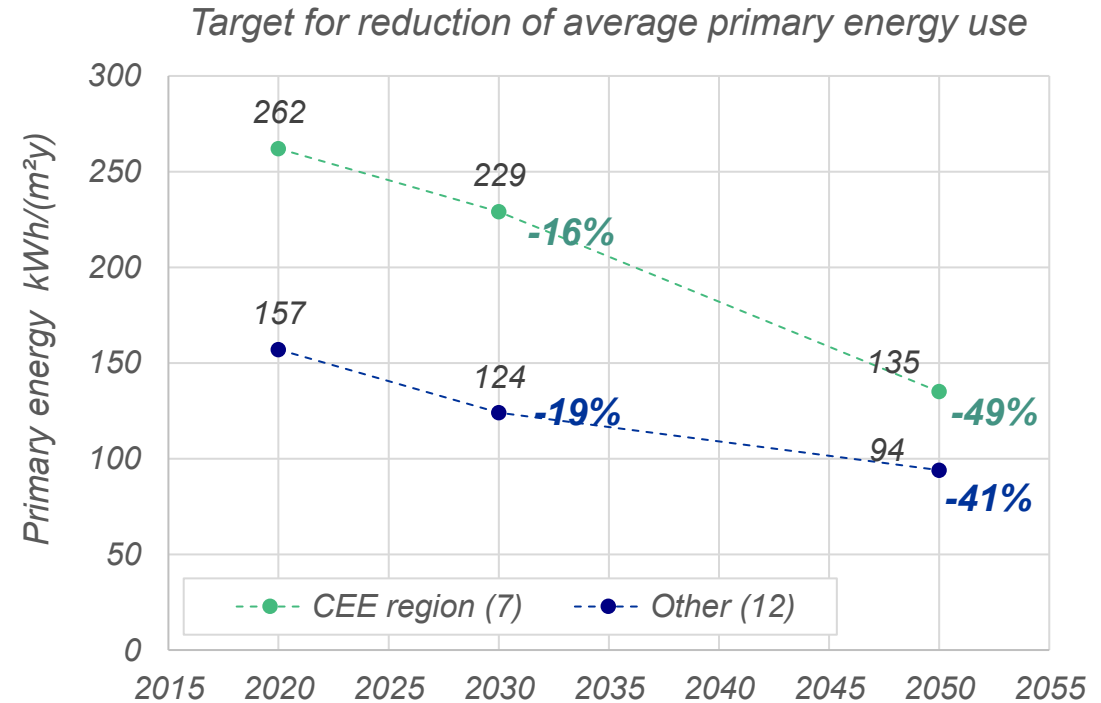
Energy and GHG reductions calculated from aggregated baseline and target values for countries with available data; renovation rates represent medians



Key findings CEE region 3/3

Bulgaria, Croatia, Estonia, Latvia, Lithuania, Romania, Slovenia

- **Primary energy use of residential buildings kWh/(m²y)**
- CEE residential buildings start from **higher primary energy use**
- **2030** reductions are broadly **similar** (**16%** vs **19%** compared with 2020 levels)
- by **2050**, CEE targets a slightly **higher reduction** (**49%** vs **41%**), **narrowing the gap**
- Primary energy use **remains higher in CEE region in 2050**



EXTRA - Examples



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Examples - CEE good practices/measures

Tenants' protection

Lithuania

- Developing a plan to **reduce energy costs** in the event of an **energy supply disruption** or a **sudden spike in electricity prices** in the market. Each municipality should draw up such plan and are responsible for the funding aid.

Decarbonisation of heating

- Lithuania plans to **replace 50,000 fossil fuel boilers and install over 11,000 heat pumps** by 2030. It also aims to upgrade 1,000 km of heat networks, increasing renewable energy sources in district heating systems.

Financing instruments and assistance for building renovation

Romania

Scenarios for the mobilisation of private funds based on current market conditions, regulatory constraints, historical data, findings from recent surveys, absorption of public funds.

Examples of good practices/measures

Residential buildings (worst-performing)

- **Wallonia** - two mechanisms for [residential buildings](#):
 - [sale-related](#) obligation that requires the new owner to carry out energy-efficiency upgrades within 5 years after sale (e.g. EPC class D by 2028)
 - a residential [building stock-wide](#) obligation (e.g. EPC class F by 2031)
- **Netherlands** - regulation to phase-out worst-performing [rental housing](#) (EPC classes E-F-G) by 2029 to meet at least class D and plans an additional step with the obligation to meet class B by 2040.
- **France** - regulation to phase-out worst-performing [rental housing](#) (EPC classes E-F-G) by 2034. This measure is complemented by a rent freeze in the for residential units with EPC classes F and G.

Calendrier des obligations PEB pour le secteur résidentiel en Wallonie		
Objectif : un parc immobilier décarboné et durable en 2050		
ANNÉE D'OBLIGATION	EN CAS D'ACHAT L'acheteur a 5 ans pour atteindre le label	PARC EXISTANT Dates butoir pour tous les logements
2028	D	
2031	C	F
2036	B	E
2041	A	D
2046		C
2050		B

Examples of good practices/measures

Energy poverty and housing affordability

Cyprus

- Use of state-owned land in combination with financial aid, technical assistance, renovation of temporary refugee houses to enhance housing affordability and **support vulnerable households**.

Netherlands

- **Housing valuation scheme** which prescribes maximum rent based on a house quality scoring (floor area, EPC class). The purpose is to keep **rent lower** for energy inefficient housing and encourage owners to renovate.

Spain

- Dedicated grant line to **renovate the vacant housing**, with the condition that the refurbished units be rented as **social** or **affordable housing** for a prescribed period (at least five years).

Wallonia

- Introduces the 'renovation lease on the private rental housing stock' which involves operators to renovate in exchange for a long-term lease (18-30 years) vacant and dilapidated properties with the condition to maintain **affordable rents**.

Examples of good practices/measures

Tenants' protection

Netherlands

- **Housing valuation scheme** which prescribes maximum rent based on a house quality scoring (floor area, EPC class). The purpose is to keep **rent lower** for energy inefficient housing and encourage owners to renovate. The energy performance fee was legally capped, ensuring that tenants maintain **affordable housing costs**.

Lithuania

- Developing a plan to **reduce energy costs** in the event of an **energy supply disruption** or a **sudden spike in electricity prices** in the market. Each municipality should draw up such plan and are responsible for the funding aid.

Denmark

- The National Building Fund supports the non-profit **housing sector** by financing of large-scale renovations and green upgrades in housing and by **subsidy schemes** aimed at **keeping rents in the renovated buildings affordable**.

Examples of good practices/measures

Housing affordability

Spain

- Dedicated grant line to **renovate the vacant housing**, with the condition that the refurbished units be rented as **social** or **affordable housing** for a prescribed period (at least five years).

Wallonia

- Introduces the 'renovation lease on the private rental housing stock' which involves operators to **renovate** in exchange for a long-term lease (18-30 years) **vacant** and dilapidated properties with the condition to maintain **affordable rents**.

Cyprus

- Use of state-owned land in combination with financial aid, technical assistance, renovation of temporary refugee houses to enhance housing affordability and **support vulnerable households**.

Examples of good practices/measures

Decarbonisation of heating

- **Denmark** aims for **complete gas decarbonisation supply by 2030.**

Actions

- replacing natural gas in the gas grid with domestically produced biomethane
- reducing the number of gas boilers by 90% between 2023 and 2040
- phase-out oil boilers by 2035

Measures

- grants for replacing fossil fuel boilers with heat pumps
- roll-out of new district heating areas and decoupling from gas grids
- green loans to replace oil and gas boilers in an area without possibility of connecting to district heating network
- tax increase for fossil fuel-based space heating
- etc.

- **Lithuania** plans to **replace 50,000 fossil fuel boilers and install over 11,000 heat pumps** by 2030. It also aims to upgrade 1,000 km of heat networks, increasing renewable energy sources in district heating systems.

Examples of good practices/measures

Life-cycle GHG emissions in the building sector

Denmark

- **Thresholds** for whole life-cycle GHG emissions for new buildings as of 2024, by building category, which are expected to be tightened every 2 years.

France

- **Thresholds** for construction-related GHG emissions for new buildings, by building category, introduced in 2022 with progressive tightening every 3 years until 2031 with the target to achieve a 35% reduction construction-related GHG emissions by 2031.

Netherlands

- **Tax deductions** can be obtained if the materials used for construction are either at least 50% renewable raw materials, or 25% reused, or 50% demountable construction products.

Examples of good practices/measures

Financing instruments and assistance for building renovation

Romania

Scenarios for the mobilisation of private funds based on current market conditions, regulatory constraints, historical data, findings from recent surveys, absorption of public funds.

Finland

Energy Performance Contracts have an established framework and play an important role for the rental housing stock to achieve the trajectory for residential building renovation.

Spain

Focus on strengthening new business models: The **Renovation Agent** as a facilitator between the homeowners' associations and the technical, financial and administrative supply (businesses, financial institutions, administrations).

Thank you



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Analysis of submitted NBRP's – focus on the CEE Region



Quentin Jossen

CLIMACT

Associated Partner





Empowering **you** to act
on **climate change**

What fifteen draft National Building Renovation Plans show about credibility and delivery

Most of Europe's best answers are already in this region

Quentin Jossen | CLIMACT | 7 October 2026

After three rounds of strategies, now one different question

2014 · 2017 · 2020

Three rounds of long-term strategies.
The renovation rate is still around 1% a year.

2026

The first National Building Renovation Plans.
A shift towards real-life results?

Our question

**Not whether the ambition is right.
Whether this one will deliver, and what
would make it deliver.**

Delivery robustness and readiness results from three pillars

DESIGN

instruments built to work
with one another

TRANSLATION

targets turned into activity,
depth, segments

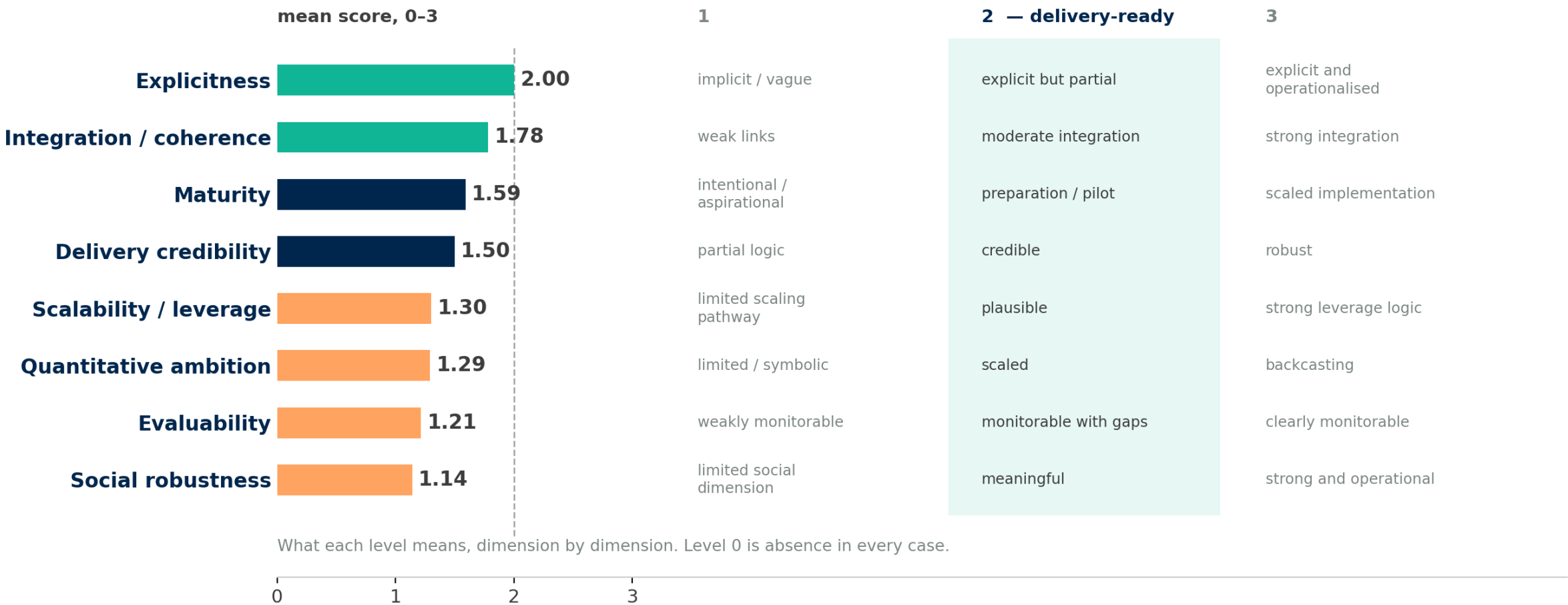
ANCHORING

an amount, a legal basis,
a date

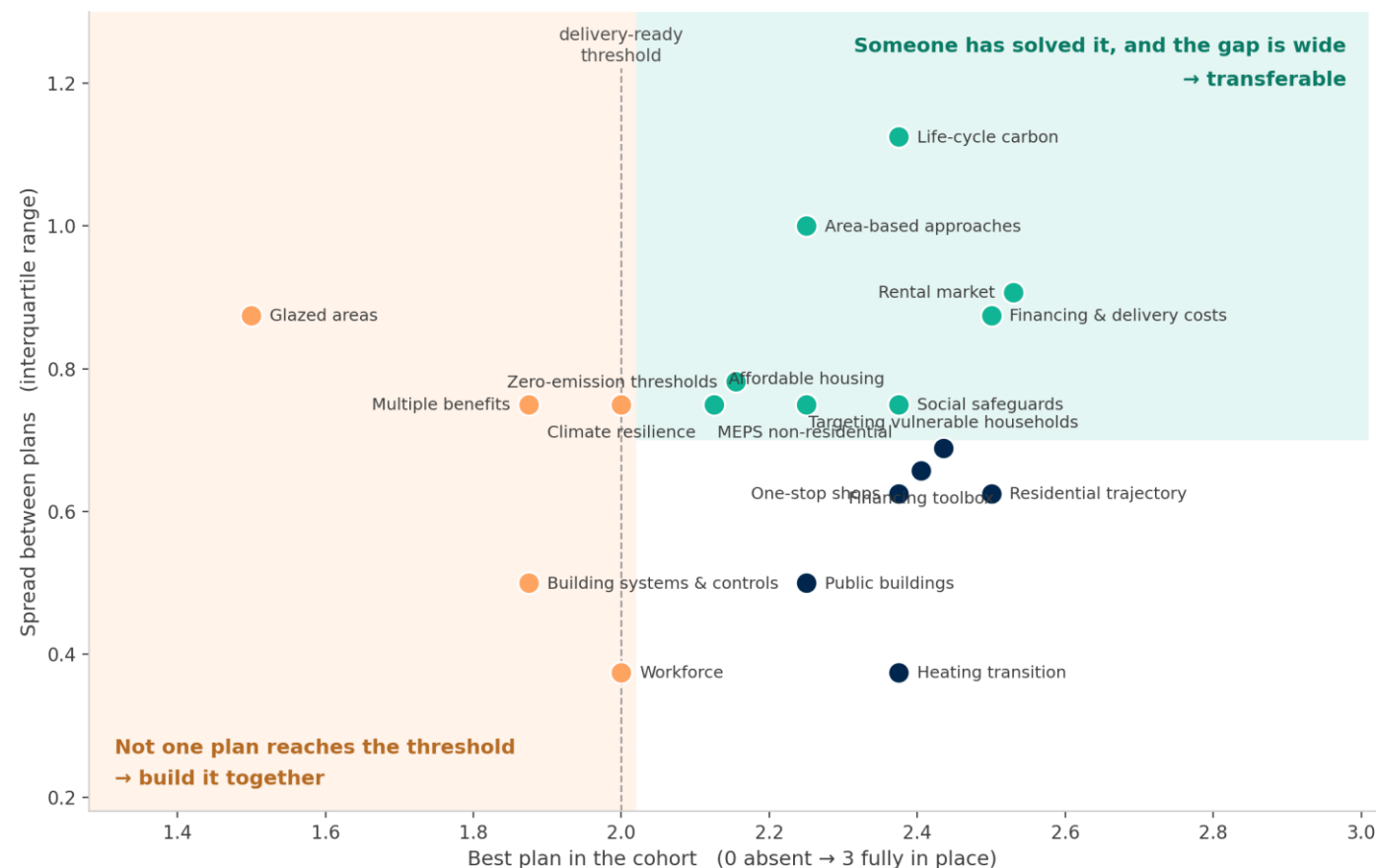
15 plans · 19 topics · 8 dimensions · 2,280 assessments · for a coalition of ten European associations

Delivery readiness is assessed on 8 dimensions, for each topic

No plan reaches the delivery-ready threshold.



Transfer is possible, building on best practices available in the plans



Best scoring plan in Europe, by topic

Residential trajectory	SI
Social safeguards	SI
Financing toolbox	SI
Targeting vulnerable households	SI
Financing of works and delivery costs	RO · SI
Area-based approaches	RO
One-stop shops	RO
Zero-emission thresholds	RO
Minimum performance standards	RO · HR
Multiple benefits	HR · SI
Public buildings as market lever	BG
Workforce	PL

CEE countries “lead” on 13 of 19 topics

Sizing the effort is a requirement for delivery readiness

STEP 1
KNOW THE NEED



STEP 2
PRICE IT



STEP 3
COMMIT TO IT

POLAND · the human need

How many people, in which trades, and how to produce them

curriculum reform · certification · instructor training · widening the pool to women, seniors, people with disabilities and workers leaving mining

380,138 needed a year by 2050 · 114,041 in post · shortfall 266,097

Stops at step 2: nothing is costed in euros

ROMANIA · the money

How much, over which periods, for which segment and which enabling cost

plus three admissions: no legal commitment taken · a grant-only model is not sustainable · the 42 offices are understaffed

Needs split by period, segment and category, aligned with the EU template

Stops at step 3: no secured budget

BUT capacity is not calibrated on the activity

**One sizes the need without the money. The other the money without the commitment.
Neither reaches the budget line.**

Financing: three different things to design in the plan

THE WORKS

financed by leverage

public money that pulls in private money

A TOOLBOX

fund of funds · concessional credit · guarantees · targeted grants

PUBLISH THE GAP

need, mobilised, and what is still missing

DE-RISK FIRST

public money only when the risk materialises

Slovenia — EUR 280M fund of funds · credit at 0.7% · the only plan to publish its residual gap

THE MEANS

cannot be leveraged

Private capital does not pre-finance a full-time equivalent against a future gain

A SEPARATE LINE

one-stop shops · advice · technical assistance

A SHARE OF THE WORKS

RO > about 6% — probably a floor, not a norm

WHICH GIVES A UNIT COST

what an OSS costs to build and to run

Romania — EUR 1,807M for 2026-2030 · EUR 250k per one-stop shop · 42 offices today, 100 by 2035

THE RETURN

counts in the budget case

public money judged against what it brings back

AVOIDED HEALTH COSTS

Non-healthy homes are paid for through another budget

ACTIVITY AND JOBS

tax receipts and local employment come back

A BIGGER ENVELOPE

brings budgets other than energy into play

Romania — EUR 2 to 5 of benefits per euro invested · 300-500 hospital admissions avoided a year by 2050

Integrating policy domains for more effective public action

A building is opened once in a generation.



CROATIA · seismic and energy, together

Learned under constraint since 2020. One national portal, two routes. A multi-apartment programme in three models, one for earthquake-damaged buildings, one for households at risk of energy poverty.

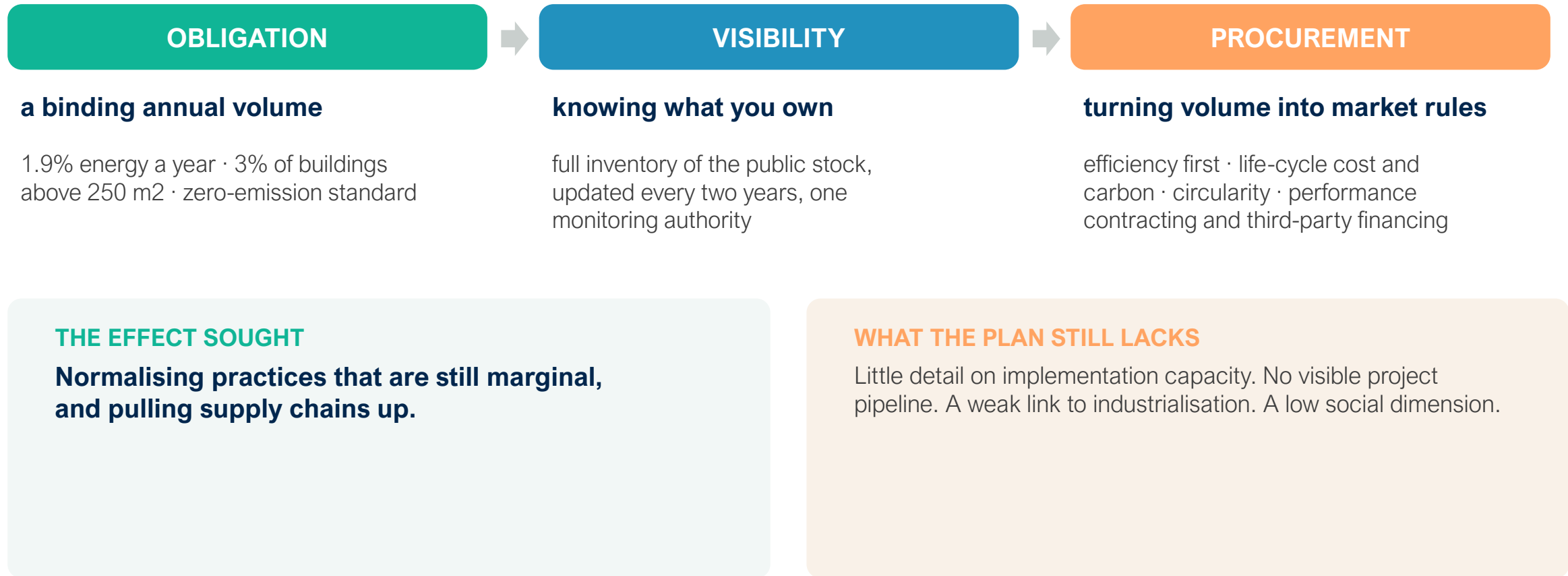
CROATIA · renovation inside housing policy

Renovation written into the 2030 housing plan from the start, with its own target. And a revolving fund from 2028 — an answer to what happens when recovery funds end.
65,000 households renovated · EUR 2.03bn to 2030

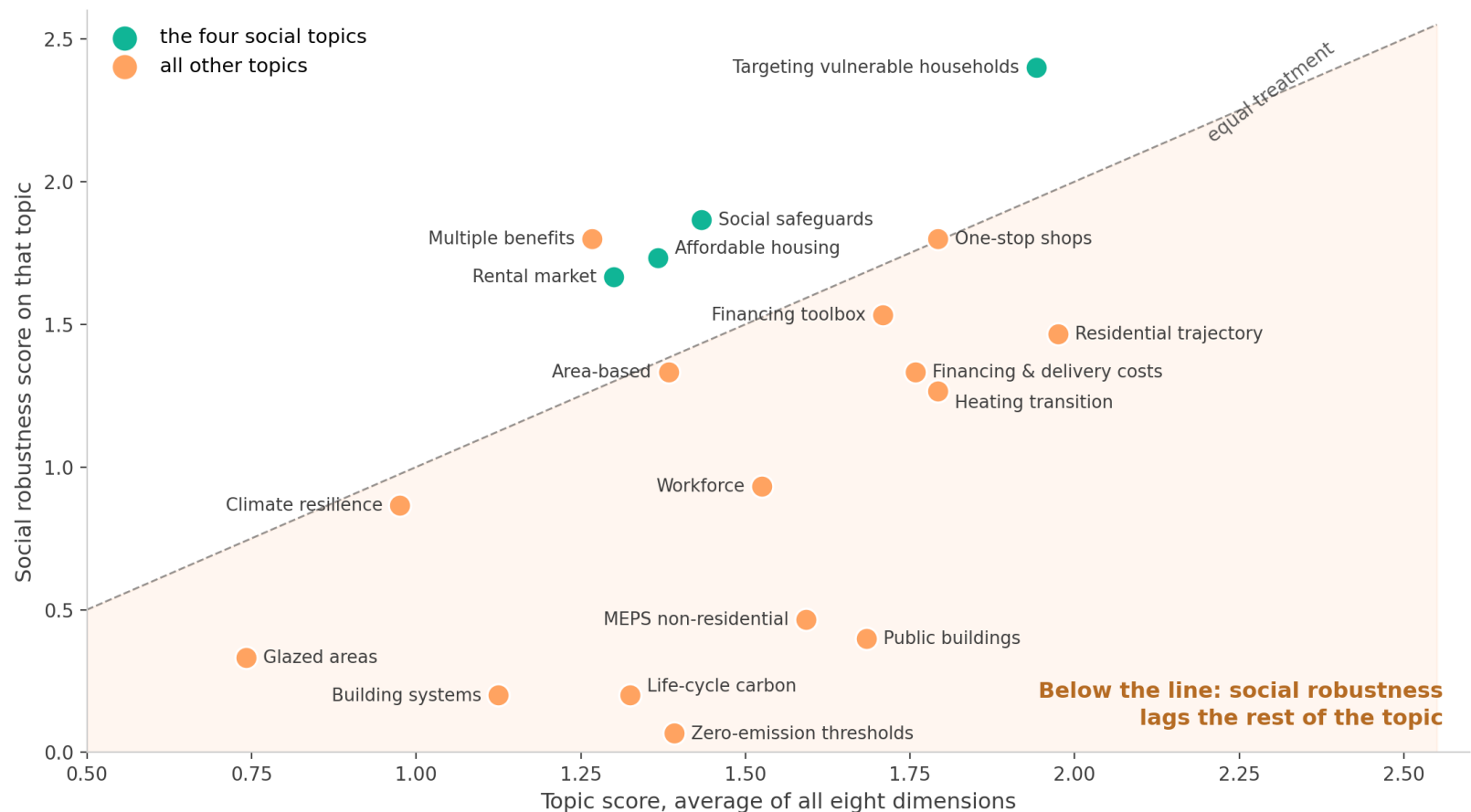
Public buildings as a lever to shape the market

The one segment where the public authority controls both the decision and the budget.

Bulgaria holds the best score on this topic.



Social robustness: from a chapter to a design principle



Scored on all 19 topics

1.92

inside the four social topics

0.93

everywhere else

0.63

on targets and the regulatory backbone

When a plan sets a threshold or publishes a trajectory, it almost never asks who bears the cost, or who is left out.

The widest gaps are zero-emission thresholds, public buildings and non-residential standards: obligations set without checking who can comply.

And the plans do not let themselves be measured: evaluability is the second weakest of the eight dimensions.

Before 31 December: four questions for your plan

VOLUME

How much renovation activity,
at what depth, in which segments?

STATUS

For each instrument:
an amount, a foreseen legal basis, a date?

MEANS

Are the means budgeted separately from the
works?

MONITOR

Can the plan be followed:
stock, each measure, multiple benefits?

Nothing that is missing needs to be invented here.
Most of the answers already exist in this region.



Empowering **you** to act
on **climate change**

Thank you.

Find out more: www.climact.com | +32 10 750 740

Securing Ambition on Energy Renovation in the CEE Region



Facing the EPBD implementation challenge – national approaches to preparation of NBRPs



Anca Ginavar

Ministry of Development, Public Works, and Administration, Romania



Irena Križ Šelendić

Ministry of Physical Planning, Construction, and State Assets, Croatia

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Thank you!

www.renovate-europe.eu

