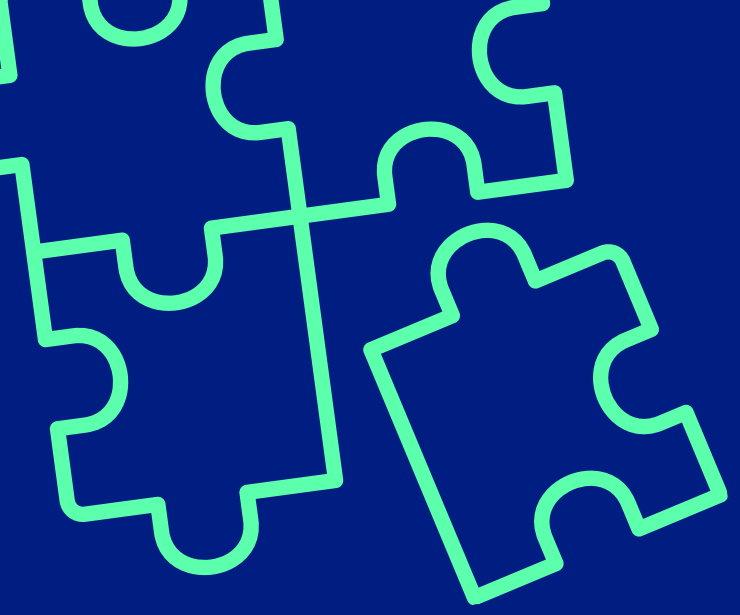




How to solve the EPBD implementation puzzle?

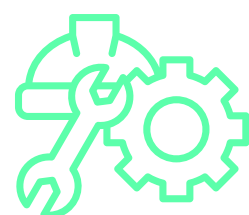
National Building Renovation Plans: from strategy to delivery



NBRPs offer a detailed operational vision for building renovation for each Member State. Every country faces different conditions when developing their NBRP:



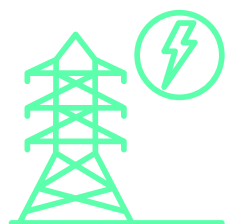
Building stock data quality
Foundation for target-setting



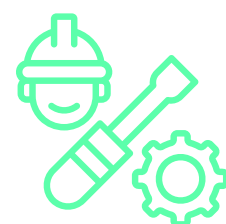
Expected building stock growth
New vs. existing stock balance



Energy carrier mix
Fossil lock-in risk



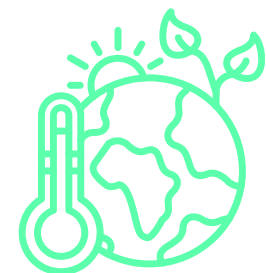
PEF for electricity
How electrification is credited



Renovation rates
Building sector readiness



Policy ambition and experience
Governance capacity



Climatic conditions
Driver of demand & measure effectiveness

What is the right policy mix for your country?

It depends on the fossil fuel share and the primary energy factor for electricity.

High
↑
Fossil fuel share in base year

High fossil + Low Primary Energy Factor

Electrification highly effective.
Combine with regulatory standards for rapid fuel switching. Envelope improvement with heat pumps to ensure high system efficiency.

High fossil + High Primary Energy Factor

Strong regulatory push needed. Electrification will deliver primary energy savings only in medium term, after electricity decarbonisation. Prioritise envelope measures and district heating expansion.

Low fossil + Low Primary Energy Factor

Favourable conditions. Economic instruments may suffice. Focus on remaining fossil pockets, worst-performing buildings, and inefficient use of renewables and district heating.

Low fossil + High Primary Energy Factor

Focus on deep renovation and efficiency. Electricity decarbonisation needed to reduce the Primary Energy Factor. Modernise district heating networks.

Low Low

Primary Energy Factor

High

What we found based on modelling policy scenarios for EU27:

Regulatory standards combined with moderate economic incentives can secure the most ambitious results



<12%

Share of gases and liquids by 2050



53-65%

Primary energy reduction by 2050



15-22%

Primary energy reduction by 2030

Priority actions for Member States

- Policy packages: combine mandatory performance standards with financial support and a credible fossil fuel phase-out timeline
- Invest in robust building stock data as the foundation for target-setting and monitoring
- EPBD coherence: align NBRP with related instruments (Article 9 trajectories, MEPS, energy performance certificates, renovation passports, zero-emission building definitions)



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