



L'UNION SOCIALE POUR L'HABITAT

16 May 2011

European Economic Recovery Plan

COM(2008) 800 Final

Measure n°6: Improving energy efficiency in buildings
Rescheduling regional Structural Fund operational programmes
to prioritise social housing

2009-2011 MID-TERM ASSESSMENT - France

APPENDIX

REGIONAL ASSESSMENT REPORTS

Report for José Manuel Durão Barroso

Regional programming dashboard (as at 31st March 2011)

FEDER	4% de l'enveloppe M euros	Programme logement initial M euros	Programme logement additionnel M euros	Total M euros	% de l'enveloppe régionale des 4%	Projets engagés M euros FEDER	Projets en instruction M euros FEDER	Total M euros	Ménages / logements concernés	Invests générés M euros	Effet de levier FEDER/ invests	Emplois induits	FEDER / logement euros
Alsace	3	3	0	3	100%	1,03	0,00	1,03	1 118	6,6	16%	94	921
Aquitaine	15	15	0	15	100%	6,80	9,80	16,60	5 677	79,8	21%	1 133	2 924
Auvergne	8	4	0	4	50%	1,68	0,00	1,68	448	13,5	12%	192	3 750
Basse Normandie	7	6	0	6	86%	0,00	2,00	2,00	650	16,6	12%	236	3 077
Bourgogne	7,4	4,5	0	4,5	61%	0,74	6,00	6,74	2 302	55,5	12%	788	2 929
Bretagne	12	5	5,7	10,7	89%	4,30	0,00	4,30	2 103	53,5	8%	760	2 045
Centre	7,8	4	1	5	64%	2,20	1,60	3,80	1 516	17,2	22%	244	2 507
Champagne Ardenne	7,5	1,8	1	2,8	37%	2,20	0,00	2,20	2 297	47,7	5%	677	958
Franche Comté	5,8	5,8	0	5,8	100%	2,90	0,88	3,78	1 037	29,8	13%	423	3 646
Haute Normandie	8,8	8	0	8	91%	7,40	0,00	7,40	2 069	29,3	25%	416	3 577
Ile de France	6	6	4	10	167%	10,00	0,00	10,00	3 953	40,6	25%	577	2 530
Languedoc Roussillon	10,8	10,8	0	10,8	100%	5,70	2,70	8,40	2 390	28,2	30%	400	3 515
Limousin	5	1	1	2	40%	0,41	1,15	1,56	1 558	22,5	7%	320	1 001
Lorraine	13,2	13,2	0	13,2	100%	4,90	9,90	14,80	5 392	40,9	36%	581	2 745
Midi Pyrénées	17,2	17,2	0	17,2	100%	0,33	8,00	8,33	3 619	49,0	17%	696	2 302
Nord pas de Calais	28	20	20	40	143%	2,40	17,90	20,30	4 502	206,0	10%	2 925	4 509
Pays de la Loire	12	12	0	12	100%	1,29	1,90	3,19	1 538	55,2	6%	784	2 074
Picardie	8	8	0	8	100%	0,76	0,00	0,76	410	8,4	9%	119	1 841
Poitou Charentes	8	8	0	8	100%	0,58	8,60	9,18	2 603	68,2	13%	968	3 527
PACA	12	7,1	2,5	9,6	80%	7,10	0,00	7,10	1 924	58,1	12%	825	3 690
Rhone Alpes	13	12,9	0	12,9	99%	12,90	0,00	12,90	3 500	87,0	15%	1 235	3 686
TOTAL	215,5	173,3	35,2	208,5	97%	75,62	70,43	146,05	50 606	1013,6	14%	14 393	2 886
								70,05%					

Regional mid-term assessment reports – monitoring sheets

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Alsace

ERDF programming in figures

4% of envelope	€M
Initial housing programming	€M
Additional programming	-

Housing projects approved	1,03M€
Projects under appraisal	NA
Total	1.3M€
Projects awaiting appraisal	NA

ERDF social housing allocation method

- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposals mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Call for project proposals launched in conjunction with the Region, with the ERDF taking care of the additional cost of works relating to eco-energy sources. The ERDF subsidy amounts to €1,500 per dwelling, capped at €05,000 per operation.

ERDF eligibility criteria

Buildings with the highest levels of energy consumption and therefore initially given an energy efficiency rating of E, F or G need to achieve a class C-type level of performance, representing an energy saving of 100kWh_{ep}/m² TNFA/year.

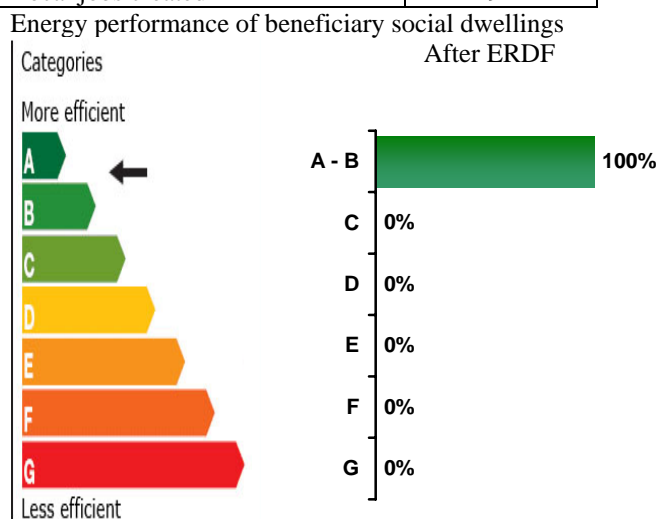
Buildings initially given an energy efficiency rating of D need to achieve at least a class C-type rating as well as a compulsory saving of 50kWh_{ep}/m² TNFA/year.

A bonus of 10% applies if the BBC Effinergie Renovation rating (class B) is achieved, i.e. around 80kWh_{ep}/m² TNFA/year.

The Region intends to step up its requirements. Only projects targeting a BBC Effinergie (class B) rating and with a maximum ERDF cofinancing rate of 40% will be funded.

Mid-term results (6/2009-03/2011)

Households affected	1,118
Investment generated	€6,6M
Local jobs created	94



Comments

The call for project proposals launched in 2009 resulted in the subsidising of 8 projects in this first year, affecting a total of **1,118 dwellings**. The initial objective of funding the rehabilitation of 500 dwellings was therefore largely surpassed. A new call for project proposals was launched in 2010 with the aim of **subsidising 1,000 dwellings**. Given the complexity of the dossier compilation process, no dossiers have yet been processed. The jury is due to meet in late April 2011 to analyse 6 new dossiers concerning some **250 additional dwellings**. The Region will launch a study of energy consumption following renovation over 2 years' worth of heating in 2011, with a report on this study due to be released in late 2013 and a mid-term statement due in late 2012.

Resources contact: Alain Randami, Areal Director, +33 (0)3 90 56 11 90

Aquitaine

ERDF programming in figures

4% of envelope	€15.7M
Initial housing programming	€15M
Additional programming	0

Housing projects approved	€6.8M
Projects under appraisal	€9.8M
Total	€16.6M
Projects awaiting appraisal	NA

ERDF allocation method

- ☒ Subsidy mode (Desk open up to limit of the programmed envelope)
- ☐ Call for project proposals mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

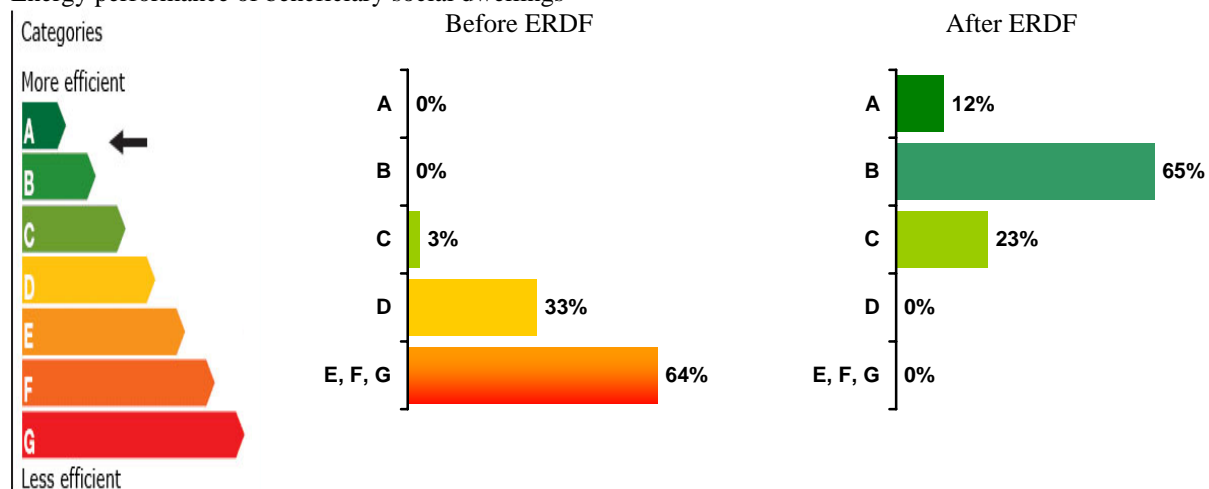
Local programming choices: Energy consumption after renovation:

- between 104 and 135 Kwhep/m/year: 20% ERDF
- between 73 and 103 Kwhep/m/year: 25% ERDF
- < or = to 72 Kwhep/m²/year (BBC certification): 30% ERDF
- < or = to 72 Kwhep/m² (TNFA)/year (BBC Renovation): 25% ERDF

Mid-term results (6/2009-03/2011)

Households affected	5,677
Investment generated	€99.8M
Local jobs created	1,133

Energy performance of beneficiary social dwellings



Comments

Opening the ERDF up to social rental operations has resulted in the strengthening of the local partnership.

Resources contact: Sylvie Régnier, Director of AROSHA ('Regional Association of Social Housing Organisations'), +33 (0)5 56 69 47 90, e-mail: s.regnier.arhlmaq@union-habitat.org

Auvergne

ERDF programming in figures

4% of envelope	€8M
Initial housing programming	€4M
Additional programming	-

Projects approved	€1.68M
Projects under appraisal	-
Total	€1.68M
Projects awaiting appraisal	-

ERDF allocation method

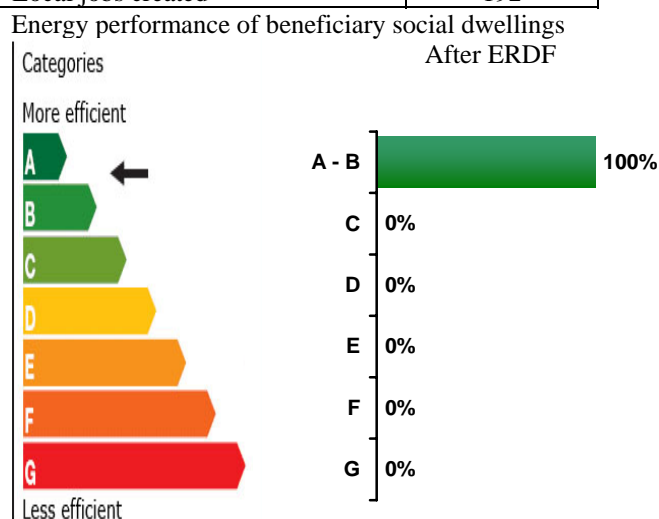
- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposals mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Call for project proposals resulting in entitlement to ERDF funding for rehabilitation operations where a BBC rating is achieved with a promotional objective for exemplary operations.
ERDF aid = maximum €50/m². This aid is not capped per operation.

Mid-term results (6/2009-03/2011)

Households affected	448
Investment generated	€13.48M
Local jobs created	192



Comments

The form of the call for project proposals imposes upon the organisations involved a risk related to the uncertainty that their project will be selected, whilst submitting an application requires a series of very advanced studies which exceed regulatory obligations, thus involving significant extra financial cost and time with no guarantee of return on investment. The reduced envelope does not compensate for the lack of visibility in the funding of such operations, even though considerable needs are expressed. Furthermore, the BBC rating is not necessarily the optimum rating in economical terms and cannot therefore be applied to all types of building.

Resources contact: Association Régionale Auvergne de l'USH ('Auvergne USH Regional Association'), Tel. + 33 (0)4 73 34 01 07, e-mail: arhlmauv@union-habitat.org.

Basse-Normandie

ERDF programming in figures

4% of envelope	€7M
Initial housing programming	€6M
Additional programming	0

Projects approved	0
Projects under appraisal	€2M
Total	€2M
Projects awaiting appraisal	NA

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposals mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Minimum saving > 80kWh/m²/year with the following certifications:

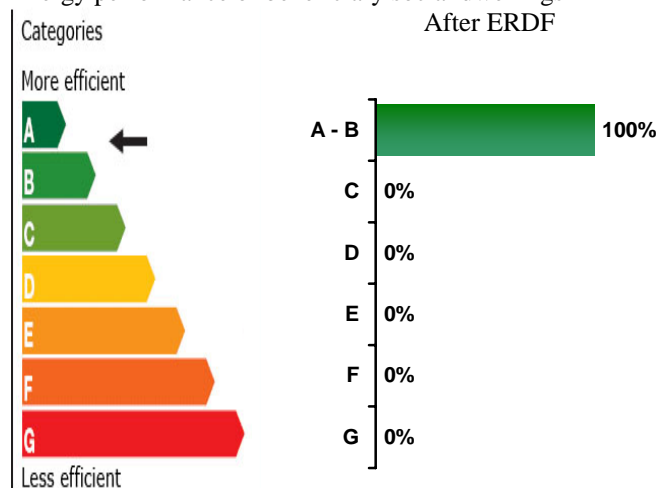
HPE ('High Energy Performance') < 150KWh/m²/year: €2,500 subsidy in 2010 only

BBC ('Low Energy Consumption Building') < 80KWh/m²/year: €5,000 subsidy

Mid-term results (6/2009-03/2011)

Households affected	650
Investment generated	€16.6M
Local jobs created	236

Energy performance of beneficiary social dwellings



Comments

Opening the ERDF up to social rental operations has:

- resulted in the strengthening of the local partnership initially set up with the direct help of the region and the ADEME (French Environment and Energy Management Agency) for social housing and facilitated the establishment of a regional structure (ARCENE: *Association Régionale pour la Construction Environnementale en Normandie* ('Regional Association for Environmental Construction in Normandy')), in which all players in the construction industry, the Regional Council and the State are involved,
- had a very significant leveraging effect which has enabled greater investment beyond the objectives of the *Grenelle de l'Environnement* agreement by taking into account the needs of organisations as outlined by the regional association (opening up to dwellings in class D, cofinancing, in some cases, of a CLF eco-loan, etc.),
- had a knock-on effect resulting in the focus being switched from HPE certification operations to BBC operations (classes A and B).

The main areas for improvement are the coordination of the various players involved in the operation and the assessment and monitoring of energy and environmental performance and their impact on consumption.

Resources contact: Stéphane Courtin, Director of the *Association Régionale pour l'Habitat Social Basse-Normandie* ('Basse-Normandie Regional Social Housing Association'), +33 (0)2 31 50 08 30, e-mail: arhlmbn@union-habitat.org

Bourgogne

ERDF programming in figures

4% of envelope	€7.4M
Initial housing programming	€4.5M
Additional programming	0

Projects approved	€742,600
Projects under appraisal	€6M
Total	€6.7M
Projects awaiting appraisal	€2.3M

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposals mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

- a minimum saving of 100KWh/m²/year for dwellings initially in class D,
- a minimum saving of 80KWh/m²/year for dwellings initially in other classes, where the *Haute Performance Energétique* ('High Energy Performance') rating (i.e. class C, 150kWh/m²/year prior to adjustment) must in any case must at least be achieved
- a significant proportion of the operations selected must achieve the BBC rating (80kWh/m²/year prior to adjustment)

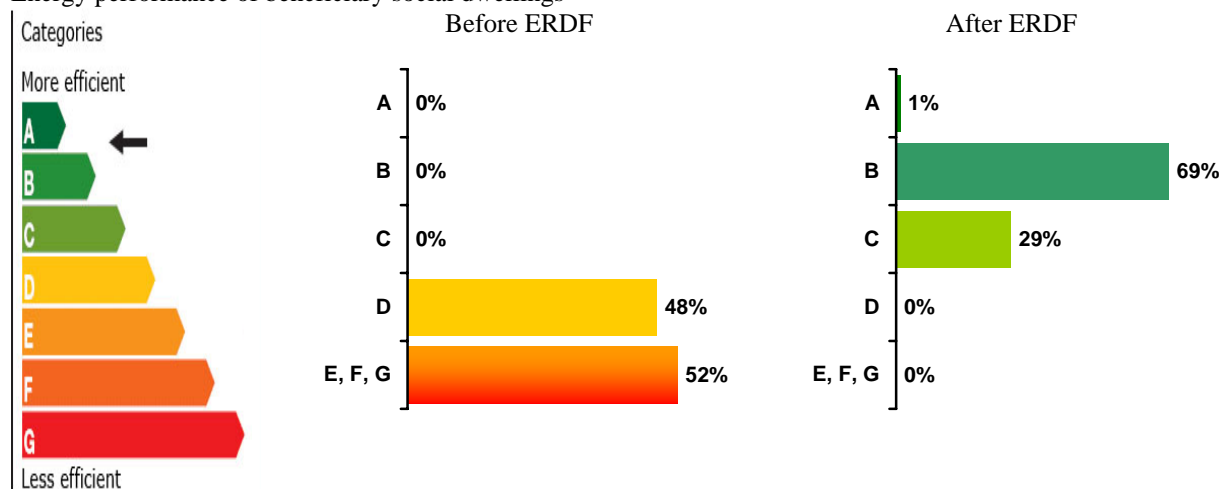
Financial aid: ERDF support rate = 20% with two caps:

- €50/m² for the BBC certification
- €25/m²/TNFA for other target certifications

Mid-term results (6/2009-03/2011)

Households affected	2,302
Investment generated	€55.5M
Local jobs created	788

Energy performance of beneficiary social dwellings



Comments

The HLM Movement in Bourgogne is very proud of the implementation of this initiative which has enabled it to draw the attention of the Regional Council and the territorial collectivities to the major issue of serious renovation. There were various hurdles to overcome beforehand, including the releasing of an envelope and the revision of the existing ERDF financial model, the outlining of objectives and priorities between the concern to make the Region and the ADEME a model example and the desire on the part of landlords to have greater control over rental income, and the drafting of a common set of specifications for energy-related auditing prior to renovation, essential to any rehabilitation work for the purposes of developing statutory texts. The difficulties experienced during the operational stage were related to the complexity of the procedure, the delays caused and the shortfall in the available envelope.

Resources contact: Emmanuel Bouet, Director of the USH in Bourgogne - +33 (0)3 80 36 44 44 – e-mail: e.bouet.arhlmbou@union-habitat.org

Brittany

ERDF programming in figures

		Projects approved	€4.3M
4% of envelope	€12M	Projects under appraisal	-
Initial housing programming	€5M	Total	€4.3M
Additional programming	€5.7M	Projects awaiting appraisal	€2.1M

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposals mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Operations applying as part of the Regional/ADEME/Departmental '*Bâtiment Basse Consommation*' ('Low Energy Consumption Building') call for project proposals, operations benefiting from the social housing eco-loan (targets E, F and G) and operations involving the replacement of electrical heating, preferably in areas where electrical constraints apply. Eligibility criteria:

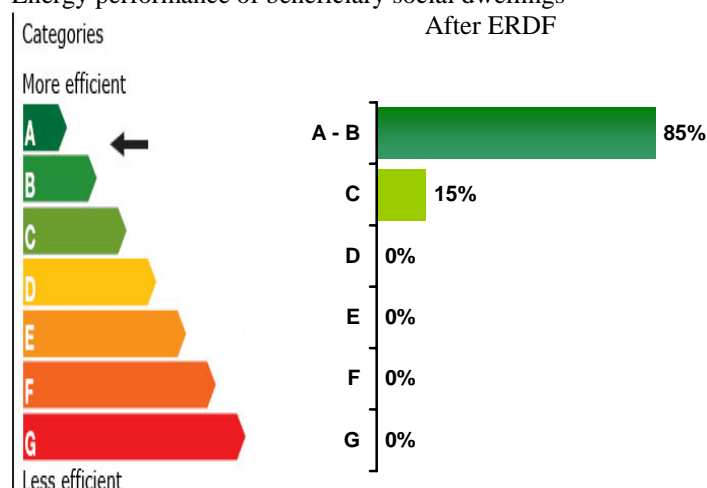
- For operations applying as part of the '*Bâtiment Basse Consommation*' scheme: Eligibility by means of the call for project proposals selection criteria (requirements based on the BBC certification). ERDF aid total: €30/m².
- For operations benefiting from an eco-loan, E, F and G ratings: Post-renovation consumption lower than 165kWh/m²/year with a minimum reduction in consumption of 80kWh/m²/year. ERDF aid total: €30/m².
- For operations involving the replacement of electrical heating: replacement with a hot water vector heating system. Post-renovation consumption lower than 145kWh/m²/year. ERDF aid total: 20% of the eligible expenditure capped at €10,000 per dwelling.

New ERDF envelope: Presentation of new regulations/ Appraisal of dossiers, October-November 2011/ Target = Primarily dwellings heated by electricity /Framework = *Pacte Electrique Breton*

Mid-term results (6/2009-03/2011)

Households affected	2,103
Investment generated	€53.51M
Local jobs created	760

Energy performance of beneficiary social dwellings



Comments

ERDF allocation methods were outlined in partnership and the ERDF subsidies of the initial envelope based on existing systems. A new envelope of €5.7M has been granted in the framework of the electricity pact ('*Pacte Electrique Breton*'). It exclusively targets those social dwellings currently heated by electricity, meaning that particular care must be taken in making an accurate diagnosis of the regional social housing concerned and in identifying the most efficient targets for the work.

Resources contact: Patrick Sciberras, Director of the ARHLM ('Regional HLM Association') in Brittany - +33 (0)2 99 35 02 75- e-mail: arohabitat.bretagne@wanadoo.fr

Centre

ERDF programming in figures

4% of envelope	€7.8M
Initial housing programming	€4M
Additional programming	€1M

Projects approved	€2.2M
Projects under appraisal	€1.6M
Total	€3.8M
Projects awaiting appraisal	-

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Buildings with the highest levels of energy consumption and therefore initially given an energy efficiency rating of E, F or G need to achieve a class C-type level of performance, representing an energy saving of 100 kWh_{ep}/m² TNFA/year.

Buildings initially given an energy efficiency rating of D need to achieve at least a class C-type rating as well as a compulsory saving of 50kWh_{ep}/m² TNFA/year.

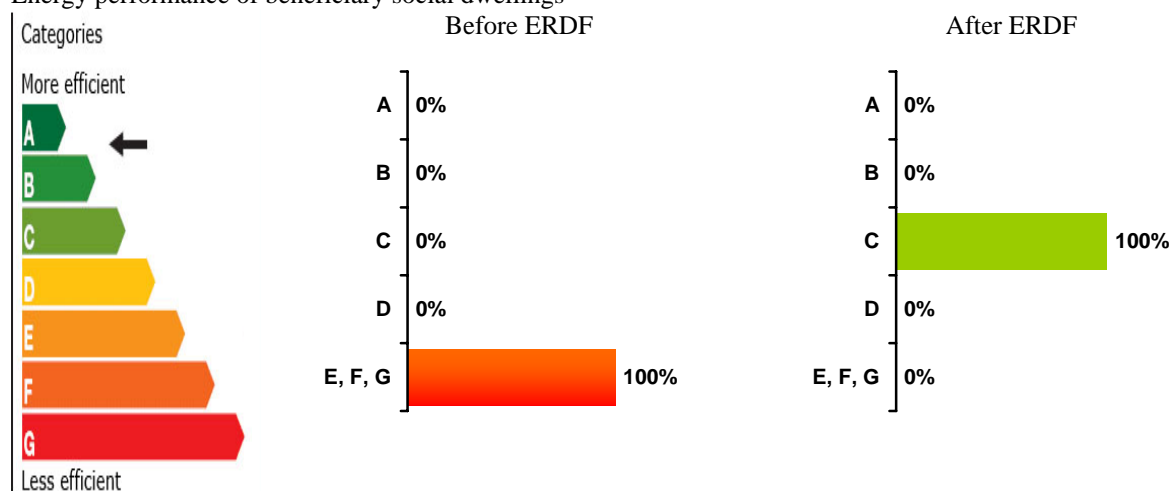
A bonus of 10% applies if the BBC Effinergie Renovation rating (class B) is achieved, i.e. around 80kWh_{ep}/m² TNFA/year.

The Region intends to step up its requirements. Only projects targeting a BBC Effinergie (equivalent to class B) rating and with a subsidy rate of 40% will be funded.

Mid-term results (6/2009-03/2011)

Households affected	1,516
Investment generated	€7.2M
Local jobs created	244

Energy performance of beneficiary social dwellings



Comments

A very useful system which some organisations quickly learned to adopt. Many new organisations make demands which are likely not to be met since the initial envelope has been practically exhausted. It would be necessary to obtain the maximum amount of €7.8M corresponding to the 4% envelope. The announced stepping up of the Region's requirements is not good news. One person is responsible for compiling and appraising the dossiers at Regional level, but the appraisal process remains a very long and taxing one; it can take several months or even nearly a year, which consequently discourages HLM organisations.

Resources contact: Brigitte Jallet, Director of the *Union Sociale pour l'Habitat* in the Centre region, +33 (0)2 18 84 50 00, e-mail: arhlmce@union-habitat.org

Champagne Ardenne

ERDF programming in figures

4% of envelope	€7.5M
Initial housing programming	€1.8M
Additional programming	€1M

Projects approved	€2.2M
Projects under appraisal	-
Total	€2.2M
Projects awaiting appraisal	-

ERDF allocation method

- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☒ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

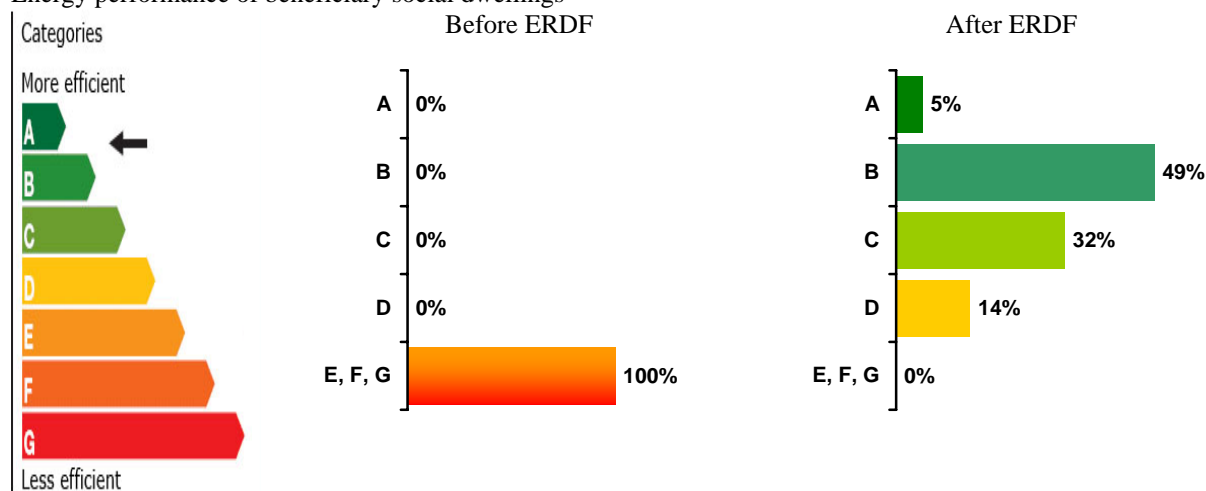
Local programming choices

The system supports that of the Consignments and Loans Fund with regards to the social housing eco-loan, meaning an initial conventional energy consumption of 230KWh/m²/year or more is required. ERDF and Regional Council aid offset, half in equal share, the current accumulation of this residual interest charge to 1.9%, thus bringing the loan down to an equivalent 'zero rate'.

Mid-term results (6/2009-03/2011)

Households affected	2,297
Investment generated	€7.7M
Local jobs created	677

Energy performance of beneficiary social dwellings



Comments

Making ERDF funding available for the renovation of housing has accelerated the *Bâtiment Grenelle* social housing plan.

Getting the relevant players involved in the issue for the purposes of optimising this new measure has resulted in the creation of a coordinated system (point of single contact) which has also facilitated the steps to be taken by social housing organisations.

The system that has now been set up is satisfactory. The Consignments and Loans Fund appraises the funding request dossiers (eco-loans, ERDF funding, and regional funding) based on two noticeably identical dossiers.

Resources contact: Laurence Malassagne, Director of ARCA, +33 (0)3 26 05 04 14, e-mail:

l.malassagne@arca-hlm.com

Franche Comté

ERDF programming in figures

4% of envelope	€5.8M
Initial housing programming	€5.8M
Additional programming	

Projects approved	€2.9M
Projects under appraisal	€81,351
Total	€3.8M
Projects awaiting appraisal	

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

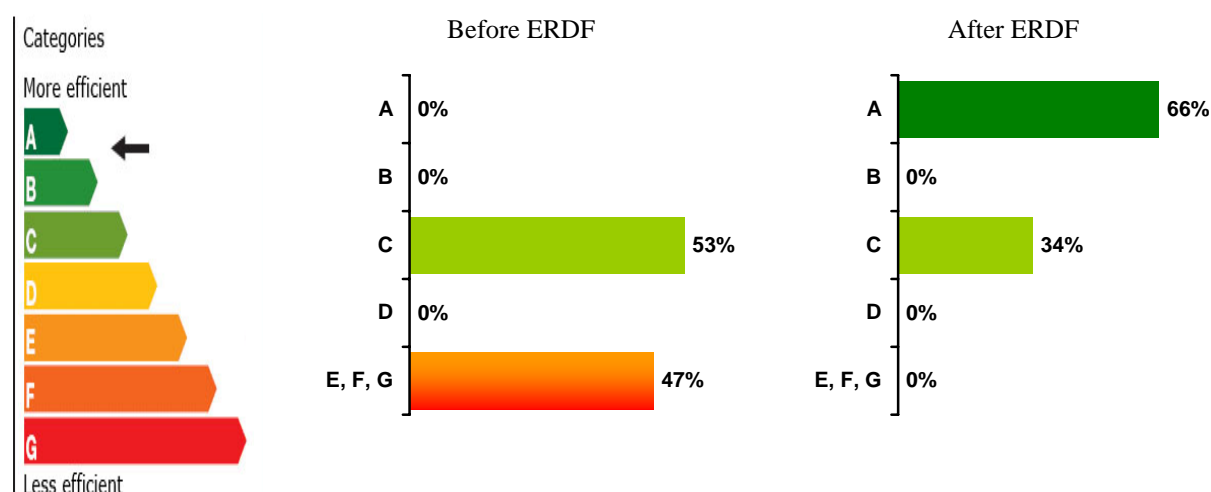
Local programming choices

- progression from classes E, F and G to C: rate of 20% ERDF with cap of €40/m²
- achievement of BBC certification (classes A and B): rate of 40% ERDF with cap of €70/m²

Mid-term results (6/2009-03/2011)

Households affected	1,037
Investment generated	€29.8M
Local jobs created	423

Energy performance of beneficiary social dwellings:



Comments

Positive points:

- Fast, pragmatic implementation
- Leveraging effect for rehabilitation to BBC certification

Points to improve:

- Aiming for the dematerialisation of dossiers
- Shortening appraisal time frames where government departments are concerned

Resources contact: Elise Douchez-Cattin, Director of the *Union Sociale pour l'Habitat* in Franche-Comté,
Tel.: +33 (0)3 81 52 21 55

Haute Normandie

ERDF programming in figures

4% of envelope	€8.8M
Initial housing programming	€8M
Additional programming	0

Projects approved	€7.4M
Projects under appraisal	0
Total	€7.4M
Projects awaiting appraisal	NA

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Total aid:

The maximum subsidy rate is 36% of the eligible basis for assessment for classes E, F and G and 20% for class D.

The ERDF contribution per dwelling is between €1,200 and €5,400.

The cumulative amount of public aid must not exceed 50% of the total eligible cost for classes E, F and G and 20% for class D.

Eligibility criteria:

-A pre-renovation energy consumption level greater than 200kwh/m²/year and the highest consumers in class D. Priority will be given to classes E, F and G.

-A post-renovation consumption level below the target of 195kwh/m²/year

-A minimum increase of 80kwh/m²/year.

-Programme concerning at least 24 collective dwellings or group operation concerning at least 10 individual dwellings.

Various priority criteria have been added to the official template:

- The energy-related benefits of the project: relationship between the euros spent and the KWH saved per square metre.
- The involvement of landlords in terms of raising awareness among tenants.

Mid-term results (6/2009-03/2011)

Households affected	2,069
Investment generated	€29.3M
Local jobs created	416

Comments

The setting up of the ERDF was facilitated by a long-term partnership. Since 2008, the USHHN (*Union Sociale pour l'Habitat de Haute-Normandie*) has taken a stand with regards to the management authorities by highlighting the needs of landlords as identified by some initial approximation work related to the 2007 regional framework. The inventory of rehabilitation needs of housing in Haute Normandie taken between May and December 2009 supported negotiations regarding eligibility criteria.

There was some difficulty on the part of the appraising bodies with regards to respecting a partnership from start to finish. A period of internal validation (Government departments and local authorities) followed, in which the regional HLM association was not involved, along with the necessary adaptation of the regulations under appraisal and the rules of arbitration and regulation between organisations so as to recover the envelope which was insufficient to cover the needs expressed.

Organisations have noted that compiling a dossier is a complex process and that lots of additional documentation is required. Nevertheless, the number of dossiers submitted and appraised within a reasonable time frame is something to be proud of. Indeed, in April 2010, almost the entire envelope was allocated.

This has had a great leveraging effect on thermal renovation in the Haute Normandie area.

Points to improve: Greater clarity of decision-making processes and greater transparency on the part of the management authority.

Resources contact: Marie Lorraine Hibon, Director of the *Union Sociale pour l'Habitat* in Haute-Normandie,

Ile-de-France

ERDF programming in figures

4% of envelope	€6M
Initial housing programming	€6M
Additional programming	+€4M

Projects approved	€10M
Projects under appraisal	
Total appraised	€10M
Projects awaiting appraisal	

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

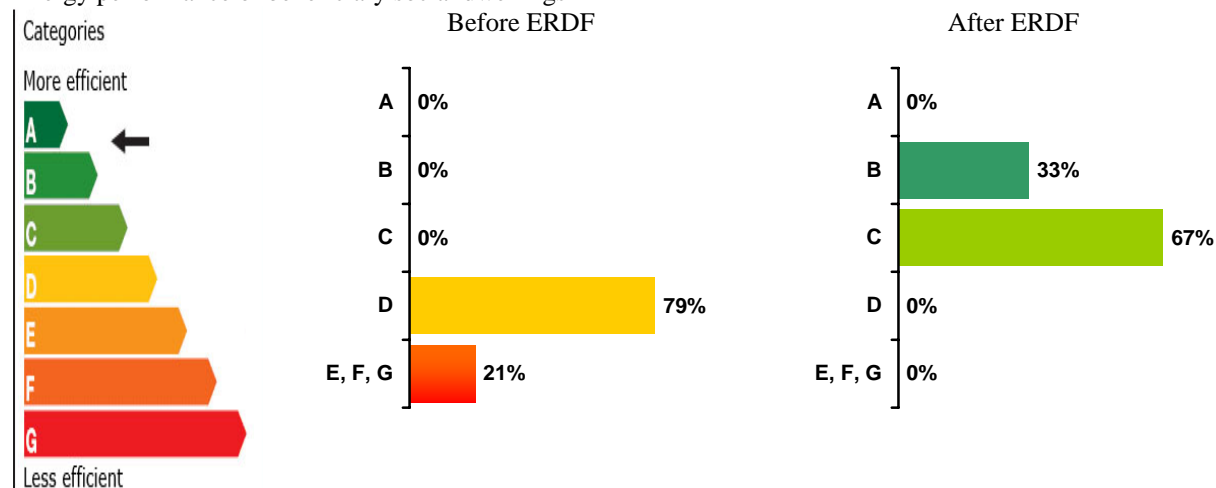
Local programming choices

- Priority allocation to social dwellings located in sensitive urban areas
- ERDF contribution capped at 30% of investment costs,
- Targeting the most inefficient dwellings (classes G, F, E and D)
- Objective to achieve to satisfy ERDF requirements:
 - a minimum saving of 80kwh/m²/year per dwelling, irrespective of the initial energy efficiency rating
 - a 75% reduction in household consumption
 - complying with the requirements of the Effinergie certification
- Dwellings in classes E, F and G must achieve a consumption level of below 150kwh /m²/year.

Mid-term results (6/2009-03/2011)

Households affected	3,953
Investment generated	€40,6M
Local jobs created	677

Energy performance of beneficiary social dwellings



Comments

- Regional programming greater than the 4% regional envelope
- Structural shortfall in the regional envelope with regards to the potential for developing the measure in the Ile de France area and actual needs in terms of thermal renovation.

Resources contact: Christophe Rabault, Director of AORIF ('Association of HLM Organisations in the Île-de-France Region'), contact@aorif.org, +33 (0)1 40 75 70 15

Languedoc-Roussillon

ERDF programming in figures

4% of envelope	€0.8M
Initial housing programming	€0.8M
Additional programming	-

Projects approved	€5.7M
Projects under appraisal	€2.7M
Total	€8.4M
Projects awaiting appraisal	-

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Type of operation and housing concerned: classes D, E, F and G

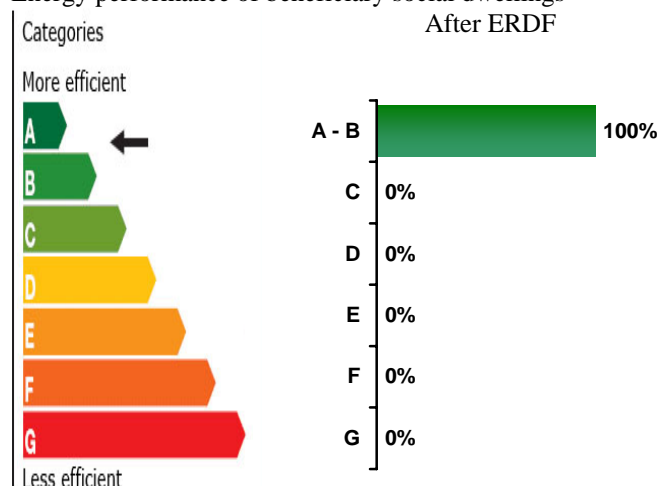
Eligibility criteria: aiming to achieve a knock-on effect and to lead by example

- progression to 120 Kwhep/m²/year - class C: 10% ERDF rate,
- progression to 96 Kwhep/m²/year - class C: 20% ERDF rate,
- progression to 64 Kwhep/m²/year - class B: 30% ERDF rate,

Mid-term results (6/2009-03/2011)

Households affected	2,390
Investment generated	€28.2M
Local jobs created	400

Energy performance of beneficiary social dwellings



Comments

The ERDF was initially set up as the result of a collaboration between the SGAR ('Secretary General for Regional Affairs'), the Regional Council and URO Habitat. The consultation was then extended to include territorial collectivities (Departmental and Town Councils) as well as all social landlords in the region.

Given the specific nature of the social rental housing stock (under-representation of classes E, F and G), a special system was set up for the purposes of increasing subsidies for dwellings in class D, provided that they achieved a minimum saving of 80kWh/m²/year and met the requirements for an energy efficiency rating of B (THPE, 'Very High Energy Performance').

Resources contact: Denis Rey, Director of URO Habitat - e-mail: denis.rey@urohabitat.org - +33 (0)1 40 75 70 15

Limousin

ERDF programming in figures

4% of envelope	€M
Initial housing programming	€M
Additional programming	€M

Projects approved	€16,000
Projects under appraisal	€1.15M
Total appraised	€1.57M
Projects awaiting appraisal	-

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

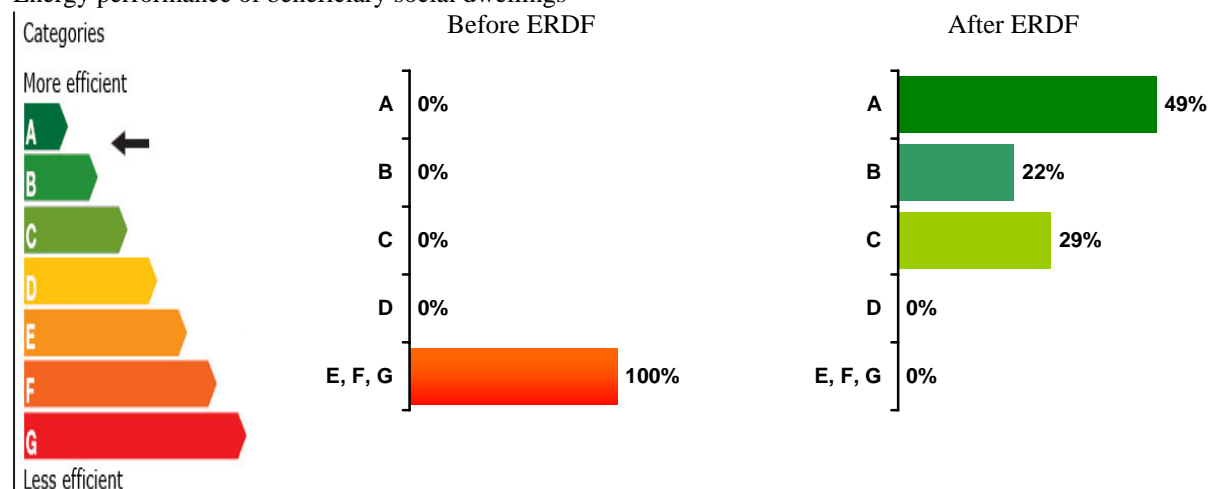
Subsidy of €1,000 per dwelling for a national contribution of €2,000 and for a minimum eligible 'energy-related' works total of €5,000 (not including works carried out beforehand).

A post-renovation consumption level of <150kwh/m²/year must be achieved.

Mid-term results (6/2009-03/2011)

Households affected	1,558
Investment generated	€22.52M
Local jobs created	320

Energy performance of beneficiary social dwellings



Comments

The *Association Régionale* was involved in the exchanges prior to the measure being introduced in Limousin and the proposals it made during steering committee meetings were heard, which meant that the aid could be supported by an existing system which was already well-known among social landlords, namely the 'social housing' eco-loan. Generally-speaking, local partnership and regular exchanges with the departments responsible for allocating the Fund enable the system to run efficiently and provide specific responses to the requests of social landlords. The latter, however, are still faced with the complexity of compiling the dossier.

Resources contact: *Association Régionale des Organismes Hlm du Limousin* – +33(0)5 55 79 97 48 e-mail: info@arolim.com

Lorraine

ERDF programming in figures

4% of envelope	€13.2M
Initial housing programming	€13.2M
Additional programming	-

Projects approved	€4.9M
Projects under appraisal	€9.9M
Total	€14.8M
Projects awaiting appraisal	€4M

ERDF allocation method

- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

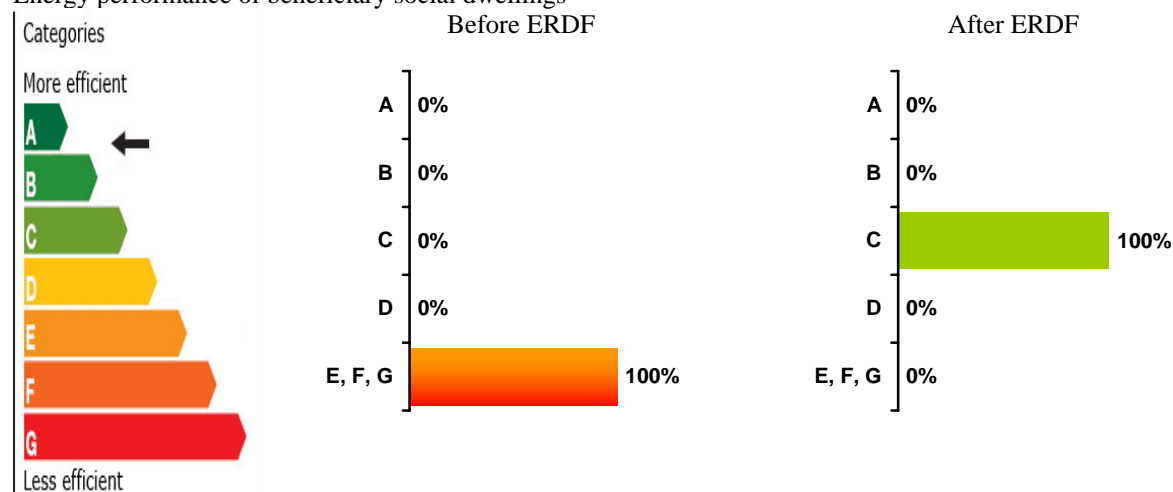
Buildings built before 1948: carrying out of a series of energy efficiency-related works as indicated in the Eco-Loan agreement, irrespective of the initial energy efficiency rating.

Buildings built after 1948: a minimum saving of 80kwh/m²/year must be achieved, irrespective of the initial energy efficiency rating. Dwellings in classes E, F and G must achieve a consumption level of below 150kwh/m²/year. This initiative was the subject of a call for project proposals targeting primarily the least efficient buildings whilst aiming to lead by example and achieve a knock-on effect. Funding for 'Prebat/Effinergie' demonstration buildings could be maintained. The ERDF will fund a maximum of 35% of eligible expenditure.

Mid-term results (6/2009-03/2011)

Households affected	5,392
Investment generated	€40.9M
Local jobs created	581

Energy performance of beneficiary social dwellings



These performance levels are based on averages and some buildings will be awarded a B rating.

Comments

A considerable financial envelope which had the intended reducing effect. A major opportunity to raise awareness among our regional and governmental partners of the rehabilitation issues facing the Lorraine area. A coherent system in terms of objectives set for HLM organisations with the eco-loan and Regional Council subsidies. Funding which of course contributes to the rehabilitation of the HLM stock but also to supporting the local economy. A major issue in a very fragile region.

Administrative complexity of the dossier and slow pace of the appraisal procedure. Acculturation between the HLM world and the functioning of the SGAR necessary and time-consuming, despite great attentiveness to the prerogatives of the AR ('Regional Association') during the compilation of the call for project proposals (notably based on the eco-loan). Difficulty in sustaining links beyond the measure implemented (exchange of information difficult with regards to processing dossiers). An adequate localised system for operations which are already in the very advanced stages but which does not allow for the implementation of a medium-term policy.

Resources contact: Franck Ceccato, ARELOR, +33 (0)3 87 69 01 35 e-mail: f.ceccato.arelor@union-habitat.org

Midi Pyrénées

ERDF programming in figures

4% of envelope	€17.2M
Initial housing programming	€17.2M
Additional programming	-

Projects approved	€32,000
Projects under appraisal	€8M
Total	€8.3M
Projects awaiting appraisal	€8M

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

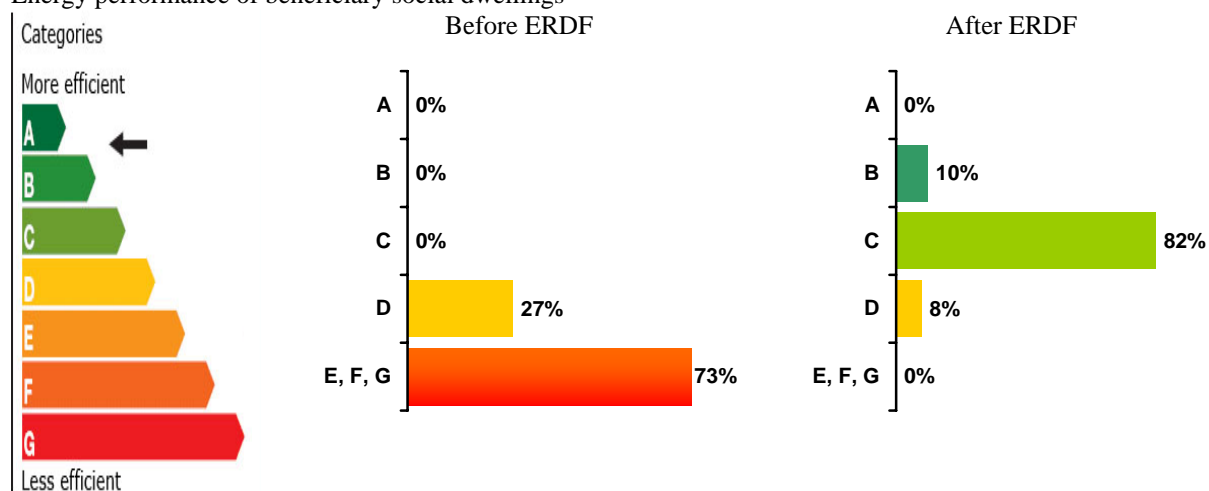
Buildings built before 1948: carrying out of a series of energy efficiency-related works as indicated in the Eco-Loan agreement, irrespective of the initial energy efficiency rating.

Buildings built after 1948: a minimum saving of 80kwh/m²/year must be achieved, irrespective of the initial energy efficiency rating. Dwellings in classes E, F and G must achieve a consumption level of below 150kwh/m²/year, with some flexibility according to altitude and climate area.

Mid-term results (6/2009-03/2011)

Households affected	3,619
Investment generated	€49M
Local jobs created	696

Energy performance of beneficiary social dwellings



Comments

Regional level is an effective operational and political scale on which to develop a coherent housing thermal renovation strategy. However, since it involves ERDF funds, the USH in the Midi-Pyrénées region has highlighted the limits of the current system, which is not aimed at 'sanctifying' funds for social housing, on several occasions. This non-sanctification resulted in the envelope being largely used up by projects relating to heating networks and calls for photovoltaic project proposals which were not submitted by social housing organisations. The principle aimed at funding dossiers which come in on the fly was seen as disadvantageous to HLM organisations. In fact, and for the record, this generation of ERDF funds began in 2006 and therefore became part of the Social Cohesion Plan from the outset. During this period, social housing organisations, at the request of the State, focused their strategies on new production. Since 2009 and the regional energy performance diagnosis, on the one hand, and the conclusion of the Social Cohesion Plan, on the other, energy rehabilitation has become an issue for the regional HLM Movement.

Resources contact: Sabine Veniel Le Navenec, Director of the *Union Sociale pour l'Habitat* in Midi Pyrénées - +33 (0)5 61 36 07 60 - ushmp@union-habitat.org

Nord Pas de Calais

ERDF programming in figures

4% of envelope	€28M
Initial housing programming	€20M
Additional programming	€20M ¹

Projects approved	€2.4M
Projects under appraisal	€17.9M
Projects awaiting appraisal	€2.6M
Total appraised	€20.3M

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

20% of the cost of the works and engineering operations within a subsidy window set according to the characteristics and energy performance of the operation, i.e.:

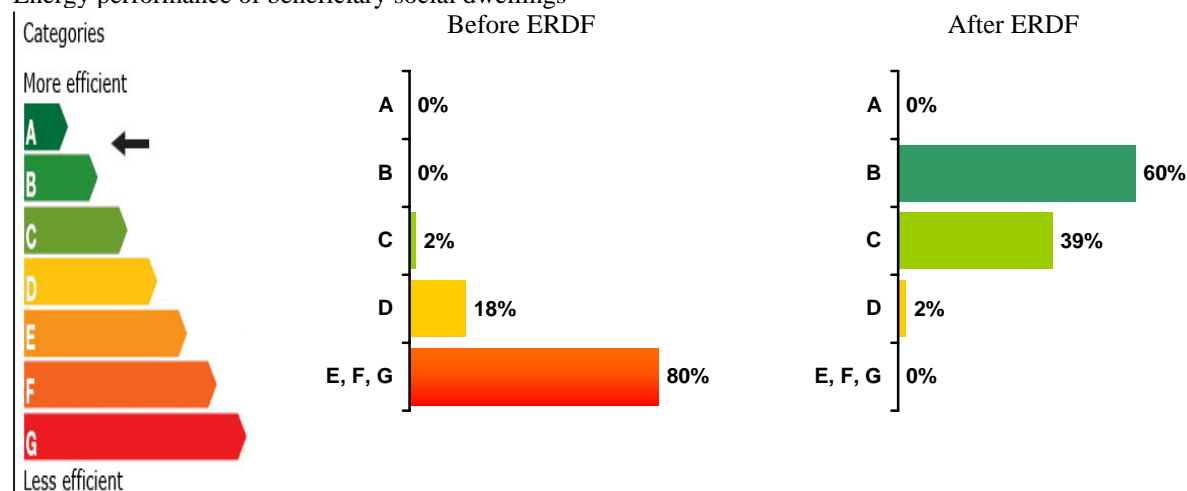
Collective dwellings subject to total thermal regulation

- ERDF ≤ €2,000 per dwelling for dwellings achieving a thermal regulation of 'existing -10%'
- ERDF ≤ €5,000 per dwelling for dwellings achieving a thermal regulation of 'existing -30%'
- Collective dwellings not subject to total thermal regulation
- ERDF ≤ €2,000 per dwelling for dwellings achieving an energy performance of 120kwh/m²/year
- ERDF ≤ €5,000 per dwelling for dwellings achieving an energy performance of 100kwh/m²/year
- Individual dwellings
- ERDF ≤ €3,000 per dwelling for dwellings achieving an energy performance of 135kwh/m²/year
- ERDF ≤ €7,500 per dwelling for dwellings achieving an energy performance of 104kwh/m²/year

Mid-term results (6/2009-03/2011)

Households affected	4,502
Investment generated	€206M
Local jobs created	2 925

Energy performance of beneficiary social dwellings



Comments

- Opportunity to form a collective approach involving 20 landlords with faster professionalisation of contractorship in a new sphere of activity, thus facilitating the acquisition of new methods with which to approach rehabilitation
 - Exchanging and capitalising upon experiences, enabling a good level of energy performance to be achieved
- Points to improve
- Insufficient experience on the part of thermal design offices when it comes to supporting innovative initiatives; Lack of synergy between the various sources of funding.

Resources contact: Jean-Luc Lemaire, Director of the *Association Régionale pour l'Habitat* ('Regional Housing Association') in Nord Pas de Calais, +33(0)3 28 16 07 70, e-mail: contact@hlm-nord-pas-de-calais.org

¹ Application pending

PACA

ERDF programming in figures

4% of envelope	€12M
Initial housing programming	€7.1M
Additional programming	€2.5M

Projects approved	€7.1M
Projects under appraisal	-
Total	€7.1M
Projects awaiting appraisal	-

ERDF allocation method

- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Regional/ERDF/ADEME calls for project proposals 2010: Three post-renovation performance levels can be targeted, capped at €20,000 per dwelling:

- a DPE energy performance rating of C+ < 120kWh/m²/living area/year: 20%, €2,000 per dwelling, max. aid per programme €250k
- THPE-type ('Very High Energy Performance') rating: 50%, €2,000 per dwelling, max. aid per programme €250k
- BBC Effinergie Renovation certification rating: 70%, €14,000 per dwelling, max. aid per programme €750k capped at €1.5M per organisation and per department.

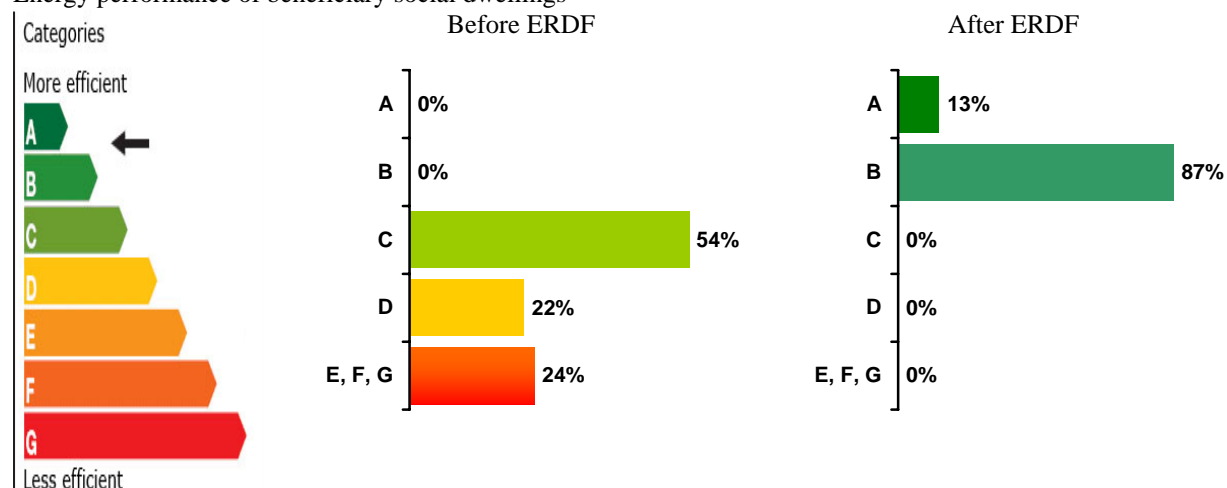
Regional/ERDF/ADEME calls for project proposals 2011

Very selective (only around ten or so operations will be selected), aimed at setting up a series of benchmark operations, reaching an average performance level of a 20% reduction in relation to the BBC Rehabilitation rating, i.e. below 60kWh/m²/TNFA/year. The subsidy rate is 50% of the eligible expenditure, capped at €20,000 per dwelling or €1M per operation.

Mid-term results (6/2009-03/2011)

Households affected	1,924
Investment generated	€58.1M
Local jobs created	825

Energy performance of beneficiary social dwellings



Comments

Very good collaboration among local partners in order to become operational as quickly as possible. This being the case, the distribution of ERDF credits was straightforward. Given the consumption level of the envelopes, on the one hand, and the high quality of the dossiers submitted, on the other, additional ERDF credits (€1.1M) were raised in order to withdraw the initial envelope for this 2010 call for project proposals.

Resources contact: Philippe Oliviero, Director of the AROHLM in PACA and Corsica, +33 (0)4 91 13 73 26, e-mail: bienvenue@arhlm-pacacorse.com

Pays de la Loire

ERDF programming in figures

4% of envelope	€12M
Initial housing programming	€12M
Additional programming	-

Projects approved	€1.29M
Projects under appraisal	€1.9M
Total	€3.19M
Projects awaiting appraisal	€4.6M

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

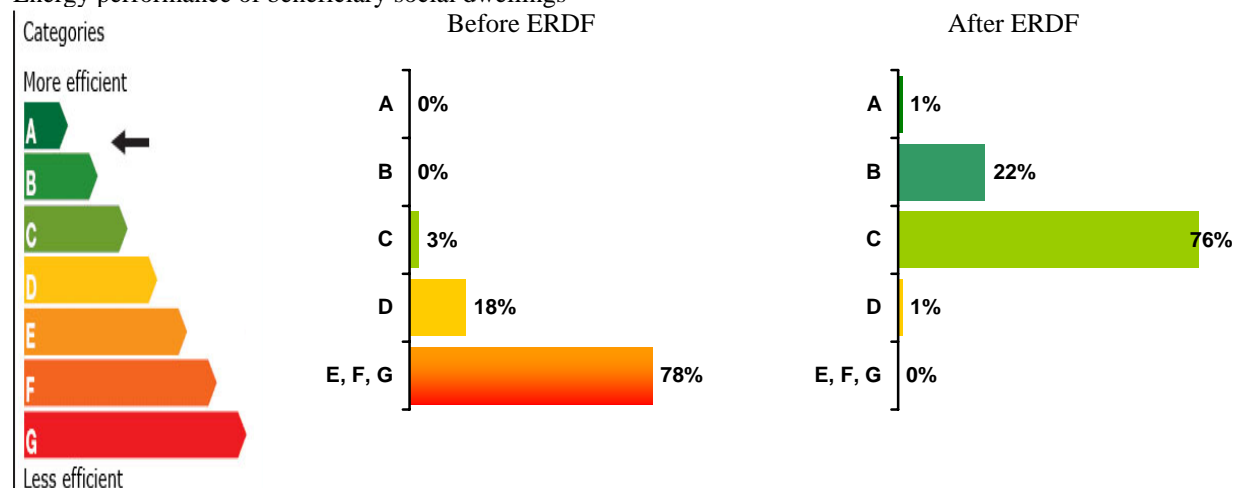
Local programming choices

- For buildings initially in classes E, F and G: subsidy of 20% capped at €20,000 per dwelling, i.e. a maximum of €4,000, progressing to a minimum of class C.
- For buildings initially in classes C and D: subsidy of 10% capped at €20,000 per dwelling, i.e. a maximum of €2,000 and with an energy saving of at least 80kwh/m²/year.

Mid-term results (6/2009-03/2011)

Households affected	1,538
Investment generated	€55.2M
Local jobs created	784

Energy performance of beneficiary social dwellings



Comments

Positive points:

- identification of areas for improving energy performance in social rental housing,
- improvement of the financial balance of thermal renovation operations,
- incorporation of ERDF aid into a regional aid system designed to support energy rehabilitation in the social rental housing sector and articulation between the various financial aid packages available.

Points to improve:

- facilitating the appraisal of funding dossiers from both an administrative and technical perspective,
- improving relations between the contractor-owner of the project and the appraising body in order to reduce the time it takes to compile and appraise a dossier.

Resources contact: Mireille Evenot – Director of the *Union Sociale pour l'Habitat* in the Pays de la Loire, +33 (0)2 40 94 87 59, e-mail: mevenot@ush-pl.org

Picardie

ERDF programming in figures

4% of envelope	€M
Initial housing programming	€M
Additional programming	-

Projects approved	€755,040 ²
Projects under appraisal	-
Projects awaiting appraisal	-
Total appraised	€755,040

ERDF allocation method

- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

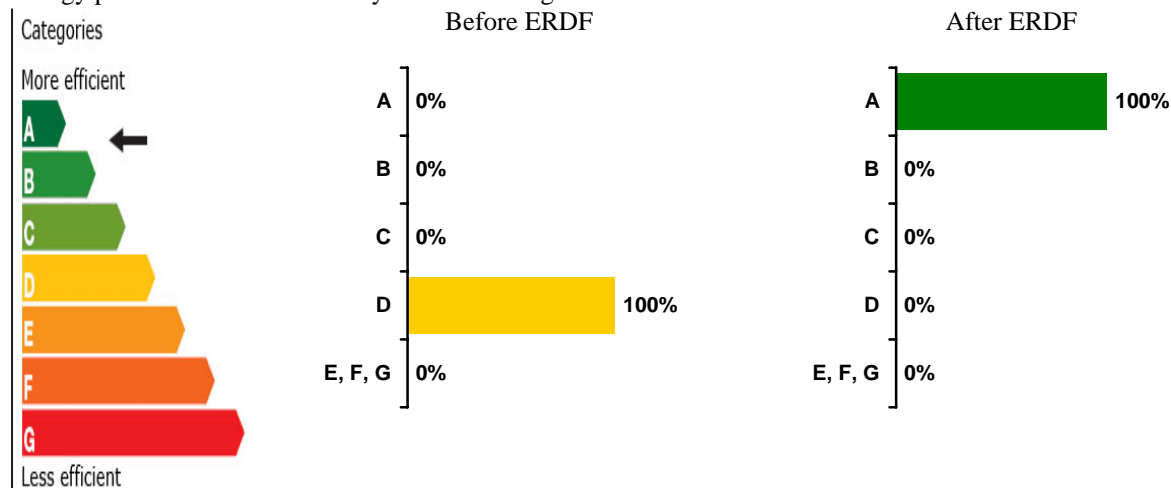
Conditions passed since 4th February 2011 and enforceable since 8th February 2011. Eligible dwellings:

- Prior to renovation
 - a conventional primary energy consumption level for the building of greater than 230kWh/m²/year (Th-C-E ex method) or greater than 330kWh/m²/year for dwellings heated by electricity.
- Following renovation
 - 1st level: less than or equal to 150*1.3 (coef. in Picardie) = 195kWh/m²/year (accepted only in relation to the energy-related renovation of individual dwellings using electrical energy for heating) >> subsidy rate: 40%
 - 2nd level: less than or equal to 150kWh/m²/year >> subsidy rate: 50%
 - 3rd level: less than or equal to 80*1.3 (coef. In Picardie) = 104kWh/m²/year (BBC Renovation) >> subsidy rate: 70%

Mid-term results (6/2009-03/2011)

Households affected	410
Investment generated	€8.4M
Local jobs created	119

Energy performance of beneficiary social dwellings



Comments

System set up too recently.

Resources contact: Jérôme Petit-Le Gallo - URH Picardie, +33 (0)3 22 71 84 70, e-mail: jerome.petit@picardie.urh.org

² Dossiers funded on the specific 4% budget line prior to the passing of the call for project proposals conditions, with applications being examined as of 2nd May 2011

Poitou-Charentes

ERDF programming in figures

4% of envelope	€8M
Initial housing programming	€8M
Additional programming	-

Projects approved	€8,6
Projects under appraisal	€5M
Total	€13,6M
Projects awaiting appraisal	

ERDF allocation method

- ☒ Subsidy mode (desk open up to limit of the programmed envelope)
- ☐ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

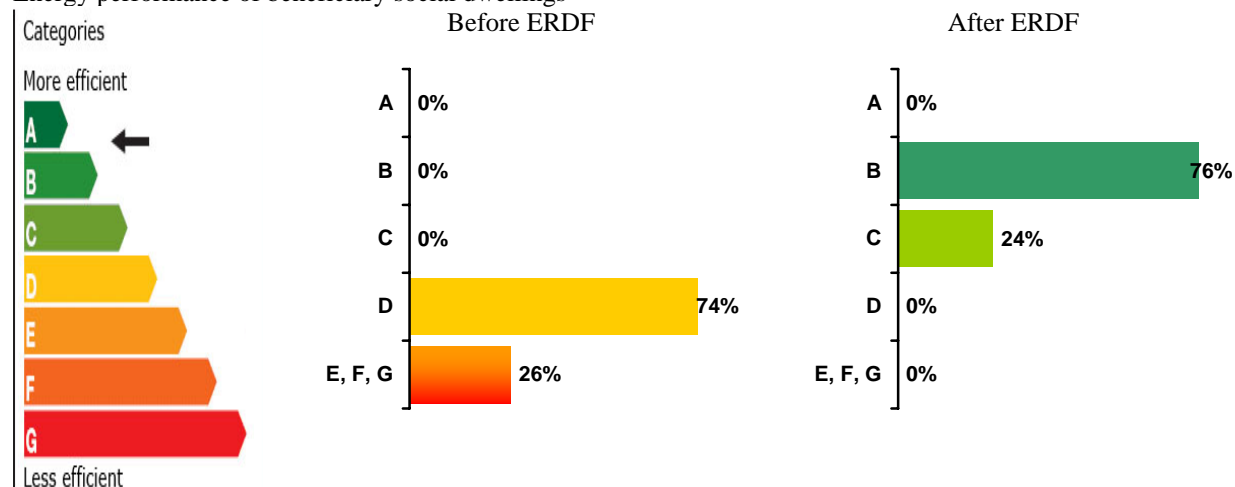
For buildings initially in classes E, F and G: achieving a minimum of a class C rating with a saving of 80kwh/m²/year, the aid is incremental according to the saving made, ranging from €1,600 to €9,120 per dwelling (>270kwh/m²/year).

For buildings initially in class D: achieving a minimum of a class C rating with a saving of 80kwh/m²/year: aid is incremental according to the saving made, ranging from €1,782 to €6,003 per dwelling (>170kwh/m²/year).

Mid-term results (6/2009-03/2011)

Households affected	2,603
Investment generated	€68,2M
Local jobs created	968

Energy performance of beneficiary social dwellings



Comments

Using the ERDF to encourage energy rehabilitation programmes has resulted in a very high level of involvement among organisations with regards to the energy-related rehabilitation of the housing stock. Incorporated alongside loans from the Consignments and Loans Fund and subsidies from the Regional Council as part of an ambitious and high-performance regional system, it has also meant that model examples of sustainable rehabilitation have now become widespread. Furthermore, it has opened up other avenues of reflection common to the organisations involved, such as raising awareness of energy-saving issues among tenants, monitoring consumption levels following renovation, using renewable energy sources and even promoting the energy-saving certificates generated as a result of such operations.

The gradual and inevitable exhaustion of the envelope in the medium-term is now generating concerns among the organisations involved; despite having put a great deal of effort into preparing themselves to deal with the issues of sustainable rehabilitation, they have become aware of the fact that the ERDF funds made available in Poitou-Charentes are not currently expected to enable them to cover all their needs and achieve all their objectives.

Resources contact: Axel David, ARHLM ('Regional HLM Association') in Poitou-Charentes, +33 (0)5 49 88 71 80, e-mail: aroshpc@union-habitat.org

Rhône-Alpes

ERDF programming in figures

4% of envelope	€13M
Initial housing programming	€12.9M
Additional programming	-

Projects approved	€12.9M
Projects under appraisal	0
Total appraised	€12.9M
Projects awaiting appraisal	-

ERDF allocation method

- ☐ Subsidy mode (desk open up to limit of the programmed envelope)
- ☒ Call for project proposal mode (following selection by a jury in accordance with a set of preliminary specifications)
- ☐ Financial engineering mode (interest rate subsidy, State guarantee, revolving fund, etc.)

Local programming choices

Three eligible performance levels

Objective C (150kWh):

Building with F or G rating: 30% of the cost of the works, capped at €4,500 per dwelling.

Building with E rating prior to renovation: 20% of the cost of the works, capped at €2,000 per dwelling.

Objective 'progressive C':

Technical requirement for achieving a BBC rating through several stages of renovation works.

Aid rate identical to that applicable to the standard C rating.

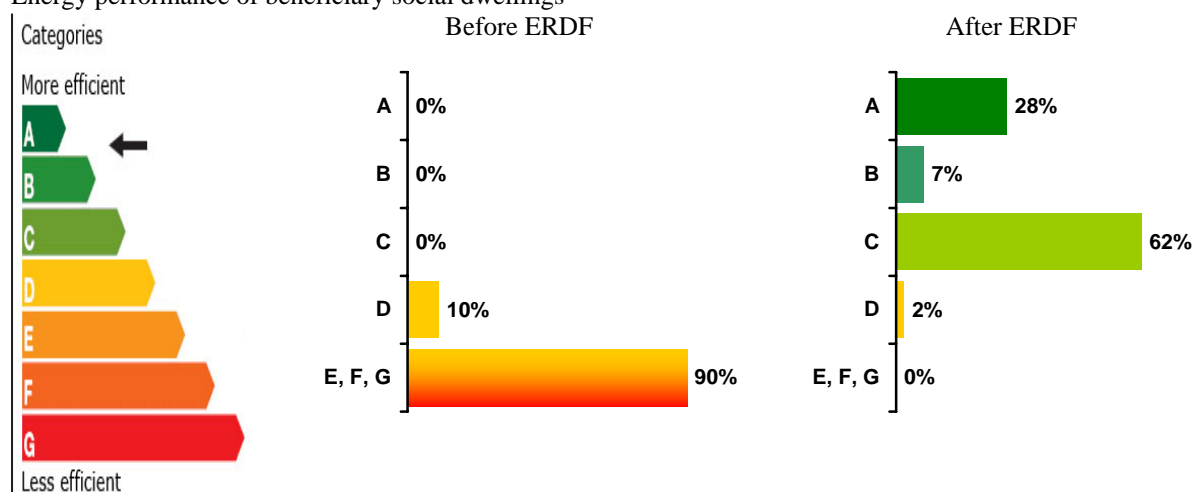
Objective BBC (80kWh):

35% of the cost of the works, capped at €6,000 per dwelling. Dwellings in class D are eligible for this performance level.

Mid-term results (6/2009-03/2011)

Households affected	3,500
Investment generated	€87M
Local jobs created	1.235

Energy performance of beneficiary social dwellings



Comments

In the absence of a funding system which offers a long-term vision, the objectives relating to reducing CO2 emissions and energy consumption by 75% by 2050 will be extremely difficult to achieve. Achieving these goals would involve:

- Taking into account all maintenance-related needs of the existing stock, including those relating to thermal aspects, accessibility, safety and the comfort and well-being of the occupants.
- Releasing funding for buildings with a DPE energy performance rating of D and dwellings fitted with electrical heating systems.
- Rehabilitating without exhausting energy-saving resources and whilst maintaining control over the accelerated ageing of the housing stock for the purposes of achieving the Factor Four concept by 2050.
- Continuing to raise awareness among residents and training professional players for the purposes of monitoring rehabilitation operations and guaranteeing the anticipated energy performance levels.

Resources contact: Aïcha Mouhaddab, Director of ARRA-Habitat, +33 (0)4 78 77 01 08 - a.mouhaddab@arra-habitat.org