

# The 27 National Energy Efficiency Action Plans – Results of the In Depth Analysis



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# EEW In-Depth-Evaluation of NEEAPs

- Compliance with formal ESD requirements
  - Status of notification
  - Target setting
  - Exemplary role of public sector
  - Provision of information & advice
- Level of information provided in each NEEAP / General performance
  - E.g. role of ESCOs, information on financing etc.
- Calculation of targets
  - Relationship between ESD potential study, NEEAP, measures
- Innovative policy elements
  - E.g. new approaches, positive side effects etc.

Remark: Evaluation of documents submitted, i.e. effectiveness, efficiency, implementation of measures cannot be judged here

# Criteria for selection of Member States

	South/north Member State	New/old Member State	Small/big Member State	GDP per capita (lower/higher than average)	Upcoming presidency yes/no
<b>Belgium</b>	North	Old	Small	High	No
<b>Bulgaria</b>	South	New	Small	Low	No
<b>Czech Republic</b>	North	New	Small	Low	Yes
<b>France</b>	North/South	Old	Big	High	Yes
<b>Germany</b>	North	Old	Big	High	No
<b>Hungary</b>	North/South	New	Small	Low	No
<b>Italy</b>	South	Old	Big	High	No
<b>Poland</b>	North	New	Big	Low	No
<b>Romania</b>	South	New	Big	Low	No
<b>Spain</b>	South	Old	Big	High	No
<b>Sweden</b>	North	Old	Big	High	Yes
<b>UK</b>	North	Old	Big	High	No
<b>Sum of evaluated NEEAPs</b>	<b>North: 8 South: 6</b>	<b>New: 5 Old: 7</b>	<b>Big: 8 Small: 4</b>	<b>High: 7 Low: 5</b>	<b>Yes: 3 No: 9</b>

# Compliance with formal ESD requirements (1)

- Status of notification

- All MS finally submitted a NEEAP
- Only two NEEAPs in time, last one in May 2008 (due: 30th July, 2007)
- Belgium submits 4 plans (Brussels, Flanders, Wallonia, Federal)

- Target setting

- Nearly all MS set required 9% savings target until 2016
- Belgian regions set 9% targets, but not mentioned in Federal plan
- Denmark and Spain apply differing time frames (11% by 2012)
- **Eight** of 27 states **set more ambitious targets** (e.g. 18% expected in UK; 13,5 in Romania)
- Most MS set interim targets

## Compliance with formal ESD requirements (2)

- Exemplary role of public sector
  - Except for Czech Republic, all MS are formally complying
  - Huge differences regarding scope and design of actions
  - 15 plans clearly explain measures and intended implementation, all others only provide basic information
- Provision of information & advice
  - All MS formally complying
  - Great variety of suggestions (e.g. to be implemented by public authorities or utilities or private institutions)
  - Considerable differences regarding level of detail

# Level of information provided (1)

- i.e. general performance of NEEAPs, additional information
- Role of energy utilities, ESCOs etc.
  - 80% of MS assign a role to utilities, retailers etc.
  - But: not always related measures drafted
  - Only 30% refer to ESCOs => underestimated (!)
- Financing of measures
  - Information provided in most NEEAPs
  - Partly not explained clearly
  - Denmark and UK already introduced an Energy Efficiency Fund, others have according plans

## Level of information provided (2)

- Additionality and Early Savings
  - Most MS distinguish between measures already implemented and new ones
  - **Unclear definition of additionality** (weakness of ESD): which measures are induced by ESD?
  - Eight MS claim early savings, two explicitly do not want to
    - => **controversial point**
  - In 10 NEEAPs the issue remains unclear => uncertainties
  - High amounts in Germany and Austria (45 and 43%)
- Monitoring and Evaluation
  - 12 MS have made ex-ante estimates (savings per measure and sector)
  - **Nine MS do not mention evaluation at all**
  - => **More attention in next round of NEEAPs needed**

# Calculation of targets

Effects of measures are calculated

- Either as **aggregated sum on national level**
- Or as estimations **per sector**
- Or as **expected impact per measure** (then aggregated to sectors and compared to savings targets)

=> **Clear definition needed of what is applicable**



# Innovative policy elements (1)

- Innovation is of key importance as NEEAPs and the related ESD process provide an **opportunity for mutual learning** among MS
- Different starting points: some MS with **long tradition of EE** measures and strategies in place, others (e.g. NMS) just establishing **basic infrastructures**
- Learning process: from single measures towards **comprehensive policy packages**
- Cross sectoral thinking: measures address **actors across sectors**
- Policy packages:
  - Basic: addressing **final consumers / end energy use**
  - Advanced: basic **PLUS** measures addressing **supply side**

# Innovative policy elements (2)

## a) basic policy packages

1. Provision of information
2. Provision of advice and consultancy
3. Provision of funding and financing schemes
4. Establishing an institutional framework
5. Creating legal regulations and standards

## b) advanced policy packages

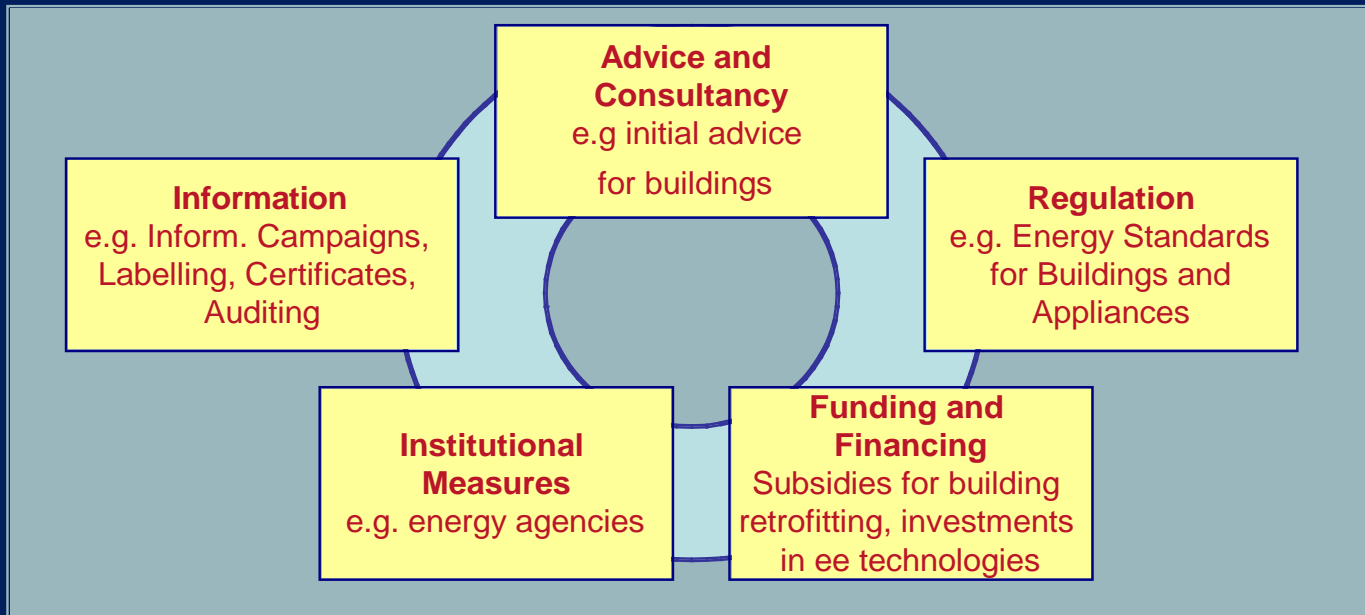
1. Education and quality assurance
2. Market-based instruments and services
3. Involvement of sectoral associations and producers (e.g. in voluntary sectoral agreements)

# Innovative policy elements (4)

Supplier



End User



# General remarks on sector coverage

- Buildings/Residential Sector
  - Regulatory approach (according to EU Directives)
  - Focus on establishing a funding structure
  - Focus on multi-family houses
  
- Industry and Service Sector
  - Focus on establishing a funding structure
  - Networks and voluntary agreement
  
- Transport Sector
  - „weakest part in the chain“
  - Transport sector not or not adequately addressed
  - Focus on improving the transport infrastructure
  - „soft measures“ (Information etc.)
  
- Agricultural sector
 

totally neglected in most NEEAPs (incl. those with high sector relevance)

Spanish NEEAP mentions agriculture & fishery!

## Conclusions 1st set of NEEAPs

- Very heterogeneous NEEAPs => **difficult to compare**, especially regarding calculation
- **Minimum** requirements fulfilled
- **Public sector** coverage rather weak
- General performance: measures, calculations etc. often **intransparent / not very elaborate**
- **Impressive scope of new measures**  
=> source of **inspiration / for mutual learning**
- Step towards **coherent policy packages**

## Recommendations for 2011 NEEAPs

- Standardised reporting format
- Harmonised methodology for calculation of targets and effects of measures
- Clear definition of **additionality** (what is meant by 'early action' / 'early savings'?)
- pay specific attention to issues as
  - role of **ESCOs**
  - coverage of **transport** and **agricultural** sectors
  - Elaboration of measures regarding **supply side**
- Set **binding EE target** (link ESD to 20/20/20 target)

# Thank you for your attention!

Please see for details /  
good practice examples:

[www.energy-efficiency-watch.org](http://www.energy-efficiency-watch.org)  
(brochure for download)

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