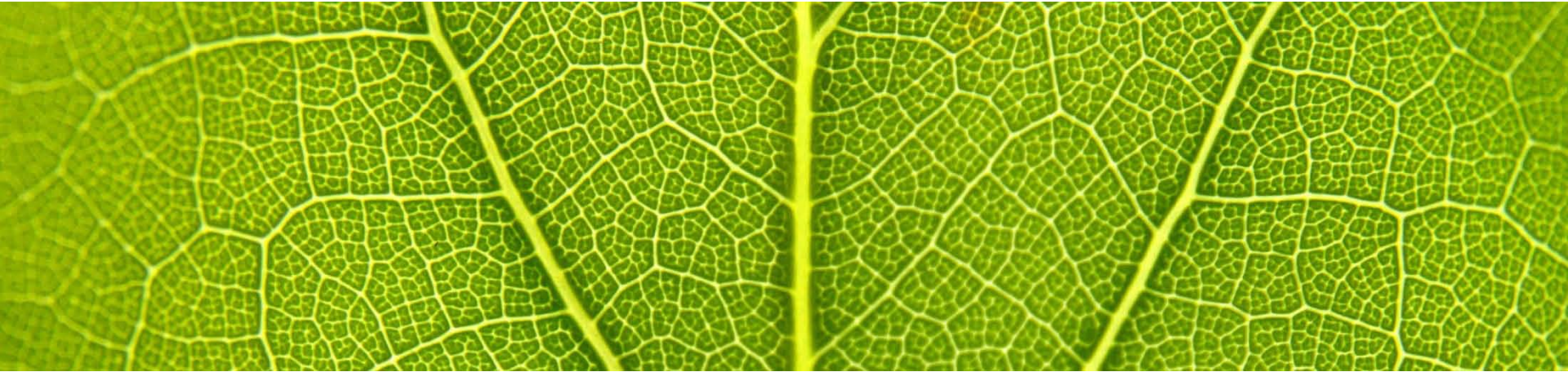




sustainable energy for everyone



## Energy Efficiency Watch

### Presidency Briefing

### EEW: Market Feedback on implementation of EE policies

05/12/2012

Daniel Becker

# Outline

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- Our task
- Our approach
- Some preliminary results
  - of the NEEAP screening
  - of the expert survey

# What is a NEEAP?

- ESD requires MS to submit three NEEAPs (2007, **2011**, 2014)
- Guidance provided by COM, but no obligation to use the template → large differences in structure, contents, and level of detail (**from 14 to >300 pages**)
- Typical contents
  - National saving **target for 2010 and 2016** (usually 9%)
  - Calculation of **achieved and expected savings**
  - **Evaluation methods** used
  - **Policies and measures per sector** (in more or less detail)
  - Reporting on specific ESD requirements: role of **public sector**, advice and **information**, contributions from **energy companies**, market for **energy services**

# What is our task?

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- One key product of the EEW project: **27 National Reports** (to be released in summer 2013)
- **Objectives:**
  - Highlight **strengths and weaknesses** of national EE policy/ESD implementation (**good practice examples, implementation deficits**)
  - Identify **policy gaps** and give policy **recommendations**
- **Sources of information:**
  - **NEEAP screening:** analysis of selected aspects
  - Broad **survey** among experts/practicioners on their perception of EE policy progress
  - In-depth **interviews** with selected national experts

# What approach do we use?

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- **Focus on** following selected aspects:
  - **Effective sectoral policy packages** –  
Comprehensive? Adequate and well-balanced? Well-implemented?  
(quality of implementation often impossible to assess due to lack of detailed information → therefore market feedback/ interviews needed)
  - **Governance framework** (i.e. institutions / structures / mechanisms facilitating smooth implementation of sectorial EE policies) –  
Long-term targets and strategies? Energy agencies? EE (financing) mechanisms? Involvement of other actors? Favourable conditions for energy services? Effective MRV?
- No checking of target achievement / correct calculation of savings
- No doubling of Commission's official assessment

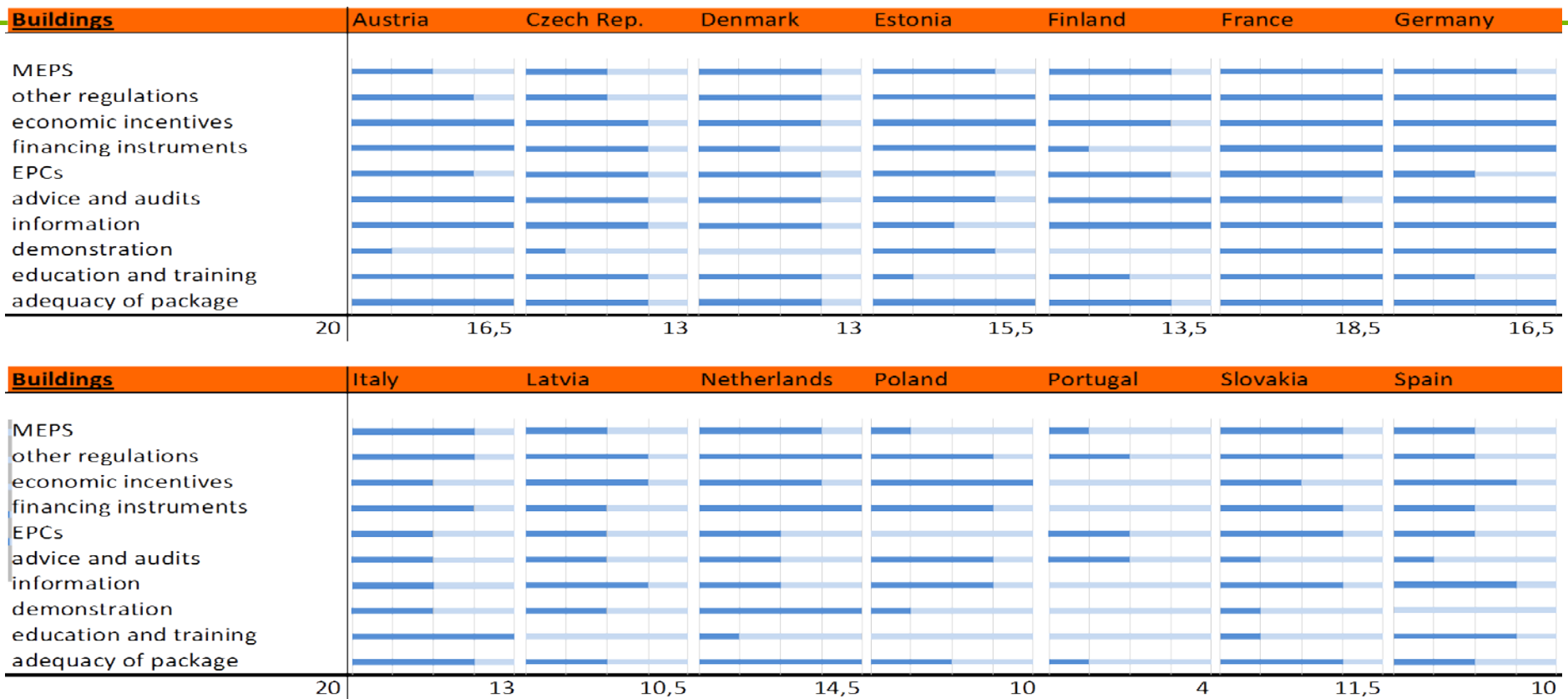
# NEEAP screenings

## Preliminary results – full overview

	Sweden	Denmark	Estonia	UK	Ireland	Belgium	Malta	NL
<b>Public</b>								
Public sector strategy	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Role model, transparency, and demonstration	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Mobility management	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Public procurement	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Public buildings	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Adequacy of policy package	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
<b>Buildings</b>								
Minimum Energy Performance Standards	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Other regulations	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Economic incentives	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Financing instruments	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Energy performance certificates (EPCs)	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Energy advice and audits	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Information tools	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Demonstration projects	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Education and training for stakeholders	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Adequacy of policy package	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
<b>Governance</b>								
Long-term EE target(s) and strategy	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Involvement of other actors	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Energy agencies and climate protection agencies	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
EE mechanisms for overall coordination and financing	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Favourable framework conditions for energy services	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
Horizontal measures	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████
MRV	██████████	██████████	██████████	██████████	██████████	██████████	██████████	██████████

# Cross-country analysis

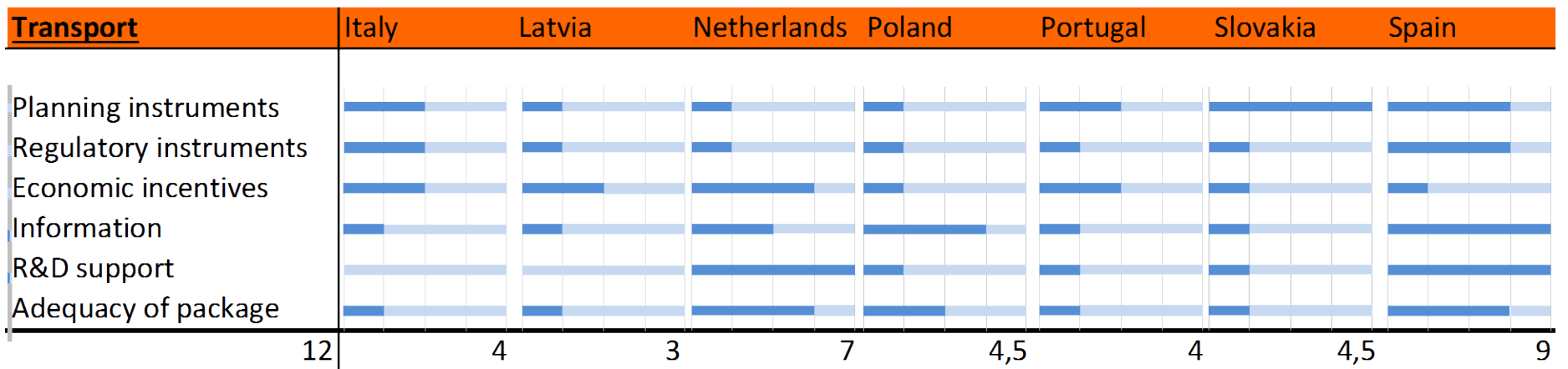
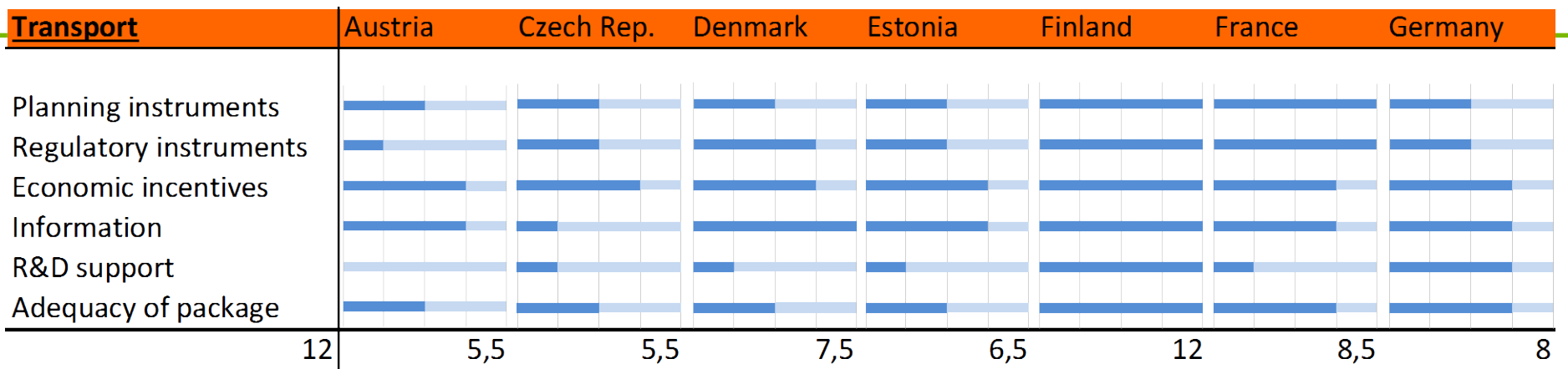
## Buildings



- + Economic incentives for EE in buildings & relatively advanced packages  
(→ large potentials recognised & EPBD effect)
- Gap regarding education & training for professionals  
(exceptions: e.g. AT, LU)

# Cross-country analysis

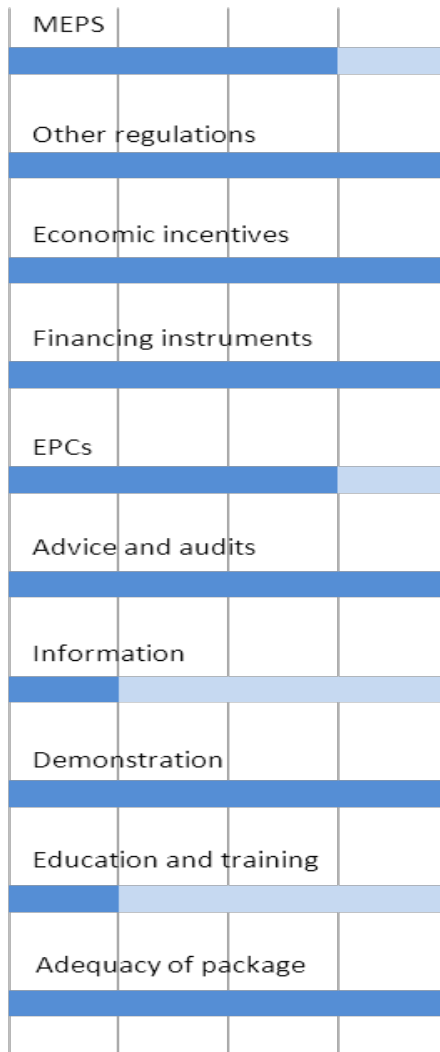
## Transport



+/- Overall mixed picture: weakest sector in several MS, but also good examples (e.g. FI, SE, UK)



# Good practice – buildings (Estonia)



- In place since 2008 & regular tightening foreseen
- Control and enforcement strategy unclear
- Spatial planning for district heating regions
- Subsidies for EE renovation of apartment buildings (up to 35% of project costs, depending on level of savings)
- Incentives for audits
- Tax incentives to foster EE renovation
- Large soft loan programmes for EE renovation (funded through EU structural funds)
- EPCs in place since 2009
- Publication of EPCs required
- Subsidies for audits, audits required for public buildings
- Assistance during design and construction for apartment associations
- €5 million funding for demonstration buildings
- Nothing implemented yet, but need for education and training of building professionals recognised

# Good practice - transport (Finland)

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- Strong focus on improving conditions for public transport, walking and cycling
- Besides national implementation of EU regulation further regulatory instruments concerning different transport modes and addressing different actors
- Tax system based on vehicle's emissions
- Major investments in public transport are given
- Different transport modes and actors are addressed by diverse information and advice measures
- Funding of research to reducing energy use
- Financing pilot projects on public and non-motorised transport
- Policy mix is well balanced (planning, economic, regulatory, informative and research instruments)

# Good practice – public sector (Belgium)

public sector strategy			
role model			
mobility management			
public procurement			
public buildings			
adequacy of package			

- Lack of clear target and a vision
- 25 new passive schools, energy accounting and saving measures in schools (Flanders)
- Info center and technological showcase for buildings (Wallonia)
- Pilot projects for nearly zero energy buildings (Flanders)
- Promotion of public transport and bicycle use amongst civil servants (free rail ticket)
- Increased interoperability of public transport, fleet modernisation, promotion of car sharing (Wallonia)
- Government buildings to be centralised in vicinity of transport stations (Flanders)
- Sustainable public procurement guide at Fed. level
- Knowledge of green procurement is disseminated amongst civil servants
- Public ESCO
- Strict EE criteria for all public real estate investments (Wall.)

# NEEAP screening – main messages

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- Some sectors addresses by a good set of measures, some very weakly
- Sectoral policy packages (e.g. appliances, buildings) of some MS to large extent based on EU legislation
- The majority of MS have not adopted long term strategies and targets
- The economic downturn has had significant consequences on EE policy in several MS (e.g. Greece, Romania)
- Target achievement is in many cases also due to economic recession

# NEEAP screening

## Preliminary Conclusions

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- NEEAPs II (again) very heterogeneous in quality and size of reporting, but in total an improvement compared to NEEAPs I
- NEEAPs express what is **addressed by policies** – implementation is a different story (survey)
- Step forward: EU-MS now come up with more policy approaches (still lagging behind in comparison with RE)
- Source of mutual learning
- MS with strong institutional framework have more advanced NEEAPs
- Implementation challenges – open: stakeholder motivation? (e.g. ESCO framework weakly developed)

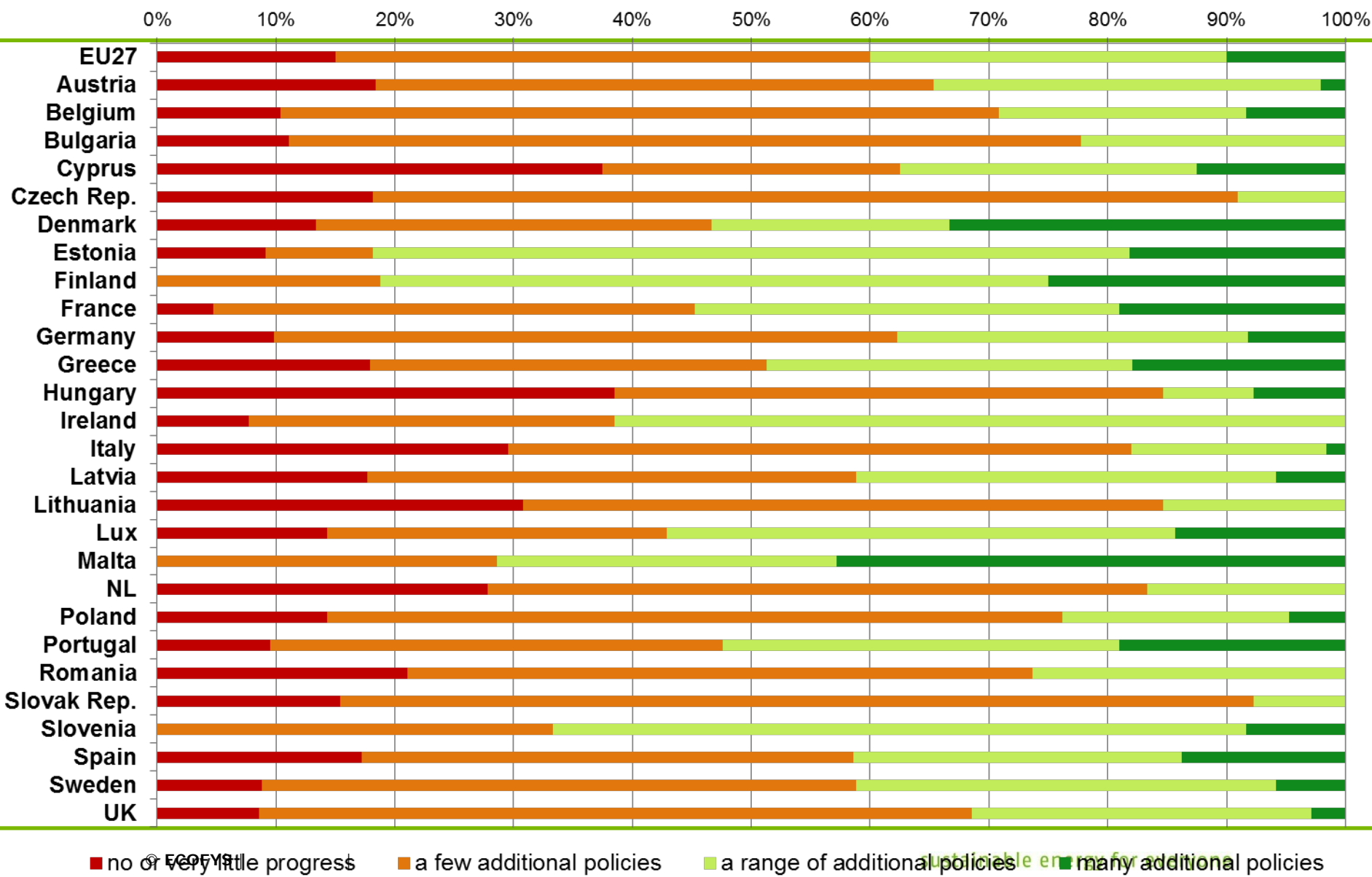
# The Energy Efficiency Watch Survey

## First Results

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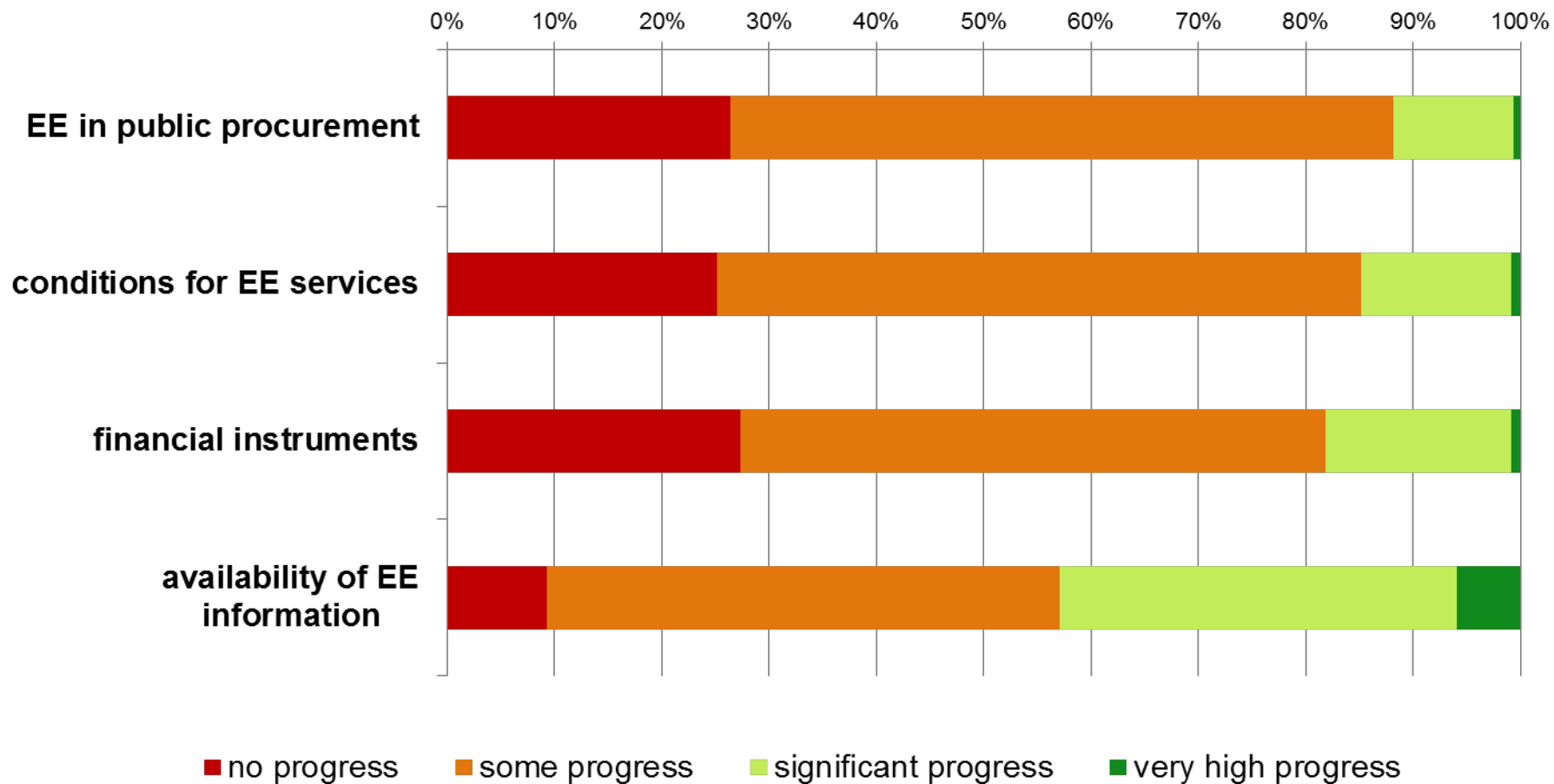
- Objective of the survey:  
**views of experts and stakeholders on actual progress** in energy efficiency policies in their respective country since NEEAP I
- more than 700 experts from all Member States consulted
  - quantitative survey: 655 completed questionnaires
  - qualitative survey: oral interviews with 3 experts in each Member State
- survey carried out by the O.Ö. Energiesparverband, with contributions from ECEEE, Fedarene, Energy Cities

# How do you rank the progress in energy efficiency policies in your country in the last 3 years



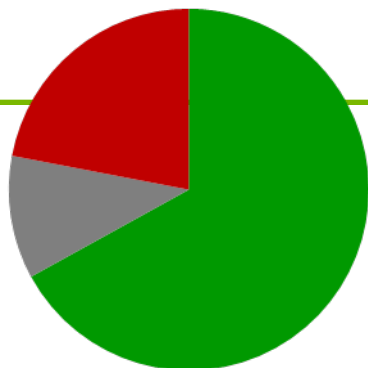
■ no or very little progress
 ■ a few additional policies
 ■ a range of additional policies
 ■ many additional policies

# How do you see the improvements in actual implementation in the last 3 years





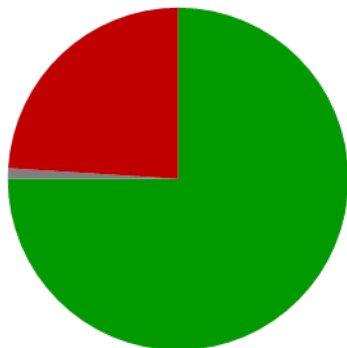
# The impact of ambitious energy efficiency policies...



■ support the competitiveness of EU industry | 67%

■ are more of a financial burden on EU industry than a competitive advantage

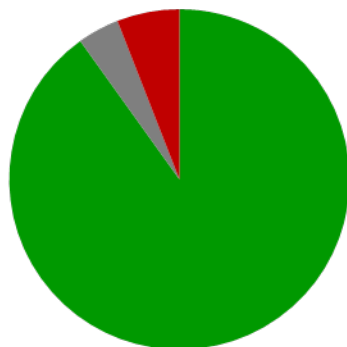
■ depends/neither nor



■ create jobs | 75%

■ destroy jobs

■ depends/neither nor



■ stimulate innovation in business, industry and public sector | 91%

■ do not significantly contribute to innovation

■ depends/neither nor



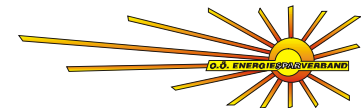
ENERGY EFFICIENCY WATCH

# The Energy Efficiency Watch Survey

## Presentation of the full survey:

### Workshop "Implementation of the energy efficiency policies: Market feedback"

Eufores & the Coalition for Energy Savings  
28 November 2012, 10.00 – 12:30  
European Parliament, room A5G315



Please contact us for more information

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