



ENERGY EFFICIENCY WATCH

The Energy Efficiency Watch Survey



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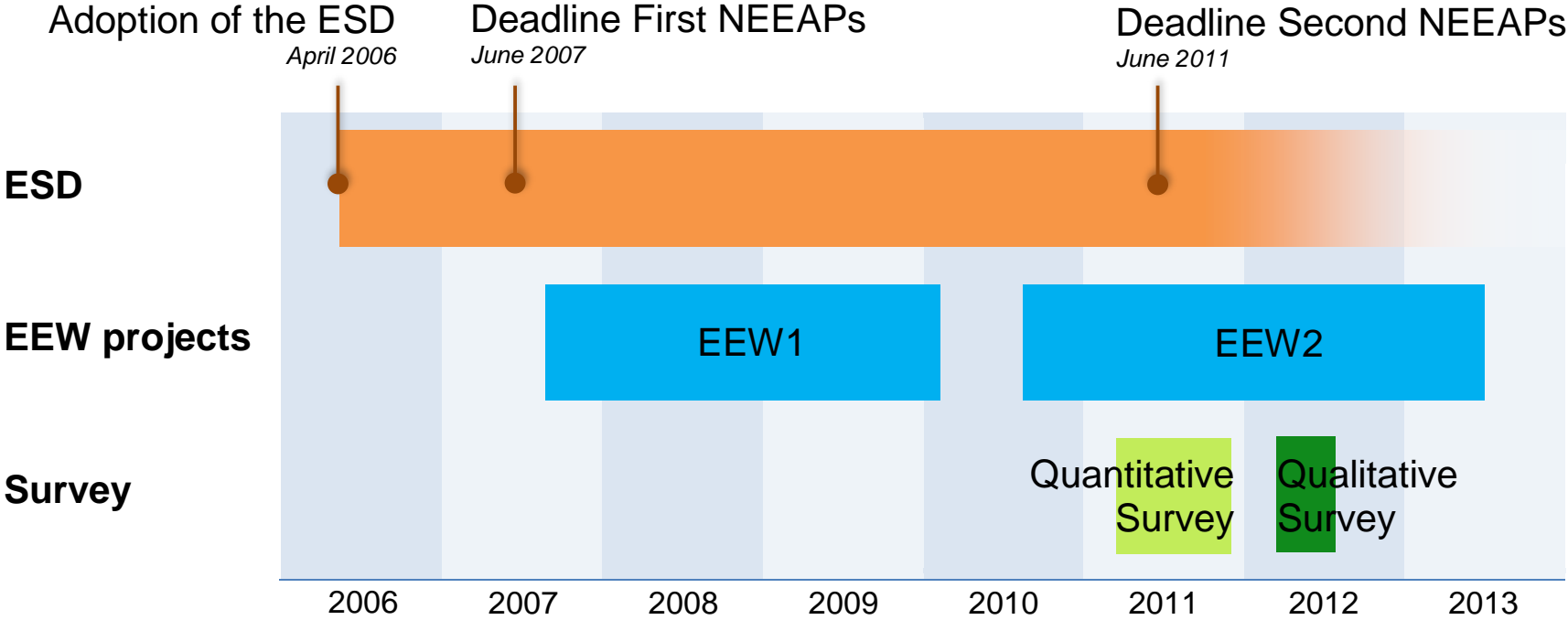
www.energy-efficiency-watch.org



Background & objective of the survey

- Objective of the survey:
 - views of experts and stakeholders
 - on the actual, "real-life" progress in energy efficiency policies in their respective country
 - since the first NEEAPs
- **more than 700 experts from all Member States consulted**
 - quantitative survey (questionnaires)
 - qualitative survey (oral interviews)
 - additionally, discussion within the partner networks and interviews with European networks
- survey carried out by the OÖ Energiesparverband (in co-operation with the University of Linz), with contributions from ECEEE, Fedarene, Energy Cities, Eufores

Time-table



Approach & methodology: Elements of the EEW survey

- **Quantitative Survey**

- quantitative information on energy efficiency progress, "snapshot picture"
- **655** completed questionnaires (online or during main European conferences)








- **Qualitative Survey**

- qualitative information on energy efficiency progress
- oral interviews with **3 experts per Member State** based on an interview guideline

- **Network Reports by Fedarene, Energy Cities, ECEEE and EUFORES (external network partners)**

- network inputs on progress of energy efficiency progress
- network meetings
- gathering inputs from major European energy efficiency networks and NGOs

Completed questionnaires by MS (quantitative survey)

	Austria	51
	Belgium	50
	Bulgaria	9
	Cyprus	8
	Czech Rep.	11
	Denmark	15
	Estonia	11
	Finland	16
	France	42
	Germany	63
	Greece	39
	Hungary	13
	Ireland	13
	Italy	61

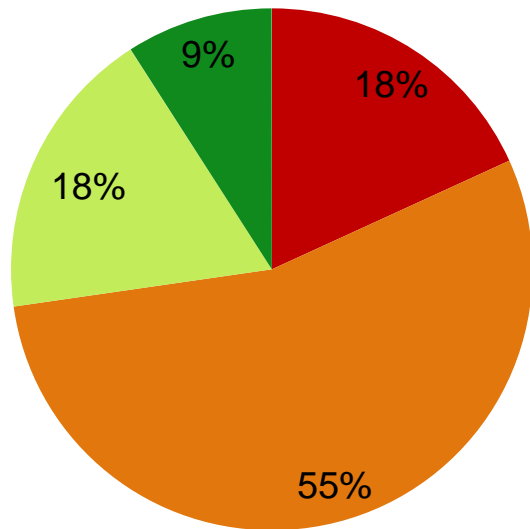
	Latvia	17
	Lithuania	13
	Lux	7
	Malta	7
	NL	19
	Poland	22
	Portugal	21
	Romania	21
	Slovak Rep.	14
	Slovenia	12
	Spain	31
	Sweden	34
	UK	35
	Total	655

How should the results be seen?

- Perceptions of experts on the progress in energy efficiency policy implementation in their own countries since 2007
- and not: the absolute levels of energy efficiency and energy efficiency policies in each country
- and not: what people think about other countries
- and not: the opinion of the authors of the study

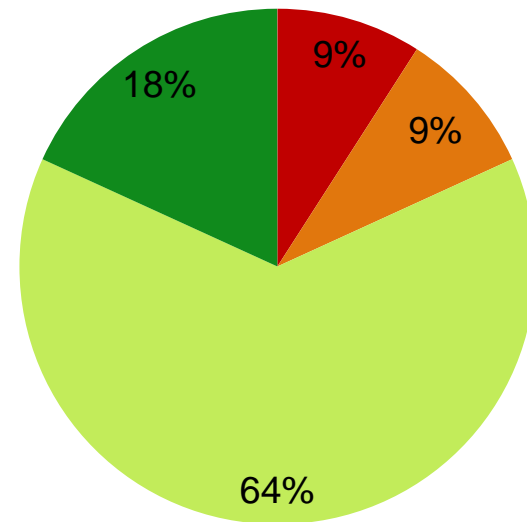
"Pictures" of the Member States (1)

Estonia: overall ambition of the energy efficiency policies



- generally, rather low
- ambitious in a few sectors, less so in most others
- ambitious in a range of sectors, less so in a few others
- generally, rather high

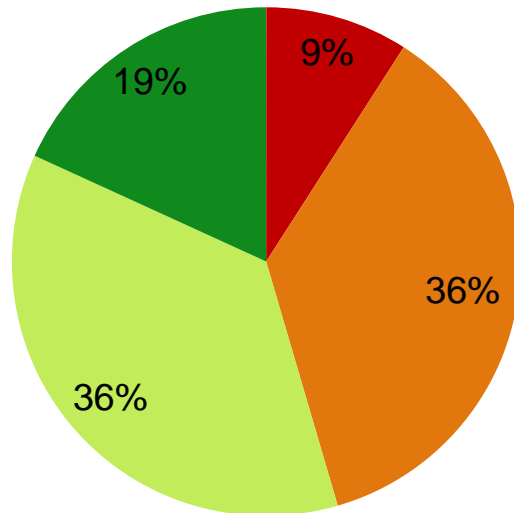
Estonia: progress of energy efficiency policies in the last 3 years



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

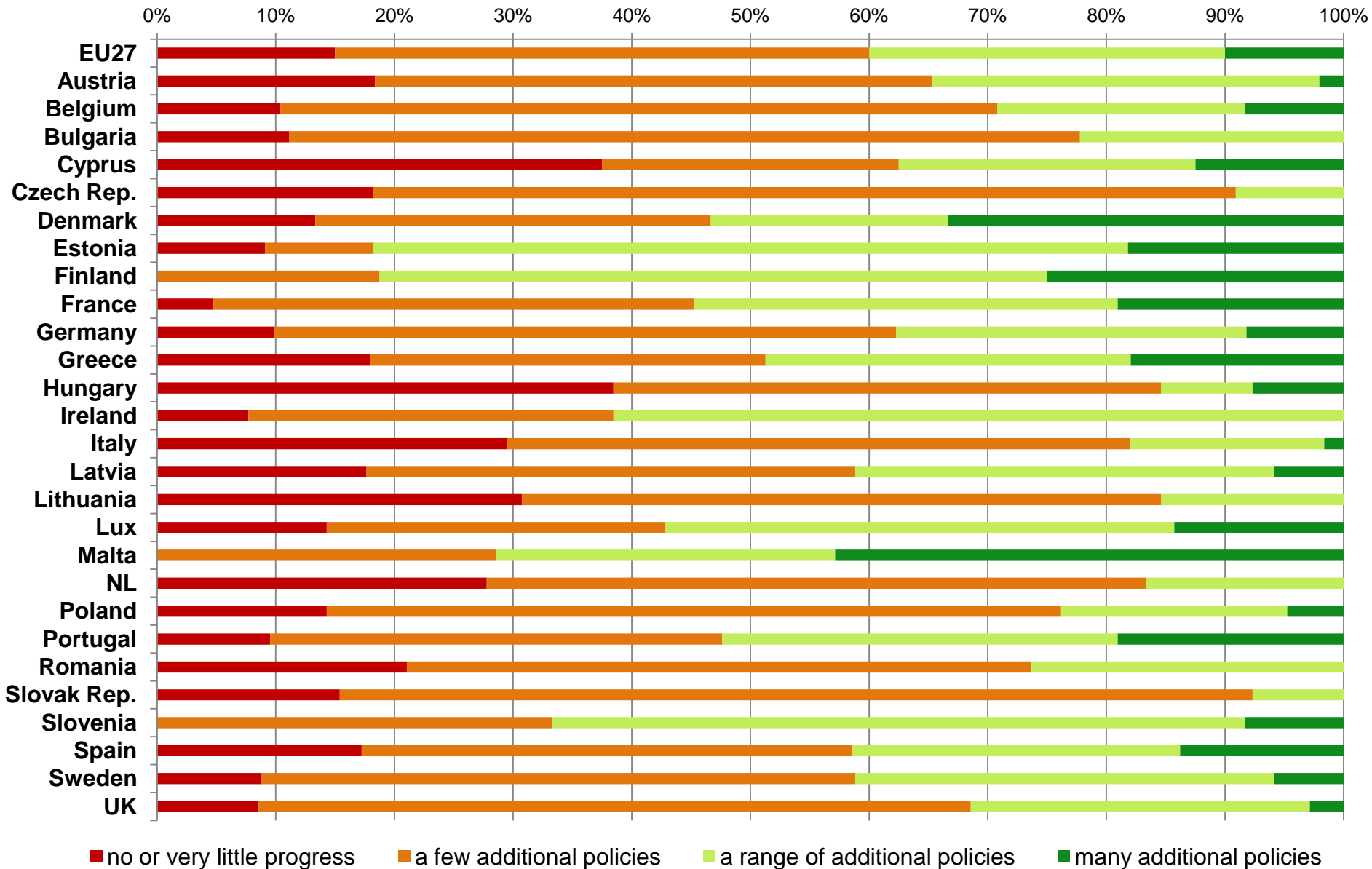
"Pictures" of the Member States (2)

Estonia: achievement of national energy savings target (ESD)



- target will not be achieved
- target will be achieved but will not lead to a lot of additional savings
- target will probably be achieved
- target will certainly be achieved

How do you rank the progress in energy efficiency policies in your country?









How is your country performing in achieving the national energy savings target (9% ESD target)?

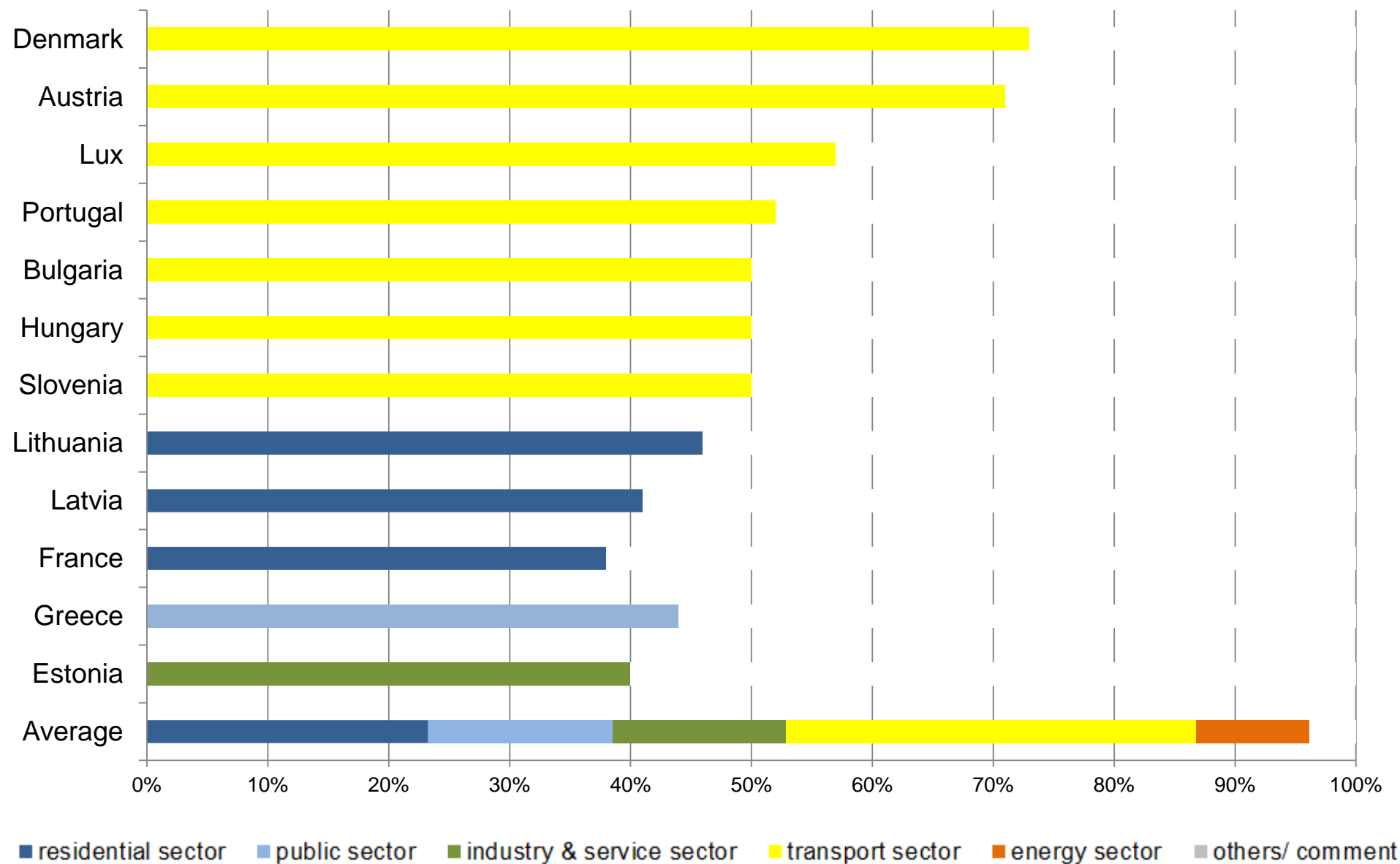
Target is likely to be achieved

- 67 % Denmark 
- 53 % Finland 
- 27 % 

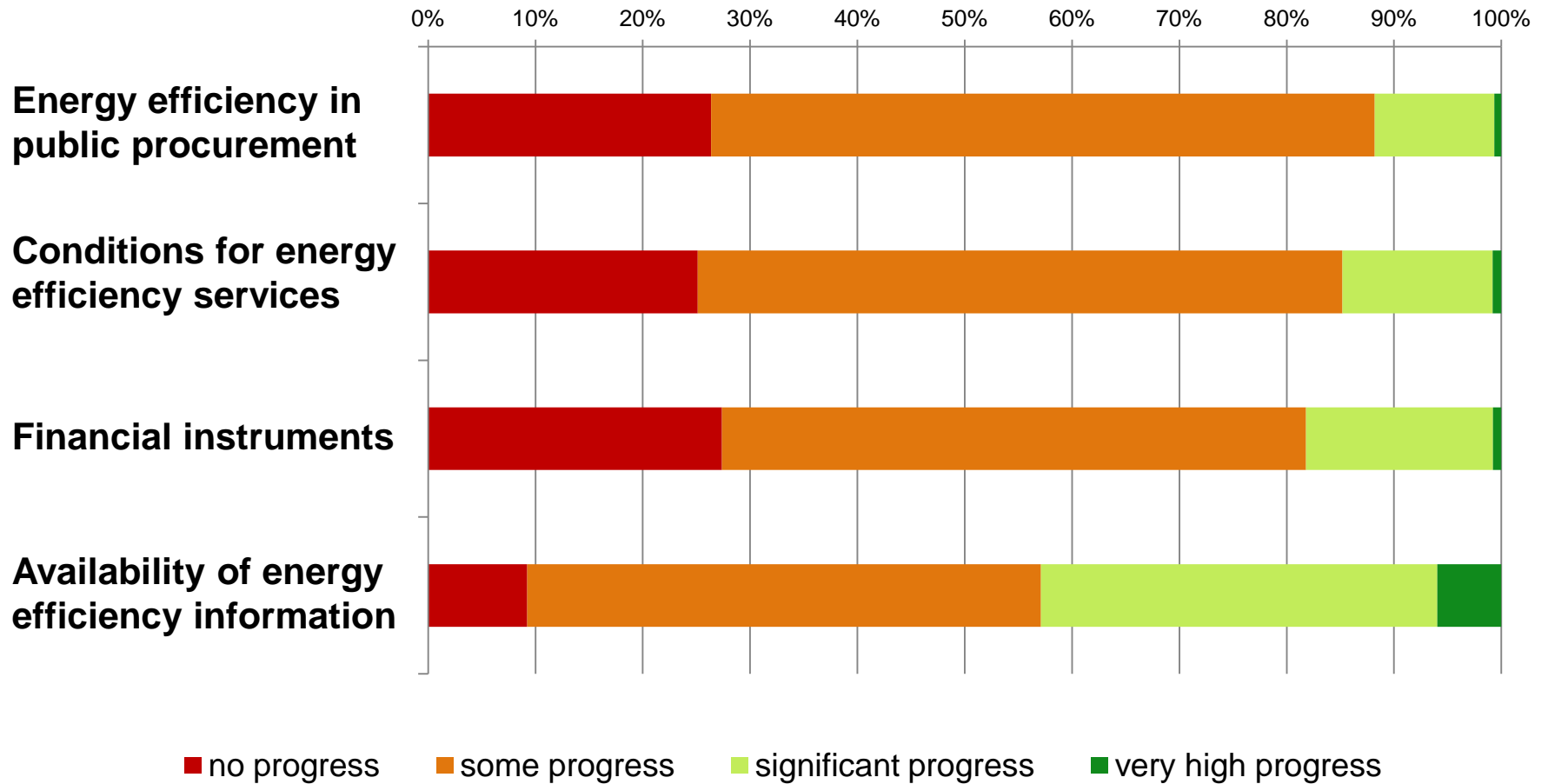
Target will not be achieved

- 62 % Ireland 
- 58 % NL 
- 52 % Romania 
- 49 % Austria 
- 48 % UK 
- 39 % 

In which sector do you see the most important gaps in energy efficiency policy in your country?



How do you see the improvements in actual implementation (EU27)?





LIKE



DISLIKE

Voluntary Agreements

Sweden 84%

NL 79%

Denmark 73%

Austria 53%

Lux 50%

Spain 45%

Obligations for energy companies

Denmark 100%

UK 86%

Slovenia 73%

Cyprus 38%

Lithuania 38%

Hungary 33%

Energy Audits

Denmark 93%

Austria 92%

Czech R. 90%

Cyprus 50%

Lithuania 31%

Belgium 31%

Smart Metering

Finland 80%

NL 39%

Estonia 36%

Germany 36%

Slovenia 36%

From the ESD to the EED (1)

Political will: understanding of the benefits of energy efficiency

- survey showed enormous disparity among MS in levels of ambition of energy efficiency policies
- continued communication challenge: energy efficiency is not a burden on public finances but the opposite - **a way to save money in public buildings and a significant factor for job creation and tax income**

A new and ambitious EU framework of energy efficiency policies needed

- overall progress in energy efficiency in the last years across MS was rather modest
- EU legislation recognised as a key driver for energy efficiency policies, especially in countries where it is not a political priority

From the ESD to the EED (2)

Progress in energy efficiency in transport is the weakest

- complete lack of comprehensive policies on energy efficiency in transport, including the European level
- absence of political will to act in this sector in most Member States

Building renovation and how to finance it

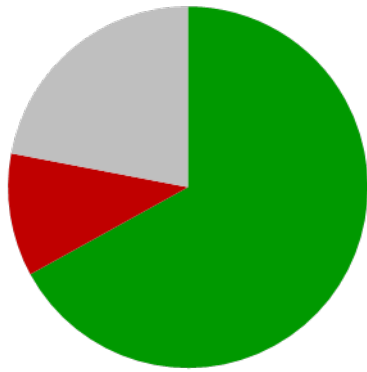
- urgent need for extensive building renovation across the EU
- existing programmes and approaches will not suffice to achieve significantly increased renovation rates
- clear longterm strategy (as now foreseen in Article 4 of the EED) needed (including better continuity of funding programmes, solutions to overcome the user/investor problem, mobilisation of local actors)

From the ESD to the EED (3)

Many other barriers than money

- legal, institutional, in the fields of information, awareness raising, training etc.
- negative example: failure to develop a market for energy performance contracting (EPC) in most MS
- positive example: product-independent energy advice and audits crucial role in overcoming information barriers, especially when implemented in a package with other policy incentives

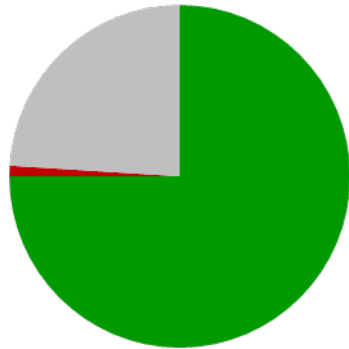
The impact of ambitious energy efficiency policies...



■ support the competitiveness of EU industry | 67%

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

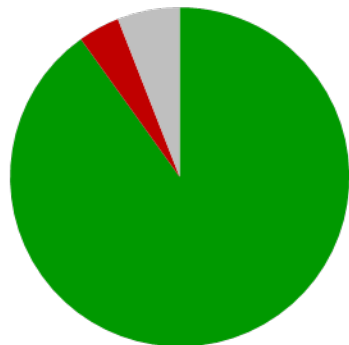
■ depends/neither nor



■ 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



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The Energy Efficiency Watch Survey

Reports available for download at:

www.energy-efficiency-watch.org

- Survey Report
- 27 country reports
- EEW Brochure: Good practice ways out of energy debt

