

**Disclaimer and acknowledgements**

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## D3.6 Event Report Business Stakeholder Workshop 1-10

<b>Deliverable Name</b>	Event Report Business Stakeholder Workshop 1-10
<b>Work Package No</b>	3
<b>Work Package Title</b>	Narrative Analysis
<b>Responsible for this Deliverable</b>	GUIDEHOUSE (former Navigant)
<b>Description</b>	This set of reports will compile the reports on the business stakeholder events.
<b>Issue Date</b>	1.12.2021

## 1/10 EEW4 Internal Event Report

**Project Partner:** Navigant

<i>Title of the event:</i>	National Business Stakeholder Workshop, Germany: Narratives for an efficient energy transition
<i>Date &amp; location:</i>	28 January 2020, 9:00 – 12:30 hrs, Ørsted Office, Hamburg
<i>Organiser(s):</i>	Navigant, supported by Deutsche Unternehmensinitiative Energieeffizienz e.V. (DENEFF)
<i>Number of Participants:</i>	24
<i>Summary of the event</i>	The first EEW4 national business stakeholder workshop took place on January 28 in Hamburg, Germany, in collaboration with the DENEFF, a non-profit energy efficiency initiative. The event was moderated by Carsten Petersdorff, Director at Navigant. In three break-out groups and a vivid plenary discussion, prevailing narratives used in the energy efficiency business community were discussed and novel narrative elements have been developed. From the input received, the EEW-analysis team identified narrative elements with potential to be further developed.
<i>Event evaluation</i>	The event received positive feedback from participants and collaborators for the concept and organisation. The workshop concept was understood and has been picked up with interest by the audience, especially the opportunity to transmit feedback from the business community to decision makers through the project has been welcomed.
<i>Objective &amp; main programme point</i>	The aim of the workshop was to collect input on existing narratives around energy efficiency and to receive input from business stakeholders with a view to developing narratives for enabling the effective implementation of energy efficiency policies and measures in the EU.
<i>Input Collection</i>	The business stakeholder workshop revealed that mainly quantitative and economic narratives are being used in the current debate on energy efficiency policies and measures, e.g. regarding reductions of energy consumption, emissions and energy costs. Business stakeholders do not perceive it to be easy to translate key benefits into comprehensive or appealing narratives. The energy efficiency business community would

consider it helpful to receive guidance on how to translate efficiency benefits into stringent narratives that resonate with key stakeholders.

From the input received, the EEW-analysis team identified the following storylines with potential for further development:

- Energy efficiency is part of the **new generation's lifestyle** that embraces environmental awareness, health and new technologies. This provides opportunities to connect energy efficiency with the benefits of the new lifestyle, e.g. home office implying less traffic and more available office space and comfort, no commuting time, etc. Energy efficiency is something everyone can do and could be contextualised as a bottom-up movement.
- **Freedom as the absence of regulation** - this widely shared counter-narrative often seems to hamper policy makers in taking necessary decisions for climate action and energy efficiency. An enabling narrative could be developed to illustrate the benefits of regulation for the purpose of climate protection in general and for energy efficiency in particular, such as: Today, freedom is commonly seen as the absence of regulation. However, the current lifestyle causes emissions that will limit our freedom in the future. Each day that we do not change our current way of living, e.g. by decreasing our carbon footprint, will further restrict our freedom in the future. Forward-looking regulation that reduces future-threatening behaviour as early as possible allows us to preserve our freedom also in future. Policies and regulation should therefore encourage and incentivise environmentally friendly behaviour and limit action that restricts our future freedom.
- In Scandinavia, regulatory measures in energy and climate policy are common and mutually accepted. Narratives used there could serve as a model for positively framing regulatory measures in the context of energy efficiency.
- Contextualising energy efficiency as the **conservative pillar of the energy transition** by linking energy efficiency to pecuniary savings and preservation can appeal to certain conservative parts of society.
- By their nature, energy efficiency projects typically promote **local value creation**, jobs and other benefits especially for small- and medium-sized business and refurbishes the infrastructure. This can therefore be highlighted as an opportunity especially for rural communities.

- Energy efficiency allows **stable return on investment in times of zero interest rates.**
- The communication by the European Commission of the Green Deal as Europe’s man-on-the-moon moment was widely and positively received by the energy efficiency business community.

*Programme*

9:00 – 9:15	<p><b>Begrüßung</b></p> <ul style="list-style-type: none"> <li>• Präsentation des EU-Projektes “Energy Efficiency Watch“</li> <li>• Ziele und Ablauf des Workshops</li> <li>• Vorstellung der Teilnehmer</li> </ul>
9:15 – 9:30	<p><b>Hintergründe zu Narrativen</b></p> <ul style="list-style-type: none"> <li>• Einführung <ul style="list-style-type: none"> <li>- Was ist ein Narrativ?</li> <li>- Welche Funktion nehmen Narrative in der gesellschaftlichen Verständigung ein?</li> <li>- Worin liegt die Kraft von Narrativen für die politische Diskussion?</li> </ul> </li> </ul>
9:30 – 10:45	<p><b>Entwicklung erfolgreicher Narrative in Kleingruppen</b></p> <ul style="list-style-type: none"> <li>• Entwicklung erfolgreicher Narrative für eine effiziente Energiewende</li> <li>• Vorstellung der erarbeiteten Narrative</li> </ul>
10:45 – 11:00	<p>Kaffeepause</p>
11:00 – 12:00	<p><b>Diskussion ausgewählter Narrative für eine effiziente Energiewende</b></p> <p>Leitfragen:</p> <ul style="list-style-type: none"> <li>• Welche Botschaft möchten Sie der Europäischen Kommission übermitteln?</li> <li>• Welche Narrative können zu einer ambitionierteren Energieeffizienzpolitik beitragen und die Akzeptanz von Energieeffizienzmaßnahmen stärken?</li> </ul>



12:00 –  
12:30

**Wrap-up**

- Identifikation und Verständigung über die wichtigsten Ergebnisse des Workshops

## Documentation of the moderator (summary)

### Key categories for energy efficiency narratives

- Economic benefits for end consumers and industry from the societal perspective
  - Enables a feasible energy transition
  - Guarantees security of supply
  - Reduces energy prices
- Supports economy due to job effects, local and national investments instead of oil imports, and higher state income (VAT, Taxes)
- Local solutions are enabled by energy efficiency and lead to local benefits
- Energy efficiency helps SMEs and the middle class which builds our core of our economy and society
- Energy efficiency is one of the only investments with stable interest rates in times of zero interests
- Lower investment requirement and less environmental impact compared to renewables (spatial and visual) or batteries (resources and exploitation)
- Pick up narrative element used by Fridays-for-Future-movement
  - Climate protection
  - Environmental and energy policy for peace and social justice
  - CO<sub>2</sub>-footprint of industry and products
  - Development policy
  - focus on the interest of the people taking into account (global) justice and social aspects instead of acting just in the interest of the large companies
- Create a positive image: energy efficiency is part of the new generation's lifestyle due to associations with comfort, health, better leisure time other rewards instead of old school and not just savings and the avoidance of environmental damage
- Connect energy efficiency with the benefits of the new lifestyle with many benefits, e.g. home office, less traffic, more office space, more comfort, no commuting time
- Energy efficiency is something everyone can do and can be perceived as a bottom-up movement



- Avoidance of wasteful behavior, resourceful behavior is a value for many people not only for the Fridays-for-future-movement but also for penny pinchers and more conservative citizens
- Energy efficiency (conservation) is the conservative pillar of the energy transition to address conservative stakeholders
- Include narrative elements like:
  - Take care of the pence and the pounds will take care of themselves.
  - Constant dripping wears away the stone.

### Recommendations for effective narratives

- Make it specific: arguments for different stakeholder groups and target groups are needed
- Fact-based arguments are important, e.g. number of jobs created, amount of investments that have been incentivized by subsidies, amount of subsidies that have been refinanced via increased taxes
- Create a good mix of fact-based information and emotions: addressing emotions is more powerful than using quantitative statements. Therefore, narrative elements like fear or freedom are more expressive and catchier than abstract arguments addressing climate protection
- Develop counter narratives and arguments for reacting to typical negative arguments and anticipated rebound effects
- Learn from international examples, e.g. Denmark, instead of reinventing the wheel
- Consensus matters
- Use catchy slogans, e.g.
  - the best energy is the one that avoids energy
  - I am an energy saver
  - Green house number
  - Nuclear energy: no, thanks!
- Tips for improving policy makers
  - Use state of the art marketing strategies (social media, google ads, etc.) instead of flyers and poster campaigns



- the government has to fulfill its role as frontrunner to stimulate followers and should create best practice examples

**Pictures**







## 2/10 EEW4 Internal Event Report

**Project Partner:** Navigant

<b>Title of the event:</b>	National Business Stakeholder Workshop, Italy: Business perspectives on energy efficiency policy
<b>Date &amp; location:</b>	Online event: - First session: 27 April 2020, 15:00 – 17:00 - Second session: 28 April 2020, 10:00 – 12:00
<b>Organiser(s):</b>	Navigant, supported by the Italian Federation for Energy Efficiency (FIRE - Federazione Italiana per l'uso Razionale dell'Energia)
<b>Number of Participants:</b>	32
<b>Summary of the event</b>	<p>The second EEW4 National Business Stakeholder Workshop gathered over 30 participants from Italy and was held in two interactive sessions on April 27 and April 28 as a virtual meeting due to COVID-19 health restrictions. The participating business representatives and energy auditors shared their insights and discussed on how to make progress on energy efficiency and how to make efficiency policies a success. The event was organised in collaboration with the Italian Federation for Energy Efficiency (FIRE), an independent non-profit organization for promoting sustainability and the efficient use of energy. Daniel Becker from Navigant, a Guidehouse company, presented the results of previous EEW projects, the methodology and workplan of EEW4, and the role of narratives in policy implementation. Dario Di Santo from FIRE underlined the importance of highlighting non-energy benefits in the communication of energy efficiency policies and measures to increase awareness and acceptance also beyond the energy sector business society. The input received through the workshop will feed into in a case study report by the EEW-analysis team to be published on the Energy Efficiency Watch website.</p>



<i>Event evaluation</i>	<p>In the light of the COVID-19 pandemic, this workshop was the pilot for an interactive online format for the EEW Business Stakeholder Workshops. The event received positive feedback from participants and collaborators for the concept and organisation of a virtual format that allowed for a vivid exchange in times of social distancing restrictions in Italy and Europe. Breakout sessions, polls and live notes were used as tools to accompany the discussions. The concept for this interactive online workshop concept worked well and has been picked up with interest by the audience. The discussions delivered valuable input that will be condensed in one of the EEW case studies.</p>
<i>Objective &amp; main programme point</i>	<p>The aim of the workshop was to collect input on existing narratives around energy efficiency and to receive input from business stakeholders with a view to developing narratives for enabling implementation of energy efficiency policies and measures in Italy and the EU.</p>
<i>Input Collection</i>	<p>Italy's White Certificate Scheme is complex but worked very well after a few years as reported during the Business Stakeholder Workshop. Success factors have been good information, a training system and the role given to ESCOs to act as facilitators for energy efficiency measures.</p> <p><b>Narrative elements for potential case study</b></p> <p>Predictability in the costs and benefits is key to stimulate businesses' interest in investing in energy efficiency measures</p> <ul style="list-style-type: none"><li>• The implications of energy efficiency measures should be explained in monetary terms instead of energy values to convince decision makers. Highlighting economic benefits of improving energy efficiency is essential.</li><li>• Often, decision makers are not aware of the full benefits and cost savings that come with the implementation of energy efficiency measures.</li><li>• Energy is often a central cost factor for businesses, industries and public services but still energy efficiency is not a priority, e.g. due to sometimes long payback periods or perceived complexity of proposed measures, among SMEs in particular.</li><li>• There are plenty examples of cost-effective energy efficiency measures and of solid business cases. Business decisions for</li></ul>



energy efficiency measures are not entirely determined by economic rationales and should therefore be encouraged with convincing arguments.

- Establishing long-term relations is essential for ESCOs to reduce the cost risks of clients, e.g. through energy performance contracting and by including success fees, internalising external costs in energy prices and balancing costs of electrical and thermal energy.
- Focus on the client perspective as a policy maker or ESCO: monitoring energy performance and key performance indicators allow for process improvements, e.g. in production. Communicate measures for the support of energy efficiency investments to reduce payback time. Highlight effective business models.

A holistic and persistent view on energy efficiency is needed

- Energy efficiency services need to be differentiated and tailored to broad range of use cases.
- Non-energy benefits of energy efficiency should receive more attention in the communication of energy efficiency
- The implementation of innovative and energy efficient processes can contribute to a company's positive image, e.g. quality improvements through digitalisation and automation.
- Energy efficiency policies and measures do not have a negative impact on the company in terms of outages.

More and new formats for communication between stakeholders and policy makers are necessary

- Most of the people do not know that particular energy efficiency instruments exist, e.g. low-cost loans in Italy. Policy makers and business stakeholders need to improve the communication to increase awareness on these instruments.
- Energy efficiency is not in need of protective policy measures but needs recognition in political and public debate.
- A dialogue between industry, policy makers and ESCOs is necessary to rebuild mutual trust.



A level playing field and predictable instruments are necessary to support the private sector in developing new business models

- Investment support is essential for reaching ambitious energy efficiency targets
- Incentives, audits and communication are useful instruments to increase awareness for energy efficiency
- Energy efficiency policies are needed, particularly for non-energy intensive industries. Energy efficiency should be connected to policies for digitalisation (e.g. Industry 4.0 programme) and innovation. Supporting measures for energy efficiency & innovation should be combined / synergies strengthened.
- Support capacity building for energy management in SMEs

### Programme

First session: 27 April 2020, 15:00 – 17:00

#### Energy Efficiency Watch & sharing business experiences

15:00 – 15:30	<b>Welcome &amp; Input session: Energy efficiency policy &amp; Energy Efficiency Watch 4 project</b>
15:30 – 16:15	<b>Breakout sessions: Business perspectives on best-practices of implementing energy efficiency</b>
16:15 – 16:45	<b>Breakout session presentations</b>
16:45 – 17:00	<b>Reflection and discussion of breakout sessions</b>

Second session: 28 April 2020, 10:00 – 12:00

#### EU energy efficiency policy & narratives for promoting energy efficiency





10:00 – 10:30	<b>Input session: Developing narratives for promoting energy efficiency</b>
10:30 – 11:30	<b>Plenary discussions: A policy perspective on implementation and acceptance of energy efficiency</b>
11:30 – 12:00	<b>Wrap-up</b>



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Pictures

Input session: Energy Efficiency Watch 4 project

Recording

# Energy Efficiency Watch 1-4 Introduction



## Energy Efficiency Watch 1-3

- mutual learning on energy efficiency policy instruments
- exchange on best-practices among EU Member States
- based on an evaluation of all National Energy Efficiency Action Plans (NEEAPs)

## Energy

- support policy makers for improving implementation and acceptance of energy efficiency policies
- identify and develop enabling narratives for efficiency policies for national, regional and local level
- create a broader understanding of the multiple benefits of energy efficiency

In this **National Business Stakeholder Workshop** and other formats, input from various stakeholder groups on elements for narrative building is being gathered for improving the acceptance and implementation of energy efficiency.



ENERGY EFFICIENCY WATCH



NAVIGANT  
A Guidehouse Company



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Recording

# Energy Efficiency Watch 1-4 Progress



## 2007

- Hardly any proven energy efficiency policies around when NEEAP process started
- Initially, predominance of info campaigns
- Many approaches still rather theoretical
- Often doubted whether broad energy efficiency policies could address complex savings potentials

- Impressive toolbox of energy efficiency policy instruments
- Many of them are really good practice!
- Decentral EU approach provides great variety

→ **Yes we can: EU-27 has succeeded in developing good energy efficiency policies!**



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### Welcome note Dario Di Santo, Managing Director, FIRE

**What is energy efficiency?**

- 1. Avoiding waste and inefficient uses**  
It mainly requires management, and it is very cost effective
- 2. Using efficient technologies (cost effective)**  
It requires investments (i.e. resources to be spent)
- 3. Using efficient technologies (non-cost effective)**  
It requires investments and public support
- 4. Changing behaviours and rethinking businesses**  
It requires investments and a different mindset (i.e. smart minds), but it allows to grasp much more than the other options

The slide also features a cartoon character of a boy with glasses and a pencil behind his ear, carrying a briefcase.

### Breakout session presentations

**How do you promote the energy efficiency products or services of your organization in everyday client conversations?**

- Correct calculations are key. Let figures work for themselves.
- Difficult to move it up the agenda
- Paper industry: know specific production process very well. Make proposal from within process! Know internal logic of producing business.
- SME is a bit different than large corporates. Need to know what you talk about. Gain the trust of your counterpart. (because of past experience with other offers). Be credible and present complexity of the solution (pros / cons, risks, etc.) – then come back to technical issues.
- If you control energy, you control everything in your company. Provides a lot of collateral information. Having technical transparency is key.

**What was the story you told when you lastly convinced an initially skeptical client?**

- Example: heat recovery. Help of general management was necessary to convince production team. A balanced approach to evaluate risks and opportunities. Create a holistic view. Needs to always be feasible for the production teams.
- Easier to talk about energy efficiency with companies with continuous processes (paper, glass, food). Visibility of energy savings is key (via monitoring system)!



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Workshop slides, ITA\_webinar\_Henrik - Last Modified 2h ago

Italian National Business Stakeholder Webinar  
Key takeaways

- EE is not a priority for SMEs: incentives, audits and communication is necessary
- Predictability in the costs and benefits is key to enable clients' and policy makers' interest in EE
- More and new formats for communication between stakeholders and policy makers are necessary
- Air quality as a policy target can be reached through EE
- Non-energy narrative elements
- Innovation and developing new business models
- EE should be a priority especially for public services since energy is often a central cost driver, e.g. for rail transport. Audits can help to increase the awareness of energy aspects.
- Monitoring of energy performance and KPIs also allows for process improvements, e.g. in production.
- Economic benefits are key in the first place. Integrate innovative concepts, automation, quality improvements, etc.
- A level playing field is necessary to create beneficial and predictable instruments for stakeholders
- Innovation is essential for companies'
- Investment support is essential for reaching ambitious EE targets
- Establish long-term relations with clients and reduce their cost risks, e.g. due to energy performance contracting including success fees
- Frame EE as an instrument to reach your clients targets not as a final target
- Focus on client / policy perspective and also take into account non-energy benefits
- EE efficiency is not in need of protective policy measures but needs r
- with adequate EE policies

ENERGY EFFICIENCY WATCH

Security Manage Participants Polls Chat Share Screen Pause/Stop Recording Reactions Leave Meeting

Workshop slides, ITA\_webinar\_Henrik - Last Modified 2h ago

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- Air quality as a policy target can be reached through EE
- Non-energy narrative elements
- Innovation and developing new business models
- EE should be a priority especially for public services since energy is often a central cost driver, e.g. for rail transport. Audits can help to increase the awareness of energy aspects.
- Monitoring of energy performance and KPIs also allows for process improvements, e.g. in production.
- Economic benefits are key in the first place. Integrate innovative concepts, automation, quality improvements, etc.
- It must be achieved that EE is perceived as beneficial a predictable instrument for stakeholders
- Innovation is essential for companies' image
- Investment support is essential for reaching ambitious EE targets
- Establish long-term relations with clients and reduce their cost risks, e.g. due to energy performance contracting including success fees
- Frame EE as an instrument to reach your clients targets not as a final target
- Focus on client / policy perspective and also take into account non-energy benefits
- A dialogue between industry and policy makers is necessary to rebuild trust and catch up with adequate EE policies

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Drawing Tools



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### 3/10 EEW4 Internal Event Report

**Project Partner:** Navigant

<b>Title of the event:</b>	National Business Stakeholder Workshop, Ireland: Business perspectives on energy efficiency policy
<b>Date &amp; location:</b>	Ireland (online event), May 6
<b>Organiser(s):</b>	Navigant supported by the Tipperary Energy Agency (TEA)
<b>Number of Participants:</b>	9 participants
<b>Summary of the event</b>	<p>The third National Business Stakeholder Workshop took place in Ireland on 6 May, organised by Navigant in collaboration with the Tipperary Energy Agency (TEA). In the discussions with the participants from diverse areas of the Irish energy efficiency business community, profitability and cost aspects have been identified as predominant narrative elements to win over the private sector in Ireland for energy efficiency. Stakeholders further pointed out that robust monitoring and verification of measures play a key role for showing the broader relevance of energy efficiency for profitability. Mandatory corporate carbon reporting has been suggested as a lever to further increase awareness and incentivise energy efficiency measures in companies. Daniel Becker, Director at Navigant, a Guidehouse company, moderated the workshop and spoke on the role of narratives in policy implementation and the Energy Efficiency Watch methodology and workplan. Paul Kenny, CEO at TEA, gave an overview on energy efficiency policy in Ireland and the related work of his organisation. The workshop was organised as an online event in the light of COVID-19 health restrictions.</p>
<b>Event evaluation</b>	<p>The Irish Business Stakeholder Workshop was a pilot for an interactive online format with a selected group of participants with one focused session for the stakeholder discussion. The limited number of participants allowed for a profound exchange. Discussions were very fruitful but did not gain the same momentum as in live events with broader participation. For subsequent online workshops, it will be preferable to limit the duration of the highly interaction-based online events to around two-hour sessions to maintain focus and engagement. Content-wise, the discussions and</p>



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*Objective & main programme point*

insights from the Irish stakeholders delivered valuable results which are envisaged to inform a case study that explores the potential of energy efficiency to become a key vector of profitability.

The key aim of the workshop was to receive input from the business community for analysing prevailing storylines around energy efficiency and collect ideas with a view to developing resonating narratives to promote the effective implementation of energy efficiency policies and measures in Ireland and in the EU.

*Input Collection*

Key statements from the participating business stakeholders:

- Energy efficiency is often perceived as being an expensive and complex matter. Many companies and households are sceptical because energy efficiency solutions were sold with wrong promises in the past, e.g. unrealistic payback periods. Potential clients of energy services often feel that *it is easier to do nothing* than implementing energy efficiency measures.
- Energy efficiency needs to be thought from a **cost perspective** rather than from an energy perspective. Monetary savings matter for clients, not carbon emissions or energy use.
- When offering energy services, clients should be challenged: *Everybody knows that energy consumption must be decreased in future, ask what they are doing.*
- Irish homes are typically privately owned and often quite new, renovation is thus not a priority topic in Ireland.
- Commercial clients can be convinced by explaining that early investments in energy efficiency lead to earlier and continuous savings in future, long payback periods however are a problem.
- SMEs miss ESCOs offering services to them, support schemes might not be attractive enough.
- **Energy audits** are a chance to create client relations and to reveal unknown energy efficiency potentials. Stakeholders suggest that energy audits should be combined with an obligation scheme for closer relation and constant exchange between companies and auditors.
- **Integrate energy deeper into organisation's procedures**, e.g. on board-level and in finance departments. Carbon disclosure can be a lever to increase awareness for energy in organizations.



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- **Government recognition** is important for the success and positive reception of energy efficiency solutions.
- **Innovative energy efficiency business cases** need to be developed and linked to comfort improvements: *People pay for convenience.*

#### Joint conclusions

- **Grants and tax breaks** smartly **coupled with effective measures** support implementation.
- **Long-term stable policy instruments** that improve over time are needed, e.g. carbon tax with effective and long-term predictable price level.
- Energy efficiency should be framed as a chance to decrease costs for gaining a **strategic advantage** in the long run. Energy savings are a contribution to profit and image.
- **Mandatory corporate carbon reporting** modelled on Art. 5 EED can be a lever to increase awareness for energy efficiency in companies, e.g. at board level and in finance (Swedish example)
- **Monitoring and verification of measures** play an important role for showing the broader relevance of energy efficiency for profitability.
- Energy efficiency decreases **energy import dependency.**

#### Potential narrative elements

- **Profit and cost aspects** are the overarching argument for energy efficiency in Ireland. Connect energy efficiency with profitability and image not with savings: *there is money in this; ego or wallet.*
- **Climate change** creates a necessity to deal with carbon and energy, better early than too late to increase the profit from energy cost savings.
- Successful narratives need to address **the head and the heart** and include relevant examples and stories tailored to audience.

#### Potential case study

- Making energy efficiency a key vector of profitability
- Profitability assessment; profitability is also driven by image and perception of a company



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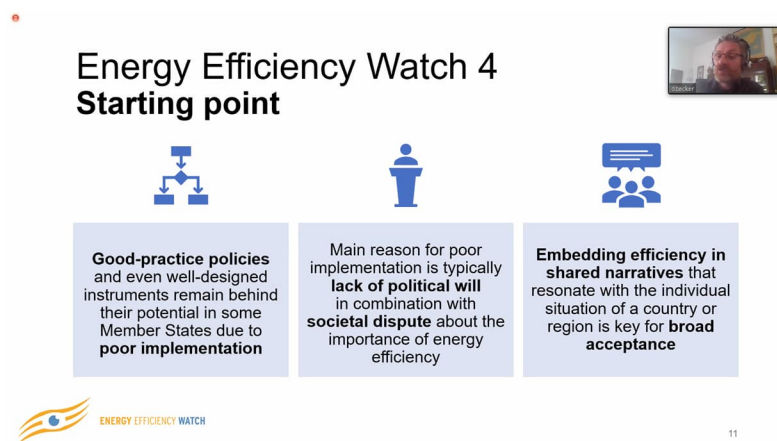
**Attachments:**

*Programme*

6 May 2020, 10 am (Irish Time)

10:00 – 10:30	<b>Welcome &amp; Background Energy Efficiency Watch</b>
10:30 – 11:00	<b>Discussion: Business perspectives on energy efficiency implementation</b>
11:00 – 11:15	<b>Background: Narrative development</b>
11:15 – 12:30	<b>Discussion: Narratives for enabling implementation and acceptance of energy efficiency</b>
12:30 – 13:00	<b>Wrap-up &amp; takeaways</b>

*Pictures*



**Energy Efficiency Watch 4 Starting point**

- Good-practice policies** and even well-designed instruments remain behind their potential in some Member States due to **poor implementation**
- Main reason for poor implementation is typically **lack of political will** in combination with **societal dispute** about the importance of energy efficiency
- Embedding efficiency in shared narratives** that resonate with the individual situation of a country or region is key for **broad acceptance**

ENERGY EFFICIENCY WATCH



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**Energy Efficiency Watch 4 Objectives**

- Understand debates and motivations for efficiency & **good practice policies**
- Develop argumentative drivers** for promoting societal benefits of energy efficiency
- Support **effective implementation** of efficiency policies

Logos: eufores, OENERGIESPARVERBAND, NAVIGANT (A Guidehouse Company), FEDARENE, energycities (WHERE ACTION & VISION MEET), ENERGY EFFICIENCY WATCH

Zoom interface: Mute, Start Video, Participants, Chat, Share Screen, Record, Reactions, Leave Meeting

**Energy Efficiency Watch 4 Questions & Answers**

Icon: Two people with a question mark in a speech bubble.

Zoom interface: Video feed of a participant, Mute, Start Video, Participants, Chat, Share Screen, Record, Reactions, Leave Meeting

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## 4/10 EEW4 Internal Event Report

<i>Project partner</i>	Navigant
<i>Title of the event:</i>	National Business Stakeholder Workshop, Slovenia: Business perspectives on energy efficiency policy
<i>Date &amp; location:</i>	27 May 2020, 15:00 - 17:00 CEST & 28 May 2020, 10:00 - 12:00 CEST; Slovenia (virtual meeting)
<i>Organiser(s):</i>	Navigant supported by Energap
<i>Number of Participants:</i>	16
<i>Summary of the event</i>	<p>The Business Stakeholder Workshop set out to discuss the enabling factors for successful energy efficiency measures and policies in Slovenia. Gathering Slovenian business stakeholders from a broad range of sectors including energy services, utilities, transport and the buildings, the interactive workshop was held in two consecutive online sessions due to the health-related restrictions of the COVID-19 pandemic. Starting with an introduction to the Energy Efficiency Watch project and aims of the workshop, Daniel Becker from Navigant led through the Workshop, supported by Vlasta Kremlj from Energap, the Energy Agency of Podravje in Slovenia. Participants reflected on effective arguments to make the case for energy efficiency with regards to different actor groups in Slovenia.</p> <p>Arguments and challenges highlighted with regards to businesses and investors:</p> <ul style="list-style-type: none"><li>• Reducing operating costs and improving competitiveness are key drivers for investing in energy efficiency.</li><li>• Improving energy efficiency in production processes can also improve product quality (example: optimising temperature levels and ventilation in pharmaceutical plant)</li><li>• A holistic perspective is needed on overall energy use and production processes. ESCO-type offerings typically require engaging company as whole to include board, finance and technical experts.</li><li>• Social responsibility/ performance in sustainability is an additional incentive for energy efficiency measures e.g. for certain owners/investors as it can be leveraged as an asset through PR.</li><li>• Innovation benefits of energy efficiency not always recognised.</li></ul>



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Arguments and challenges highlighted with regards to authorities and decision-makers:

- Appealing to political/ PR benefits of energy efficiency measures can be key vector, notably vis-à-vis local decision-makers (example: esthetical appeal of renovated buildings in a town).
- Consultation or dialogue formats between local authorities and stakeholders are not structurally implemented in the political processes; examples where cooperation takes place in working groups. Overall, implementation often remains a challenge, key is to receive political backing.
- Local energy plans are key instruments to drive the energy transition and fulfill national and EU targets, but often lack commitment and budget needed for investments to drive change (e.g. for developing district heating networks, expanding CHP/ waste heat recovery).
- Advances in building's efficiency are hampered by insufficient expertise of renovation contractors, capacity building programmes for constructors and renovation contractors are needed to increase the effectiveness of energy efficiency investments.
- Biomass energy from wood and timber production have potential for development; significant wood exports for heating but little processing, also a matter of competitiveness vis-à-vis industries in other Member States. Linking concessions for forestry exploitation to conditionality for investment in timber processing capacities suggested as a lever to develop timber industry for more local value creation; need for the right incentives.
- For biomass heating, would need to address bad image as polluting. Switch from wood-based heating towards RES-based heating e.g. using heat pumps to be advanced.

Arguments and challenges highlighted with regards to households:

- Shifting to electric vehicles (EV) often triggers holistic reflection of energy use and sources by households and enterprises, e.g. leading to installing PV systems to feed private charging infrastructure and buildings. Strong battery research in Slovenia, potential for local production of EV.
- Strong government narrative emphasising provision of social welfare and 'leaving no one behind' found to impede somewhat the debate on and recognition of energy poverty as an issue, further hampered by unclear definition.



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<i>Input Collection</i>	<p>The second session of the workshop started with a brief presentation on the role of narratives for policy implementation after which participants consolidated their input and recommendations on ways and potentials for an effective implementation of energy efficiency policies and measures in Slovenia, complementing the points raised in the first session, including inter alia:</p> <ul style="list-style-type: none"><li>• Leverage dialogue formats to build trust between 1) businesses and energy service providers, 2) decision makers and stakeholders</li><li>• Embed energy efficiency as a centerpiece in the industrial strategy and develop a smart combination of innovative technologies (e.g. storage, EV, local production, etc.) that connects with the existing industrial structure</li><li>• Use pilot projects and involve local communities to improve acceptance of energy projects as there is increasing interest in self-consumption, energy autonomy etc.</li><li>• Enhance opportunities for mutual learnings with and from other Member States through partnerships and European projects</li><li>• Promote easy access to energy data for consumers (good example: portal on EV charging stations)</li><li>• Have a policy design that makes energy efficiency the best/ easiest choice, e.g. as done with required energy performance levels for building renovation grants. Bad example: initial lack of energy performance requirements for furnaces.</li><li>• Increasing investments needed in Slovenian electricity grids also opportunity for prioritizing efficient energy use and develop demand side management solutions.</li><li>• Expand educational programmes and incentives for stakeholders and broader public, e.g. in form of company programme to reward the best diplomas in the field or competitions rewarding change of individual behaviours. New technologies such to be made desirable beyond cost arguments, e.g. through campaigns/marketing to create appeal or convenience (e.g. link mobile app with smart meters)</li></ul>
<i>Objective &amp; main programme point</i>	<p>The aim of the workshop was to collect input on existing narratives around energy efficiency from business stakeholders with a view to support the effective implementation of energy efficiency policies and measures in Slovenia and in the EU. Insights from previous business stakeholder workshops also fed into the discussion. Participants were moreover invited to take part in the Energy Efficiency Watch Survey, introduced by the Energy Agency of Upper Austria.</p>
<i>Event evaluation</i>	<p>The workshop concept was well understood and picked up with interest by the audience. The opportunity to transmit feedback from the business community to</p>



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decision makers through the project was particularly appreciated. Considering the online format of the event, an in-person workshop could likely still be more effective compared to virtual formats, especially when the primary focus is on gathering input through exchange and interactive discussions.

**Attached:****Programme****First session: 27 May 2020, 15:00 – 17:00**

15:00 – 15:30	<b>Welcome &amp; Introduction</b> <ul style="list-style-type: none"><li>• Welcome and introduction</li><li>• Agenda and interactive format of the workshop</li><li>• Background on Energy Efficiency Watch</li><li>• Q&amp;A</li></ul>
15:30 – 16:45	<b>Group discussion:</b> <b>A business perspective on best-practices of implementing energy efficiency</b> <ol style="list-style-type: none"><li>1. Which story do you tend to tell for convincing clients that energy efficiency is important?</li><li>2. How can we make the case for energy efficiency vis-à-vis decision-makers, companies/ investors, households/ society?</li></ol>
16:45 – 17:00	<b>Joint reflection on findings</b>

**Second session: 28 May 2020, 10:00 – 12:00**

10:00 – 10:30	<b>Input session:</b> <b>Finding narratives for promoting energy efficiency</b> <ul style="list-style-type: none"><li>• Background on narratives</li></ul>
10:30 – 11:30	<b>Group discussion:</b> <b>A policy perspective on implementation and acceptance of energy efficiency</b> <ol style="list-style-type: none"><li>1. What do you consider as successful policy instruments to promote energy efficiency measures and investments?</li></ol>

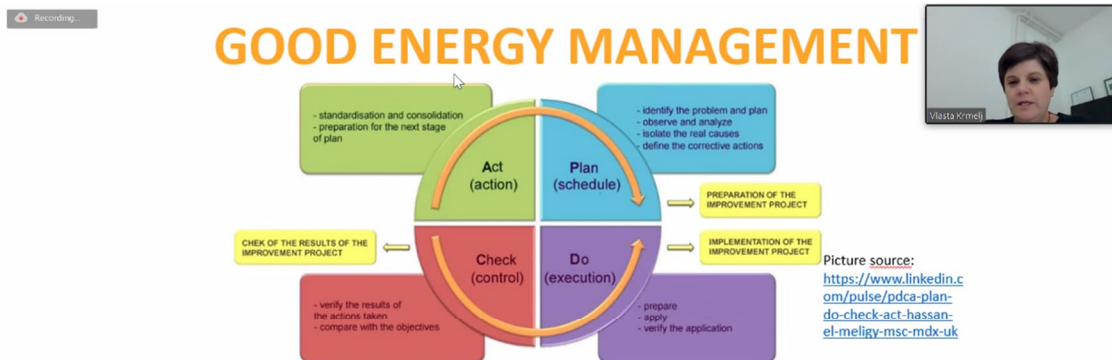


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	2. What were the argumentative drivers that led to high acceptance of and buy-in to energy efficiency policies among decision-makers, industry/ investors, households/ society?
11:30 – 12:00	<p><b>Consolidation of results and takeaways:</b></p> <ul style="list-style-type: none"> <li>• What do you want to pass on as a message to decision makers for designing and communicating energy efficiency policies?</li> </ul>

Pictures



ISO 50001:2011 provides a framework of requirements for organizations to:

- Develop a policy for more efficient use of energy
- Fix targets and objectives to meet the policy
- Use data to better understand and make decisions about energy use
- Measure the results
- Review how well the policy works, and
- Continually improve energy management.

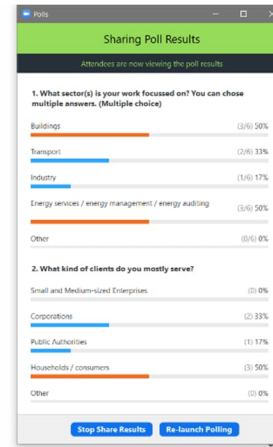


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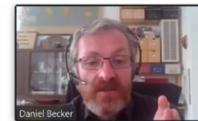
Recording...

## Quick introductory poll

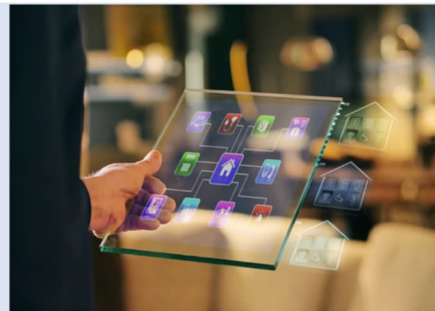


Recording...

## Energy Efficiency Watch 4 Breakout sessions



1. How do you promote energy efficiency products or services of your organisation in **everyday conversations**?
2. How can we **make the case for energy efficiency** vis-à-vis decision-makers, companies/ investors, households/ society?



Time: 40 minutes



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## With what arguments do you promote the energy efficiency products or services of your organisation in everyday conversations?

*Improving energy efficiency in production plant (temperature level, ventilation) improved product quality (pharmaceuticals)*

*Moving to EV helps to reduce fleet energy consumption & triggers holistic thinking on overall energy use/ production processes*

*Energy saving is key revenue source for ESCO. Entails complex calculations & risk management. All levels of company need to agree, arguments differ according to roles (board, finance, technical expert etc.)*

*Social responsibility is a value for companies (leveraged through PR) as incentive for energy efficiency*

*Cost reduction/ increasing competitiveness is key when arguing for energy efficiency vis-à-vis management.*

*Innovation benefits of energy efficiency recognised only in few cases.*

*Govt. narrative: social welfare is key. Energy poverty difficult to recognise. Unclear definition still.*

*Certain companies seeking to cut GHG to become competitive in sustainability (notably for company owners). Trust in service providers supporting sustainability is key.*

*EU requirements for DHC systems for RES/CHP/waste heat. Action plan to fulfil these, moving to CHP, investing in solar and storage capacities. Local Energy Plan key to drive change, but lack of commitment/ investments from local authorities. Introducing waste heat can help tackling waste treatment. Need more awareness from local authorities.*

*Dialogue/ engagement betw. Local authorities and stakeholders differs. Establishing working groups, challenge: implementation and political backing.*

*Political/PR benefits of politicians need to be appealed to for political backing.*

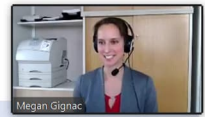
*Buildings mostly privately owned (single housing) Affordable wood heat.*

*Challenge: insufficient expertise of renovation contractors. Programme for capacity building. Need to make most efficient use of gov. fin. support*

*Building renovation key for energy saving.*

Recording...

## How is Slovenia progressing in energy efficiency? We want to know!



Your opinion counts! Make it heard!

Energy Efficiency Watch survey:  
[www.energy-efficiency-watch-survey.eu](http://www.energy-efficiency-watch-survey.eu)

With just 10 minutes of your time, you will make an important contribution to energy efficiency efforts in Europe.



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## 5/10 EEW4 Internal Event Report

**Project Partner:** Navigant

<b>Title of the event:</b>	National Business Stakeholder Workshop, Cyprus: Business perspectives on energy efficiency policy
<b>Date &amp; location:</b>	Virtual workshop: - First session: 15 June 2020, 10:00 – 12:00 - Second session: 16 June 2020, 10:00 – 12:00
<b>Organiser(s):</b>	Navigant, supported by the Cyprus Energy Agency (CEA)
<b>Number of Participants:</b>	42
<b>Summary of the event</b>	<p>The National Business Stakeholder Workshop in Cyprus was held as an interactive online event in two consecutive sessions on 15 and 16 June 2020. Over 40 business stakeholders participated in the vivid discussions on effective energy efficiency policies in Cyprus and their success factors. The role of narratives in the debate on energy efficiency in Cyprus was the focus of the second session of the workshop.</p> <p>In his welcome note, Savvas Vlachos, Director of the CEA, provided an overview on the progress of Cyprus in the field of energy efficiency. The transport sector represents the largest share in the total final energy consumption of Cyprus. The CEA sees the best opportunities for energy savings in the secondary (manufacturing) and tertiary (trade, commerce and services) sectors. Together, both sectors represent about 27% of the total final energy consumption which is about 4,000 GWh.</p> <p>Further inputs were provided by the Energy Agency of Upper Austria from the EEW consortium to promote the Energy Efficiency Watch Survey and by the Cyprus Employers and Industrialists Federation (OEB). The workshop was moderated by Daniel Becker, Director at Navigant, a Guidehouse company.</p>
<b>Event evaluation</b>	The online concept and invitation management for the virtual National Business Stakeholder workshops was further refined and received positive feedback from participants and collaborators. The workshop concept was



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*Objective & main programme point*

well understood and picked up with interest by the audience. The opportunity to transmit feedback from the business community to decision makers through the project was particularly appreciated. Considering the online format of the event, an in-person workshop could likely still be more effective compared to virtual formats, especially when the primary focus is on gathering input through exchange and interactive discussions.

The aim of the workshop was to collect input on existing narratives around energy efficiency and to receive input from business stakeholders with a view to developing narratives enabling the effective implementation of energy efficiency policies and measures in Cyprus and the EU.

*Input Collection*

### **Progress in energy efficiency in Cyprus**

Since the first regulations for the improvement of the energy performance of buildings were introduced in Cyprus in 2007, Cyprus has seen progress in energy efficiency. Final energy consumption decreased from 2009 to 2014 but afterwards started rising again until 2017. In 2018, final energy consumption remained constant compared to 2017. The transport sector represents the largest share in the total final energy consumption of Cyprus. The CEA sees the best opportunities for energy savings in the secondary (manufacturing) and tertiary (trade, commerce and services) sectors. Together, both sectors represent about 27% of the total final energy consumption which is about 4,000 GWh.

According to a CEA business survey, energy saving measures in Cyprus have been implemented mostly in the areas lighting (>45% of respondents), Energy Management Systems (>40%), staff education (>30%) and HVAC (>20%). Businesses expressed biggest interest in energy efficiency measures focusing on lighting (>50%), renewables (>35%), efficient HVAC equipment (>50%), efficient electrical appliances (>30%) and insulation (>30%).

### **Energy efficiency policies and measures in Cyprus**

- Support schemes providing financial incentives play a key role in Cyprus. A **grant scheme** for SMEs and households linked with actual investments for energy saving renovations including



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heating, cooling and lighting has been successful in Cyprus. Even in case of short payback periods, little investments are expected from households if not supported by state incentives.

- **Subsidies for solar water heaters and thermal insulation** of roofs have been key drivers of the energy transition and efficiency with a high impact on savings in buildings, especially for the existing building stock. Financial payback periods of thermal roof insulation can be between 3-5 years without subsidies. Both support schemes have been well accepted by society and industry.
- **Trainings and education**, e.g. for installers of thermal insulation, have been another successful policy.
- For new buildings, **minimum standards** for thermal insulation and windows have been implemented successfully.
- Additionally, a **replacement scheme** has been offered to households and industry for substituting old fossil fuel-based boilers with heat-pumps or solar water heaters as well as for replacing windows or adding rooftop and wall insulation.
- Recently, a **VAT reduction** and **investment incentives** for households investing in the combination of PV with roof insulation were introduced.
- Self-consumption is incentivized by **net metering** and an **energy tariff reform**. Further energy efficiency potential is in **demand-side management** and **battery storage**, measures that should be promoted with new policies.

### Recommendations of business stakeholders in Cyprus

Improve communication, marketing and education on energy efficiency

- More support and **communicative elements between local and regional authorities and the EU** are needed. EU policies are perceived to be a driver of change at national level. However, this is not always well communicated. In the public debate in Cyprus, the emphasis is often put on obligations, requirements, penalties etc. Stakeholder suggest that the European Commission should improve the communication on EU initiatives and policies to put the focus more on chances and opportunities.
- Promoting **stakeholder dialogue with the right formats** is important to encourage exchange between all stakeholders. The



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public debate in Cyprus usually focuses on existing policies, especially on grants. Stakeholders are generally well aware of existing support schemes. However, not all stakeholders feel included in the same way in the policy process and consultations that tend to be dominated by policy, institutions and associations leaving out citizens. Communication formats need to be improved to increase the uptake of energy efficiency measures.

- **Marketing** for energy efficiency measures could be improved. It has been suggested to include people who deployed solar energy systems or implemented building insulation in promotion campaigns as “ambassadors” for their energy efficiency measure to spread awareness of the benefits, e.g. lower energy bills.
- Integrating environmental protection, sustainable energy and energy efficiency in **educational programmes** across all age levels is important to bring about lasting change. Politicians and other decision makers should be educated about energy efficiency on the challenges in the implementation but especially on the chances.

#### Reshaping energy efficiency policies

- **Governmental support schemes for energy efficiency** need to be reshaped and tailored to meet sector-specific needs, e.g. to energy-intensive SMEs, micro SMEs etc.
- **Procedures and bureaucracy** should be simplified as far as possible to make energy efficiency projects more attractive for SMEs and other businesses.
- Moving towards **market-based instruments** such as low-interest loans for energy efficiency measures to replace a successful grant scheme as required by the EU is perceived as a challenge. ESCOs could not yet find ground in Cyprus.
- **Insufficient lending** for energy efficiency measures is seen as an important barrier. Cypriot banks are not in the position to finance even small projects. Establishing an investment bank for supporting business development as well as capacity building programmes for the banking sector would help increase the uptake of energy efficiency projects.



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- A bill that is currently being discussed in the Parliament for improving conditions for **social entrepreneurship** can be a chance to enable the private sector, especially if incentives for energy efficiency services would be included.
- National/ regional innovation strategies for **smart specialisation** as part of the EU's cohesion policy are a useful tool to develop competitive industries – such as tourism or shipping in the case of Cyprus – and provide an opportunity to make energy efficiency part of economic strategies.
- Strategies and policies to improve energy efficiency in the **transport sector** are needed and should be implemented effectively in Cyprus. Stakeholders call for more pressure and support from the EU to proceed with energy efficiency in the transport sector.
- **Resilience** should be more prominent on the EU energy and climate policy agenda.

#### More engagement for energy efficiency from municipalities

- **Municipalities and local authorities** should play a more active role in driving energy efficiency in the communities. To give a positive example, public authorities should move first to implement energy efficiency measures and increase the engagement with local businesses.
- A bill that is currently being discussed in the Cypriot Parliament for a **reform of the local government** towards larger jurisdictions with more competences is a chance to enable the implementation of energy efficiency on local and municipal level.

#### Narrative elements for EEW case studies

- A **holistic view** on energy that includes its multiple benefits such as improved **health** is needed.
- **Energy poverty** has been named to be an issue in Cyprus that cannot be dealt with sufficiently due to the lack of financial and technical capacity in banks.
- **Bureaucracy** in public authorities is considered a key barrier to many projects and energy efficiency implementation. Procedures



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should be simplified as far as possible to enable households SMEs and other businesses to take energy efficiency measures.

- New business models need to be promoted that embrace the **economics of climate change** and consider the role of energy efficiency.
- The EU energy strategy contributes to **energy independence**, especially through expanding renewable energy production, which is welcomed by stakeholders in Cyprus. Imports of energy carriers and raw materials should be decreased. Stakeholders pointed out interest in **circular economy** and an efficient use of local resources.
- Narratives and communication strategies highlighting the benefits of energy efficiency for the **tourism industry** would be of great value in Cyprus. COVID-19 can be a chance for the tourism sector to develop new business models. Image campaigns focusing on energy efficiency and sustainability could raise awareness for the topic, e.g. in the hotel and travel industry.

### Programme

First session: 15 June 2020, 10:00 – 12:00 (Cyprus time)

#### Factors of successful energy efficiency implementation

10:00 – 10:10	<b>Welcome &amp; Introduction with inputs from CEA &amp; OEB</b>
10:10 – 10:30	<b>Background: Energy Efficiency Watch</b>
10:30 – 11:15	<b>Breakout sessions: Energy efficiency instruments and factors of successful implementation</b>
11:15 – 11:30	<b>Summaries from breakout sessions</b>
11:30 – 12:00	<b>Reflection and open discussion</b>



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Second session: 16 June 2020, 10:00 – 12:00 (Cyprus time)

**Developing narratives for promoting energy efficiency**

10:00 – 10:20	<b>Background: Narratives for promoting energy efficiency</b>
10:20 – 11:30	<b>Plenary discussions: Argumentative drivers for implementation and acceptance of energy efficiency instruments</b>
11:30 – 12:00	<b>Joint conclusions</b>



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Pictures

**Energy Efficiency Watch 4 Input formats**

- Workshops with business stakeholders
- Online survey with energy experts
- Workshops with MPs from the European Parliament and national parliaments
- Inputs from partner networks Energy Cities, FEDARENE, ECEEE (Borg & Co)
- Focus group

The slide is part of a Zoom meeting. A video feed of a man with glasses is visible in the top right corner. The background of the slide shows a group of people in a meeting room. The Zoom interface at the bottom includes icons for Home, Start Video, Security, Participants, Info, Chat, Share Screen, Pause/Stop Recording, and Feedback.

**Energy Efficiency Watch 4 Starting point**

The slide features three main points, each with an icon above it: a flowchart icon, a person at a podium icon, and a group of people icon.

- Good-practice policies** and even well-designed instruments remain behind their potential in some Member States due to **poor implementation**
- Main reason for poor implementation is typically **lack of political will** in combination with **societal dispute** about the importance of energy efficiency
- Embedding efficiency in shared narratives** that resonate with the individual situation of a country or region is key for **broad acceptance**

The slide is part of a Zoom meeting. A video feed of a man with glasses is visible in the top right corner. The Zoom interface at the bottom includes icons for Home, Start Video, Security, Participants, Info, Chat, Share Screen, Pause/Stop Recording, and Feedback.

Second session

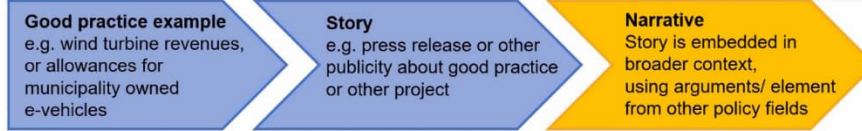


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Recording

## Energy Efficiency Watch 4 From good practice to narrative



*'Without stories, no consensus'*

Recording

View Options

## Energy Efficiency Watch 4 Narrative examples: EU energy policy



### Common energy efficiency narrative

Compared to 2005, energy efficiency in the EU led to 9.2% less primary energy consumption while GDP grew by 16% implying annual savings of €55 billion.

### Communication of Green New Deal

"Today is the start of a **journey**. The Green New Deal is the **man on the moon moment** for Europe"



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## 6/ 10 EEW4 Internal Event Report

<b>Project Partner:</b>	<b>Guidehouse</b>
<b>Title of the event:</b>	<b>National Business Stakeholder Workshop, Poland: Business perspectives on energy efficiency policy</b>
<b>Date &amp; location:</b>	Online event: - First session: 08 December 2020, 10:00 – 12:00 - Second session: 09 December 2020, 10:00 – 12:00
<b>Organiser(s):</b>	Guidehouse supported by Polish National Energy Conservation Agency (KAPE - Krajowa Agencja Poszanowania Energii)
<b>Number of Participants:</b>	14
<b>Summary of the event</b>	<p>The Business Stakeholder Workshop for Poland set out to explore enabling factors for successful energy efficiency measures and policies, both on the national and on the EU level. A broad range of Polish stakeholders attended the workshop and participated actively in the virtual sessions. Narrative elements identified in previous Energy Efficiency Watch National Business Stakeholder Workshops were also fed into the discussion and reviewed with the participants. The joint reflection on enabling narratives for energy efficiency provided valuable input from the perspective of the Polish business community for the elaboration of the Energy Efficiency Watch case studies. Daniel Becker of Guidehouse led the interactive workshop, supported by Karolina Loth-Babut from KAPE, the National Energy Conservation Agency in Poland.</p>
<b>Event evaluation</b>	<p>The workshop concept was well understood and picked up with interest by the audience. The collaborative reflection and testing of pointed narratives delivered valuable input for the further elaboration of the Energy Efficiency Watch case study reports and will be intensified in the following business stakeholder workshops.</p>



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**Objective & main programme point**

The aim of the workshop was to collect input on existing narratives around energy efficiency and to receive input from business stakeholders with a view to developing narratives for enabling implementation of energy efficiency policies and measures in Poland and the EU. Insights and pointed narratives from previous business stakeholder workshops were tested and fed into the discussion.

**Input Collection**

Narrative element and suggestions elaborated jointly with Polish business stakeholders during the workshop:

- **Transparency:** (e.g. predictability of energy market and price structures, transparent baseline data for policymaking, dialogue between stakeholders and government / meaningful public consultations & roundtables; clear benchmarks)
- For **effectiveness**, combine regulatory policy with support programmes and information campaigns (e.g. energy advisors for Clean Air Programme, link audit obligations with audit support)
- Develop **one-stop shops** (e.g. for energy renovation), address horizontal nature of energy efficiency and engage target groups; link it to EPC and ESCO schemes; preference for effective private business models. Need for ESCO guarantee.
- **Reliability** (make savings visible; reliable audits; instrument design, realistic estimation of benefits; quality standards & clear rules and enforcement for energy audits)
- Amplified view on **costs and benefits** (e.g. through guidelines for translating multiple benefits in economic/business terms)
- Recognise horizontal dimension of energy efficiency measures. Need to establish joint platforms/ one-stop shops to address local needs, incl. automated online platforms.

**Attachment:****Programme**

First session: 8 December 2020,

10:00 – 12:00 **Energy Efficiency**

**Watch & sharing business experiences** 10:00 – 10:05

10:05 – 10:20

10:20 – 10:30

**Introduction**

**Welcome note: Karolina Loth-Babut, KAPE**

**Background: Energy Efficiency Policy & Energy Efficiency Watch**



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10:30 – 10:45

10:45 – 11:30

11:30 – 11:45

11:45 – 12:00

**Icebreaker discussion:**

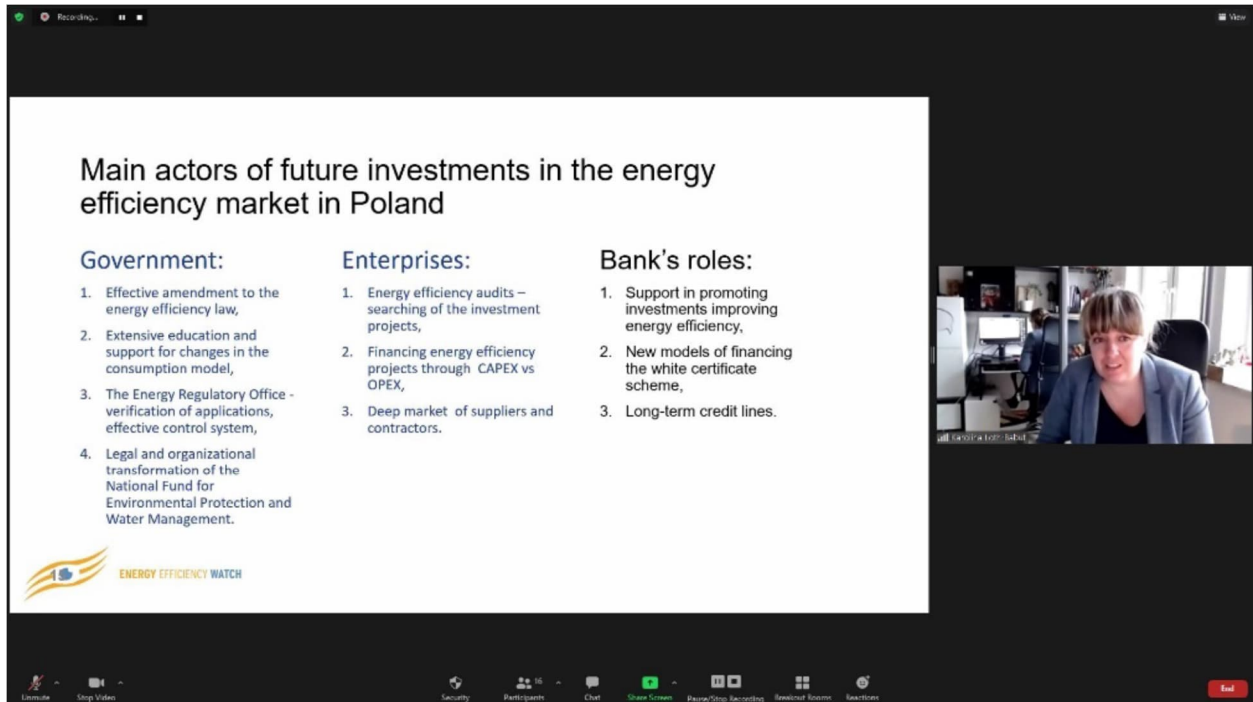
**Breakout discussion in groups:**

**Drivers for successful energy efficiency implementation**

**Breakout group presentations**

**Reflection and outlook**

## Photos

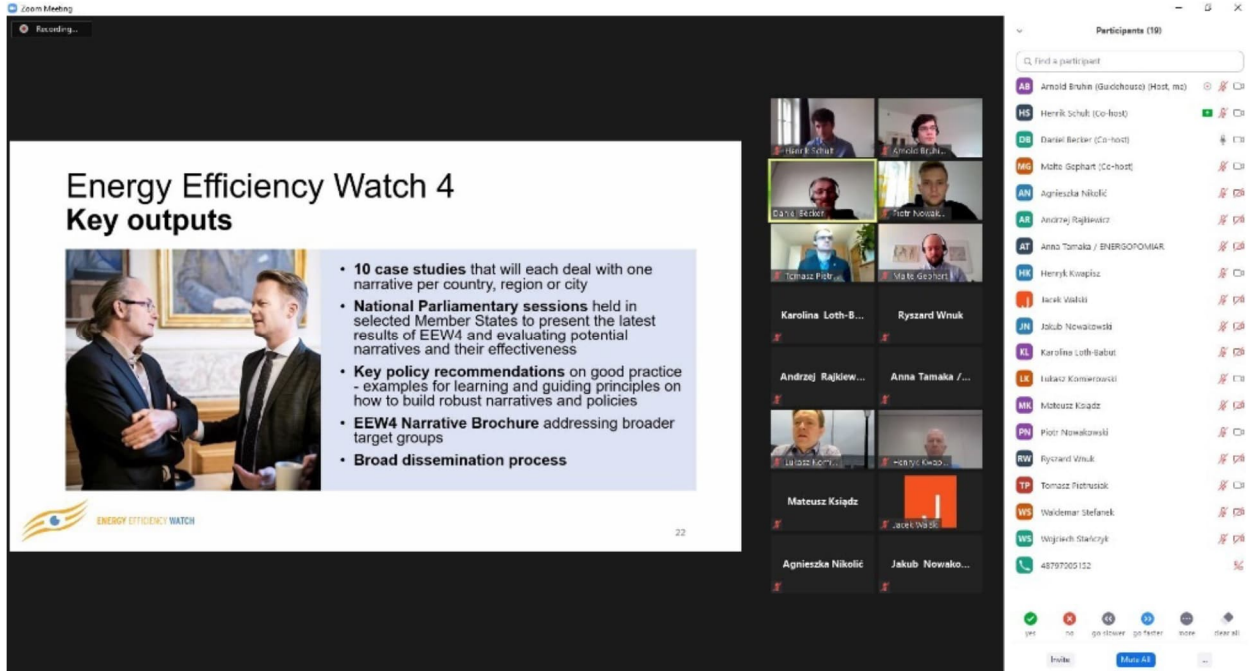


The screenshot shows a Zoom meeting interface. The main content is a slide titled "Main actors of future investments in the energy efficiency market in Poland". The slide is divided into three columns: "Government:", "Enterprises:", and "Bank's roles:". Each column contains a list of four items. The "Government:" list includes: 1. Effective amendment to the energy efficiency law, 2. Extensive education and support for changes in the consumption model, 3. The Energy Regulatory Office - verification of applications, effective control system, 4. Legal and organizational transformation of the National Fund for Environmental Protection and Water Management. The "Enterprises:" list includes: 1. Energy efficiency audits – searching of the investment projects, 2. Financing energy efficiency projects through CAPEX vs OPEX, 3. Deep market of suppliers and contractors. The "Bank's roles:" list includes: 1. Support in promoting investments improving energy efficiency, 2. New models of financing the white certificate scheme, 3. Long-term credit lines. The slide also features the Energy Efficiency Watch logo at the bottom left. On the right side of the Zoom window, there is a video feed of a woman with short brown hair, wearing a blue blazer, who is speaking. The Zoom control bar at the bottom includes icons for Mute, Stop Video, Security, Participants (16), Chat, Share Screen, Pause/Stop Recording, Breakout Rooms, and Reactions. An "End" button is visible in the bottom right corner.



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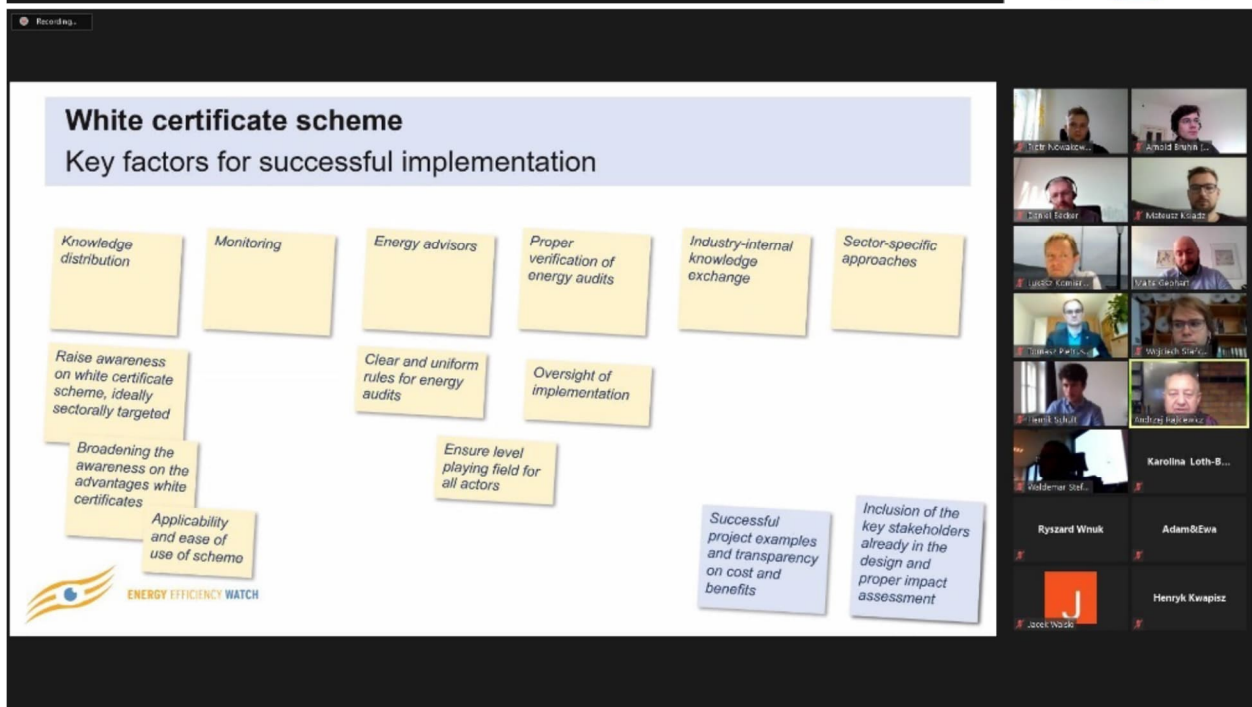
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**Energy Efficiency Watch 4**  
**Key outputs**

- 10 case studies that will each deal with one narrative per country, region or city
- National Parliamentary sessions held in selected Member States to present the latest results of EEW4 and evaluating potential narratives and their effectiveness
- Key policy recommendations on good practice - examples for learning and guiding principles on how to build robust narratives and policies
- EEW4 Narrative Brochure addressing broader target groups
- Broad dissemination process

22



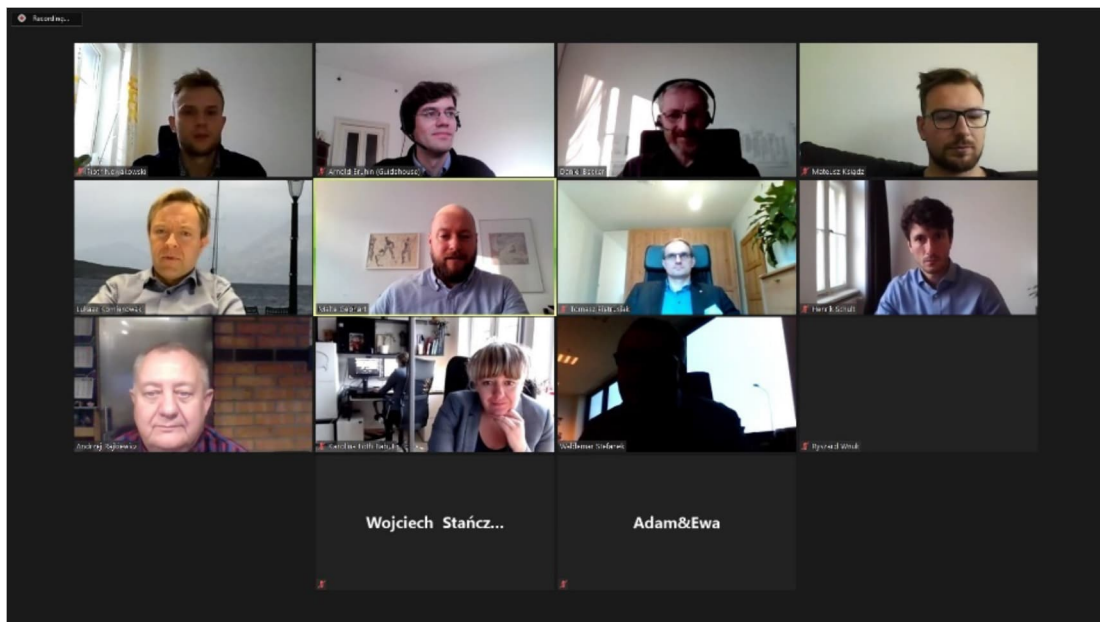
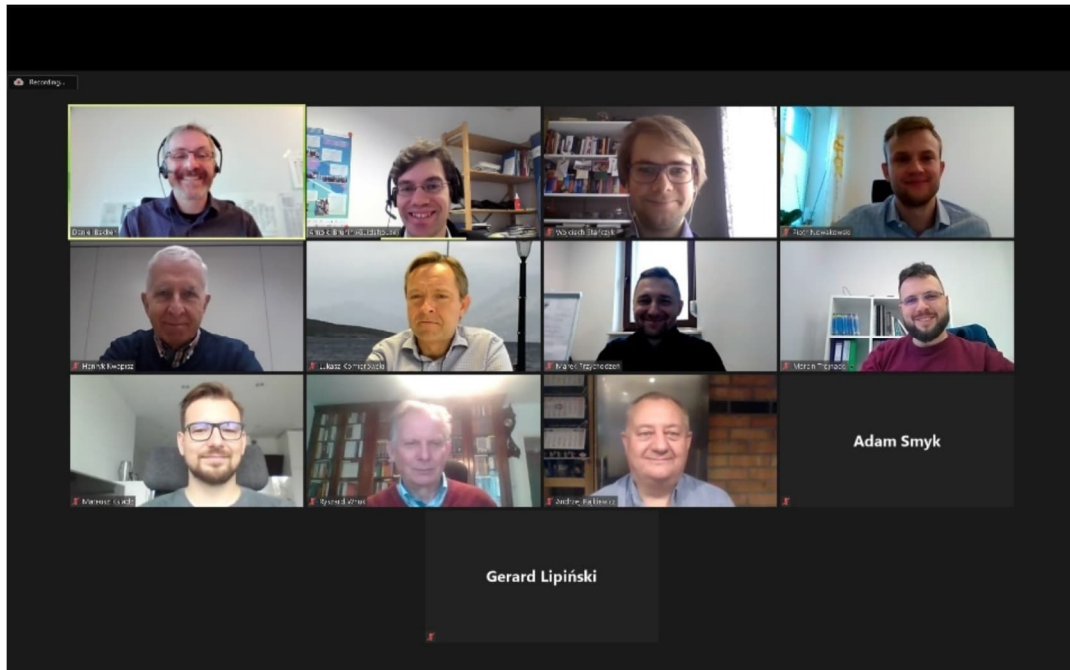
**White certificate scheme**  
**Key factors for successful implementation**

- Knowledge distribution
- Monitoring
- Energy advisors
- Proper verification of energy audits
- Industry-internal knowledge exchange
- Sector-specific approaches
- Raise awareness on white certificate scheme, ideally sectorally targeted
- Clear and uniform rules for energy audits
- Oversight of implementation
- Broadening the awareness on the advantages white certificates
- Ensure level playing field for all actors
- Applicability and ease of use of scheme
- Successful project examples and transparency on cost and benefits
- Inclusion of the key stakeholders already in the design and proper impact assessment



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## 7/ 10 EEW4 Internal Event Report

<b>Project Partner:</b>	Guidehouse
<b>Title of the event:</b>	National Business Stakeholder Workshop, Lithuania: Business perspectives on energy efficiency policy
<b>Date &amp; location:</b>	18 March 2021, 10:00 - 15:00 EEST; Lithuania (virtual meeting)
<b>Organiser(s):</b>	Guidehouse, with support of the Lithuanian Energy Agency
<b>Number of Participants:</b>	24
<b>Summary of the event</b>	<p>The Business Stakeholder Workshop set out to discuss the enabling factors for successful energy efficiency measures and policies in Lithuania. Gathering Lithuanian business stakeholders from a broad range of sectors, the interactive workshop was held as an online meeting due to the restrictions related to the COVID-19 pandemic. Starting with an introduction on the Energy Efficiency Watch project and on the aims of the workshop, Daniel Becker from Guidehouse led through the Workshop, supported by Karolis Janusevicius of the Lithuanian Energy Agency. Participants reflected on effective arguments to make the case for energy efficiency with regards to different factors for a successful implementation.</p> <p>Arguments and challenges highlighted in the breakout session by the participants with regards to the successful implementation of energy efficiency policies, instruments, and measures included:</p> <ol style="list-style-type: none"> <li>1. Differentiating the message &amp; address motivation per target group</li> <li>2. Recognising the issue of energy scarcity and the social dimension</li> <li>3. Expectation management regarding energy savings and return on investment</li> <li>4. Strengthening requirements for monitoring and verification</li> <li>5. Clear vision for implementation</li> <li>6. Integrated energy planning</li> <li>7. C-level attention for audit results</li> </ol>



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**Event evaluation**

The workshop concept was well understood and picked up with great interest by the audience. The opportunity to transmit feedback from the business community to decision makers through the project was particularly appreciated.

**Objective & main programme point**

The aim of the workshop was to collect input on existing narratives around energy efficiency from business stakeholders with a view to support the effective implementation of energy efficiency policies and measures in Lithuania and in the EU. Insights from previous business stakeholder workshops also fed into the discussion.

**Input Collection**

After a first round of opening discussion and a brief presentation on the role of narratives for policy implementation, the workshop participants consolidated their input and recommendations on ways and potentials for an effective implementation of energy efficiency policies and measures in Lithuania, complementing the points raised in the first session, including inter alia references to:

- Differentiating the message & addressing motivation per target groups
- Swedish example of household competition on energy consumption
- Better address low 'energy literacy' and education (from policy level), disseminate good practice
- Better recognising the issue of energy scarcity and the social dimension
- Better enforce "polluter pays" principle, accompanied with fin. support for alternative RES / energy efficient technologies
- Local environmental pollution needing to be addressed
- Aligning tax structure to decarbonisation targets to favour RES over fossil technologies
- Expectation management for savings and ROI
- Need for robust calculation / benchmarking tools, provided/ backed by trusted institution
- Acknowledging complexity of energy efficiency (EE) improvement in households, need holistic approach
- Linking financial support/ grants to energy performance of supported technologies



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- Raising awareness for non-financial benefits of EE in households (health, fire safety)
  - Need to increase quality of implementation of EE measures (e.g. through qualification of professionals)
  - Creating holistic & synergies / offering of package solutions
  - Strengthening requirements for monitoring and verification
  - tightening energy performance standards for new buildings and renovations & requirements for compliance, establish basis for
    - introducing requirements for building automation and controls for renovations with the transposition/ recast of the EPBD as an opportunity
  - Clear vision needed for implementation
  - Experience: EPBD requirement for NZEB perceived as obligation rather than opportunity for new buildings
  - Good practices can inspire followers (associations are key drivers, e.g. for pioneering NZEBs)
  - Strongly links to expectation management and integrated energy planning
  - Integrated energy planning as a vector for energy efficiency
- 
- Links to NECP & national initiatives to promote integrated planning. Potential to develop municipal integrated planning, often lack of funding and low priority for municipalities.
  - District heating systems: strong energy efficiency (EE) potential if demand-controlled (e.g. cloud-based, on district / apartment levels).
  - Strong role of local authorities. Pilot projects with municipalities; programmes for EE measures (heating & electricity, incl. metering) in schools/ kindergartens. Yet investment decisions typically require demonstrated financial viability.
  - Need to tackle large investment costs for district heating systems, e.g. by bringing together actors with complementary demands.
  - Obtaining C-level attention for audit results
  - Commercial sector: audit obligation for non-SMEs every 5 years (if no energy management in place), hence companies have demand for competent auditors
  - Focussing on replacement of outdated technologies
  - Having the right order of priorities: 1) energy efficiency first (e.g. through insulation), 2) correct sizing of heating systems in buildings, 3) supply sustainable energy
  - Considering audit results more holistically to feed into companies' business strategy



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## Programme

**First session: 18 March 2021, 10:00 – 12:00**

10:00 – 11:00

### Welcome & Introduction

- Welcome and introduction
- Agenda and interactive format of the workshop
- Background on Energy Efficiency Watch
- Q&A

11:00 – 11:45

### Group discussion: A business perspective on best-practices of implementing energy efficiency

What are the key factors for a successful implementation of systems supporting an energy efficient transition?

11:45 – 12:00

### Joint reflection on findings

## Pictures



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Recording...

## Energy Efficiency Watch 4 Breakout sessions



1. How do you promote energy efficiency products or services of your organisation in **everyday conversations**?
2. How can we **make the case for energy efficiency** vis-à-vis decision-makers, companies/ investors, households/ society?



Time: 40 minutes



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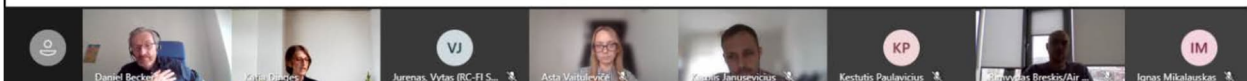
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## Overarching key themes so far

- Differentiate message & address motivation per target groups
- Energy scarcity and social dimension
- Expectation management for savings and ROI
- Clear vision for implementation
- Integrated energy planning
- C-level attention for audit results



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## 8/ 10 EEW4 Internal Event Report

**Project Partner:** Guidehouse

<b>Title of the event:</b>	<b>National Business Stakeholder Workshop, Greece: Business perspectives on energy efficiency policy</b>
<b>Date &amp; location:</b>	Online event: - First session: 22 March 2021, 11:00 - 13:00 (Athens time) - Second session: 23 March 2021, 11:00 - 13:00 (Athens time)
<b>Organiser(s):</b>	Guidehouse with support of the Centre for Renewable Energy and Savings (CRES)
<b>Number of Participants:</b>	Session 1: 24 Session 2: 22
<b>Summary of the event</b>	<p>The virtual Business Stakeholder Workshop in Greece set out to discuss the enabling factors for successful energy efficiency measures and policies on national and EU level.</p> <p>A broad range of Greek stakeholders attended the workshop and participated in the virtual discussions. Narratives elaborated in previous Energy Efficiency Watch National Business Stakeholder Workshops were tested and discussed with the participants. The interactive workshop was moderated by Daniel Becker from Guidehouse, supported by Evi Tzanakaki from the Centre for Renewable Energy and Savings (CRES).</p>



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**Event evaluation**

The workshop concept was well understood and picked up with interest by the audience. Narrative elements instrumental for promoting energy efficiency have been elaborated jointly with Greek business stakeholders during the workshop. There have been extended discussions about the energy renovation of residential buildings for instance, specifically the Exoikonomo-autonomo scheme for improving energy efficiency in residential buildings. The collaborative reflection and testing of pointed narratives delivered valuable input for the further elaboration of the Energy Efficiency Watch case study reports.

**Objective & main programme point**

The aim of the workshop was to collect input on existing narratives around energy efficiency and to receive input from business stakeholders with a view to developing narratives for enabling implementation of energy efficiency policies and measures in Poland and the EU. Insights and pointed narratives from previous business stakeholder workshops also fed into the discussion.

**Input Collection**

Narrative elements identified, challenges and recommendations for promoting energy efficiency  
Key factors and challenges for successful energy efficiency implementation:

- Cost is key for consumers: low-quality Energy Performance Certificates are available at very cheap prices, undermining the uptake of serious offers.
- Markets and authorities need to ensure availability of robust and comprehensive solutions for consumers.
- Educate consumers to become prosumers and on new technologies to better tap into potential for solar energy and develop energy as a service business models.
- Adapt regulatory framework for smart metering, e.g. third-party owners.
- Tailored policies and measures are needed to address different target groups.
- Authorities are often lagging behind market developments regarding updating funding programs and regulation.
- Need to align programmes and support to infrastructure development and technologies with overarching climate and energy targets to avoid lock-ins (e.g. regarding support to gas network development)



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- Communication between stakeholders and policy makers needs to be improved, e.g. through structured participation and consultation formats.
- Existing building stock should be more in focus rather than new constructions as there is a large share of vacant buildings in Greece.
- Generally strong own home ownership in Greece and real estate market heavily fragmented. Low levels of trust in co-owners, high cost sensitivity and low energy prices impede household investment. Strong economic volatility and uncertainties for long-term investments. Owners of commercial and tourism buildings have greater incentives to invest in energy efficiency.
- Need to decentralise the energy sector and to manage grid congestions for energy and solar as a service.

There have been extended discussions about the energy renovation of residential buildings, specifically the *Exoikonomo-autonomo* scheme for improving energy efficiency in residential buildings.

Success factors identified:

- The program experienced very wide communication throughout the supply chain, e.g. through public communication, industry advertisement, word of mouth advertisement by households. The scheme is established as a key reference in the market.
- Broad scope, easy access and long duration of the scheme allowed for wide communication and have improved acceptance
- Good match between needs and programme
- “Green DNA” of the scheme
- Found to be good example and very popular scheme throughout the buildings value chain
- increased transparency for the costs and benefits of energy
- The programme also benefited and received support from the construction industry, particularly in the beginning.

Potential for improvement identified:

- Develop better award criteria to enhance credibility
- Expand scope, potentially to commercial buildings
- Shorter intervals of calls for projects – or introduce continuous process
- Improve design of selection process, e.g. through better alignment with the main target of the policy and stronger focus on quality in eligibility and selection criteria; better criteria will improve the acceptance of the scheme
- Improve communication and transparency on the use of funds, e.g. “first come, first served” is not the approach anymore which is still not known broadly; also the technical details are not yet well known by public



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- Establishing a feedback platform would be helpful to further expand the application and to improve acceptance
- Exclude support for fossil energy sources as single measures (e.g. for gas meter only in combination with a renewable solution)
- Financial products require further development

In summary, the overarching key themes identified and discussed by participants include:

- Reinforcing the requirements and triggers for energy audits and energy performance certificates
- Enhancing communication between policies/ programmes, stakeholders and consumers
- Differentiating approaches / programmes per target group and considering role of real estate for households and the economic situation
- Adapting regulatory framework to enable new business models

#### Attached:

#### Programme First session: 22 March 2021, 11:00 – 13:00:

11:00 – 11:05	Check-in & Welcome (Guidehouse)
11:05 – 11:20	Welcome note (CRES)
11:20 – 11:30	Background on Energy Efficiency Watch (Guidehouse)
11:30 – 11:45	Icebreaker discussion: Successful energy efficiency policies Which energy efficiency policies, instruments or measures have been successful in Greece?
11:45 – 12:30	Discussion in breakout groups: Divers for successful energy efficiency implementation: key factors, focus points in public debate, evaluation over time
12:30 – 12:45	Summary presentations form breakout groups
12:45 – 13:00	Reflection and outlook

#### Second session: 23 March 2021, 11:00 – 13:00



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11:00 – 11:05	Check-in & Welcome
11:05 – 11:20	Background: Role of narratives for promoting energy efficiency
11:20 – 11:50	Joint reflection on argumentative drivers for acceptance of energy efficiency policies and measures
11:50 – 12:50	Consolidation of joint conclusion: Key messages to decision-makers
12:50 – 13:00	Wrap-up

**Photos:**



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The screenshot shows a Zoom meeting in progress. The main window displays a presentation slide from Adobe Acrobat titled "Exoikonomo-autonomo" with the subtitle "Key factors and challenges for successful implementation". The slide contains several text boxes:

- Related to cost of energy / electricity – which is transparent now
- Long duration of programme – and easy to use
- Broad scope improve acceptance
- In the beginning it also helped to support the buildings industry in general
- Green "DNA"
- Insulation related to comfort of living
- Broad effects on various market participants / segments
- Continuous development of the programme over time
- Good match between need and programme
- High rate of direct ownership – good way to modernize the home
- Wide communication (everyone has helped to communicating the programme widely)
- Also industry uses programme in their advertisement
- Incl. mouth-to-mouth communication

Below the slide, a grid of 15 video feeds shows participants. Some names are visible: Daniel Becker, Alexander De..., Epiida Elych..., Maria Geshart..., Lena Lampro..., Evi Tani..., EVANGELOS..., Epiida Dirge..., Thanasis Sakkas, Katerina Koume..., Andreas Androu..., George Roula..., Lampros Davis, Antonis Stroum..., and Michail Zoulofos. The Zoom interface at the bottom shows controls for mute, video, chat, and other meeting functions.



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## 9/10 EEW4 Internal Event Report

<b>Project partner</b>	Guidehouse
<b>Title of the event:</b>	National Business Stakeholder Workshop, Bulgaria: Business perspectives on energy efficiency policy
<b>Date &amp; location:</b>	7 April 2021, 10:30 - 12:30 EEST & 8 April 2021, 10:30 - 12:30 EEST Bulgaria (virtual meeting)
<b>Organiser(s):</b>	Guidehouse
<b>Number of Participants:</b>	19
<b>Summary of the event</b>	<p>The Business Stakeholder Workshop set out to discuss the enabling factors for successful energy efficiency measures and policies in Bulgaria. Gathering Bulgarian business stakeholders from a broad range of sectors including energy services, consumer organisation, and the buildings sector, the interactive workshop was held in an online format divided into two consecutive sessions due to the health-related restrictions of the COVID-19 pandemic. Starting with an introduction to the Energy Efficiency Watch project and aims of the workshop, Daniel Becker from Guidehouse led through the Workshop, supported by Ina Karova from the Energy Agency of Plovdiv (EAP) in Bulgaria. The EAP gave a “local” welcome to the participants and presented the broader EU framework for the Recovery Plan and the Green Deal and how the funds will be allocated to better support innovation activities for the businesses. During the discussions, EAP bridged the activities during the past and the new programming period (as represented in the Bulgarian Recovery Plan) to highlight the expected changes in the policy course and funding opportunities and the participants’ potential to bring in positive changes by sharing their stories and experiences, opinions and suggestions for the future implementation of the Operational Programme. The participants jointly reflected on effective arguments to make the case for energy efficiency with regards to different factors for a successful implementation.</p> <p>Arguments and entry points highlighted in the breakout session by the participants with regards to the successful implementation of energy efficiency policies, instruments, and measures included:</p>



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- (1) Developing research and innovation potential, better involving businesses in funding programmes and incentives structures
- (2) Addressing energy poverty in promotion policies and programmes for energy efficiency to achieve a just transition
- (3) reducing regulatory barriers for home-installed photovoltaics and energy renovation; enhancing communication towards consumers
- (4) Building on the just transition process and market/business support for improved coal phase-out for the local communities

*Input Collection*

FOCUS question 1 and 2:

*What do you expect from the Green Deal and the Recovery Plan?**What are the successful EE actions, measures, policies in Bulgaria?*

- The Bulgarian policies follow a trajectory of low level of ambition. Bulgaria is trying to achieve the goals at the minimum level, probably because we policymakers are not quite sure about achieving more ambitious goals. Thanks to the EU framework for higher goals in the field of energy and renewable energy, Bulgaria will probably follow these more ambitious EU goals and this will be a good lesson to prove that more can be achieved than initially thought. The hopes are that through time and through monitoring of all goals that Bulgaria has transposed at local level, we will see that in the short-term Bulgaria will be able to achieve the goals and even do better. The expectations of the Green Deal are to do better.
- More active policies for the energy renovation of buildings: There is a huge resource that is envisaged, but there are no innovative measures like energy systems and energy storage systems that could improve the energy efficiency class of buildings.
- There should be better communication of the operational programmes and their funding opportunities. The citizens and businesses are the beneficiaries and if they do not take active part in these actions, results will not meet expectations. A recommendation would be to establish mediators/multipliers who should introduce the ideas to the citizens, because when we speak about increasing the energy efficiency of buildings – this does not mean that the building will just look better. But citizens should be informed about savings in their electricity bills and all the benefits they get. So, these messages should reach the citizens. Households need to understand that their energy actions have an effect and what the exact effect is.
- Buildings are an important part of the energy problems. In practice, the Bulgarian legislation would require some reforms, especially regarding



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privately owned buildings. The Energy Operator needs to grant permissions for energy generation which is a long and burdensome procedure – this needs to be changed so that more individual installations are established and more citizens become prosumers.

The second session of the workshop started with a brief presentation on the role of narratives for policy implementation after which participants consolidated their input and recommendations on ways and potentials for an effective implementation of energy efficiency policies and measures in Bulgaria, complementing the points raised in the first session, including inter alia:

#### Research and innovation

- Implementation of good practices is difficult due to a lack of understanding for the need of pilot projects with involvement of businesses in Bulgaria and Eastern Europe; best practices are more convincing than political commitments.
- Businesses are willing to be part of innovation processes for products and services
- Need to develop R&D infrastructure with a more prominent role for businesses in R&D landscape to tap into innovation potential, e.g. innovation clusters, technology/industrial parks (to be considered in EU funding)
- Transformations, including the energy transition as a transformative process, should be based on innovation.
- Bad example: the national procedure for innovative clusters – there was a call open twice and cancelled twice due to different reasons. This sent a bad signal towards the businesses that spent significant time preparing their applications.
- Due to lack of innovations in the companies/businesses, the economy is facing issues with limited competitiveness.
- Bulgaria lacks innovation structures (excellence centers, tech parks, etc.) and the Recovery Plan is a great way to address this.
- There should be a synergy between the businesses and the local communities in developing innovations, because the businesses may find their interests implemented only through the acceptance of the local communities.
- Nurturing the local business ecosystems and supporting them to grow into tech parks or similar ecosystems will improve their market competitiveness.
- Good practices for innovations are related to the existence of pilot projects. And in Bulgaria and Eastern EU Member States, there is a lack of



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understanding on political and administrative level for the need for pilot projects with the participation of businesses. Usually, this understanding is related to the universities and their lab prototypes. A recommendation would be to send out a message that more pilot projects are funded, through which adequate good practises are established and promoted.

- **There is a strong need for infrastructure for research or for development of innovations and their market uptake.** In Bulgaria, there is just one example – the HighTech park in Sofia. There was an idea that the Park is replicated in Plovdiv – where there are many universities, companies, clusters - but it did not receive support from the national level (although on local level there is some support).
- There may be some possibilities in universities and research institutes, but their capabilities are very limited and represent isolated research pieces that are not in cooperation with the businesses.
- The Teaming opportunity is currently not included in the Bulgarian Recovery Plan, so we would like to send the EC a message that we wish to have more opportunities for the Teaming programme and that there should be representatives of other research and development bodies, different from the traditional university bodies and academic bodies in the Bulgarian Academy of Sciences. **The feeling is that there is some understanding for supporting the academic bodies only.** The major criteria for selection should be relevant experience and not necessarily being a traditional academic body or a university.
- The universities are mostly oriented towards education, not R&D. If we rightly identify business as drivers of the innovation, then the market uptake will happen more quickly. **An example are the excellence centers created throughout the country – currently, they are not operational, whereas the “Innovative Clusters” procedure was a success. Another failed procedure is the one for regional innovation centers – it was launched twice and then cancelled.** It turned out that it cannot be launched only for the universities and it was transferred to the OP “Competitiveness and Innovation”. There was a cheer from the regions, because usually most things happen for the Capital and not for the regions. The major requirement was for a new legal body – and many of the potential beneficiaries went through a lot of administrative and legal procedures to formalise their partnerships. At the end of the day, the procedure was cancelled and all these efforts turned out to have been in vain. It was a bad message for the businesses.
- There is a good example with the regional industrial parks in Spain that can be followed in Bulgaria and other Eastern EU countries.



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### Energy poverty (EP)

- Stakeholders asked for legislative and regulatory changes to accommodate the Energy Poverty definition
- The EP definition needs to be set on four criteria: income, energy price, building status, energy consumption behaviour.
- The definition may need in-depth study of the underlying EP factors and may turn out to be very fluid.
- First step to alleviate EP should be to develop a definition. The second step would be to develop new energy efficiency policies which in Bulgarian can be summarised in three categories: 1/ energy efficiency, establishing actions and measures for funding opportunities; 2/ mechanisms for informing the EP households about the process of liberalisation of the electricity market; 3/ measures for encouraging rational energy behaviour aimed at saving energy.
- The EP definition will allow for the development and establishment of mechanisms and policies for effective public spending and triggering energy responsible behaviours with a focus on the energy poor families.
- Example/proposal: if there is an EP definition, then it will allow for segmentation of the EP households so that they may get their renovation funded by the state at 100% whereas non-EP households may have to co-fund it at 50%
- Low-income households mostly live in single/multiple family houses are not aware of energy efficiency aspects (heating system with potential for improvement); need to reach out actively to them.
- Program run by Social Affairs Ministry (winter energy package, voucher for energy bills) didn't include behaviour changes.
- Good example: in the Plovdiv region, EAP and local businesses conduct EP campaign by providing energy saving equipment for EP households. The campaign can cover only about 100 households per season, but has a leverage factor of 3-4 times the initial investment, whereas the national policy does not have energy, environmental or financial effect. It only funds the energy bills of the applicants and thus does not motivate them to change their energy behaviour.

### Energy renovation and smart cities

- In Bulgaria, the state grant for energy renovation of multi-family buildings provides funding at a 100%-rate which makes the citizens passive actors, typically not seeking other opportunities for deep renovation and for more funding of ambitious measures. It would be a mistake that in the new



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programming period, again a 100% is granted to all households without differentiation.

- Need for development of One Stop Shops for energy renovation services in the municipalities in which all local actors are represented (incl. businesses).
- The current Energy Renovation programme does not have EP mechanism. It aims at C-class of energy efficiency of the building and thus does not call for ambitious measures.
- There should be investment in the new buildings as well so that they can become near zero or energy positive. Currently, even in the new buildings in Bulgaria, there are not innovative energy solutions that may help it be energy independent.
- Cities need to be a stage for more ambitious projects. This is lacking in Bulgaria.
- There is a need for energy positive zones and buildings, smart cities, smart installations and buildings.
- The understanding of energy efficiency gets limited to the infrastructural projects only – putting insulation and changing windows. There are no smart solutions as energy management or smart heating services. This creates an attitude of neglect in the citizens and they say “Is this your energy efficiency? Insulation and windows?”
- The EU framework may support us to impose some mandatory measures such as energy management, renewable energy for heating, photovoltaics, geothermal energy, etc. Through these a better and more innovative refurbishment of the buildings may happen. The municipalities are a medium for innovation development through public finance and this public finance may be put to very good use.

#### Just transition

- Structural change and other specific circumstances of Eastern European areas have to be considered, transfer of experiences is needed.
- Coal is central to the Bulgarian society, the New Green Deal could be a chance, but a certain campaign is needed to convince citizens of this change
- Just transition funds cover three municipalities, where there are highly qualified people who are an asset for R&D and energy sector (away from coal); qualifications can be redirected to be also used in R&D sector
- Energy transition should be also based on innovation, not only investment, but innovation is typically riskier and harder to implement



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- The local citizens are sensitive to the coal topic, because this has been their occupation for generations. Policymakers are trying to “play it safe” and avoid saying that these coal capacities need to be shut down and that preparations need to start now. Policymakers shy away from participating in debates on just transition; they do not want to start initiatives in this field because they believe it will give a negative sign for the future of these people. The debate is currently impossible to start and develop in a constructive way. The hopes are that the Green Deal may ease the strength on this process.
- The coal zones need to be revitalised and put to good use in the future – for example, with renewable energy capacities. There are possibilities for utilising waste from the coal pits, etc.
- There is a need for a larger campaign telling people what their future can be.
- Coal workers should not be afraid of the change, because they have strong educational background and long life experience in the energy sector and they should not be afraid that they will be unemployed as long as the state establishes other energy businesses and business environment to employ them. What the state plans to do remains to be seen, though.
- Energy businesses need to be involved in the just transition for these regions in Bulgaria, because people would rather trust actors with good practices and market experience behind their back rather than the political faces with promises.
- No matter what messages we send without the good example from the higher level, not only political, but also experts and social, the just transition may happen to be a painful process. So, examples must be given, practised and promoted. And to be generated.

*Objective & main programme point*

The aim of the workshop was to collect input on existing narratives around energy efficiency from business stakeholders with a view to support the effective implementation of energy efficiency policies and measures in Bulgaria and in the EU. Insights from previous business stakeholder workshops also fed into the discussion.

*Event evaluation*

The workshop concept was well understood and picked up with great interest by the audience. The opportunity to transmit feedback from the business community to decision makers through the project was particularly appreciated. Considering the online format of the event, an in-person workshop might have been still more effective compared to virtual formats.

**Attached:**



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## Programme

### First session: 7 April 2021, 10:30 – 12:30 EEST

10:00 – 10:35	Check-in & Welcome (Guidehouse)
10:35 – 10:50	Welcome note (EAP)
10:50 – 11:00	Background on Energy Efficiency Watch (Guidehouse)
11:00 – 11:15	<u>Icebreaker discussion: Successful energy efficiency policies</u>  What can be expected of the Green Deal and Recovery Plan?  Which energy efficiency policies, instruments or measures have been successful in Bulgaria?
11:15 – 12:00	<u>Discussion in breakout groups:</u>  Drivers for successful energy efficiency implementation: key factors, focus points in public debate, evaluation over time
12:00 – 12:15	Summary presentations form breakout groups
12:15 – 12:30	Reflection and outlook (Guidehouse)

### Second session: 8 April 2021, 10:30 – 12:30 EEST

10:30 – 10:35	Check-in and Welcome (Guidehouse)
10:35 – 10:50	Background: Role of narratives for promoting energy efficiency



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10:35 – 11:20	Joint reflection on argumentative drivers for acceptance of energy efficiency policies and measures
11:20 – 12:20	Consolidation of joint conclusion: Key messages to decision-makers
12:20 – 12:30	Wrap-up

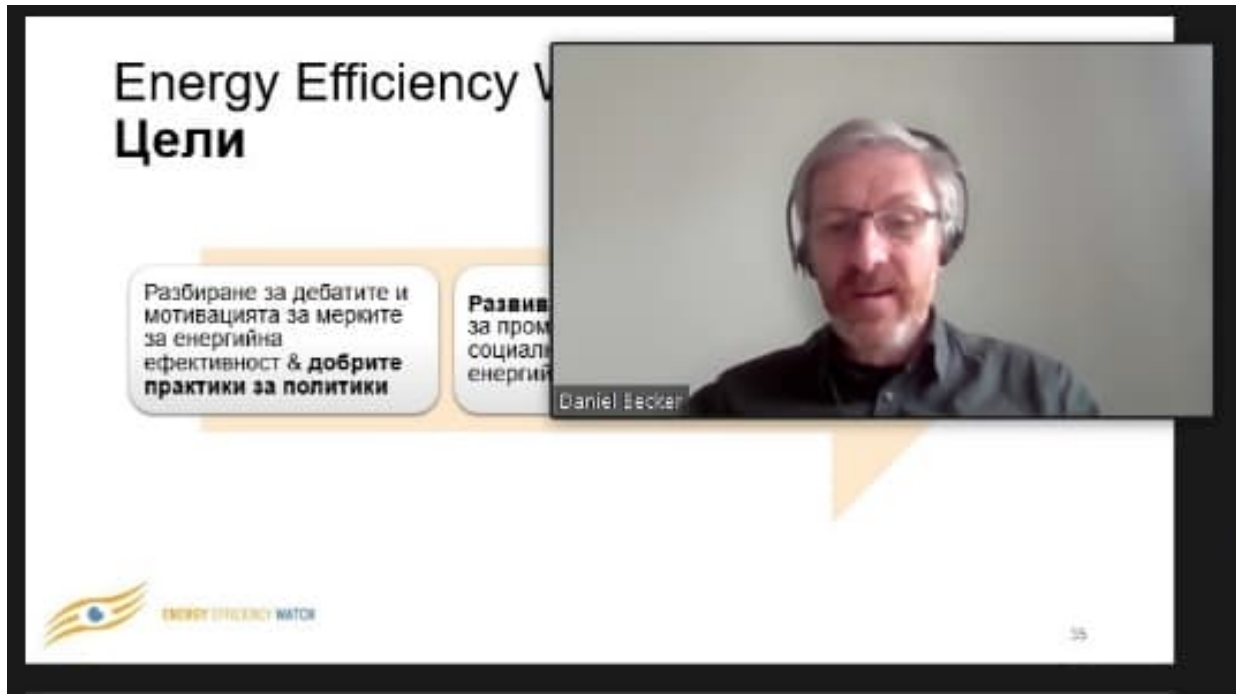


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Screenshots



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**Ключови фактори и предизвикателства за успешна реализация**

- ЕЕ темите в образованието все още липсват
- Без кредитна линия за ЕЕ, няма такава финансираща институция
- Все още няма механизъм за енергийна бедност
- Новите услуги на „Едно гише“ не са налични в българския план. Общините имат известен опит. Бизнесът участва само през Обществена Горька
- Слаба комуникация на Плановите
- Създаване на високотехнологични паркове – за прототипи и инсталации за нови продукти и услуги
- Надценване на ролята на традиционните научни звена в иновационната дейност ОП „Наука и икономически растеж“ слага барьера към всички иновативни организации – само университети и БАН могат да участват. Трябва да има включване на повече заинтересовани страни в Иновациите
- Наука и разво и комерсиализация трябва да се прави със заинтересовани страни
- Повече енергийна независимост на местно ниво като национален приоритет

Daniel Becker	Arnold Bruhin (Guidehouse)	Irina Karova	Nadezhda Angelova
Angelina Tomova	Liyana Adjarova	Milena Agopyan	Katja Dinges
Stoyan Dimitrov	Daniela Kostova	Lucky Penny	Zdravko Georgiev
Plamen Kirov	Ivan Shotlekov	Nikolay NAYDE...	Petar Kisyov
НАДЯ НИКОЛО...	Krasimira Kostova		



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## 10/10 EEW4 Event Report

**Title of the event:** Energy Efficiency Watch

**National Business Stakeholder Workshop, France:**

**Business perspectives on energy efficiency policy**

<i>Date &amp; location:</i>	Online event: 8 June 2021, 14:00 – 16:00 CEST
<i>Organiser(s):</i>	Guidehouse, supported by Regional Energy & Climate Agency (Agence Régionale Énergie-Climat - AREC)
<i>Summary of the event</i>	The Business Stakeholder Workshop in France set out to explore enabling factors for successful energy efficiency measures and policies, on both the national and on the EU level. French business stakeholders attended the workshop and participated actively in the virtual session. Narrative elements identified in previous Energy Efficiency Watch National Business Stakeholder Workshops were fed into the discussion and jointly reviewed with the participants. The joint reflection on enabling narratives for energy efficiency provided valuable input from the perspective of the French business community for the elaboration of the Energy Efficiency Watch case studies. Daniel Becker of Guidehouse led the interactive workshop, supported by Marie-Laure Falque-Masset from AREC, the Energy and Climate Agency of the Île-de-France Region.
<i>Objective &amp; main programme point</i>	The aim of the workshop was to collect input on existing storylines on energy efficiency and to receive input from business stakeholders with a view to developing enabling narratives for the effective implementation of energy efficiency policies and measures in France and the EU. Insights and pointed narratives from previous business stakeholder workshops were tested and fed into the discussion.
<i>Conclusions</i>	Based on the discussion and consolidated reflection of the participants, effective implementation of energy efficiency policies is conditioned on a number of key vectors and narrative elements, including:



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- **Trust** must be regained since the old narrative of the savings paying for the costs did not (always) deliver, as participants found. Consequently, support of the economic actors of energy efficiency and for related policies was lost. The mainstream discussion focuses on deep renovation and technical issues, but the **financial perspective** is not a focus and therefore needs to be followed up upon in the discussion.
- A **just transition must be guaranteed**: the question of who will be paying (e.g. for renovations of residential buildings, necessary infrastructure like hydrogen pipelines etc.) needs to be solved and communicated. Funding in the framework of the Green Deal and Covid-19 recovery will play a key role.
- The **job impact** of energy efficiency needs to be better communicated. Creating educational and transformational jobs, educating pupils on the energy transition and energy efficiency issues, convincing young people to choose related professions, and developing new jobs (e.g. mechatronics, craftsmen) is key. Energy efficiency and energy savings measures should be a focus of **education and training**.
- **Energy poverty** is regarded as one of the central issues in France. The cost issue needs to be addressed, especially with regards to the needs of low-income households. This includes matters of social housing, affordable energy renovations and financial tools for thermal renovation of houses and condominiums. Affordability and environmental considerations of mobility is another topic area with big discrepancies between rural and urban populations.
- There is a need to aggregate multifamily houses for upscaling energy renovations and to develop approaches on how to organise these on the level of regions.
- **Stimulating behavioural change** is seen as a further component of addressing energy poverty. Positive compensation of the individuals should be a focus, as well as developing attractive attributes and a corresponding image of energy efficiency solutions, e.g. with regards to smartness.
- Maintenance requirements (operated by service providers) and associated costs for **smart homes** (as part of a renovation) need to be communicated and made transparent to increase acceptance for new technologies and the energy transition
- For a holistic approach, the link between **circular economy** and energy efficiency should be kept in mind, especially concerning insulation materials.



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**Programme**

Online event: 8 June 2021, 14:00 – 16:00 CEST

**Business perspectives on energy efficiency policy**

14:00 – **Introduction**  
14:05

14:05 – **Welcome note: Marie-Laure Falque-Masset, AREC**  
14:20

14:20 – **Background: Energy Efficiency Policy & Energy Efficiency Watch**  
14:30

14:30 – **Tour de table**  
14:45

14:45 – **Discussion:**  
15:45 **Drivers for successful energy efficiency implementation**

15:45 – **Reflection**  
16:00



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