



ENERGY EFFICIENCY WATCH

# The Energy Efficiency Watch

## Progress in energy efficiency policies in the EU28

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# The Energy Efficiency Watch Project



## What is it?

- a project funded by the European Commission
- on the **progress of energy efficiency policies** and their implementation in the **EU Member States**

## What are we doing?

- Analysing and reporting (competence centre)
- Networking: activation and consultation
- Communicating: spreading the message

## For whom?

EU/national/regional parliamentarians, administrations on regional, national and EU levels, businesses, researchers and other stakeholders

**3 phases:** EEW1: 2006-2009, EEW2: 2009-2013, EEW3 2014-2017

**Key issue:** how can we **speed up energy efficiency** in Europe?















# The EEW3 Partners


















# Background & objective of the survey

- Objective of the survey:
  - views of experts and stakeholders
  - on the actual, "real-life" progress in energy efficiency policies in their respective country
  - since the second NEEAPs
- **more than 1100 experts from all 28 Member States consulted**
  - with questionnaires and oral interviews
  - between January and May 2015
- survey carried out by the OÖ Energiesparverband (in co-operation with the University of Linz), with contributions from ECEEE, Fedarene and Energy Cities
- similar survey carried out in 2012

# Completed questionnaires by MS (quantitative survey)

	Austria	38
	Belgium	32
	Bulgaria	23
	Croatia	48
	Cyprus	15
	Czech Rep.	31
	Denmark	47
	Estonia	15
	Finland	27
	France	51
	Germany	83
	Greece	43
	Hungary	25
	Ireland	28

	Italy	77
	Latvia	19
	Lithuania	23
	Lux	14
	Malta	14
	NL	30
	Poland	25
	Portugal	58
	Romania	26
	Slovak Rep.	17
	Slovenia	38
	Spain	66
	Sweden	39
	UK	144
	<b>Total</b>	<b>1096</b>



# How should the results be seen?















- Perceptions of experts on the progress in energy efficiency policy implementation in their own countries since 2011
- and not: the absolute levels of energy efficiency and energy efficiency policies in each country
- and not: what people think about other countries
- and not: the opinion of the authors of the study

## Croatia: Completed questionnaires by sectors



# Progress indicators 2015 - Ranking

	Austria	5
	Belgium	13
	Bulgaria	23
	Croatia	10
	Cyprus	5
	Czech Rep.	15
	<b>Denmark</b>	<b>1</b>
	<b>Estonia</b>	<b>3</b>
	<b>Finland</b>	<b>2</b>
	France	12
	Germany	5
	Greece	24
	Hungary	26
	Ireland	15

	Italy	13
	Latvia	15
	Lithuania	9
	Lux	10
	Malta	25
	NL	19
	Poland	22
	Portugal	21
	Romania	20
	Slovak Rep.	15
	Slovenia	5
	Spain	28
	Sweden	4
	UK	27

# Progress indicators 2015 Ranking - Comparison 2012

	Austria	5	13	
	Belgium	13	18	
	Bulgaria	23	16	
	Croatia	10		
	Cyprus	5	22	
	Czech Rep.	15	25	
	<b>Denmark</b>	<b>1</b>	<b>2</b>	
	<b>Estonia</b>	<b>3</b>	<b>3</b>	
	<b>Finland</b>	<b>2</b>	<b>1</b>	
	France	12	10	
	Germany	5	6	
	Greece	24	16	
	Hungary	26	20	
	Ireland	15	11	

	Italy	13	27	
	Latvia	15	12	
	Lithuania	9	18	
	Lux	10	3	
	Malta	25	3	
	NL	19	24	
	Poland	22	21	
	Portugal	21	6	
	Romania	20	23	
	Slovak Rep.	15	26	
	Slovenia	5	7	
	Spain	28	15	
	Sweden	4	9	
	UK	27	13	

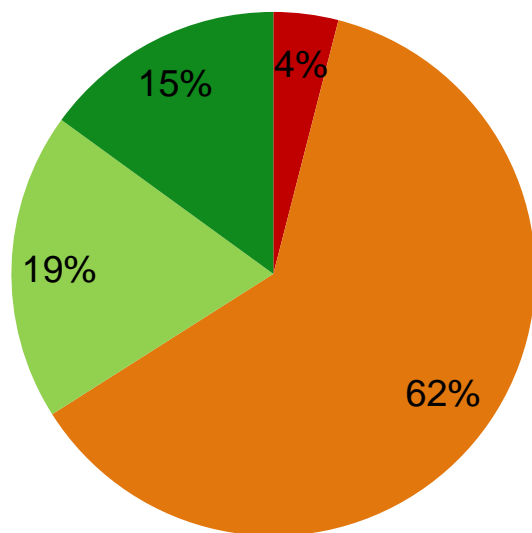




# "Pictures" of the Member States (1)

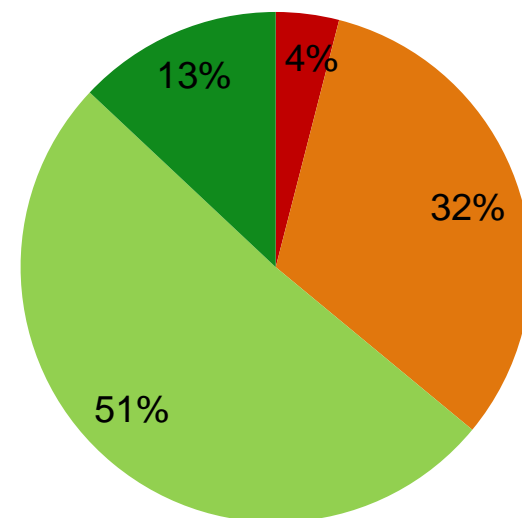
## Example: Croatia

**Croatia: overall ambition of the energy efficiency policies**



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

**Croatia: progress of the energy efficiency policies in the last 3 years**

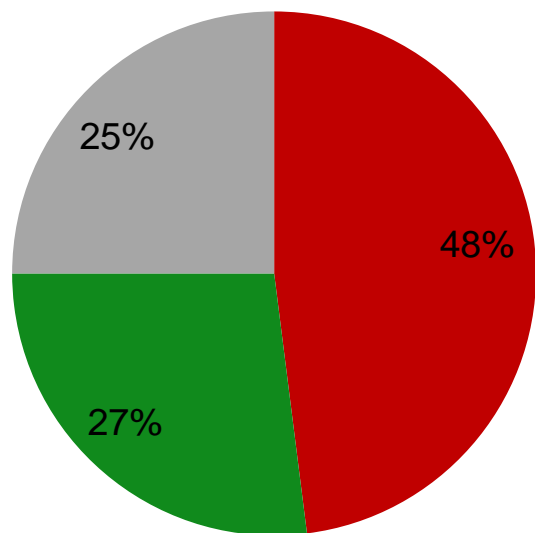


- no or very little progress
- a few additional policies
- a range of additional policies
- many additional policies

# "Pictures" of the Member States (2)

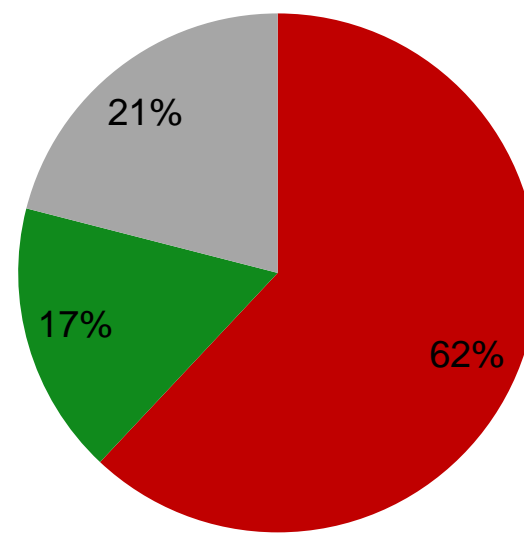
## Example: Croatia

**Croatia: achievement of national 1.5 % energy savings target (EED)**



- target is likely not to be achieved
- target is likely to be achieved
- not aware of this target



**Croatia: on track towards the "NZEB" obligation**



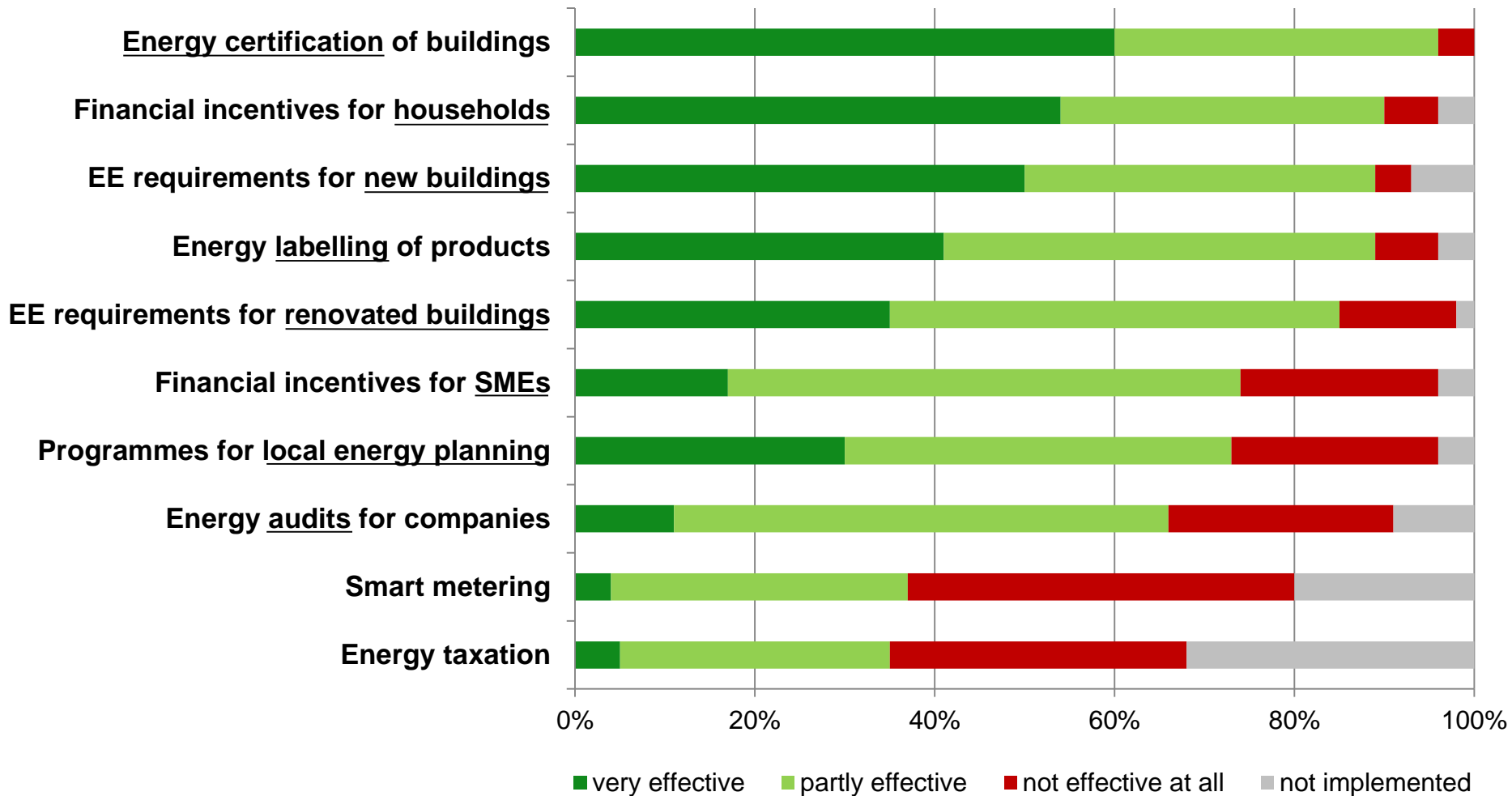
- No, we are lagging much behind
- Yes, the implementation is well underway
- I don't know

# How effective are the following policy instruments in your country?

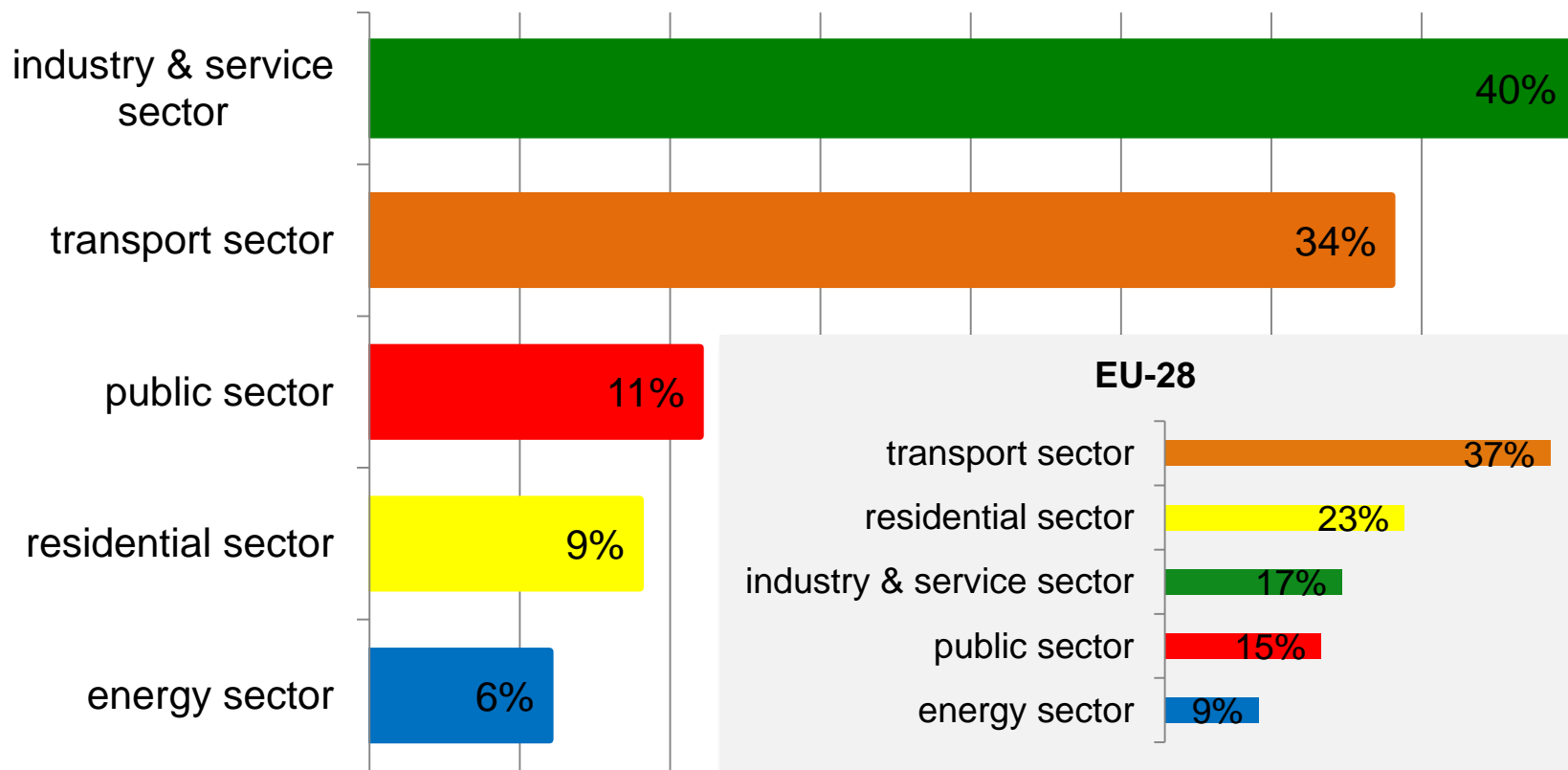
## Number of countries

	 Over 70 % see them as <b>partly/very effective</b>	 Over 30 % see them as <b>not effective</b>
EE requirements for <u>new buildings</u>	26	1
Energy <u>labelling</u> of products	26	0
EE requirements for <u>renovated buildings</u>	22	1
Energy <u>certification</u> of buildings	15	6
Programmes for <u>local energy planning</u>	12	10
Financial incentives for <u>private households</u>	11	9
Financial incentives for <u>SMEs</u>	6	11
Energy <u>audits</u> for companies	6	12
Targeted <u>advice</u> for households	6	13
Inspection <u>heating/air-conditioning</u>	3	16
Smart metering	2	17
Energy taxation	4	21

# How effective are the following policy instruments in Croatia?



# In which sector is energy efficiency policy the weakest in Croatia?



# Croatia: Issues from the survey



- How to meet the 1.5 % energy savings objective? Will the "alternative measures" be enough?
- How to mobilise sufficient funds for energy efficiency programmes (under the tight budget requirements)?
- How to set more ambitious requirements for energy efficiency in building renovation programmes?
- How to make progress in energy efficiency in transport?
- How to make the transition from "burden" to "opportunity"? How to maximise the "multiple benefits" of energy efficiency to our society (energy security, employment, innovation, environmental/climate protection etc.)?

# Key results of EEW analysis and stakeholder consultations (1)

## Polices work...

- National, regional and local governments have shown that they can develop and implement effective policy instruments and contribute energy efficiency targets
- Not a "one fits all" approach but large variety of instruments adjusted to the respective context
- There is a wealth of experience and a rich source of mutual learning making the "energy efficiency policy tool box" even stronger.

## However...

- there is a enormous disparity among member states in levels of ambition and progress of energy efficiency policies
- ups and downs in policy progress (EU policy ensures that there is at least minimum progress!)

# A new "positive narrative" for energy efficiency (1)

- Ambitious, longer-term energy efficiency policies are implemented where the country/region/city has found convincing answer to the question:  
*"Why should we want energy efficiency?"*
- Often heard in (national) debates:  
*"We must because Brussels tells us so"*
- EEW finding: where energy efficiency policies work well over a longer period, a consensus has been reached on **why it is a reasonable thing to do**
- Essential for success is a "positive narrative" which is convincing for political and businesses leaders and the public.



# A new "positive narrative" for energy efficiency (2)

- Experts emphasize the **multiple benefits of energy efficiency**:
  - cost savings
  - energy security
  - innovation and employment creation
  - social and health benefits
  - climate protection ....
- Narrative needs is different in different member states and regions!
- Merged into a new EU story line backed with excellent numbers



- *EE can save EU consumers 78 billion € annually by 2020*
- *The Energy Labelling and Ecodesign Directives alone result in savings comparable to the energy use of 60 million households*



# New business models for energy efficiency - making the "business case"

- Without the right framework, it is hard to make **energy efficiency the main business** of a company (rather than an additional "sales argument" for a product or service)
- This resulted in markets where energy efficiency potentials were **not systematically addressed** by specialised energy efficiency companies
- Examples in some Member States (e.g. Denmark and Italy) show that the right policy framework resulted in innovative business models with many new market entrants. Their main business is energy efficiency:
  - > they take a wider view
  - > by identifying economic potentials, they create business for companies with efficient products and solutions



# Energy efficiency - an engine for innovation and economic growth in Europe and its regions

- Develop positive European, national and **region specific and credible narratives on energy efficiency** and communicate them to political decision makers, administrations, businesses and the general public - in your region, which are the most important specific reasons for energy efficiency?
- Create market conditions for energy efficiency businesses by fostering innovative business models and technologies - how can
- More important than the type of the policy is its reliability (long term, transparent, at reasonable transaction cost)

**"Yes, we can make Europe and its regions the global leader in energy efficiency markets and technologies"!**



ENERGY EFFICIENCY WATCH

# The Energy Efficiency Survey

## The progress in energy efficiency policies in the EU28

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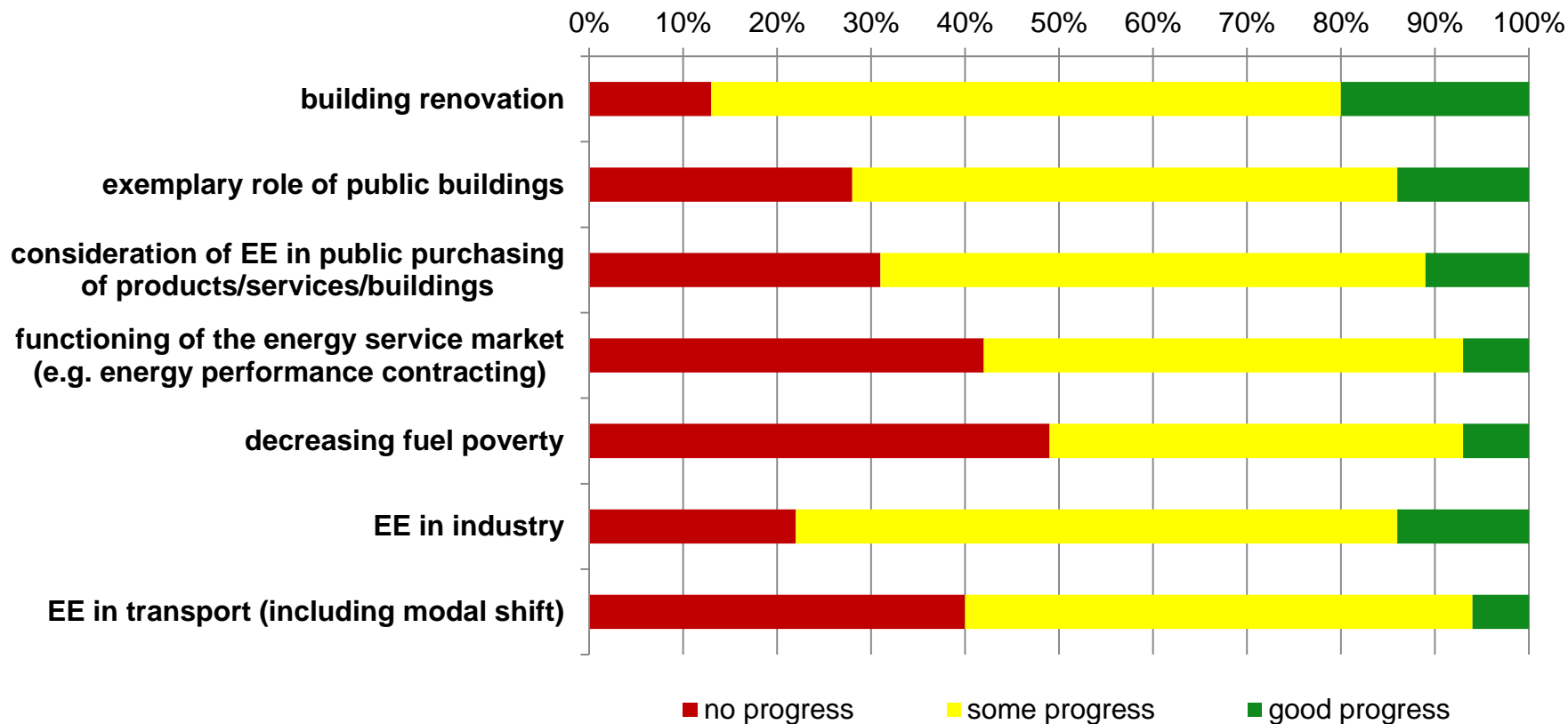


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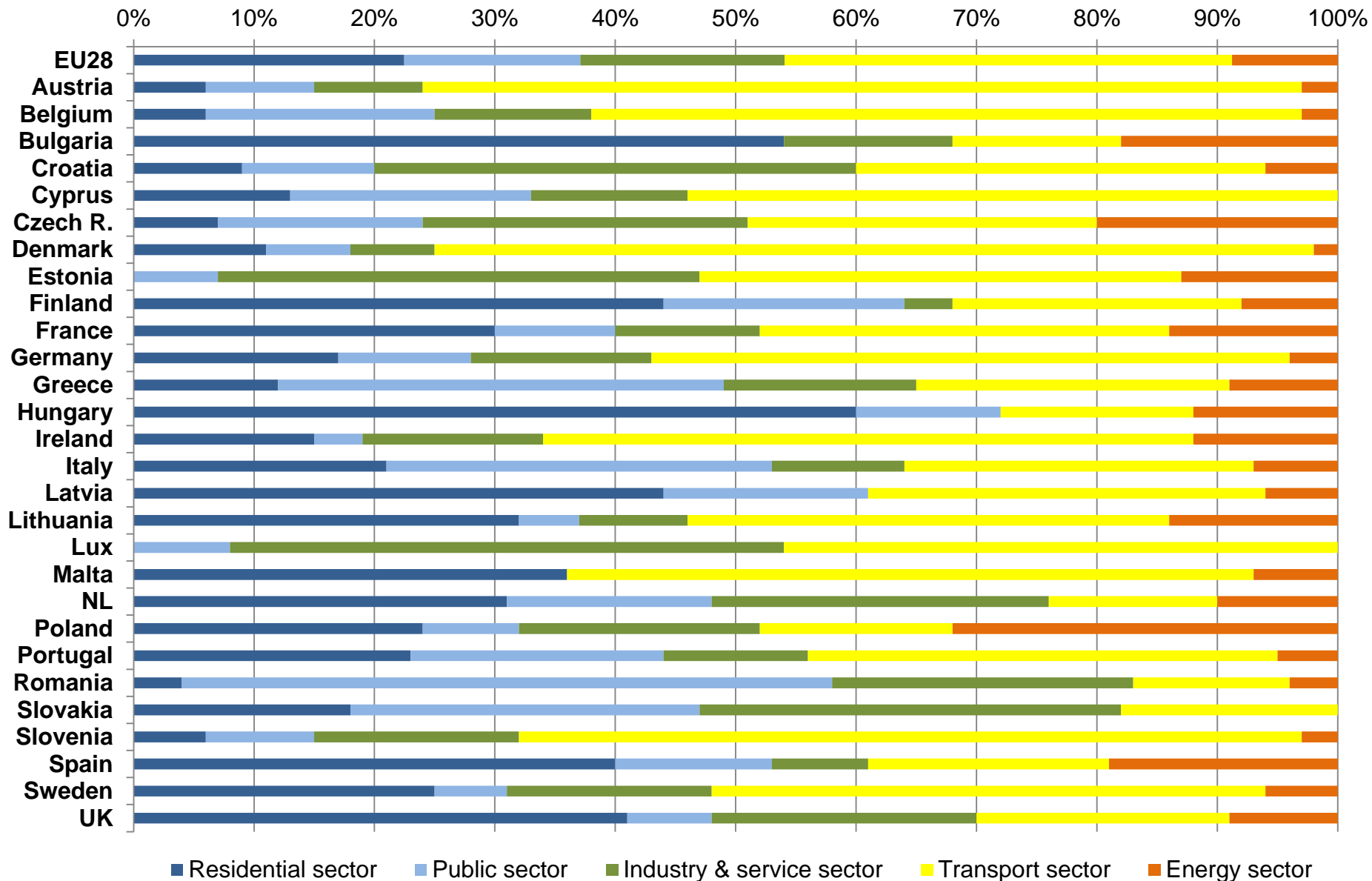


# How do you see the improvements in actual implementation in the last 3 years in the following fields?

## average EU28



# In which sector is energy efficiency policy weakest in your country?



# How do you rate overall ambition of the energy efficiency policies in your country?



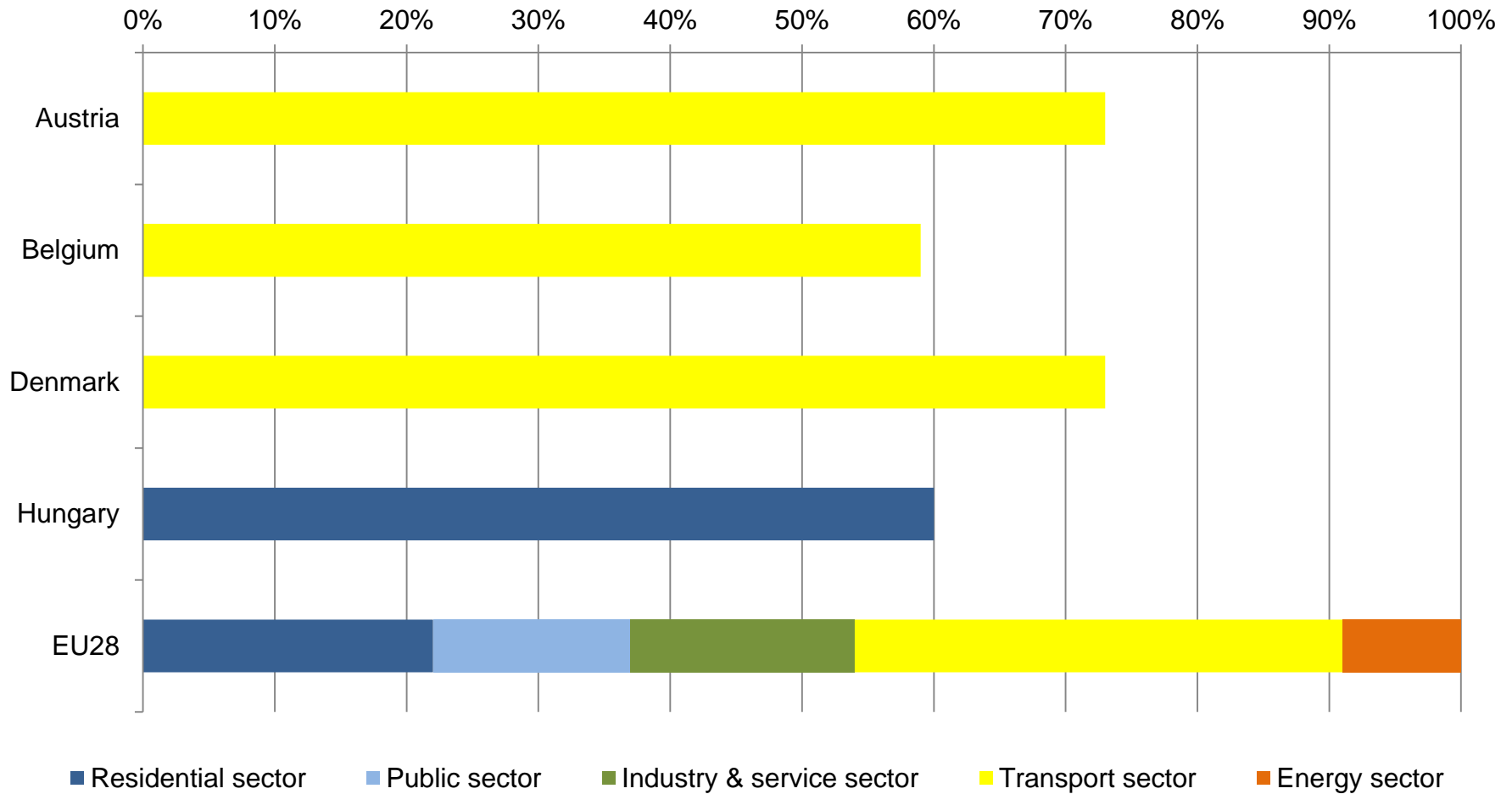
■ generally, rather low 
 ■ ambitious in a few sectors, less so in most others 
 ■ ambitious in a range of sectors, less so in a few others 
 ■ generally, rather high

# Is your country on track to meet the obligation that all new buildings must be "nearly zero-energy buildings" by 2020?

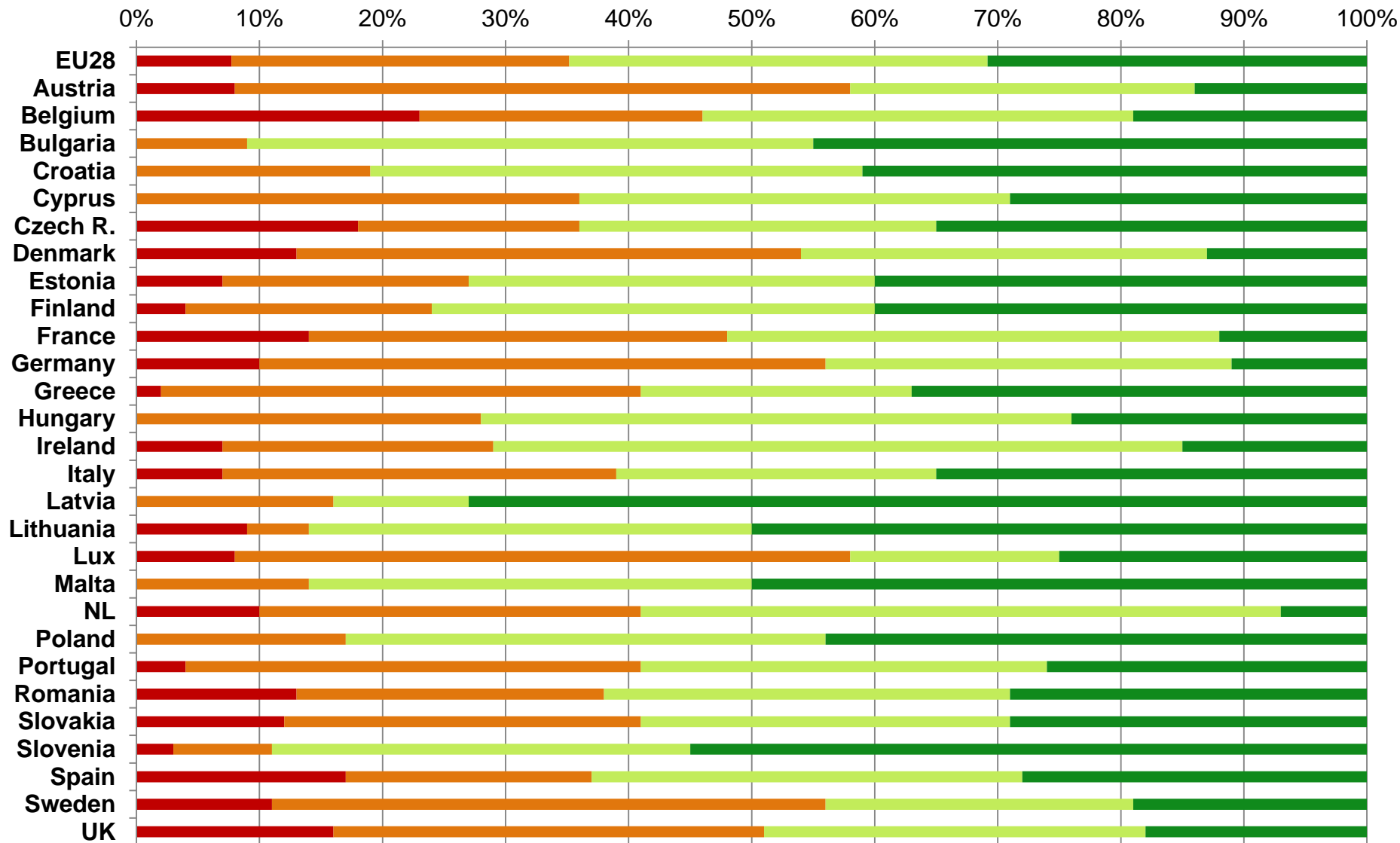




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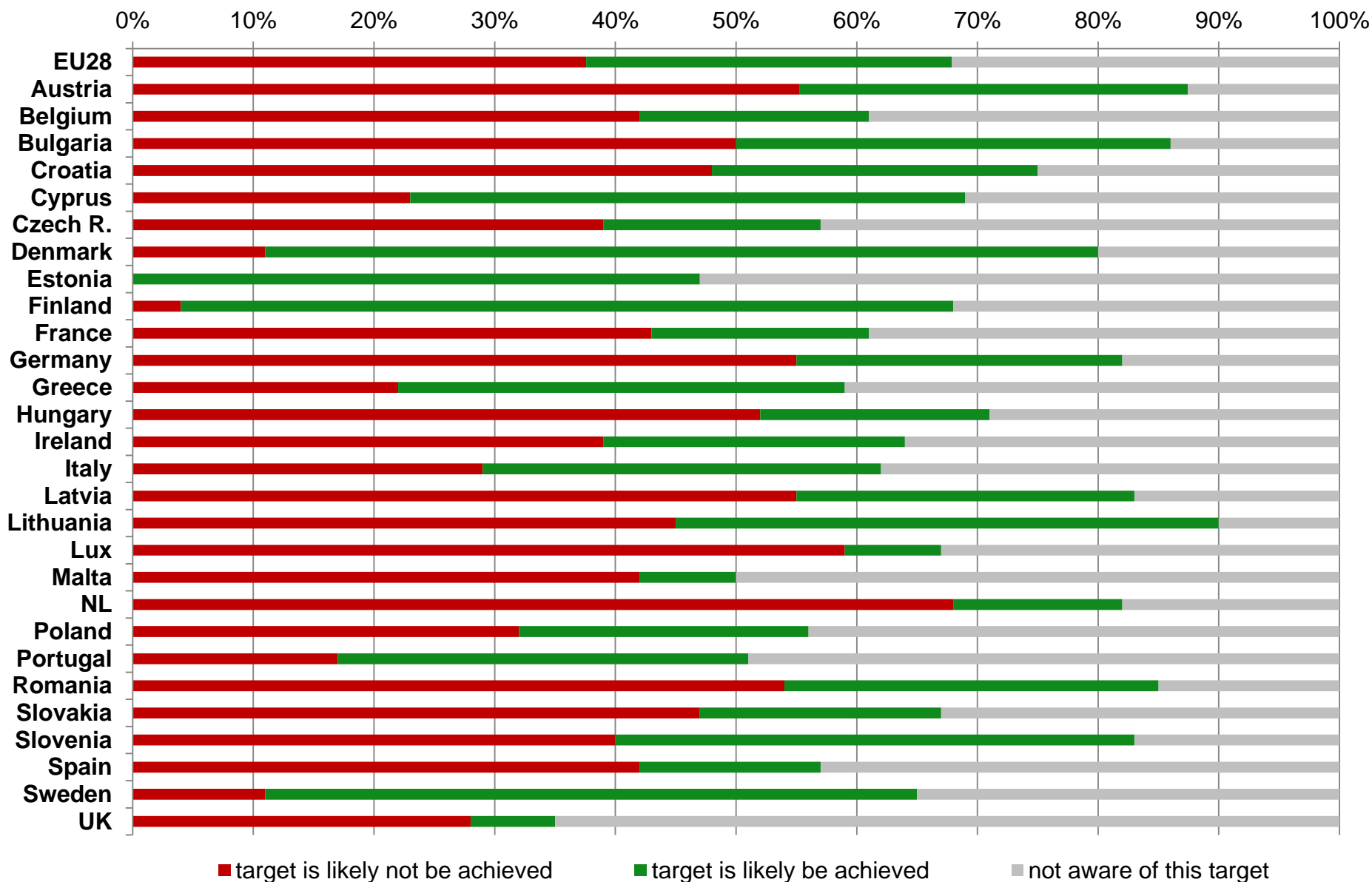


# How do you rate overall ambition of the energy efficiency policies in Europe?

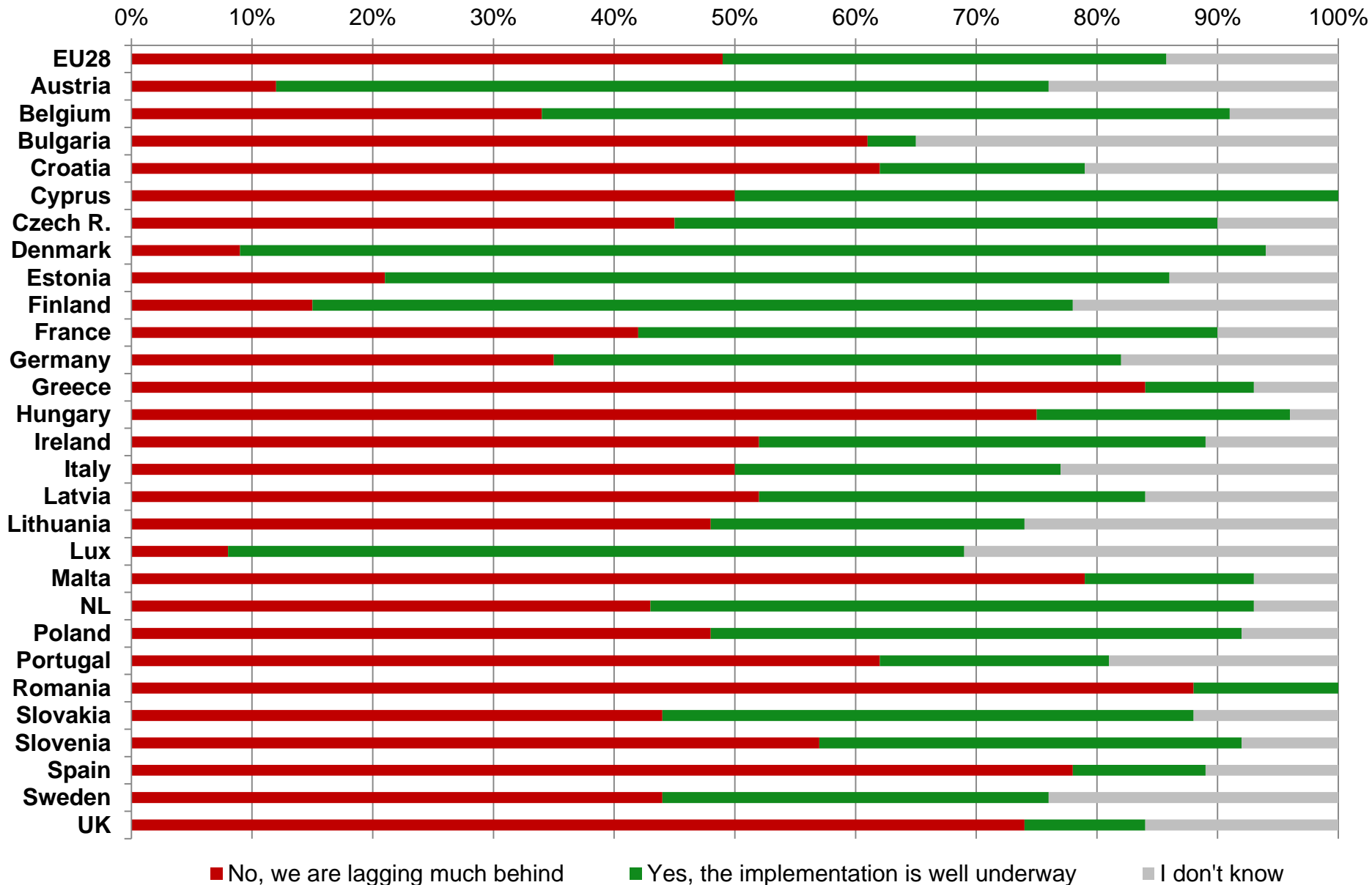


■ generally, rather low 
 ■ ambitious in a few sectors, less so in most others 
 ■ ambitious in a range of sectors, less so in a few others 
 ■ generally, rather high

# Will your country achieve the annual target of new savings of 1.5 % of the energy sales to final consumers?



# Is your country on track to meet the obligation that all new buildings must be "nearly zero-energy buildings" by 2020?

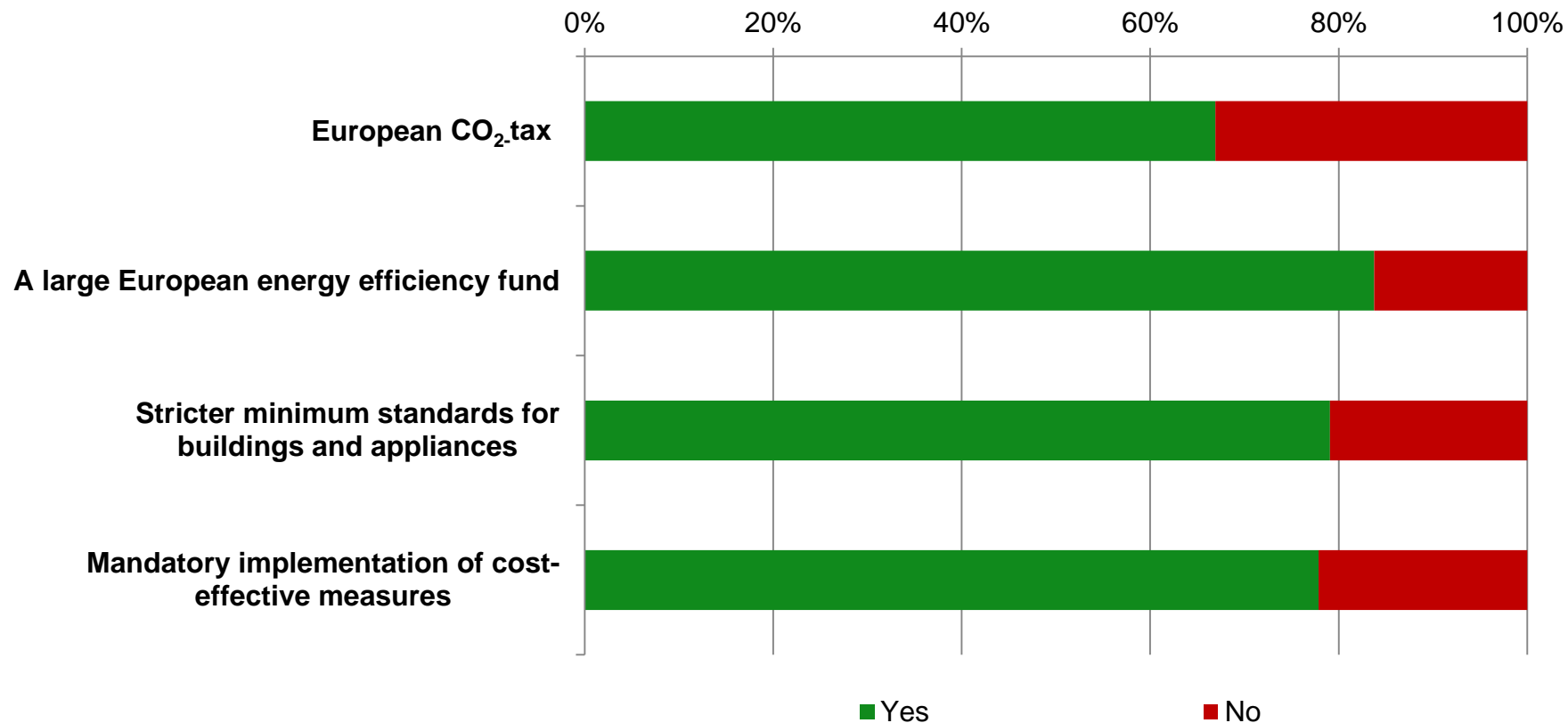


# How do you see the improvements in actual implementation in the last 3 years in the following fields?

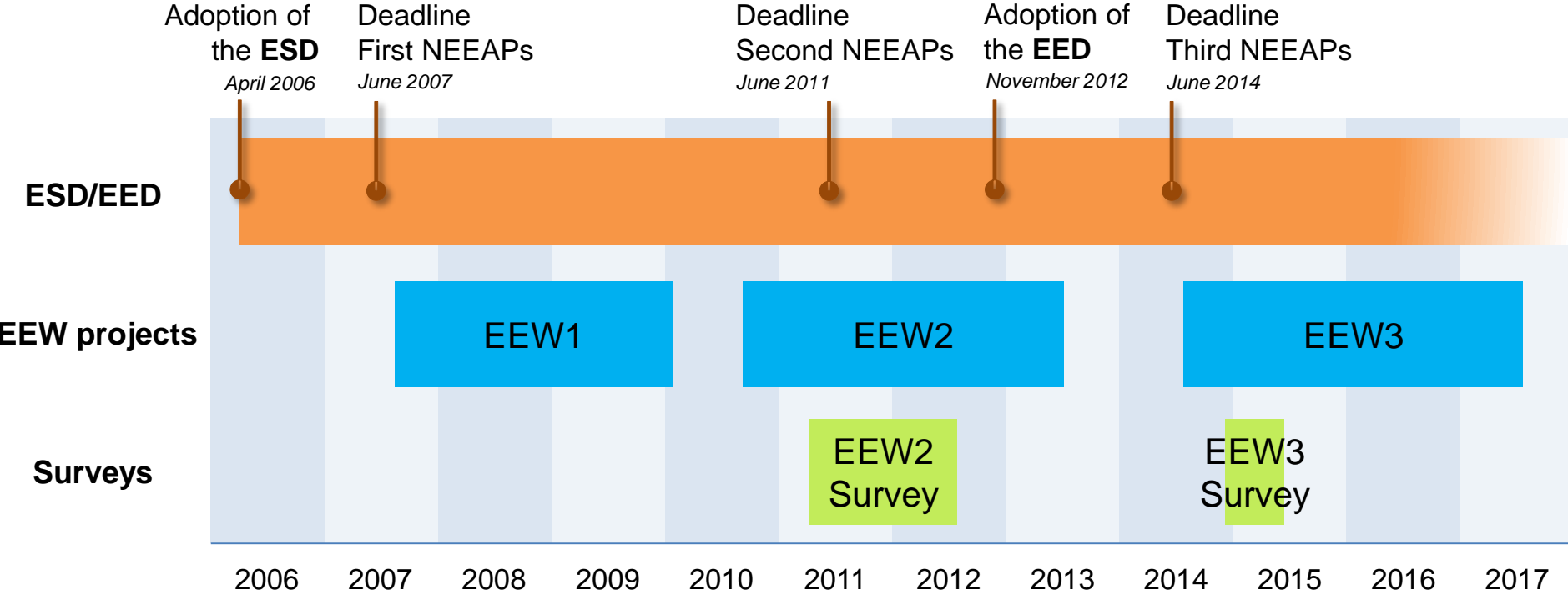
	good progress	no progress
Building Renovation	1. Estonia  2. Croatia  3. Lux 	26. UK  27. Spain  28. Malta 
Public Buildings	1. Slovenia  2. Finland  3. Croatia 	26. Greece  27. Spain  28. Portugal 
Public Purchasing	1. Sweden  2. Cyprus  3. Malta 	26. Czech R.  27. Bulgaria  28. Hungary 
EE in transport	1. Finland  2. Sweden  3. Bulgaria 	26. Latvia  27. Belgium  28. Lux 



# EU 28: measures which should be introduced on EU level



# Time-table



# Approach & methodology: Elements of the EEW survey

- **Quantitative Survey**

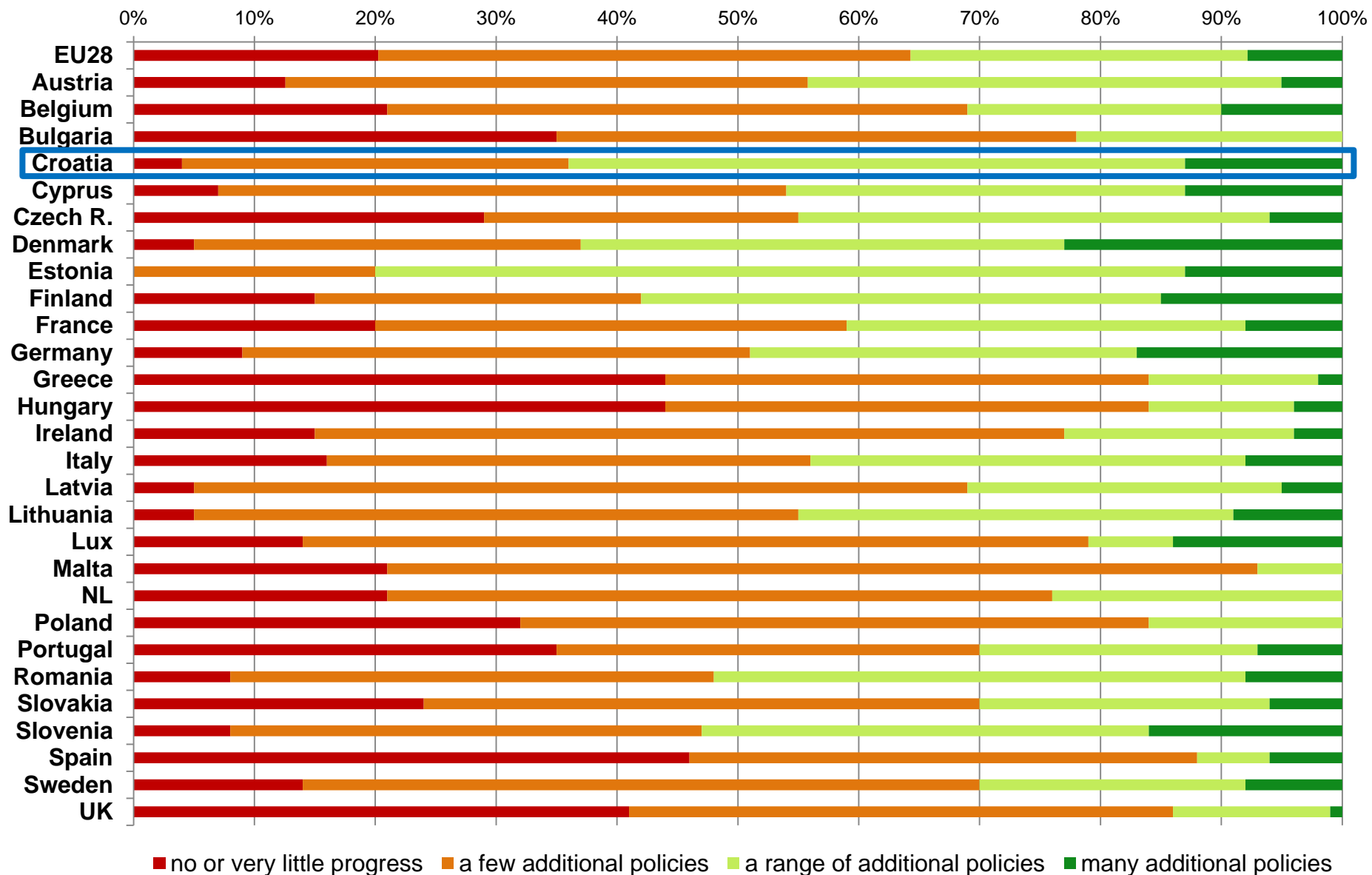
- questionnaire (online or at main European conferences)
- quantitative information on energy efficiency progress
- "snapshot picture"
- **1096** completed questionnaires

- **Qualitative Survey**

- qualitative information on energy efficiency progress
- oral interviews with **3 experts per Member State** based on an interview guideline carried out by 3 European networks (FEDARENE, ECEEE, Energy Cities)



# How do you rank the progress in EE policies in the last 3 years in your country?

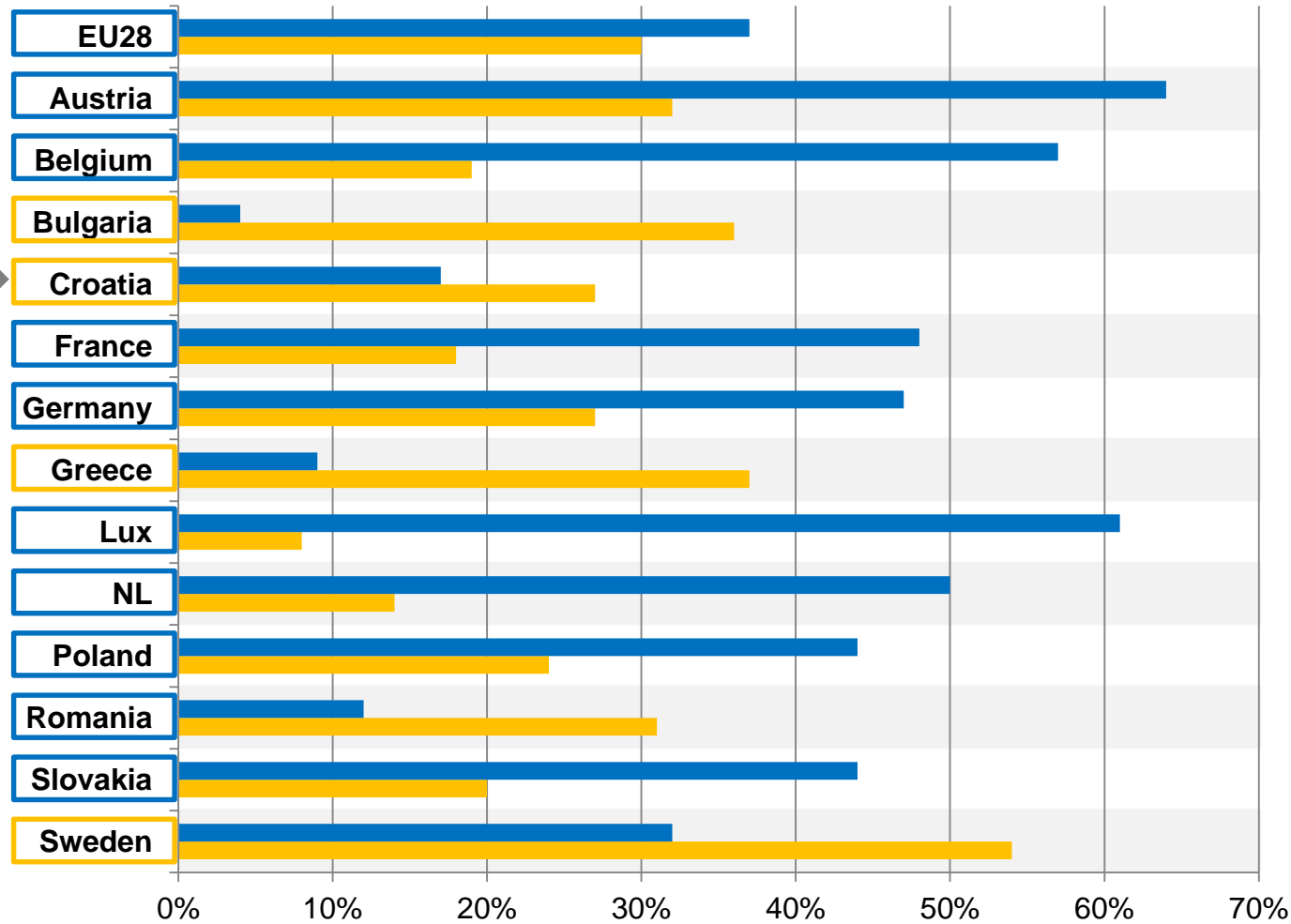


# The EEW analysis:

## Progress in EE policies & implementation since the NEEAP2

- **28 Country Reports:** document screening and analysis of progress of EE policies in each Member State (NEEAPs and other MS documents)
- **10 Case Studies:** effective energy efficiency policies in MS
- **Business Stakeholder Consultation** in 5 countries (150 stakeholders)
- **Expert Survey**

# Targets & obligations: how well is your country doing?



■ NZEB "on track"

■ 1.5 % target likely to be achieved

