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Energy Efficiency Watch

Analysis of MS ambitions

A few snapshots from the NEEAP screening and an expert survey

21/11/2012

Daniel Becker

Outline

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

What is a NEEAP?

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

What is our task?

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

What approach do we use?

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

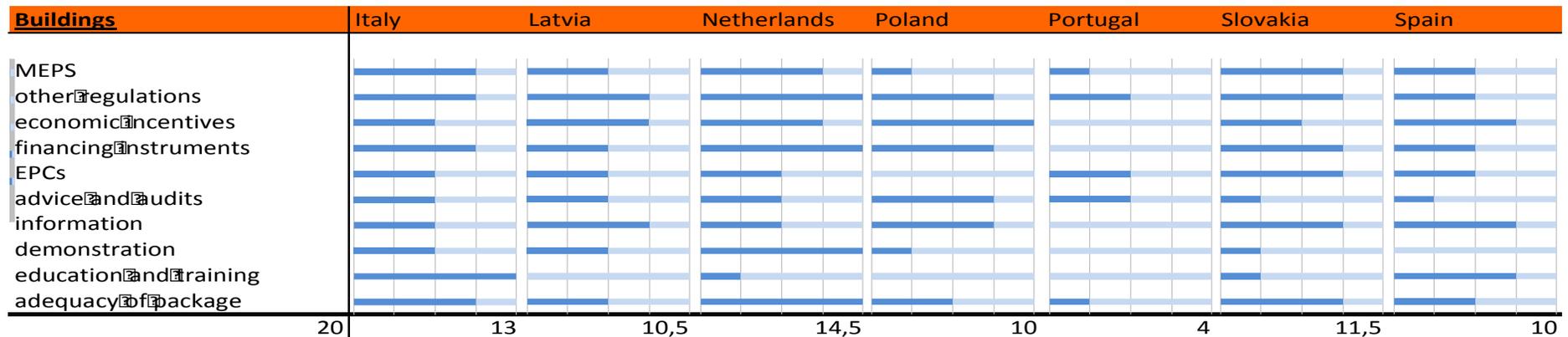
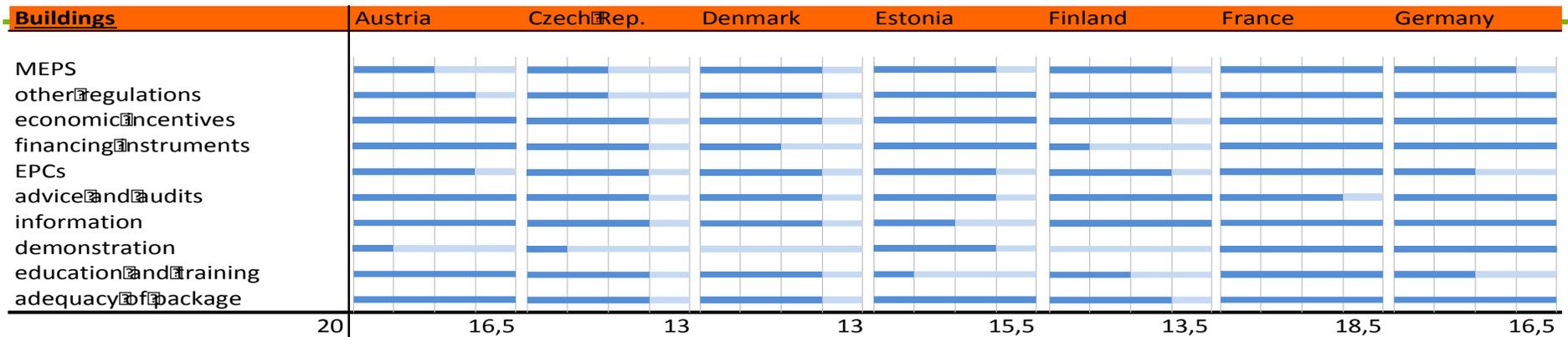
NEEAP screenings

Preliminary results – full overview



Cross-country analysis

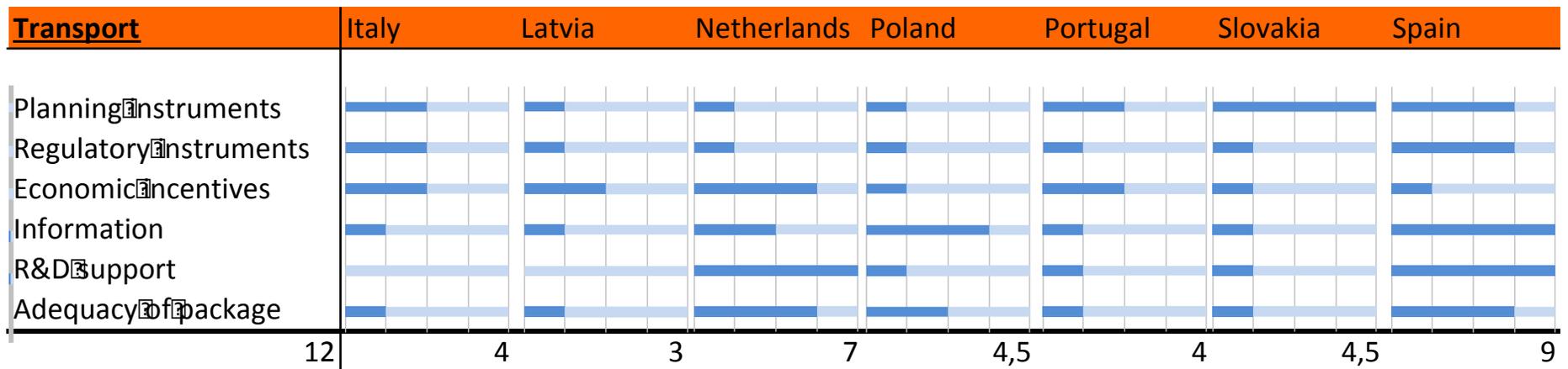
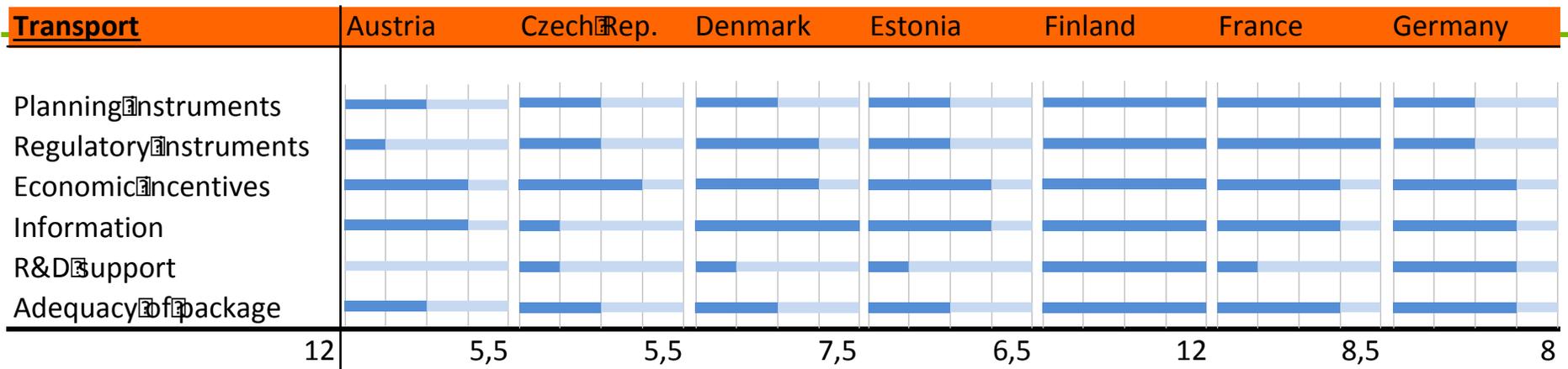
Buildings



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

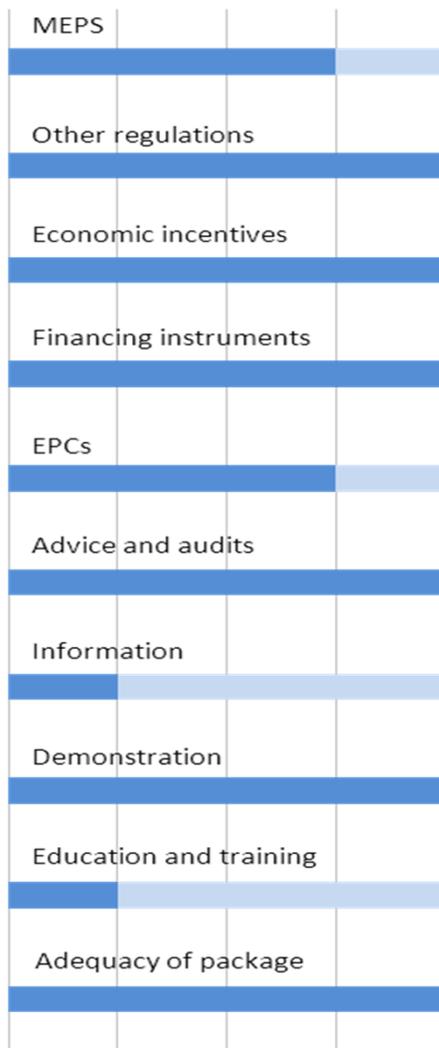
Cross-country analysis

Transport



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

Good practice – buildings (Estonia)



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

Good practice - transport (Finland)

Planning instruments			
Regulatory instruments			
Economic incentives			
Information			
R&D support			
Adequacy of package			

Strong focus on improving conditions for public transport, walking and cycling

Besides national implementation of EU regulation further regulatory instruments concerning different transport modes and addressing different actors

Tax system based on vehicle's emissions

Major investments in public transport are given

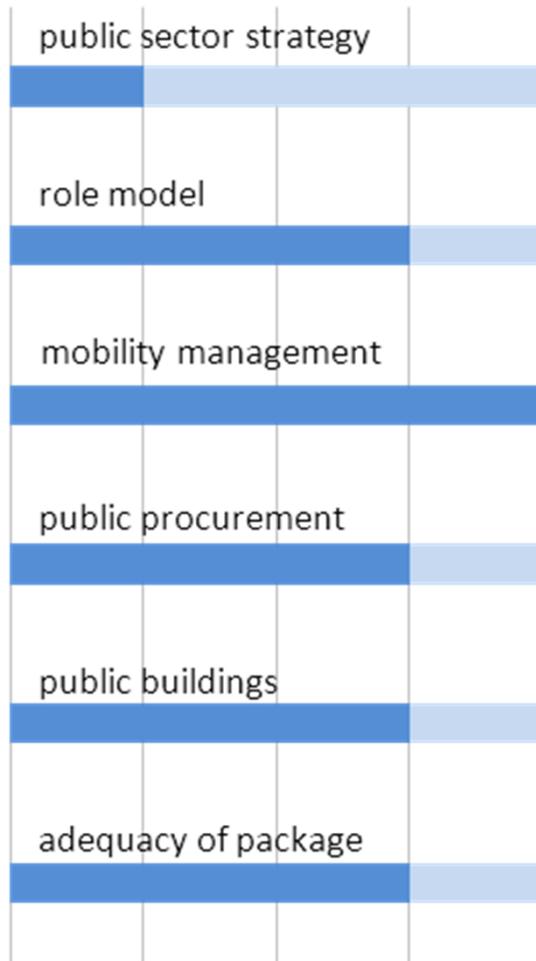
Different transport modes and actors are addressed by diverse information and advice measures

Funding of research to reducing energy use

Financing pilot projects on public and non-motorised transport

Policy mix is well balanced (planning, economic, regulatory, informative and research instruments)

Good practice – public sector (Belgium)



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

NEEAP screening – main messages

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

NEEAP screening

Preliminary Conclusions

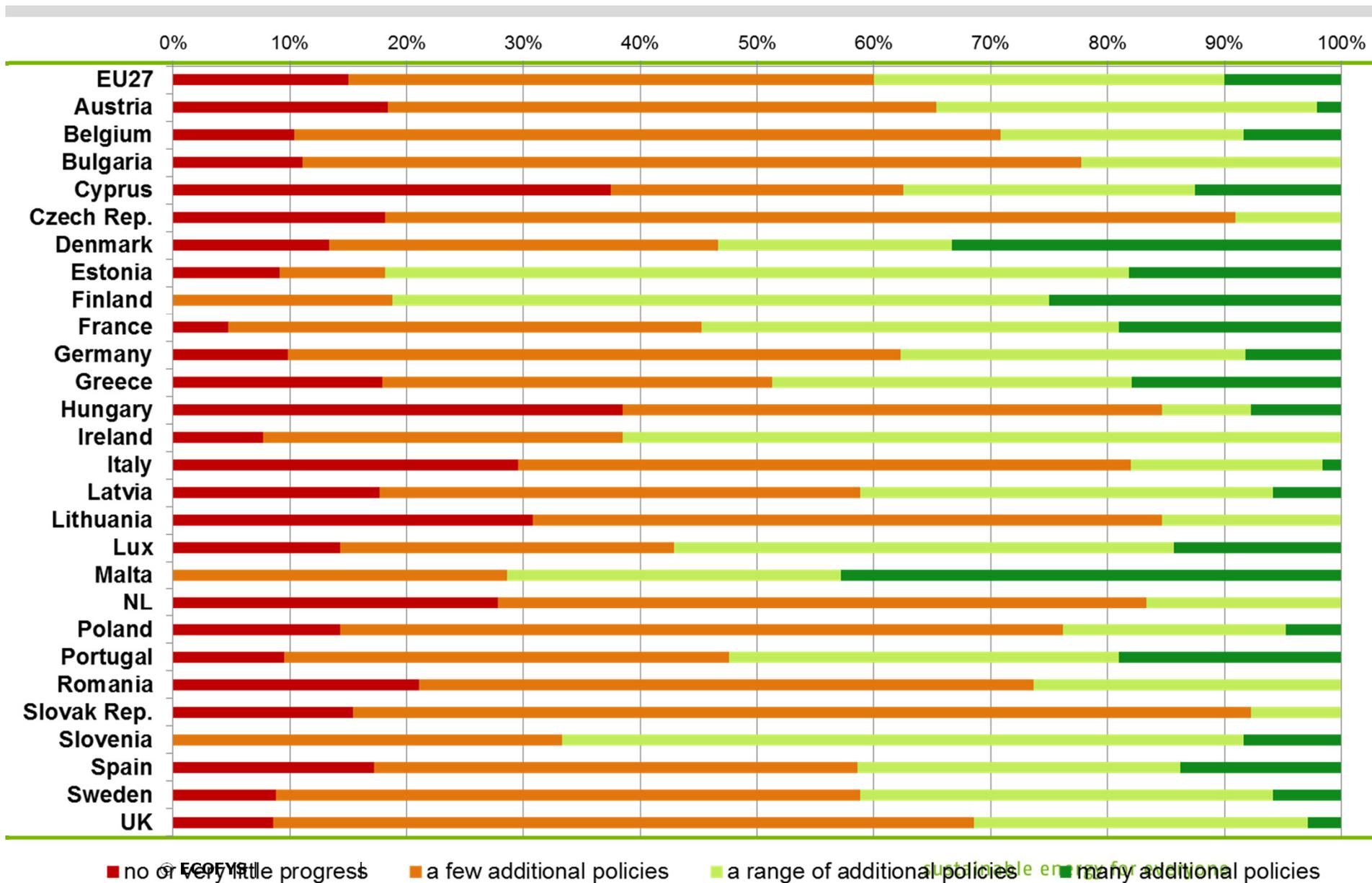
- NEEAPs II (again) very heterogeneous in quality and size of reporting, but in total an improvement compared to NEEAPs I
- NEEAPs express what is **addressed by policies** – implementation is a different story (survey)
- Step forward: EU-MS now come up with more policy approaches (still lagging behind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

The Energy Efficiency Watch Survey

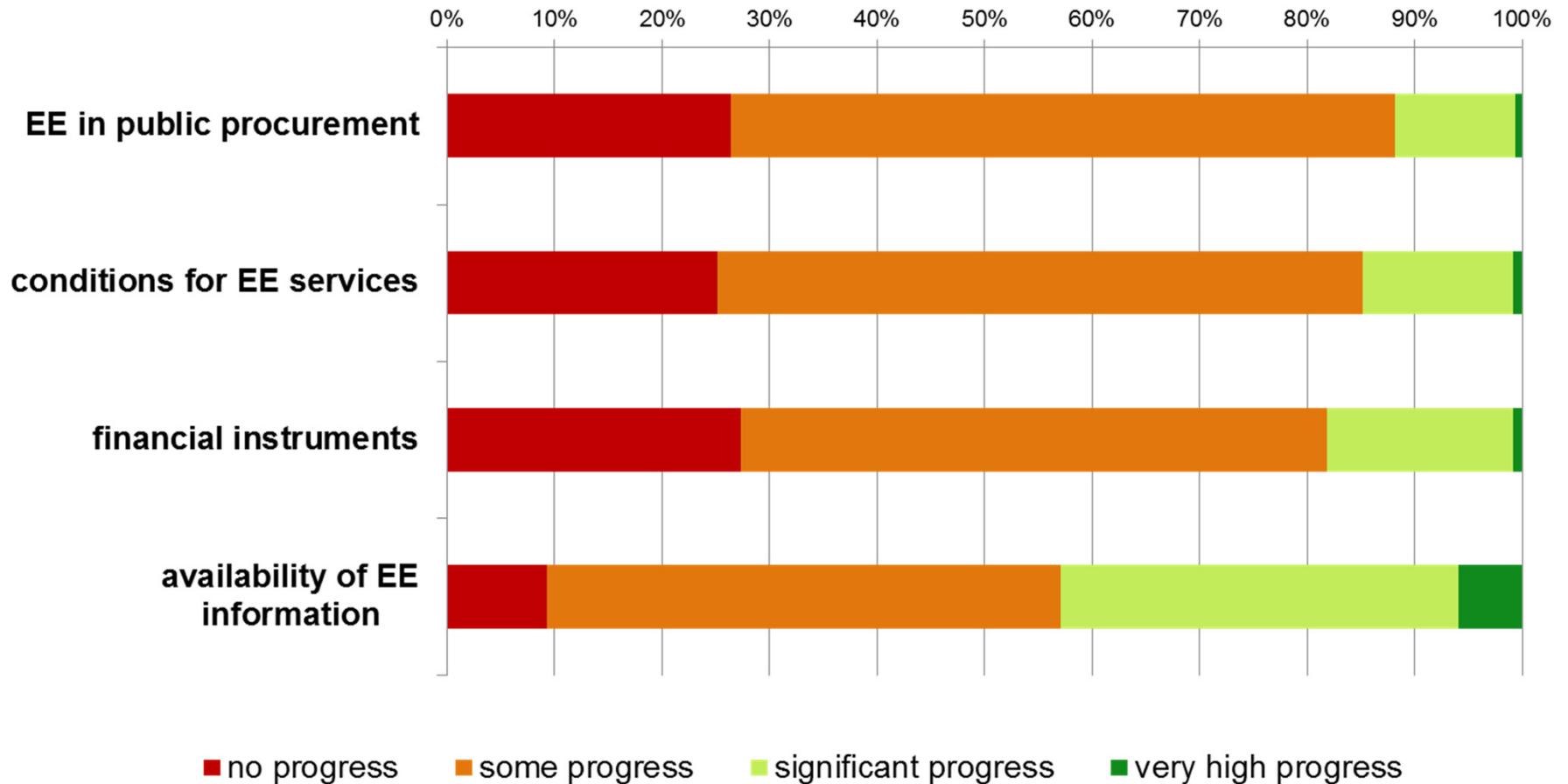
First Results

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

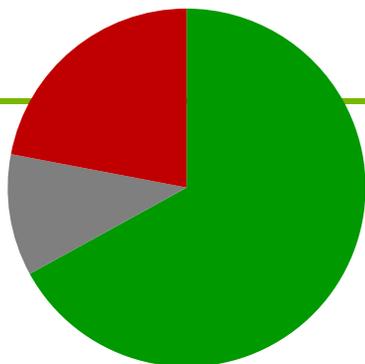
How do you rank the progress in energy efficiency policies in your country in the last 3 years



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



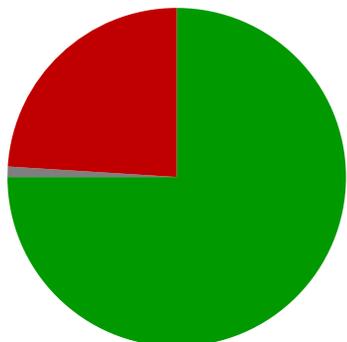
The impact of ambitious energy efficiency policies...



■ support the competitiveness of EU industry | 67%

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

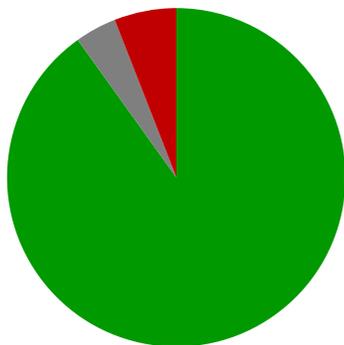
■ depends/neither nor



■ create jobs | 75%

■ destroy jobs

■ depends/neither nor



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

■ do not significantly contribute to innovation

■ depends/neither nor



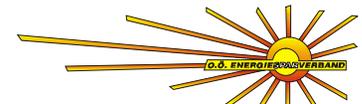
ENERGY EFFICIENCY WATCH

The Energy Efficiency Watch Survey

Presentation of the full survey:

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

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



Please contact us for more information

Ecofys Germany GmbH

Am Karlsbad 11

10785 Berlin

Germany

T: +49 (0)30 297 735 79-0

E: info@ecofys.com

I: **www.ecofys.com**