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*Presqu'île de Giens, France*

# **Paving the way for an energy-efficient future**

## **EE policy developments in EU MS and recommendations for policy adjustment based on findings of Energy Efficiency Watch 3**

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*Transport and Climate Policy*

### **EEW3 team**

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Peter Schilken, Kristina Dely (Energy Cities)

Dominique Bourges (Fedarene)

Nils Borg (eceee)



**ENERGY EFFICIENCY WATCH**

## Managing partners



**EUFORES**



**ESV - Upper Austrian Energy Agency**



**ECOFYS**



**Energy Cities**



**ECEEE – European Council for an  
Energy Efficient Economy**



**Wuppertal Institute**



**FEDARENE - European Federation of  
Regional Energy and Environment Agencies**

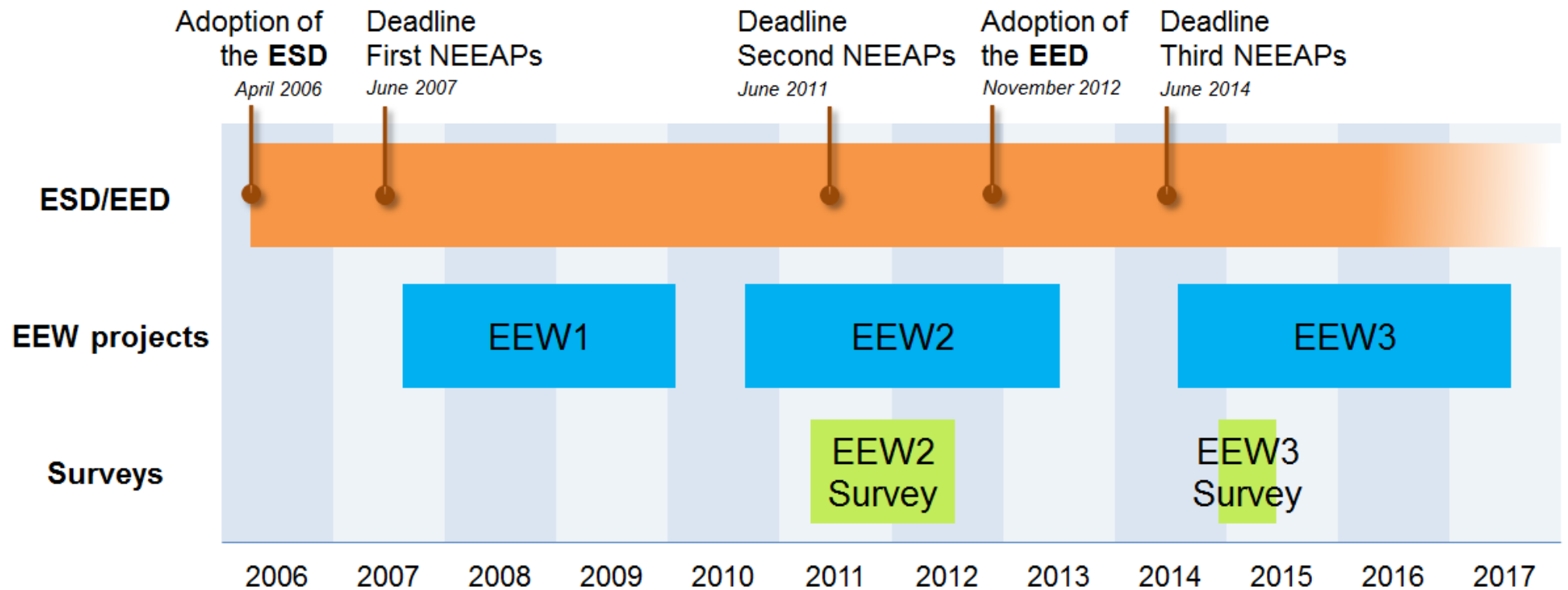
**Co-financed by**



Co-funded by the Intelligent Energy Europe  
Programme of the European Union



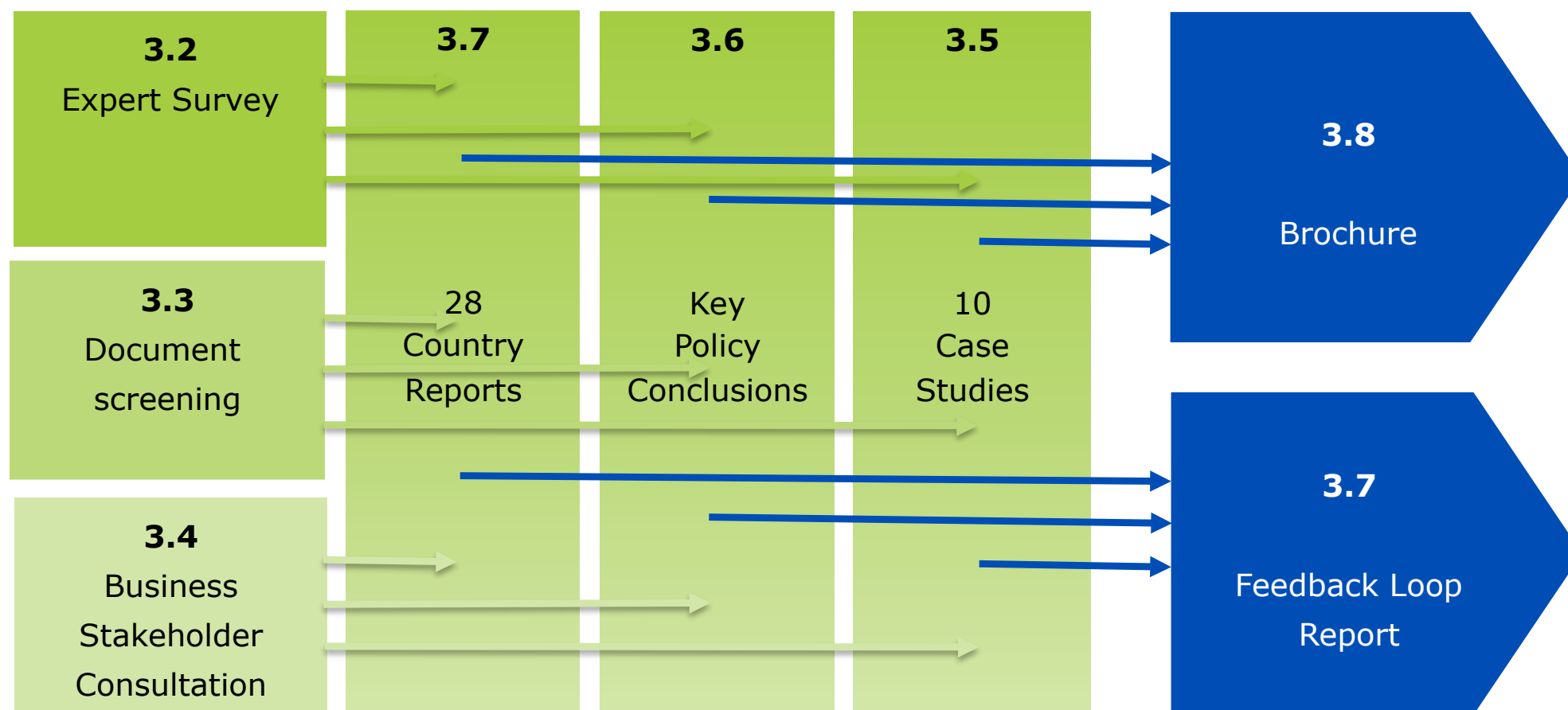
## Timetable



## Input phase

## Analysis + Conclusion phase

## Dissemination phase



## **What are expert's and other relevant stakeholder's perceptions on “real-life” progress in energy efficiency policies in their countries over the last 3 years**

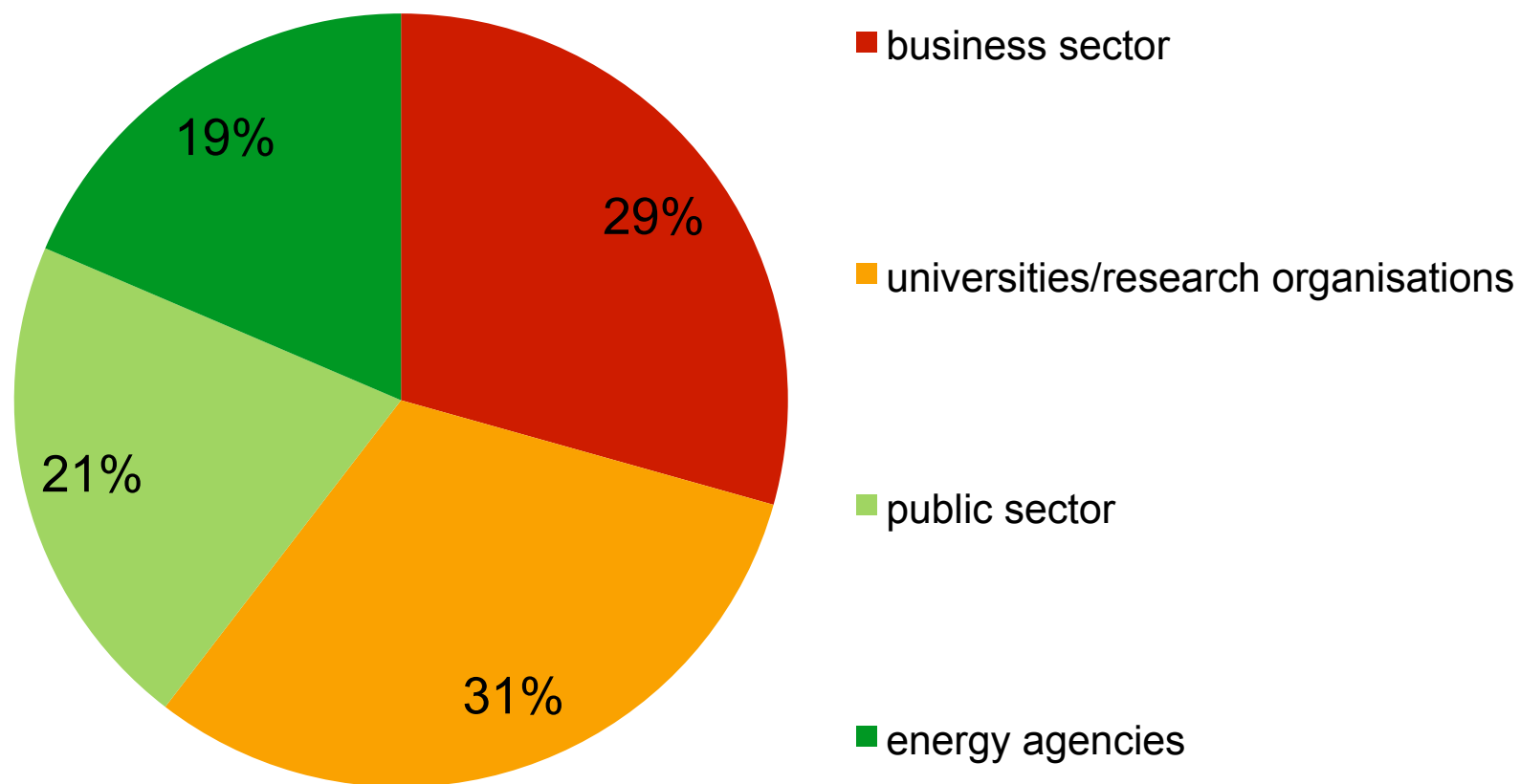
Input from more than 1,100 experts from all 28 Member States

- quantitative survey (questionnaires)
- qualitative survey (oral interviews)
- survey carried out between January and May 2015 by the OÖ  
Energiesparverband (in co-operation with the University of Linz), with  
contributions from ECEEE, Fedarene and Energy Cities



# The EEW3 Expert Survey
















## Completed questionnaires by sectors



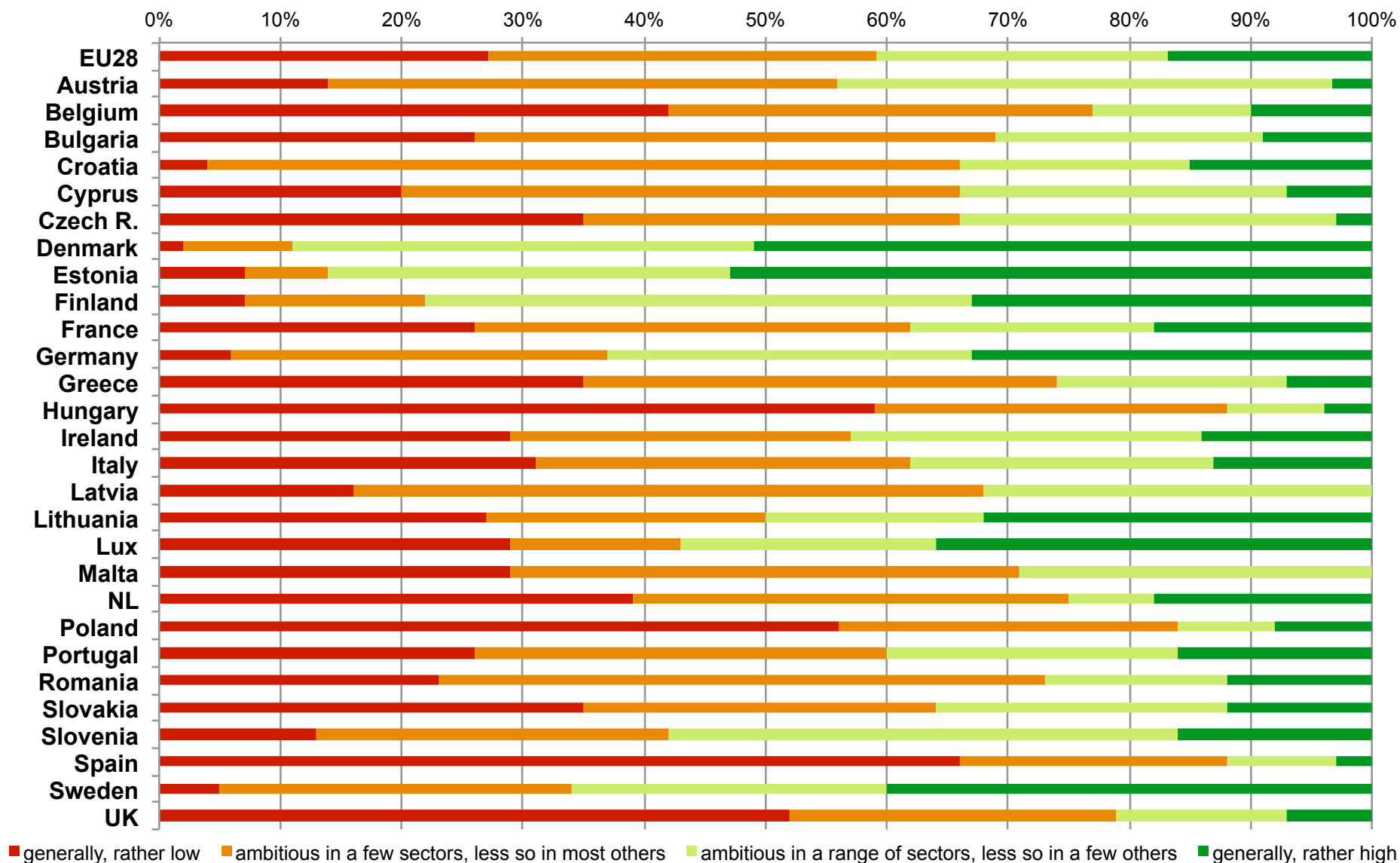
# The EEW3 Expert Survey

## Completed questionnaires by MS

	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

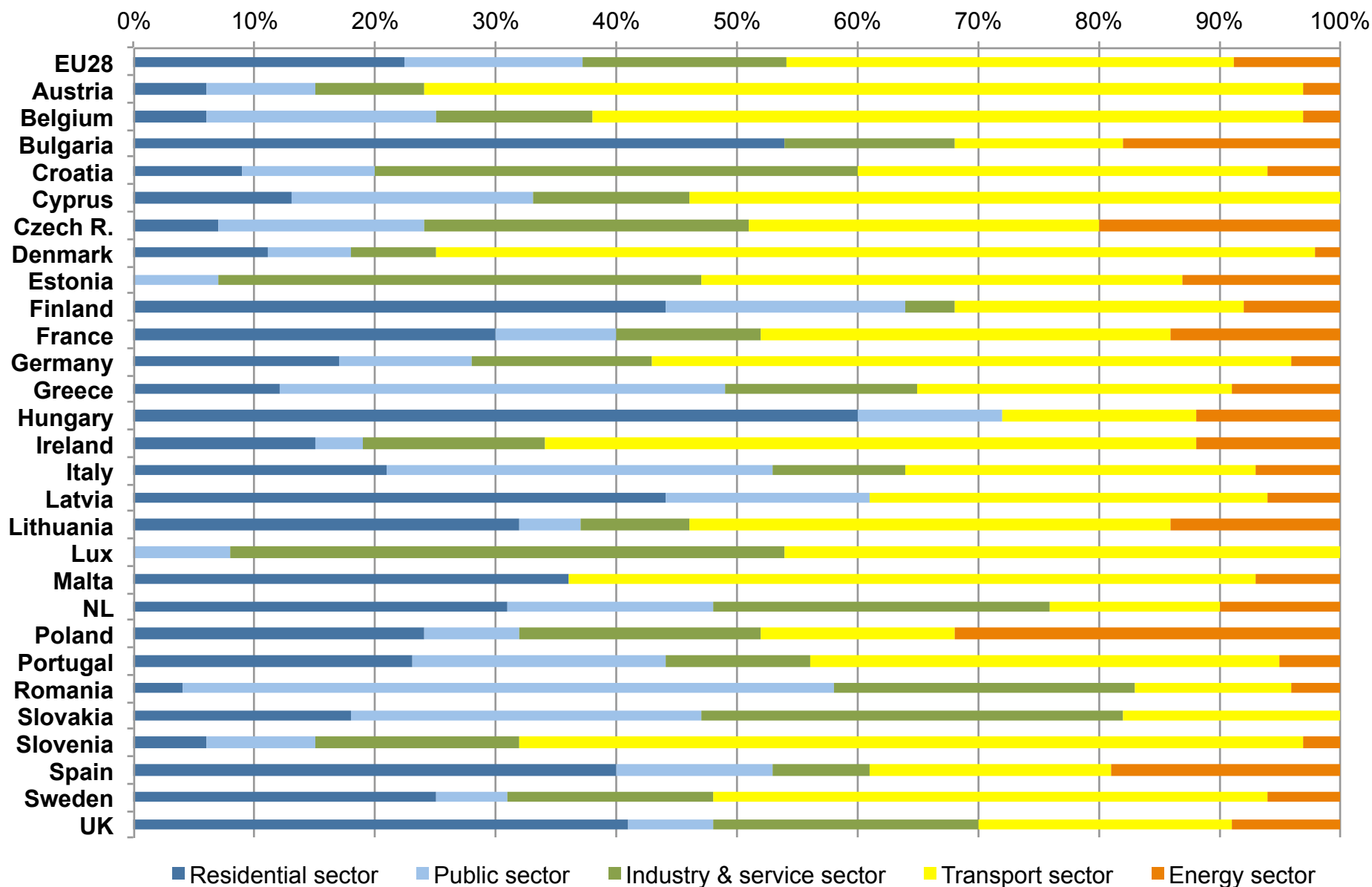
	Italy	77
	Latvia	19
	Lithuania	23
	Lux	14
	Malta	14
	NL	30
	Poland	25
	Portugal	58
	Romania	26
	Slovak Rep.	17
	Slovenia	38
	Spain	66
	Sweden	39
	UK	144
	<b>Total</b>	<b>1096</b>

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





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

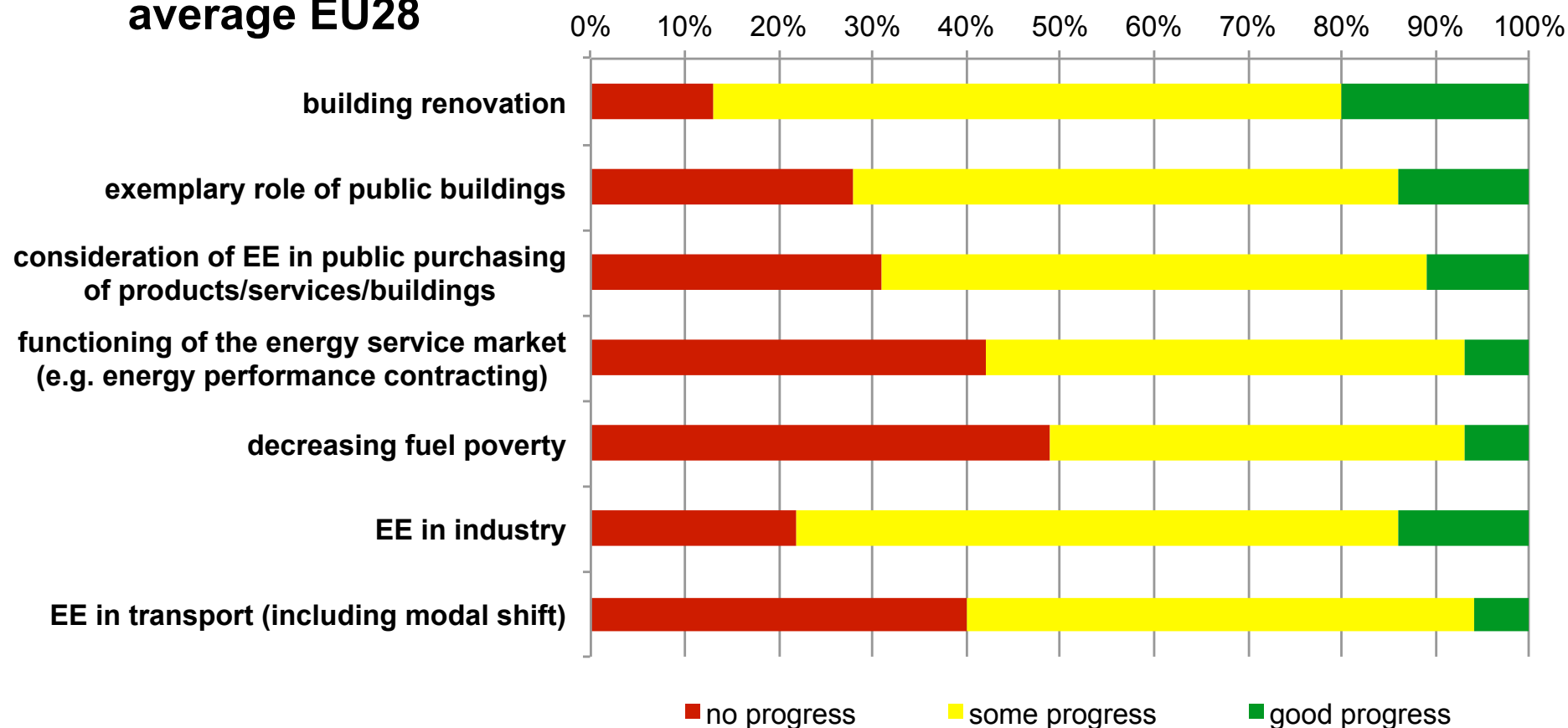


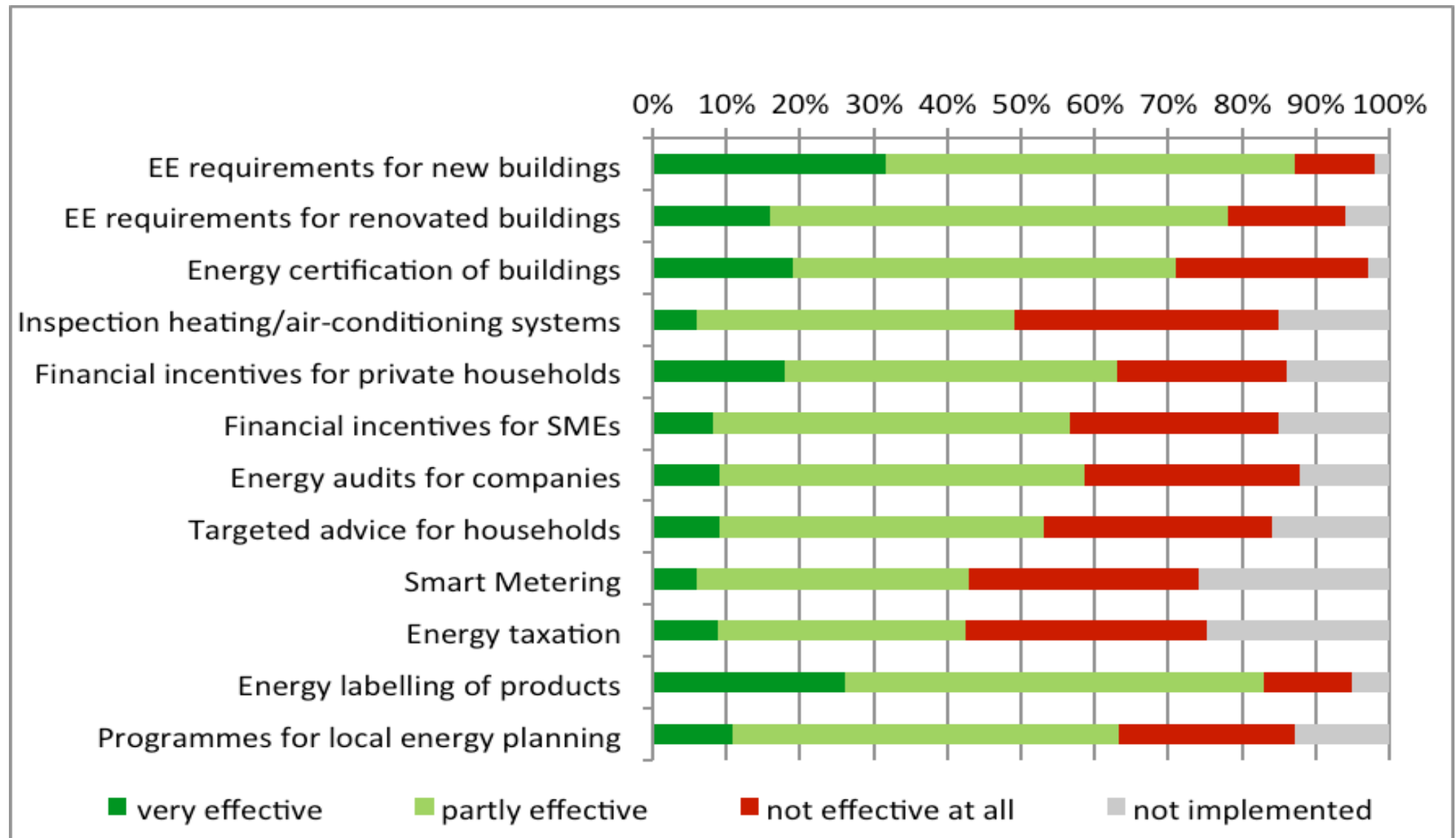
# How do you see the improvements in actual implementation in the last 3 years in the following fields?

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

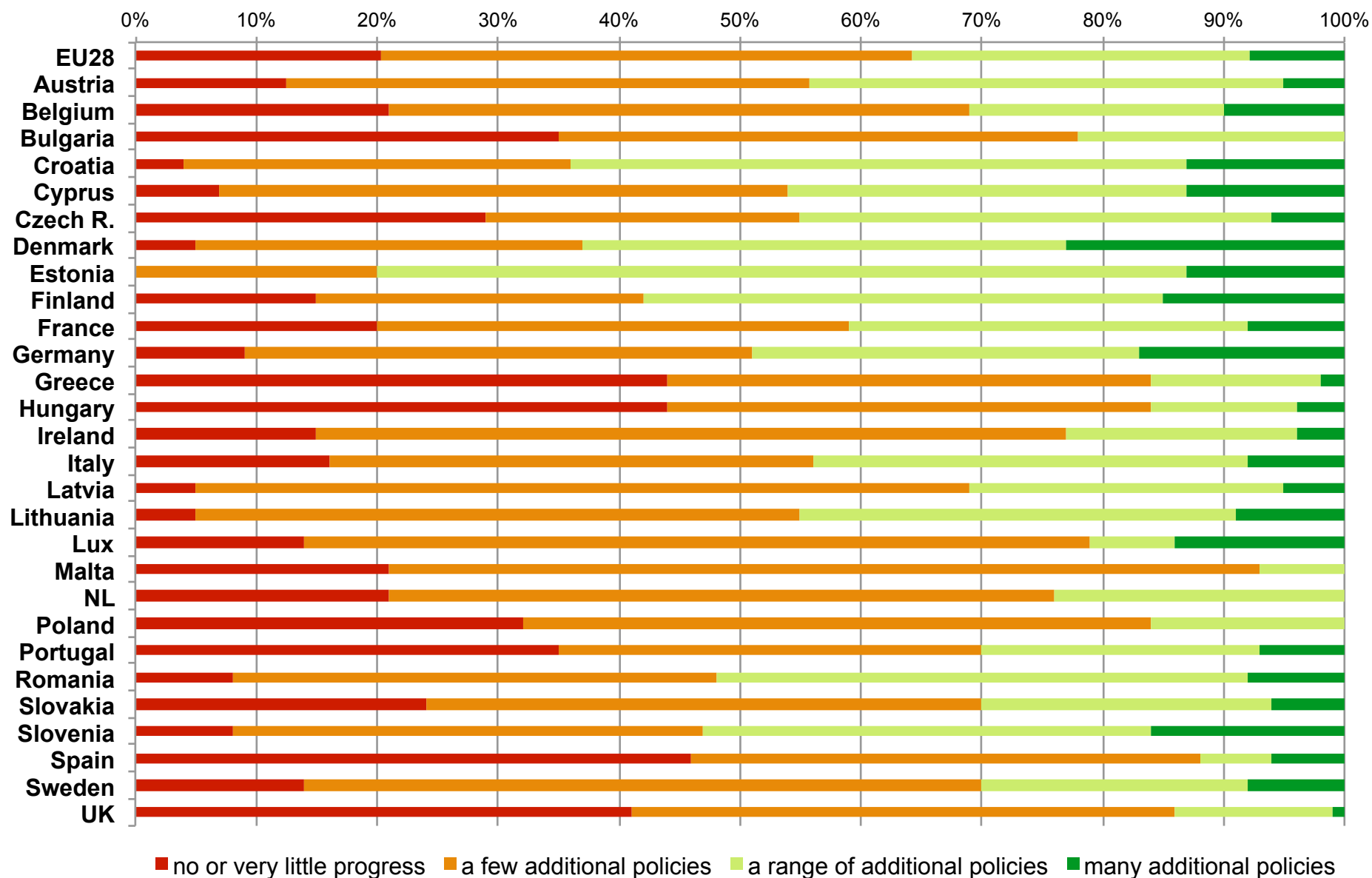
# How do you see the improvements in actual implementation in the last 3 years in the following fields?

## average EU28





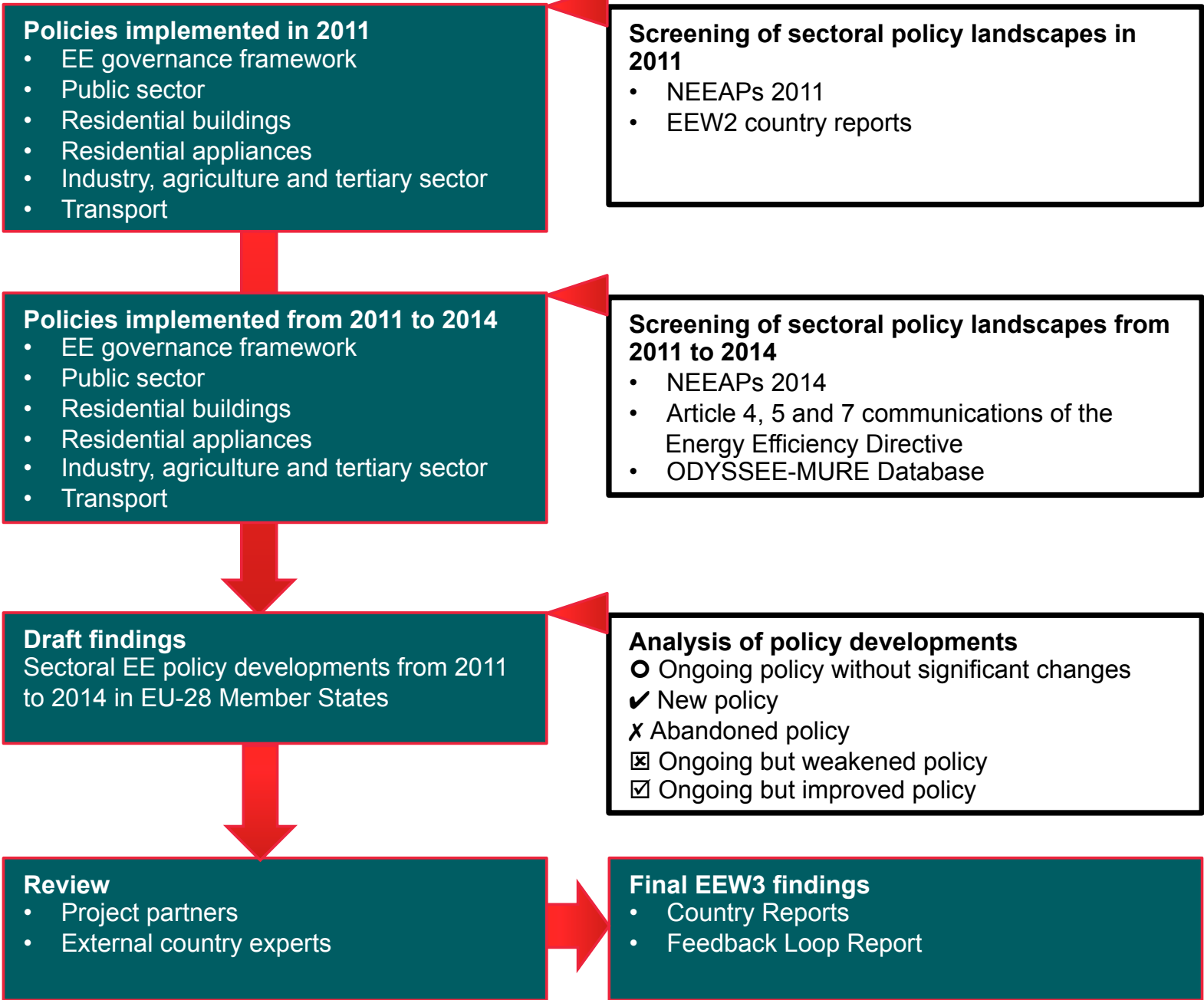
# Expert opinions on the progress of EE policies in their own countries in the last three years



# The EEW3 Expert Survey: findings

## Progress indicators 2015 ranking - comparison 2012

	Austria	5	13	↗		Italy	13	27	↑
	Belgium	13	18	↗		Latvia	15	12	
	Bulgaria	23	16	↘		Lithuania	9	18	↗
	Croatia	10				Lux	10	3	↘
	Cyprus	5	22	↑		Malta	25	3	↓
	Czech Rep.	15	25	↑		NL	19	24	↗
	<b>Denmark</b>	<b>1</b>	<b>2</b>			Poland	22	21	
	<b>Estonia</b>	<b>3</b>	<b>3</b>			Portugal	21	6	↓
	<b>Finland</b>	<b>2</b>	<b>1</b>			Romania	20	23	
	France	12	10			Slovak Rep.	15	26	↑
	Germany	5	6			Slovenia	5	7	
	Greece	24	16	↘		Spain	28	15	↓
	Hungary	26	20	↘		Sweden	4	9	↗
	Ireland	15	11	↘		UK	27	13	↓



## 28 Country reports

### Overall conclusions (1)

- More new and improved than abandoned or weakened policies implemented since 2011
- Speed of implementation too slow - re-inforcement of EU policies remains key
- Unclear whether the savings targets of Art. 3 and Art. 7 will be fulfilled
- Energy Efficiency Obligation schemes take time to implement and to increase to levels required to meet the 1.5% target
- Alternative measures and all policy implementation appear to suffer from a lack of funding and staff



ENERGY EFFICIENCY WATCH



Wuppertal  
Institut

#### Energy Efficiency Policies in Europe

Analysis of National Energy Efficiency Action Plans  
and Policies in EU Member States 2014



#### Country Report



Germany



ENERGY EFFICIENCY WATCH

#### Politiques d'efficacité énergétique en Europe

Analyse des plans d'action nationaux en matière d'efficacité énergétique  
et politiques dans les Etats-membres en 2014



#### Rapport National



France



- Enormous disparity among MS in levels of ambition and progress of EE policies
- Progress fluctuations due to austerity policy and political changes (EU policy ensures that there is at least minimum progress!)
- "older" policy instruments perceived to have most impact (energy efficiency requirements and certification of buildings, product labelling)
- Focus on building renovation shows some impact; continues to be a key area for action with a package of financing and regulatory instruments
- Involvement of the regional and local level gets even more important

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**Thank you**  
**for your attention**

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<http://www.energy-efficiency-watch.org/>

### **Overarching energy efficiency governance framework**

Art. 3 targets (and several long-term 2050, **e.g.** DE, FI, FR), many new EEOs or strengthened (DK, FR, IT), but also weakened (UK)

Energy agencies already in 2011; depts. more staff (CZ, DE), also less (NL)

EE Funds up (DE, ES, FR, IE, IT, SK, SI), some down (BG, DK)

More ESCO market support (CZ, DK, EE, GR, IT, PT, (UK))

Little change on energy taxation (PT increased VAT: 6 -> 23%)

**Good practice case studies:** EEOs in Italy and Denmark

### **Public sector**

Was sector best addressed with EE policies (lead by example, procurement, buildings) in 2011 (EEW2) => most programmes ongoing or slightly improved

However, many countries lack clear strategies and targets for the sector

Some new soft loan or grant schemes for municipalities (CZ, DK, HU, IT, PL) or stopped (LV)

**Good practice case study:** Public procurement in the Netherlands

### **Residential sector – buildings**

MEPS/Codes and EPC in force, but EE level and updating frequency varies

Loans & grants already in 2011, some recent upgrades (BG, DE, FR, HR, LU, SK), others reduced e.g. due to crisis (ES, IE, PT)

Audits&advice improved in some MS (DK, LT, MT), reduced in others (GR)

Training improved in some MS (EE, ES, FR, GR), also with BuildUp

**Good practice case studies:** loans&grants (DE, SK), codes (DK), coordination (NL)

### **Residential sector – appliances**

Most MS rely on EcoDesign and EU label; little info on market surveillance

Few financial incentive programmes (FR, IT, HR, SI)

Many but not all MS have info campaigns, databases (TopTen and others)

Very little mention of training for retail staff and other actors

**Good practice case study:** Nordic market surveillance

### Industry, tertiary sector and agriculture

Transposing mandatory audits for non-SMEs, EcoDesign&Labeling some effect

Many MS have financial incentives or loans for audits, energy management or investments (new schemes in DE, EE, FR, GR, PL) , also under EEOs, others reduced (FR, IE, IT, MT, RO)

Some voluntary agreements (BE, EE, FI, LV, LU, NL, UK), some abandoned (EEOs instead, DK; SE due to state aid rules)

Few EE networks (DE, IE) or energy manager obligations (IT, RO)

**Good practice case studies:** Network (IE); EEOs in Italy; loans (SK)

### Transport sector

Weakest sectoral policy in 2011; few changes:

Vehicle taxes based on emissions (BE, CY), road pricing (BE), support for EVs (many), also for modal shift; EEOs in FR; SUMPs (many)
















**Good practice case study:** Car registration tax (LV)

- Developing positive European and national narratives on energy efficiency
- Better communication and higher effectiveness of energy efficiency policies
- Fostering innovative business models
- Introducing binding and specific targets and effective financial instruments

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

