



ENERGY EFFICIENCY WATCH

SURVEY REPORT 2015

SUMMARY AND MAIN CONCLUSIONS

Progress in energy efficiency policies in the EU Member States - the experts perspective

Findings from the Energy Efficiency Watch Project



Co-funded by the Intelligent Energy Europe
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Summary and main conclusions

The project

Over the last 10 years, the importance of energy efficiency in European policy has steadily increased. Today, energy efficiency is a key element on the EU's political agenda. Policy makers are progressively recognising energy efficiency as a suitable means to address the triple challenge of economic recovery, energy dependency and climate change.

The European Union is committed to saving 20 % of its primary energy consumption by 2020. A range of policies were adopted in the past decade to achieve this target, among them the Directives on energy end-use efficiency and energy services (ESD), on the energy performance of buildings (EPBD) and the Energy Efficiency Directive (EED) as well as the Ecodesign Directive and the Energy Labelling Directive. As a part of the ESD and EED implementation, the Member States had to submit three National Energy Efficiency Action Plans (NEEAPs), scheduled for 2007, 2011 and 2014.

Starting in 2006, Energy Efficiency Watch (EEW) projects accompanied this process. The EEW facilitates the implementation of EU energy efficiency policies by collecting information on this process and by providing this information to a variety of stakeholders, including European, national, regional, local policy makers and experts.

The EEW is co-funded by the Intelligent Energy Europe programme and coordinated by Eufores. The current project (EEW3) runs from summer 2014 to summer 2017.

One key activity of the EEW3 project was **an extensive survey on the implementation results of the second NEEAPs in the 28 Member States**. The aim of the survey was to learn from stakeholders and experts **how they see the progress of energy efficiency policies and their implementation in different sectors since the second NEEAP in their respective country**. It was carried out in the first half of 2015. A similar survey was done in 2011/2012 as a part of the EEW2 project.

The survey consisted of a **quantitative survey**, using a questionnaire (1096 questionnaires were completed) and a **qualitative survey**, using an interview guideline (3 experts in each Member State were interviewed).

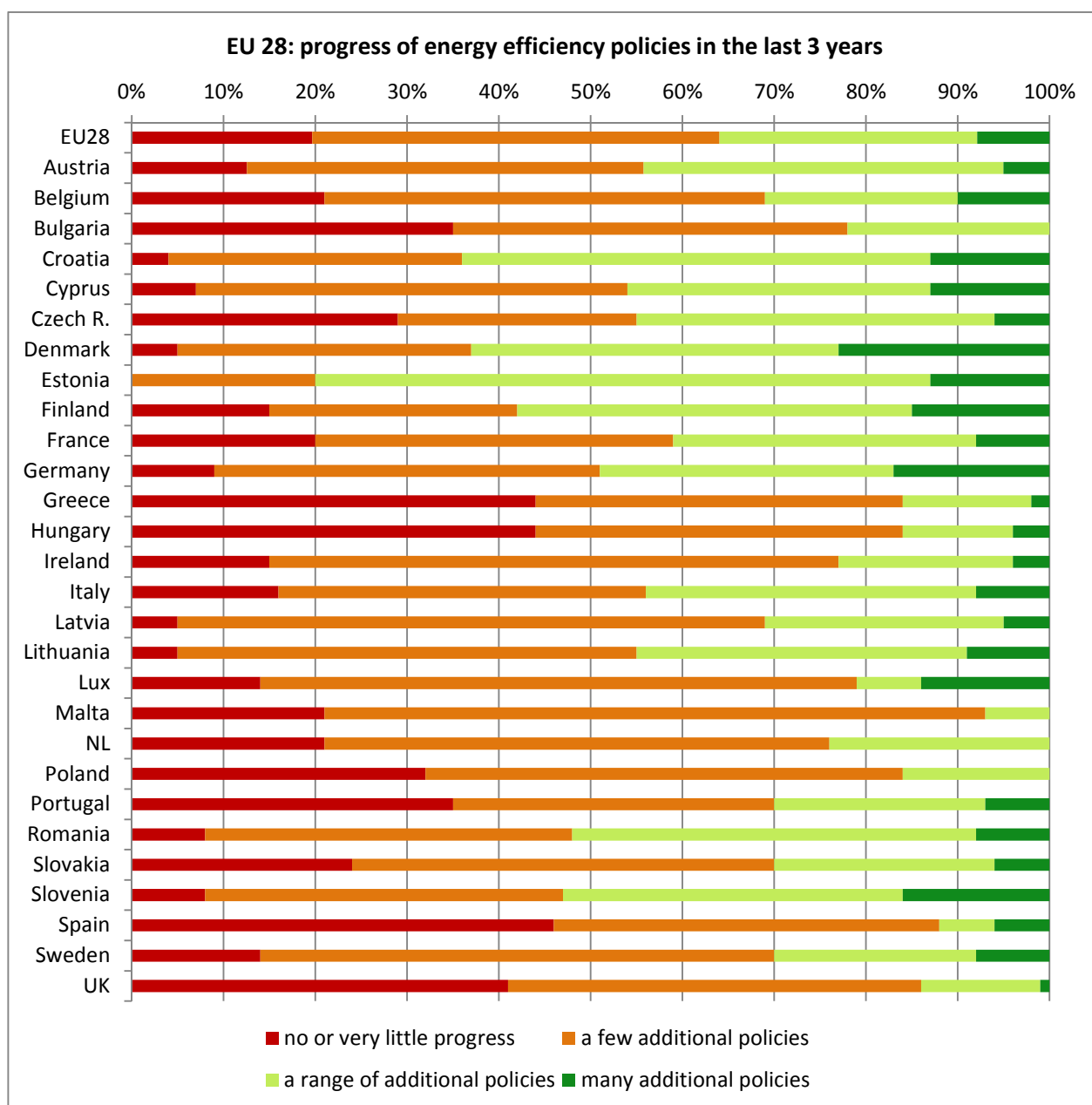
In total, more than 1,100 experts from all 28 EU Member States were consulted about the progress of energy efficiency policies in their own country in the last 3 years.

Main findings and conclusions

Ups and downs - a change of pace needed















































The adoption of the EED with its changed and more ambitious framework required a change of pace by the Member States in terms of extent and speed of the development and implementation of their energy efficiency policies. Despite good developments in some countries and in some policy fields, in overall terms, policy progress is still much too slow or even nearly absent in several Member States.

This graph shows how the experts see the progress in energy efficiency policies in their country in the last 3 years.



The survey showed enormous disparity among Member States in levels of ambition and progress of energy efficiency policies - just as the 2012 survey had. Comparing the level of progress across Member States to the 2012 survey, quite a lot of "up-and-down" movements can be observed. This was often triggered by changes in national governments which resulted in either more or less interest and priority for energy efficiency. Austerity policies also had an impact on the availability of funding programmes for energy efficiency in some Member States.

The following table shows a ranking in the levels of progress of the Member States from the 2015 survey (in blue) and the 2012 survey (in grey).

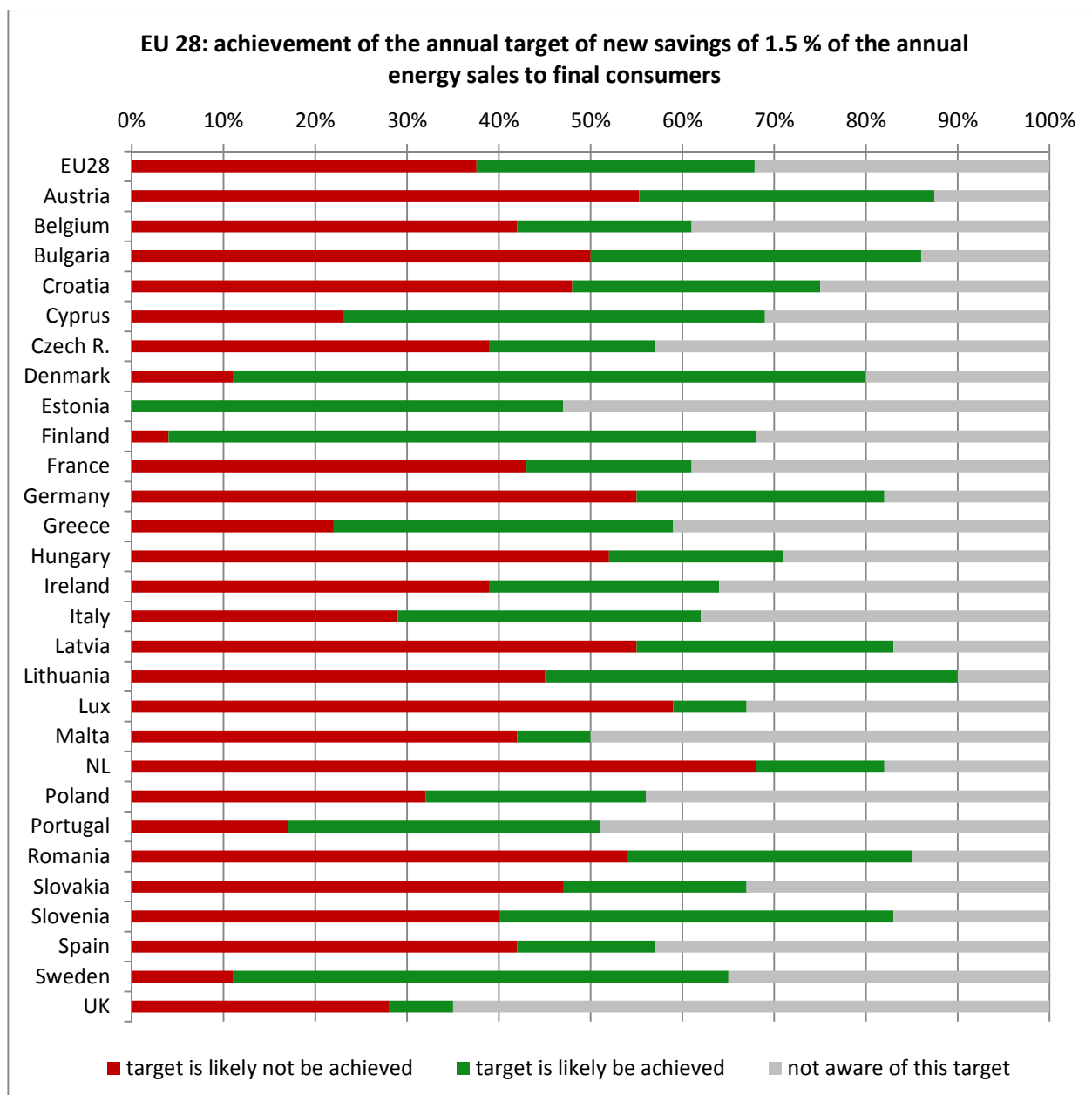
	Austria	5	13			Italy	13	27	
	Belgium	13	18			Latvia	15	12	
	Bulgaria	23	16			Lithuania	9	18	
	Croatia	10				Lux	10	3	
	Cyprus	5	22			Malta	25	3	
	Czech Rep.	15	25			NL	19	24	
	Denmark	1	2			Poland	22	21	
	Estonia	3	3			Portugal	21	6	
	Finland	2	1			Romania	20	23	
	France	12	10			Slovak Rep.	15	26	
	Germany	5	8			Slovenia	5	7	
	Greece	24	16			Spain	28	15	
	Hungary	26	20			Sweden	4	9	
	Ireland	15	11			UK	27	13	

These ups-and-downs in energy efficiency policy will continue as long as the multiple benefits of energy efficiency are not sufficiently understood by national policy makers and stakeholders and have not become an integral part of security and economic policy - instead of "just" a climate policy. In some European countries, the understanding of the positive economic, environmental and social impacts of energy efficiency has already allowed it to become independent of political fluctuation and an inherent part of energy and economic policies.

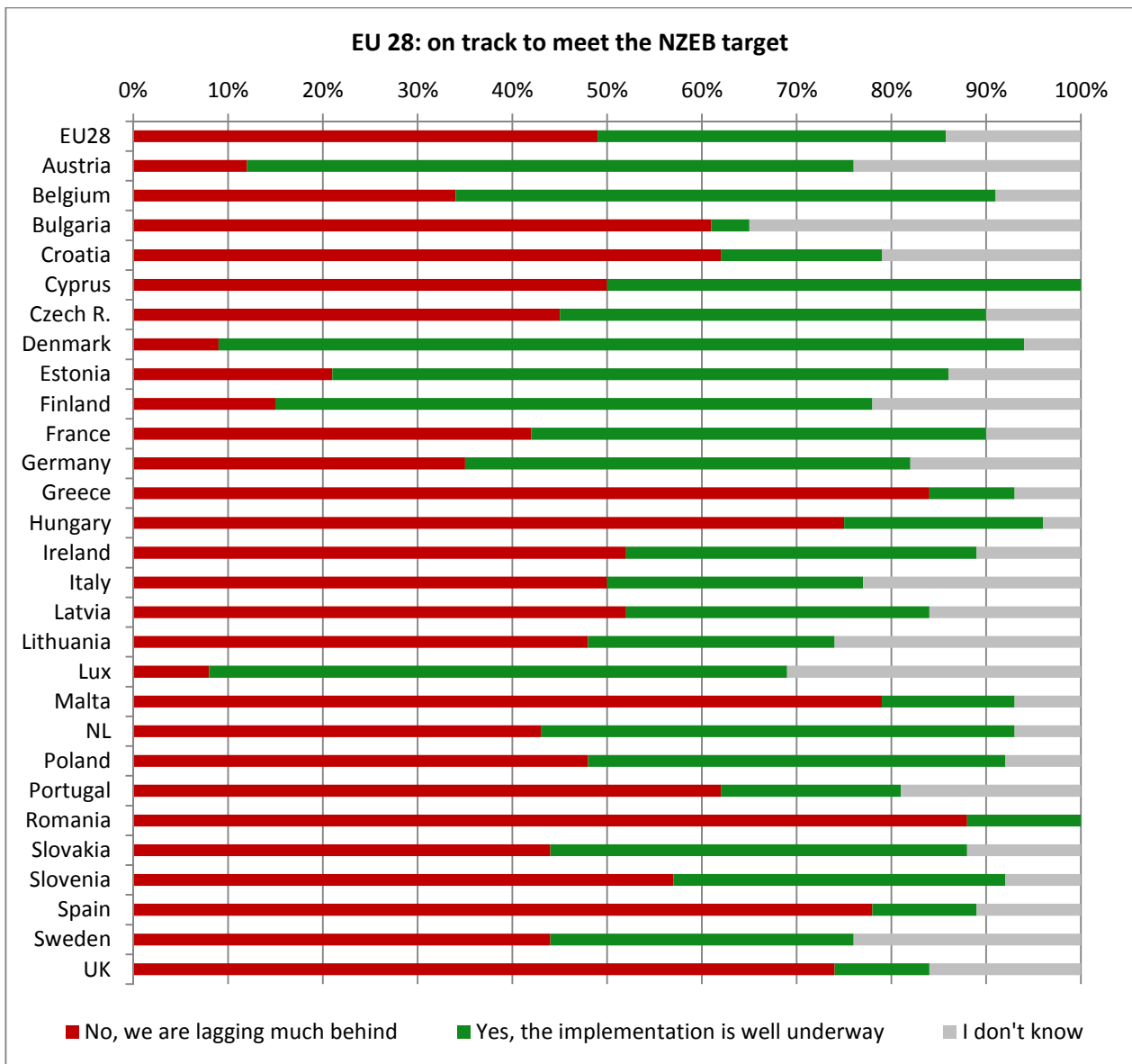
However, as long as this is not the case for the majority of Member States, rigorous implementation of ambitious EU policy remains key. It ensures that even in those countries affected by a decline in their energy efficiency policies, at least a minimum level of policy activities is maintained.

Targets and obligations: a very mixed picture

The EED foresees an annual target of new savings of 1.5 % of the annual sales to final consumers (Art. 7 of the EED). This target is not well known among the experts. Only in 10 countries do more than a third of the experts deem the target to be achievable.



A somewhat more positive picture presents itself in relation to the obligation under Article 9 of the EPBD, which requires all new buildings to be nearly zero-energy buildings (NZEB) by the end of 2020 and public buildings already by end of 2018. Nevertheless, in 14 countries, 50 % or more of the experts believe that their country is lagging very much behind in their building policies.





In contrast to these delays, the survey clearly showed that in those countries that implemented timely and well-designed policies supporting these targets, significant progress in energy efficiency was made.

Policy instruments - what works and what does not

The survey also looked at how effective specific energy efficiency policy instruments were perceived to be in the Member States. Energy efficiency requirements for new buildings and the energy labelling of products are seen as effective policy instruments by more than 70 % of the experts in 25 Member States. Also energy efficiency requirements for renovated buildings are perceived to be effective in nearly 80 % of the Member States. On the other end of the spectrum, energy taxation, smart metering and the inspection of heating and air-conditioning systems and smart metering are to be found.

How effective are the following policy instruments in your country?

Number of countries

	 Over 70 % see them as partly/very effective	 Over 30 % see them as not effective
EE requirements for <u>new buildings</u>	26	2
Energy <u>labelling</u> of products	25	0
EE requirements for <u>renovated buildings</u>	23	2
Energy <u>certification</u> of buildings	15	8
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>	2	17
Smart metering	2	17
Energy taxation	4	21

Experts also stressed that with the changing role of energy consumers to prosumers, the involvement of the regional and local levels becomes even more important.

When asked which policy measures the energy efficiency experts would like to see at EU level, the two most popular measures were "a large European energy efficiency fund (giving both grants and loans)" and "stricter minimum standards for buildings and appliances".

EU 28: measures which should be introduced on EU level

