ENERGY EFFICIENCY WATCH

SURVEY REPORT 2015

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 Programme of the European Union

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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.

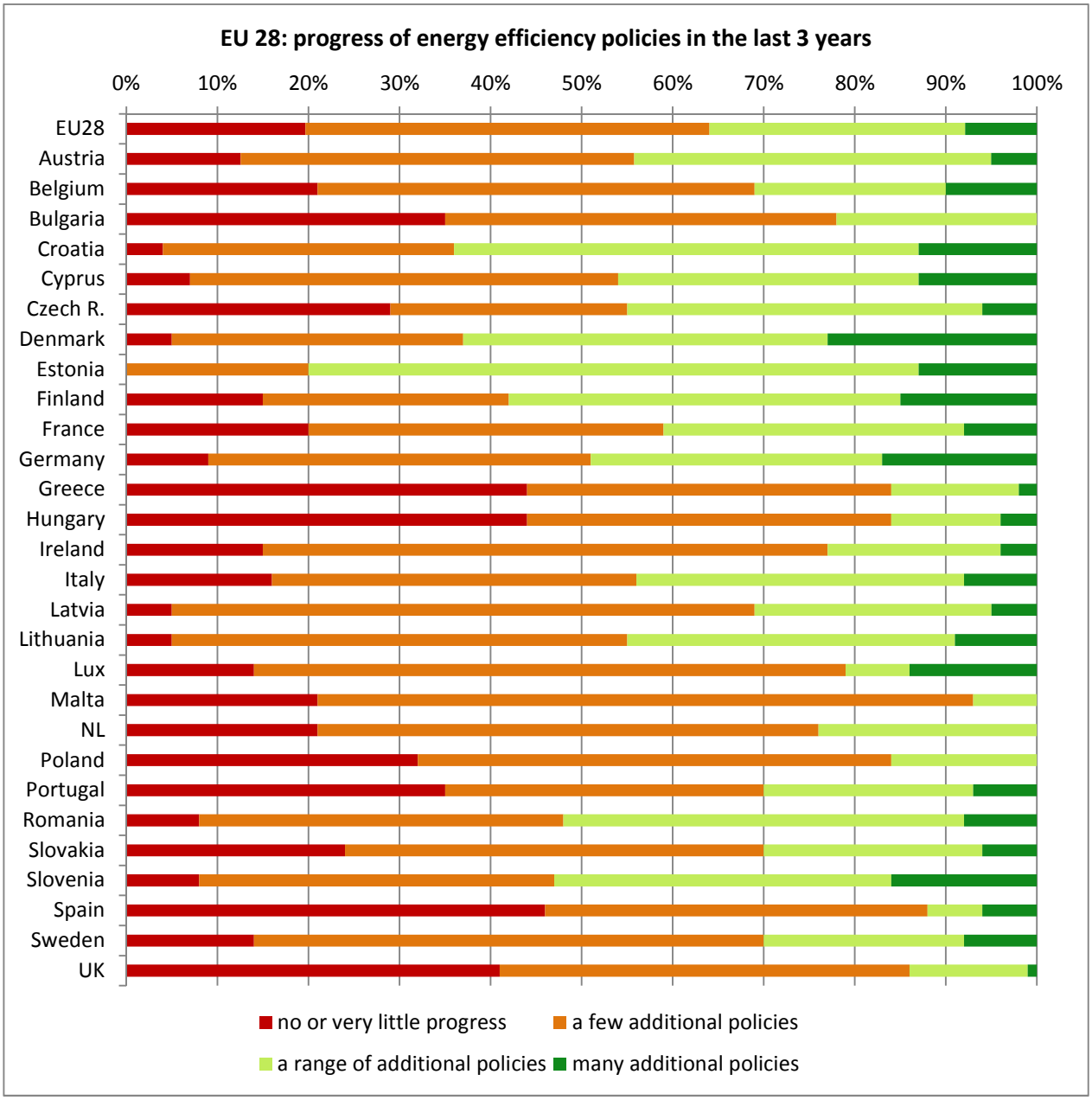
The survey consisted of a **quantitative survey**, using a questionnaire (1096 questionnaires were completed) and a **qualitative survey**, using an interview guideline (3 experts in each Member State were interviewed).

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.

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).

Progress indicator 2015 - Comparison 2012

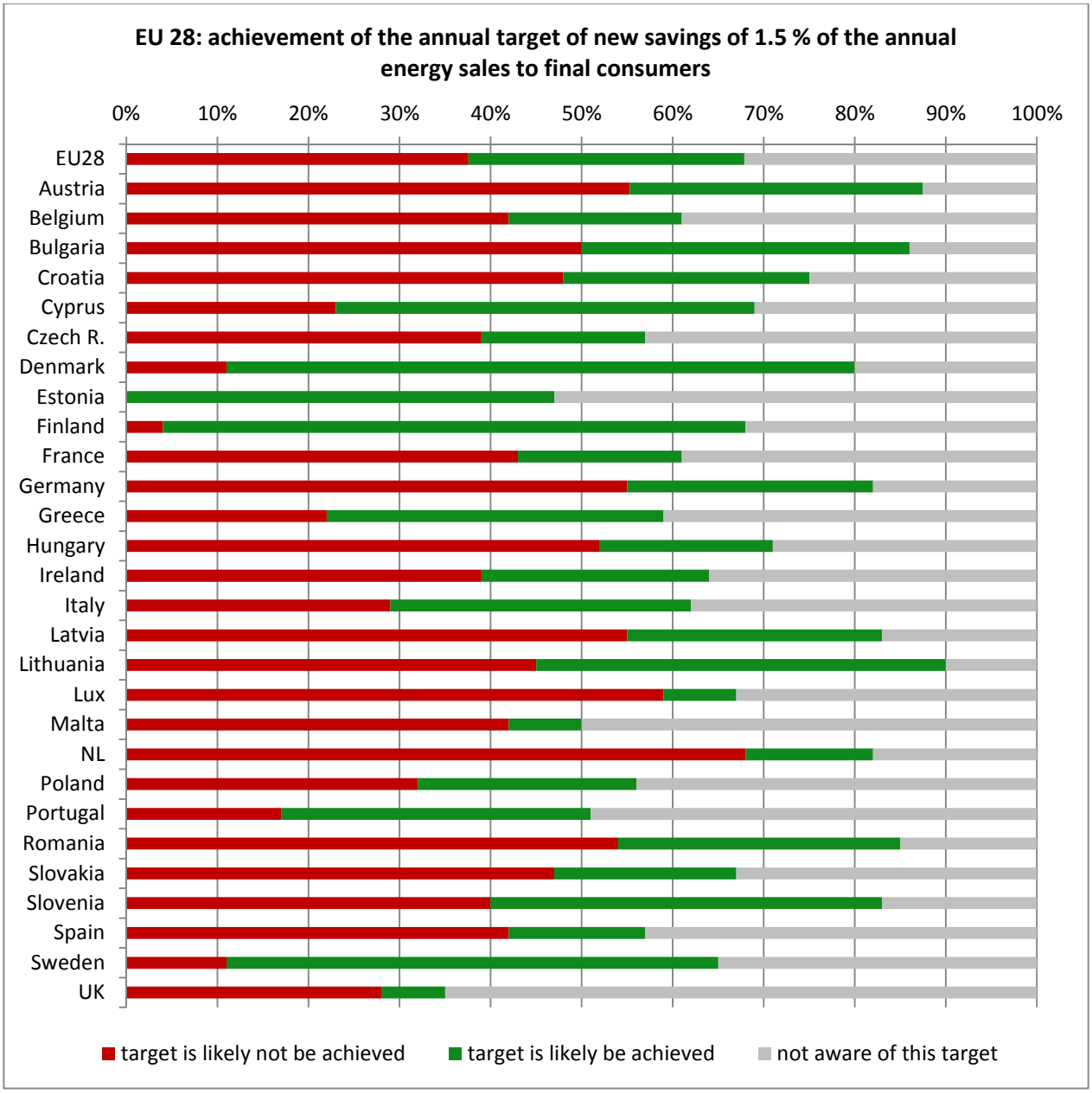
Austria	5	13	↗	Italy	13	27	↑
Belgium	13	18	↗	Latvia	15	12	
Bulgaria	23	16	↘	Lithuania	9	18	↗
Croatia	10			Lux	10	3	↘
Cyprus	5	22	↑	Malta	25	3	↓
Czech Rep.	15	25	↑	NL	19	24	↗
Denmark	**1**	**2**		Poland	22	21	
Estonia	**3**	**3**		Portugal	21	6	↓
Finland	**2**	**1**		Romania	20	23	
France	12	10		Slovak 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.

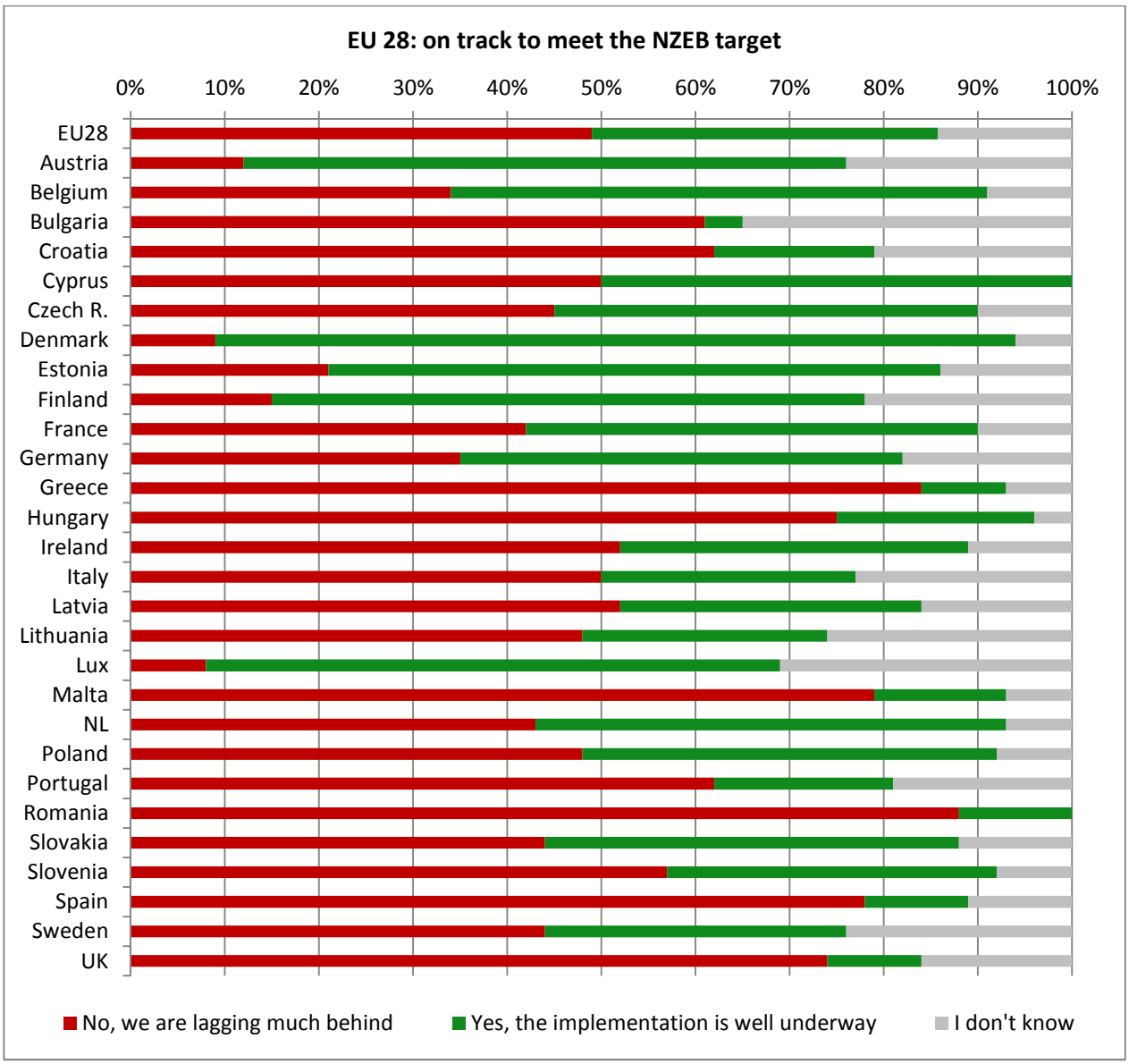
However, as long as this is not the case for the majority of Member States, rigorous implementation of ambitious EU policy remains key. It ensures that even in those countries affected by a decline in their energy efficiency policies, at least a minimum level of policy activities is maintained.

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.

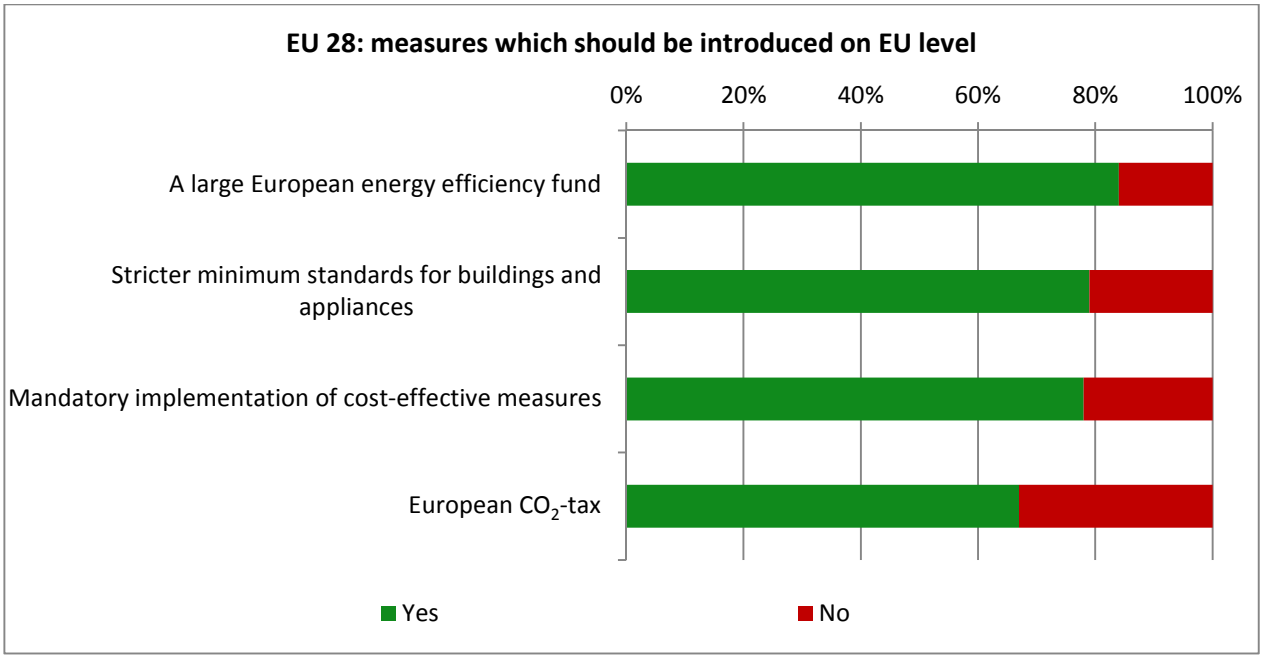
How effective are the following policy instruments in your country?

Number of countries

	Over 70 % see them as **partly/very effective**	Over 30 % see them as **not effective**
EE requirements for new buildings	26	2
Energy labelling of products	25	0
EE requirements for renovated buildings	23	2
Energy certification of buildings	15	8
Programmes for local energy planning	12	10
Financial incentives for private households	11	9
Financial incentives for SMEs	6	11
Energy audits for companies	6	12
Targeted advice for households	6	13
Inspection heating/air-conditioning	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".



Introduction and objectives

The policy framework

Over the last 10 years, the importance of energy efficiency in European policy has steadily increased. Today, energy efficiency is a key area of 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 compared to a business-as-usual scenario. The EU "Europe 2020 Strategy" for jobs and smart, sustainable and inclusive growth (COM(2010) 2020) includes energy efficiency among its headline targets. The European Council set an indicative target at the EU level of at least 27 % for improving energy efficiency in 2030.

In line with this changed approach, the "Energy Union Package" (COM(2015) 80 final) shows a clear commitment to energy efficiency. It states that the necessity to treat it as an energy source in its own right and the intention to ensure that energy efficiency and demand side response can compete on equal terms with generation capacity.

This increased recognition of energy efficiency policies resulted in a range of policies, most notably in the adoption of the following Directives:

- the Energy Efficiency Directive (2012/27/EU, EED)
- the Energy Performance of Buildings Directive (2010/31/EU, EPBD)
- the Ecodesign Directive (2009/125/EC) and
- the Energy Labelling Directive (2010/30/EU)

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. NEEAPs set out estimated energy consumption, planned energy efficiency measures and the improvements individual EU countries expect to achieve. In addition to that, Member States must report the progress achieved towards their national energy efficiency targets on an annual basis.

Starting with 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.

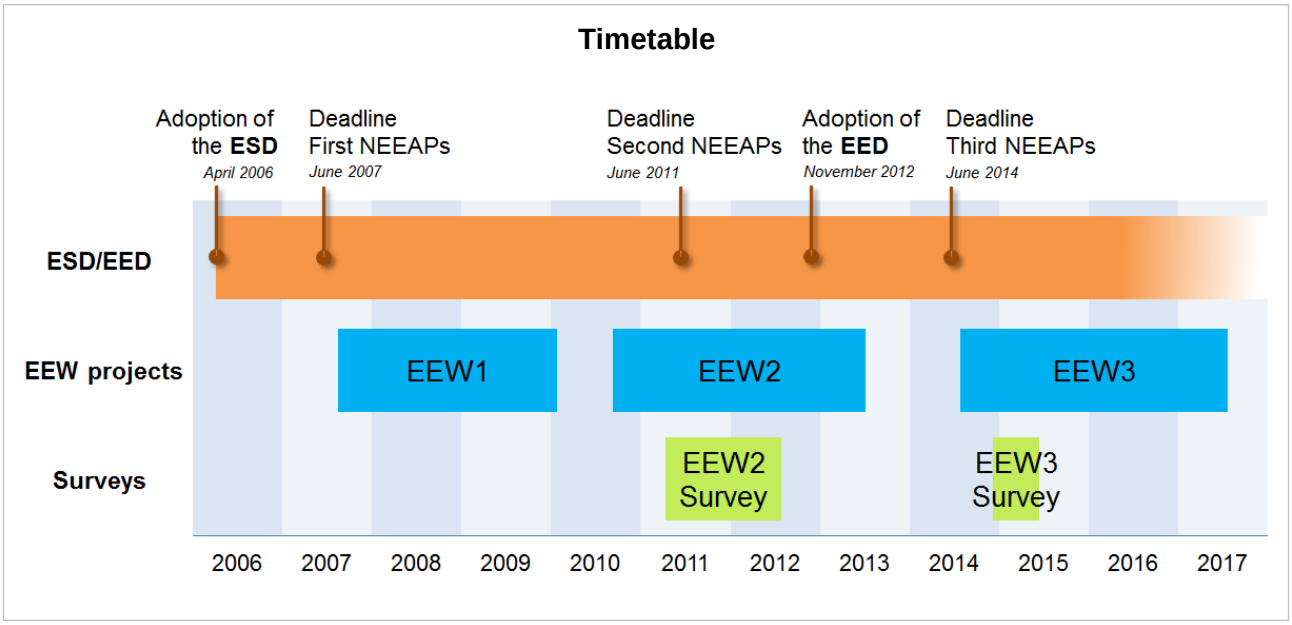
The EEW is co-funded by the Intelligent Energy Europe programme and coordinated by Eufores. The current project (EEW3) runs from summer 2014 to summer 2017.

The Energy Efficiency Watch Project

Starting with 2006, Energy Efficiency Watch (EEW) projects accompanied this policy process.

The EEW facilitates the policy implementation process of EU energy efficiency policies and supports market transition by collecting information on the implementation of energy efficiency policies and providing this information to a variety of stakeholders, including European, national, regional, local policy makers and experts. It creates a feedback loop on the implementation of European and national energy efficiency policies and thus enables mutual learning on effective policy making across the EU. It screens progress of national policies, looks into legislative documents, seeks experts' knowledge and creates new consultation platforms with a wide spectrum of stakeholders (parliamentarians, regions, cities, business and expert stakeholders). The NEEAPs are a central element in the EEW projects.

The EEW is co-funded by the Intelligent Energy Europe programme and coordinated by Eufores. The current project (EEW3) runs from August 2014 to August 2017. It directly builds upon its two predecessor projects (EEW1: September 2007 to February 2010 and EEW2: September 2010 to August 2013). Further information about this project at www.energy-efficiency-watch.org.



The EEW survey: the experts perspective on the progress in energy efficiency policies since the second NEEAP

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 "real-life" progress of energy efficiency policies and their implementation in different sectors since the second NEEAP in their respective country.

The survey was carried out in the first half of 2015. A similar survey was done in 2011/2012 as a part of the EEW2 project.

In order to get a comprehensive picture, it gathered opinions and experience from a wide range of key actors. Experts were consulted in order to learn about the progress in energy efficiency policies on Member State level since 2011. The aim was to learn how far the implementation of energy efficiency policies has progressed in the opinion of persons with day-to-day work in the energy efficiency field.

The survey consisted of two different elements:

- a quantitative survey, using a questionnaire (1096 questionnaires were completed and used to draw conclusions) and
- a qualitative survey, using an interview guideline (3 experts in each Member State were interviewed, in total, 84 experts).

The focus of the questions both in the quantitative and in the qualitative survey was on the progress of energy efficiency policies and their implementation in different sectors since the second NEEAP. More information on the approach and the results of these two surveys can be found in the following chapters and in the annex.

In total, more than 1,100 experts from all 28 EU Member States were consulted about the progress on energy efficiency policy in their own country.

Key results of the survey are also included in the 28 country reports published in the context of the Energy Efficiency Watch project. These reports address changes in policies implemented since 2011 by each Member State and their plans.

Approach and methodology of the survey

The approach chosen for the stakeholder survey aimed at reflecting the variety of experiences of a broad range of actors spanning 28 countries with vast differences both in energy efficiency policy traditions as well as in specific progress in the past years.

Stakeholders consulted came from the business field, the research and consultancy community, from the national, regional and local levels (administrations and energy agencies), as well as from NGOs and associations.

Similar to the approach taken in the 2012 survey, the following methods were chosen to collect inputs:

- the quantitative survey, using a questionnaire, aimed at reaching a large number of stakeholders and providing an insight into overall trends, mostly in which sectors progress was made and which sectors not

- the qualitative survey (interviewing carefully selected energy efficiency experts in each Member State using an interview guideline) had the objective of getting a deeper understanding of specific reasons for the lack of progress as well as collecting good practice examples of energy efficiency policy implementation

Elements of the EEW survey

- **Quantitative Survey**
  - quantitative information on energy efficiency progress, "snapshot picture"
  - questionnaires (1096 completed online or during main European conferences)
- **Qualitative Survey**
  - qualitative information on energy efficiency progress
  - oral interviews with 3 experts per Member State based on an interview guideline

A meeting among the project partners was held in November 2015 to discuss the main results from these different approaches and to agree on conclusions.

Quantitative survey

In co-operation with the project partners and the University of Linz (Institute for Environmental Management in Companies and Regions) a questionnaire was developed and tested. It aimed at collecting quantitative data on the progress in energy efficiency policies and their implementation in each Member State since the adoption of the second NEEAP. This method allowed to reach a large number of stakeholders.

The questionnaire was grouped around the following main topics (a copy of the questionnaire can be found in the annex):

- overall ambition of the energy policy of the addressed Member State and its progress in the last 3 years
- targets and obligations foreseen in the EED and the EPBD
- the implementation of specific policies and measures and the tackling of important energy consumption sectors
- most important gaps in national energy efficiency policies
- the ambition of European energy efficiency policies and energy efficiency policy measures to be introduced at European level

Due to the significant change in the policy framework between the 2012 and the 2015 survey through the adoption of the EED, only a few questions could be retained from the 2012 survey. This included the question on the overall ambition and the progress as well as the progress in some specific policy fields.

The questionnaire consisted of 13 questions relating to energy efficiency (excluding those on the country and work field of the interviewees). Several questions included a number of sub-questions, resulting in a total of 37 questions and over 40,000 answers. All answers were aggregated on a Member State level, giving more than 1,000 results on specific issues in individual Member States.

In order to be able to reach out to a large number of stakeholders and to collect a large number of questionnaires, a two-fold approach was taken:

- Conferences and meetings: Experts were encouraged to answer the questionnaires at the occasion of important energy efficiency events and meetings, e.g. the World Sustainable Energy Days 2015 (held in Wels/Austria in February 2015), the 2015 Annual Energy Cities conference (held in Aberdeen/UK in April 2015), meetings and info days held by the EASME as well as events organised by the EEW projects, such as the national business stakeholder workshops.
- Online completion: The questionnaire was made available through the website of Eufores. The EEW partners informed and motivated experts from their networks and through partner energy efficiency networks in all Member States to participate in the survey.

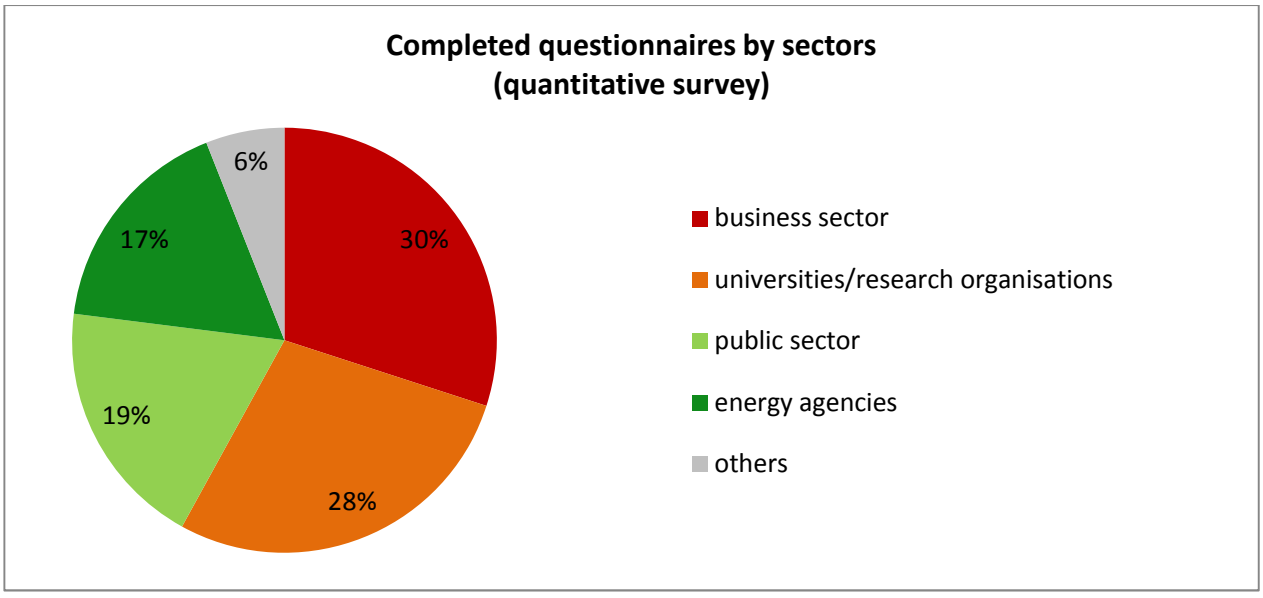
Between January and June 2015, in total 1096 completed questionnaires were collected.

Completed questionnaires by MS (quantitative survey)

Austria	38	Italy	77
Belgium	32	Latvia	19
Bulgaria	23	Lithuania	23
Croatia	48	Lux	14
Cyprus	15	Malta	14
Czech Rep.	31	NL	30
Denmark	47	Poland	25
Estonia	15	Portugal	58
Finland	27	Romania	26
France	51	Slovak Rep.	17
Germany	83	Slovenia	38
Greece	43	Spain	66
Hungary	25	Sweden	39
Ireland	28	UK	144
		Total	**1096**

The varying number of participants across Member States had to do with the presence of experts in the international events and the partner networks, language issues (the questionnaire was in English) as well as the size of the country (the 4 smallest EU countries had the lowest participation).

Participants in the survey came from the business sector (30 %), universities and research organisations (28 %), the public sector (19 %), energy agencies (17 %) and others (6 %).



Qualitative survey

Complementing the quantitative data, a qualitative survey was carried out. It aimed at developing a deeper understanding of specific reasons for the lack of progress as well as collecting good practice examples of energy efficiency policy implementation. In each Member State, 3 experts were selected and interviewed by phone.

In order to achieve best possible results, the approach to this survey was developed jointly by the partners.

The interview guideline from the 2012 survey was adapted. It focused on critical issues as well as positive developments in different energy efficiency sectors (public, residential, service, industry and transport sectors).

A special emphasis was put on carefully selecting the interviewees aiming for a balance of different perspectives in each Member State. In order to be able to report on progress over time, the project team aimed to interview the same experts as in the 2012 survey.

For the 2012 survey, a list had been collected by the project partners which included about 200 experts across all Member states. The names had come from the professional networks of the project partners. Also, experts involved in the Odysee-Mure project had been included. All experts included in the list were deemed to have a good overview of the energy efficiency policies in their respective countries as well as having worked in energy efficiency for a number of years and having gained a good insight into policy development and implementation. As a next step, the experts had been grouped in different categories (experts working on local, regional and national level, in research and consulting, in professional associations and NGOs). In a partner meeting, the experts had been jointly selected, with the aim to ensure a high-level of knowledge and a balanced representation of different actors in each Member State. Also a reserve list had been drawn up in case the experts selected were not available for an interview.

Before the start of the survey, the list of interviewees was reviewed in a project meeting by the partners and where necessary, new names were added, following the same approach as for the 2012 survey.

Each of the three involved networks (Fedarene, Energy Cities and ECEEE) took over 9 or 10 countries. An introductory eMail was sent out by Eufores informing the potential interviewees of the importance of participating. This was followed by eMails and phone calls from the respective network partner to set up a date for a phone interview.

In overall terms - keeping in mind how many surveys are carried out - the response was rather positive and many of the experts included in the first list were interviewed (without needed to resort to the reserve list). However, in many cases, it took a number of contacts to establish a suitable date. In some cases, where experts turned out to be unavailable or not willing to participate, experts from the reserve list were selected.

Out of the 81 experts interviewed from 27 Member States (without Croatia), more than two thirds were the same persons as in 2012 and 10 % came from the same organisation respective interviewees in 2012.

After the phone interviews were carried out (which generally took between 45 and 90 minutes), a transcript was sent to the interviewee allowing him/her to clear up possible misunderstandings as well as offering the option to provide additional information. The interviews were carried out between December 2014 and June 2015.

In order to collect real insights and opinions, the answers of the interviewees are treated confidentially which is a standard approach in surveys. Their names are not disclosed - due to the small number of interviewees per country, reading through the country summaries might allow making a direct connection between certain statements and the persons involved.

In November 2015, a project partner meeting was held in which the results from the quantitative and the qualitative survey were brought together and discussed.

The project team agreed that the know-how available "on the ground" was very valuable and that many experts - also due to the projects' diligent approach - were willing to share their knowledge and insights. The members of the project team were impressed by the commitment and also very good work carried out in some countries despite very challenging policy and financial framework conditions.

Survey Results

The following chapter summarises the main results of the survey, first on a country by country basis and then across the Member States.

As with any survey, the results in this report present the perceptions of the interviewees and their opinions on energy efficiency policies in their own countries. This report is not an analysis of the absolute levels of energy efficiency in each Member State based on common measurement indicators, but the views on the progress in energy efficiency policies in each Member State of the experts in that specific country. Therefore, these results are not views of the authors of this study.

The focus of the survey was to get an impression on the progress of energy efficiency policies since the second NEEAPs and not to establish a ranking of absolute levels of energy policy developments.

Surveys are always "snapshot pictures" which are influenced by current events. The survey was carried out in the first half of 2015. Country and overall results should be seen in this timing context.

Many of the questions look back 3 years (2011 - 2014), roughly the period of the implementation of the second NEEAPs.

Survey Results by Member State

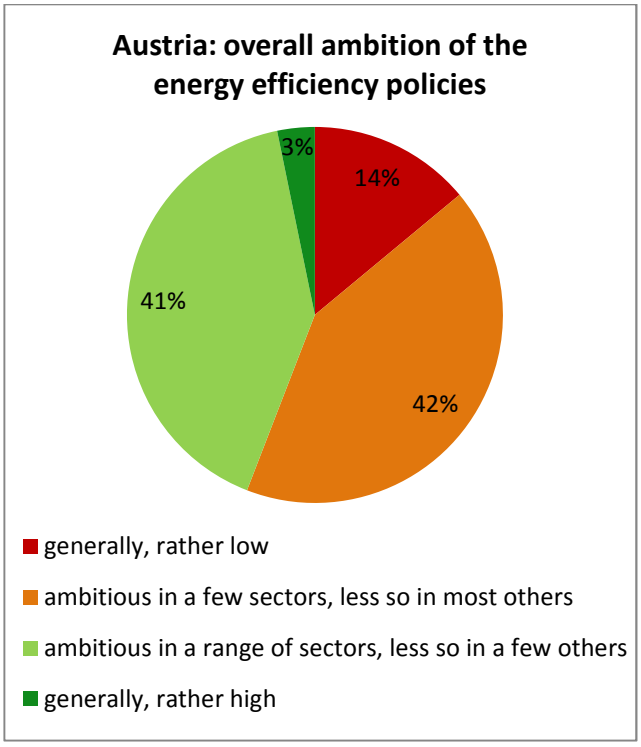
The following country specific analysis combines the results of the quantitative and the qualitative survey (countries in alphabetical order). It highlights issues that stood out either positively or negatively from the comparison across countries (quantitative survey). From the qualitative survey, those issues are presented here that were mentioned by more than one of the experts in the oral interviews. The annex includes country summaries with more comprehensive results per country.

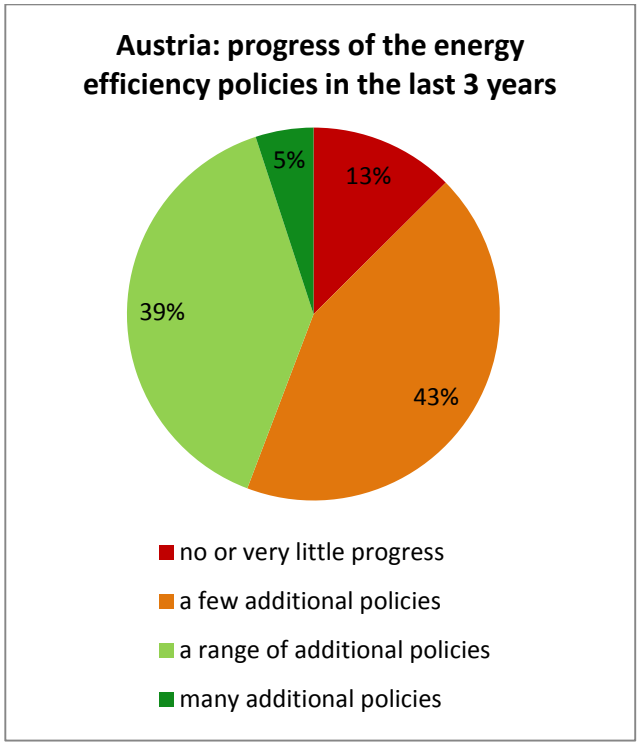
Austria

According to the Austrian experts, Austria is among the Member States that have progressed comparatively well since the second NEEAP (country progress indicator: 5 out of 28 - see page 103). The rate of progress was higher than in the preceding three years (2012 survey: country progress indicator: 13 out of 27).

Opinions on the overall ambition of energy efficiency policies are divided: 56 % consider it as relatively low whereas 44 % find it at least ambitious in a range of sectors. Very similarly, a bit more than half believes that only a few additional policies were introduced in the past years, the other half saw a range or many additional policies.

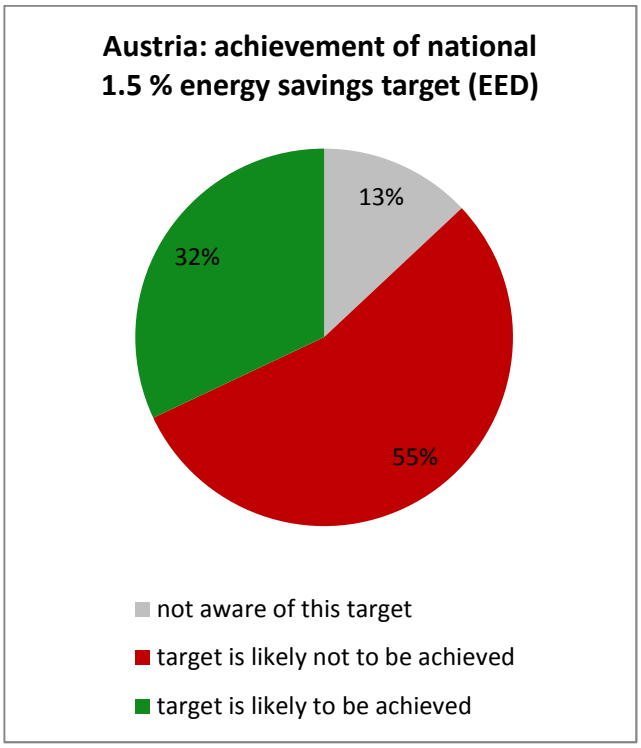
Among others, the experts mention the recently adopted Energy Efficiency Act as a challenging issue. Positive developments included the progress in energy efficiency in buildings and the respective funding and regulatory instruments.

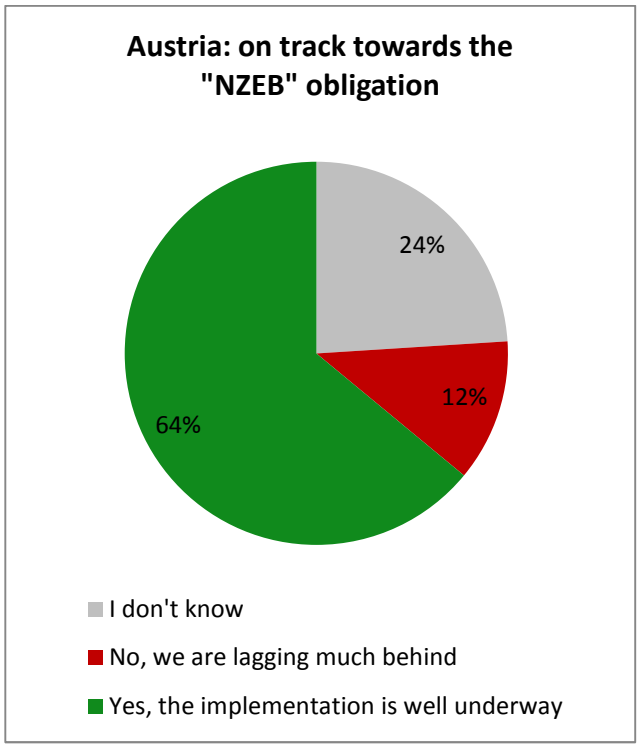




More than half of the experts think the EED savings target (new savings of 1.5% of the annual energy sales to final consumers) is not likely to be achieved. The experts reported that Austria recently adopted a law which introduced an energy efficiency obligation scheme for energy suppliers. However, significant concern was voiced over the practical implementation of this scheme and its ability to deliver the savings.

64% believe that Austria is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020. This is among the higher values across Member States.

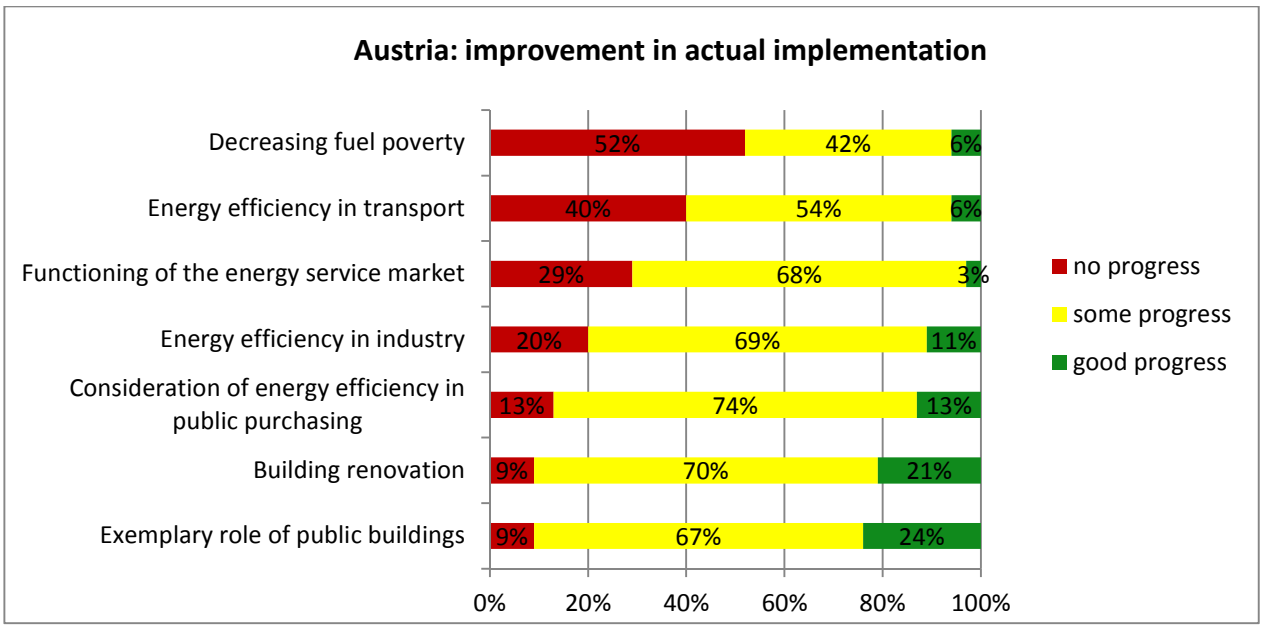




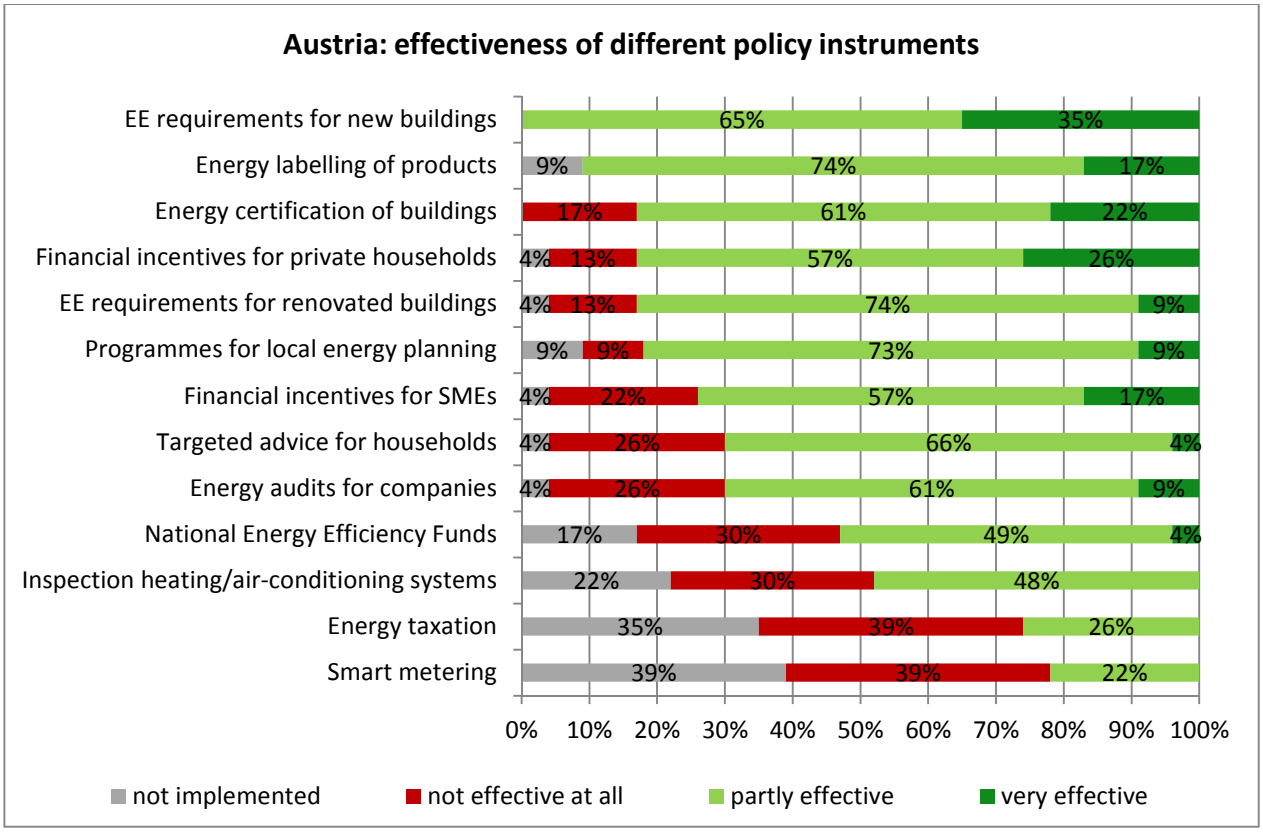
Experts mention the lack of funding in the public sector and regret that the 3 % target was not applied to the regional and local levels.

A range of funding programmes are available in the residential sector, especially on the regional level. Experts mention the need to shift more funding from new construction to the renovation sector.

In the transport sector, experts note a significant lack of progress and policy activity.



Regarding specific energy efficiency instruments, energy efficiency requirements for new buildings and energy labelling of products are seen as the most effective by the Austrian experts (rated at least partly effective by 100 % and 91 % of the experts respectively). The highest ratings for "not effective at all" are given to energy taxation and smart metering (both 39 %).

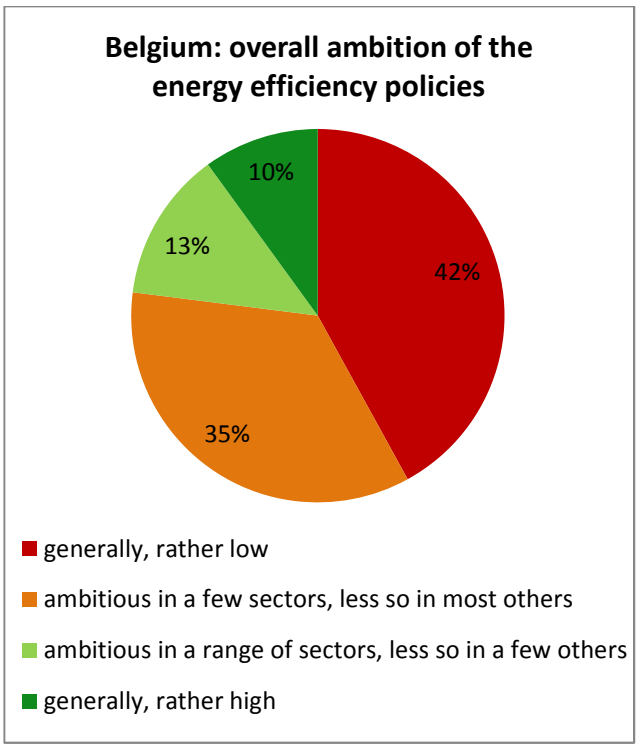


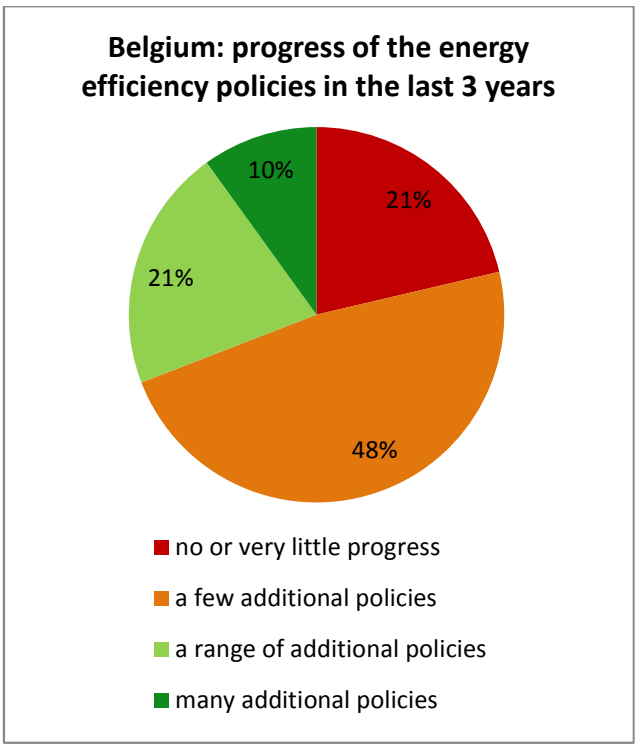
Belgium

According to the Belgian experts, Belgium is among the Member States that have made medium progress in energy efficiency policies since the second NEEAPs (country progress indicator: 13 out of 28 - see page 103). The rate of progress is somewhat higher than in the three previous years (2012 survey: country progress indicator: 18 out of 27).

The majority of experts (77 %) consider the overall ambition of the energy efficiency policies as relatively low. Nearly 70 % think that no or only a few additional policies were introduced in the last three years.

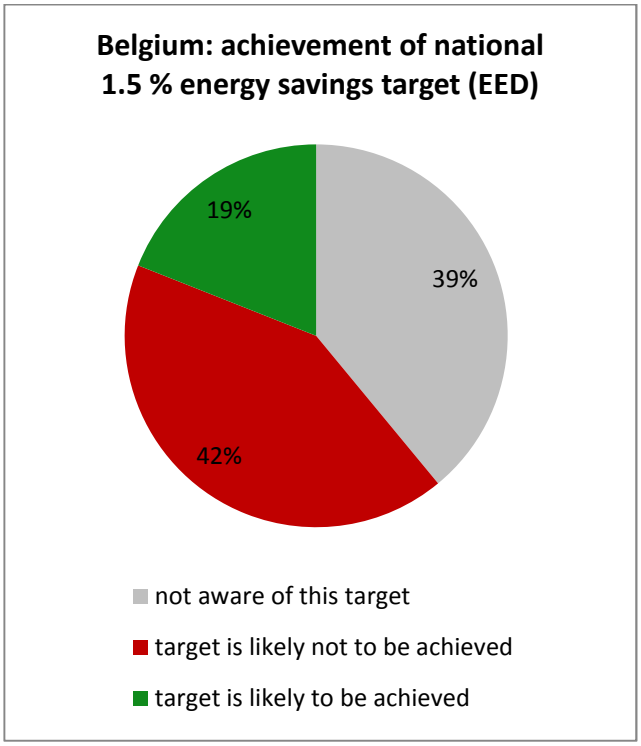
In the past few years, the decentralisation process increased, resulting in an even more important role of the regions, but also of the municipalities. Financing issues are among the main challenges observed by the experts. Positive developments reported include voluntary branch agreements for industry and the legislation in the building sector.

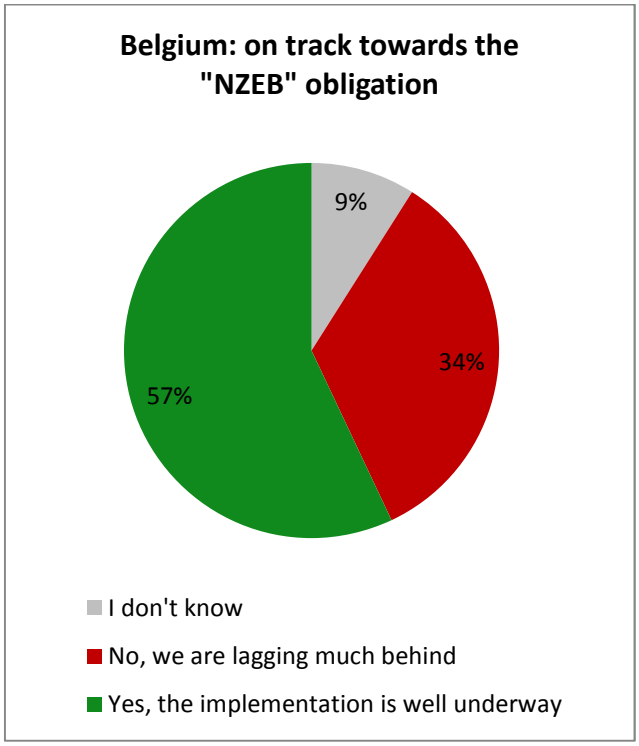




42% of the experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved - among the lower ratings in the EU. The experts reported that all three regions have decided not to introduce an energy efficiency obligation scheme for energy distributors/retailers but to opt for other policy measures, such as financial incentives.

More than half (57%) believe that Belgium is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020. This is among the higher ratings in the EU.

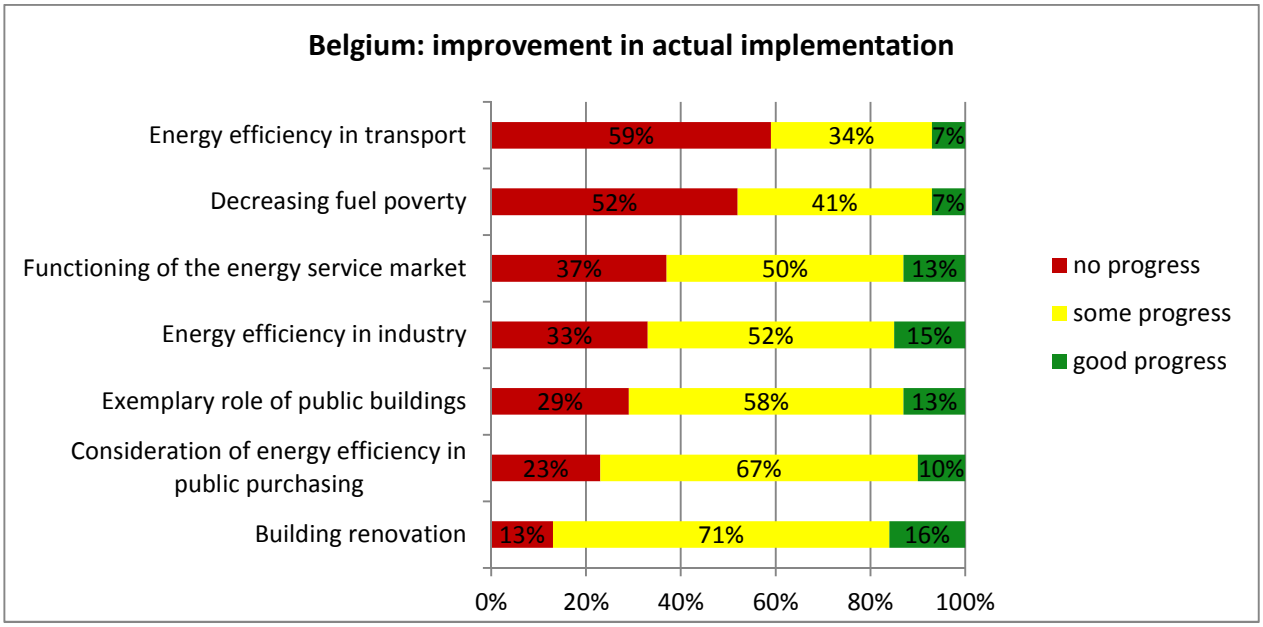




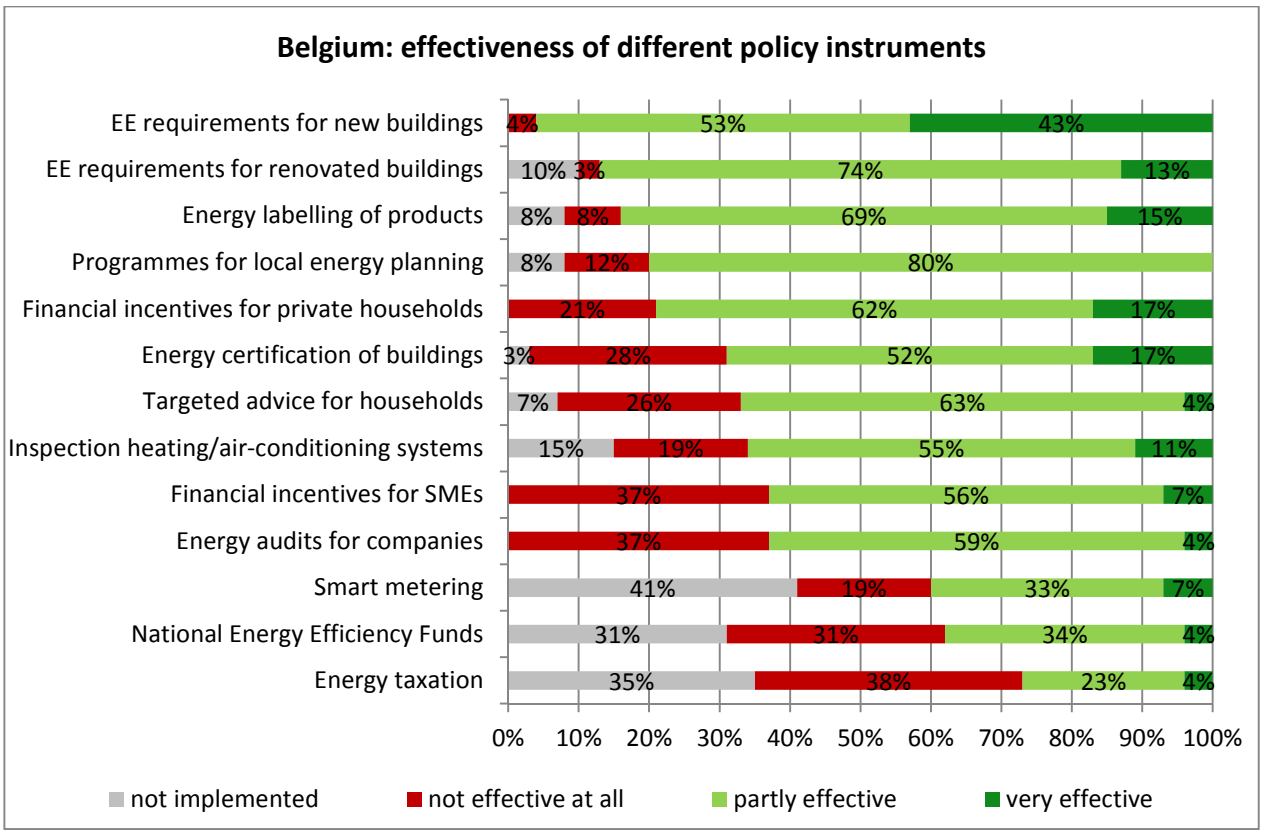
Progress was made in building renovation in the public and residential sectors, also due to the availability of funding schemes. However, renovation rates remain too low.

Experts report a need for more support instruments in the service sector. They also mention the role of branch agreements in the industry sector.

For the transport sector, improvements in strategic mobility planning on municipal level were mentioned, however, an important need to act still exists.



Regarding specific energy efficiency instruments, energy efficiency requirements for new and renovated buildings (rated as very or partly effective by 96 % and 87 % respectively) and energy labelling of products (84 % very or partly effective) are seen as the most effective in the Belgian context. The highest ratings for "not effective at all" are given to energy taxation (38 %) as well as to financial incentives for SMEs and energy audits for companies (both 37 %).

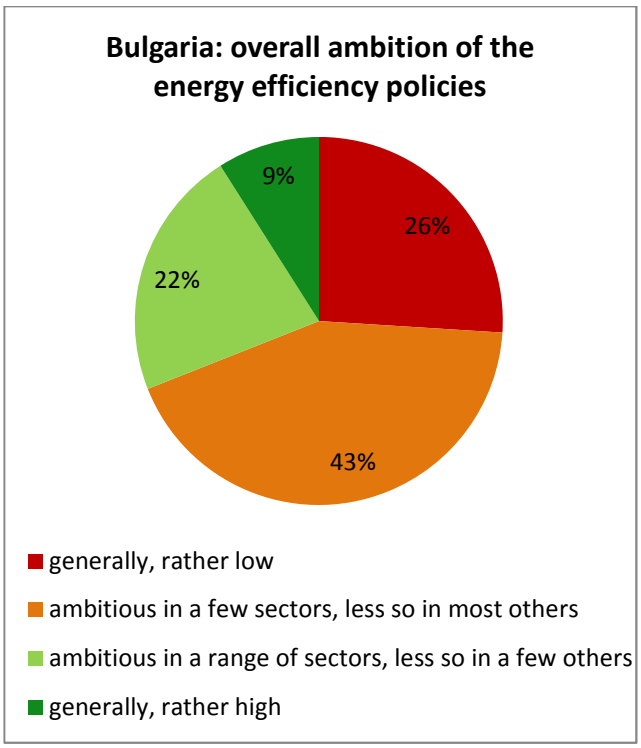


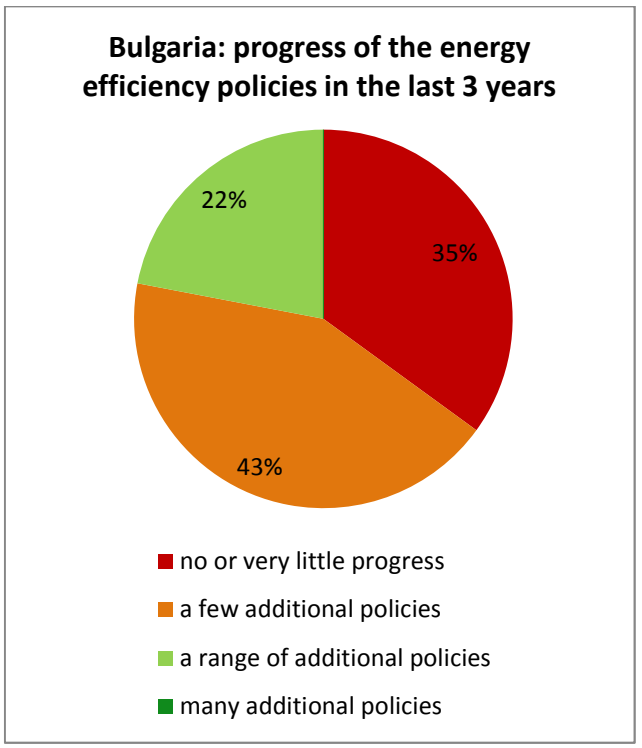
Bulgaria

According to the Bulgarian experts, Bulgaria is among the Member States that has made relatively little progress in energy efficiency policies since the second NEEAPs (country progress indicator: 23 out of 28 - see page 103). The rate of progress has significantly slowed down compared to the period after the first NEEAP (2012 survey: country progress indicator: 16 out of 27).

The majority of experts consider the overall ambition of energy efficiency policies as relatively low. However, this has improved compared to the 2012 survey (which looked back on the three years before that). Nearly 80 % think that no or only a few additional policies were introduced in the last three years.

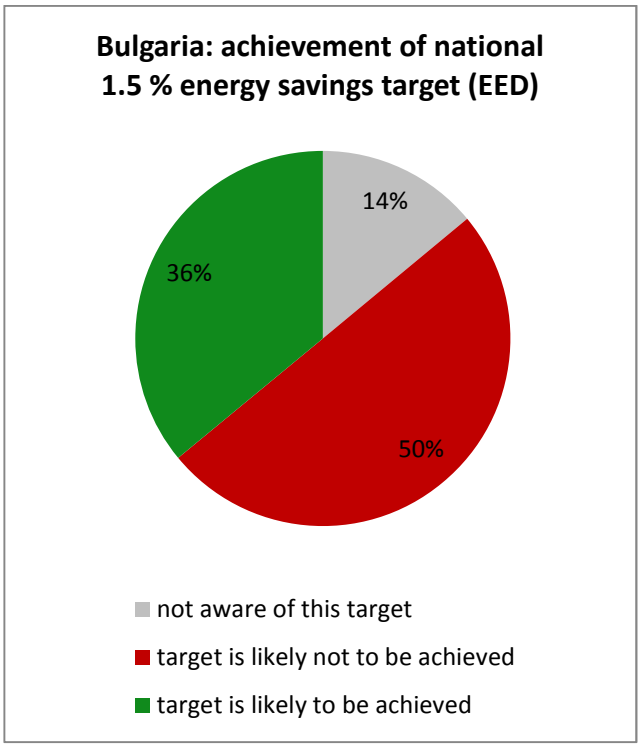
Experts comment on the lack of a comprehensive approach towards energy efficiency. On the positive side, they observe new programmes in the building sector, especially relating to building renovation (also funded by EU Structural Funds).

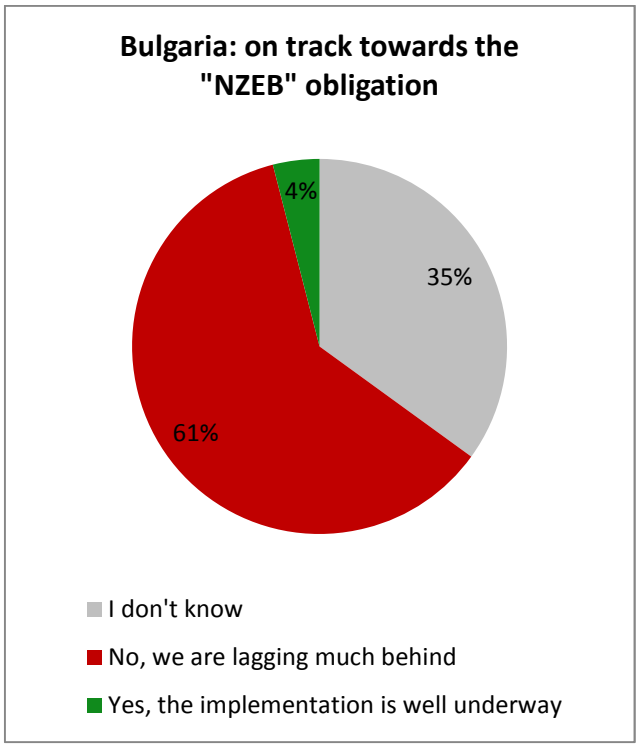




Half of the experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Experts report that the implementation of an energy efficiency obligation scheme was still under preparation at the time of the survey.

Furthermore, the majority (61 %) believe that Bulgaria is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020 (among the lowest ratings of all Member States).





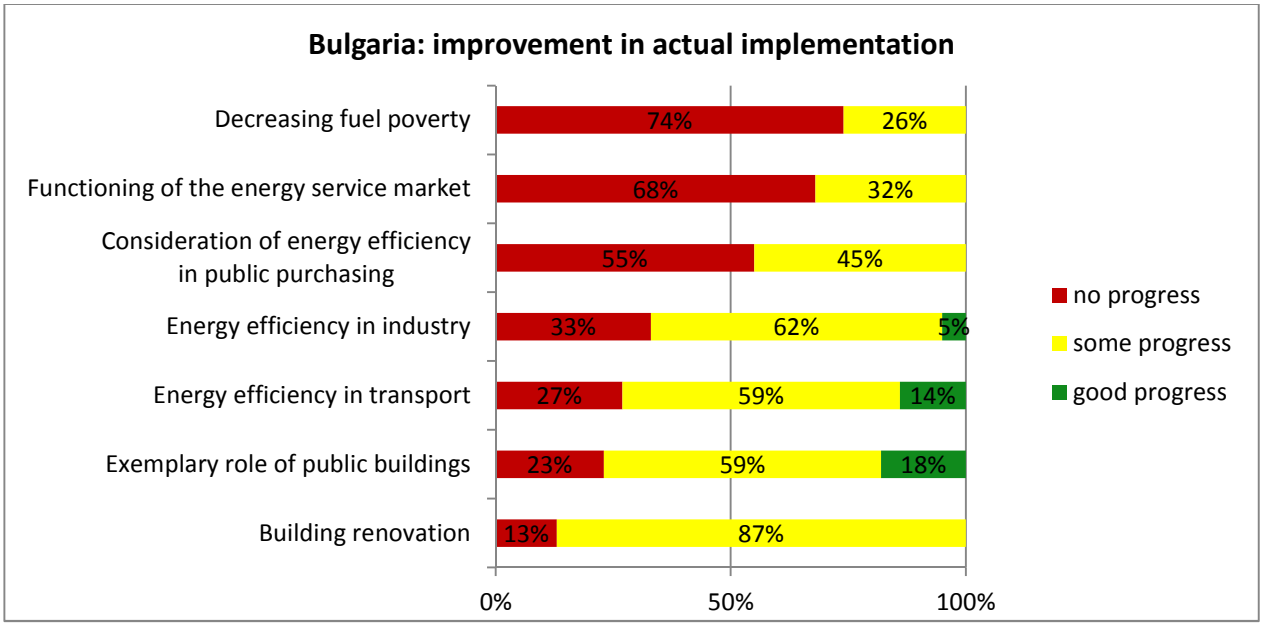
In the public sector, the "3% renovation rate" (as foreseen in the EED) is not yet perceived to have had a significant impact. However, according to the experts, an obligation for energy efficiency criteria for public buildings is now in place.

New renovation programmes for the residential sector were on the horizon at the time of the survey, but there is significant concern about their levels of ambition and ability to trigger deep renovation.

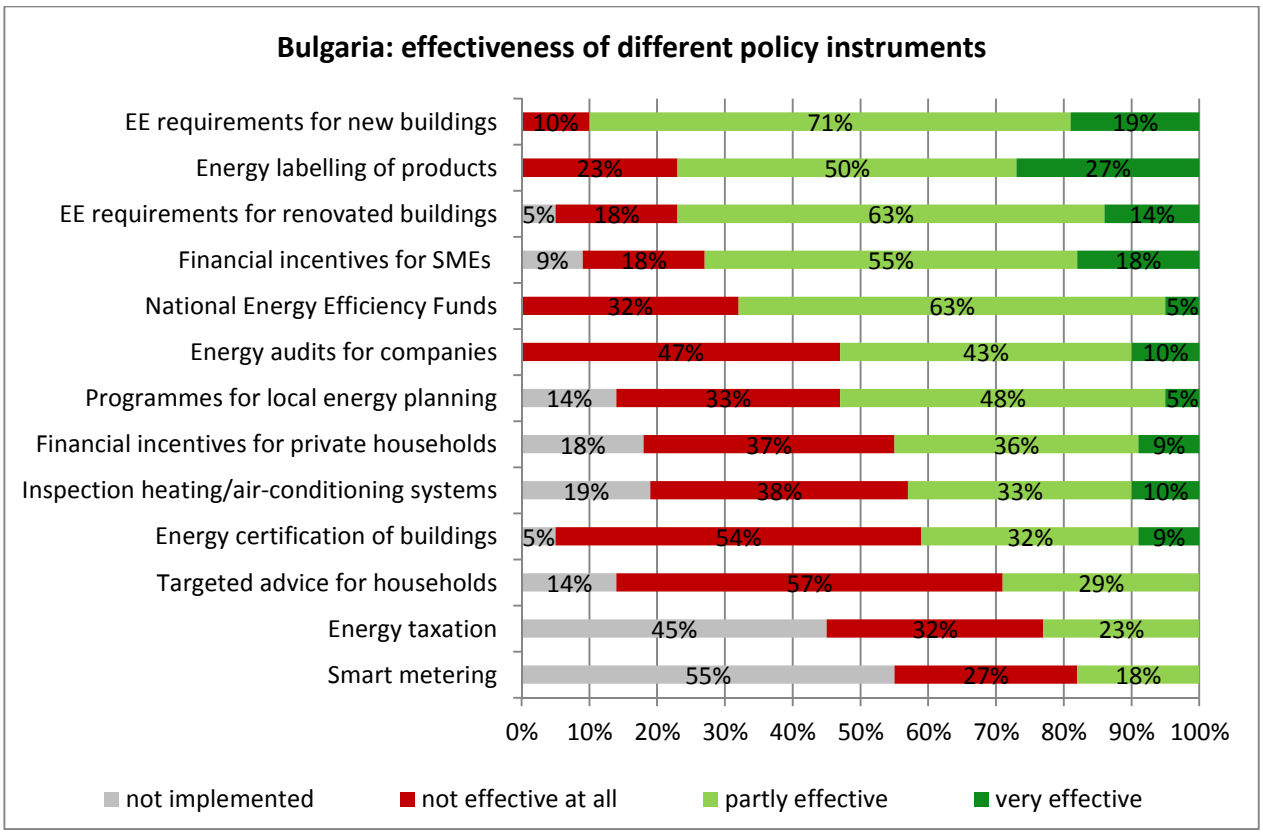
A funding programme for the service and industry sectors was in place in recent years and is expected to be continued.

For the transport sector, experts call for a comprehensive approach that would take infrastructure planning into account.

In terms of improvements in actual implementation, least progress was made in decreasing fuel poverty and the functioning of the energy service market (both values are among the lowest across the EU). Relatively better was the progress indicator in the exemplary role of public buildings, in transport and in building renovation.



Regarding specific instruments, energy efficiency requirements for new and renovated buildings and energy labelling of products were rated at least partly effective by 90 % and 77 % of the Bulgarian experts respectively. In contrast, targeted advice for households and energy certification of buildings are considered as the least effective instruments (rated "not effective at all" by 57 % and 54 % respectively - among the lowest ratings of all Member States).



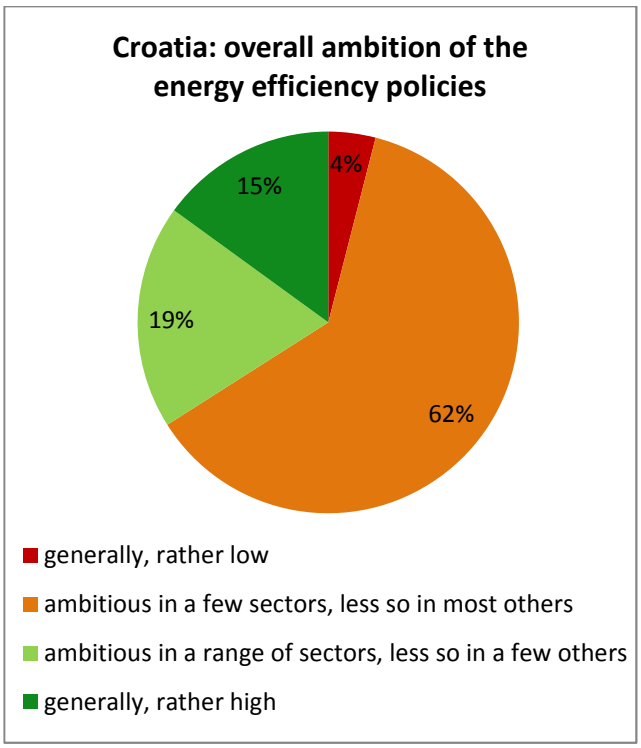
Croatia

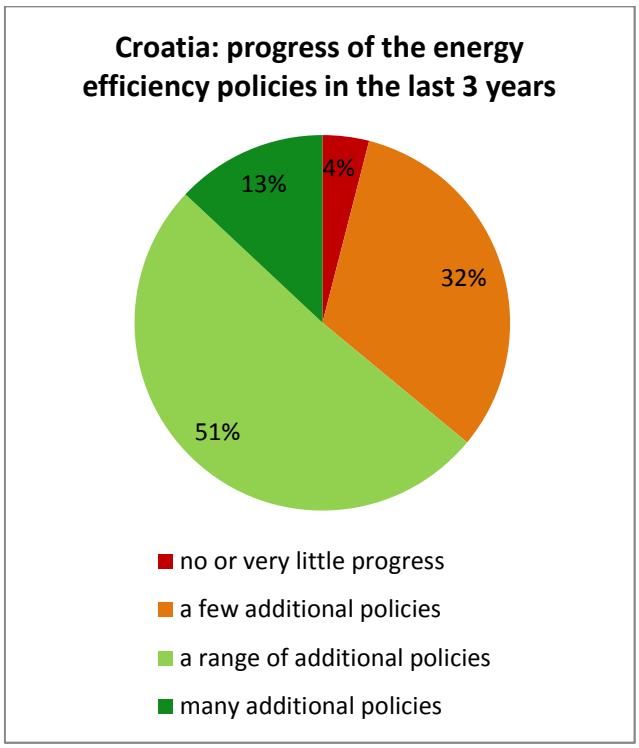
Croatia joined the European Union in 2013 and was thus not included in the survey carried out in 2012. Therefore no comparison to previous survey results is possible. Also, the implementation of the acquis communitaire resulted in a range of new energy efficiency policies which makes the situation relating to specific policies somewhat less comparable to other EU Member States.

Croatia is among the Member States that has made medium progress in energy efficiency policies in the past three years (country progress indicator: 10 out of 28 - see page 103).

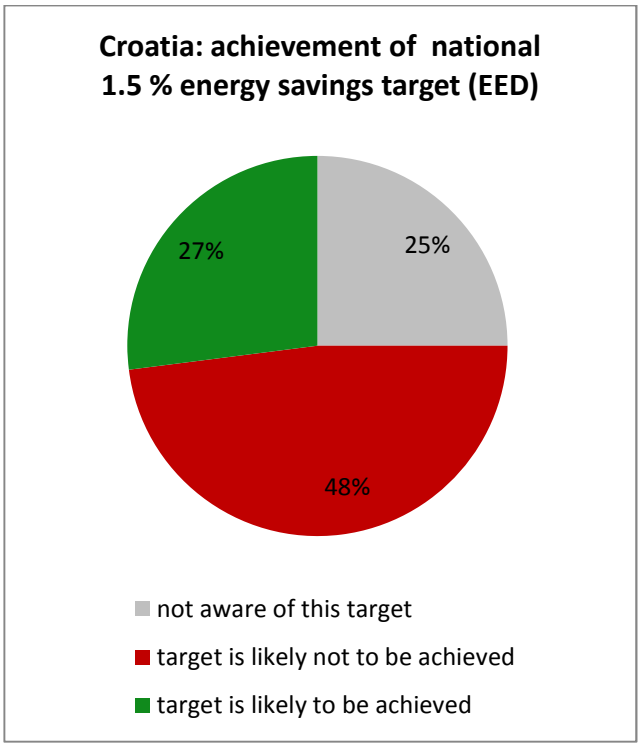
The majority of the experts (62 %) consider the overall ambition of the energy efficiency policies as moderately low in most sectors. However, 64% see that - also in connection to the EU accession - a range of or many additional policies were introduced.

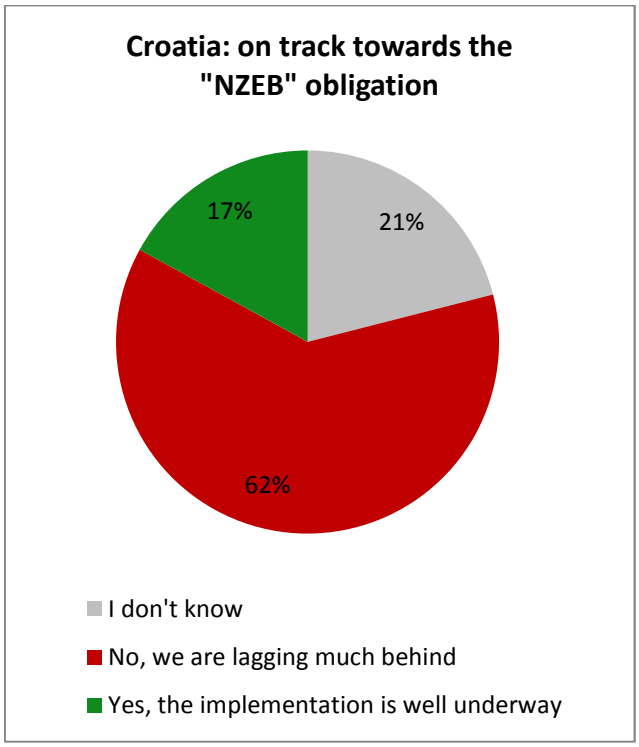
The complexity and quality of legislation as well as a lack of skills in the public and private sectors are among the critical issues mentioned by the experts. Positive developments include an increasing awareness of energy efficiency issues and the availability of funding schemes for energy efficiency.





Almost half of the experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. The majority (62 %) believes that Croatia is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

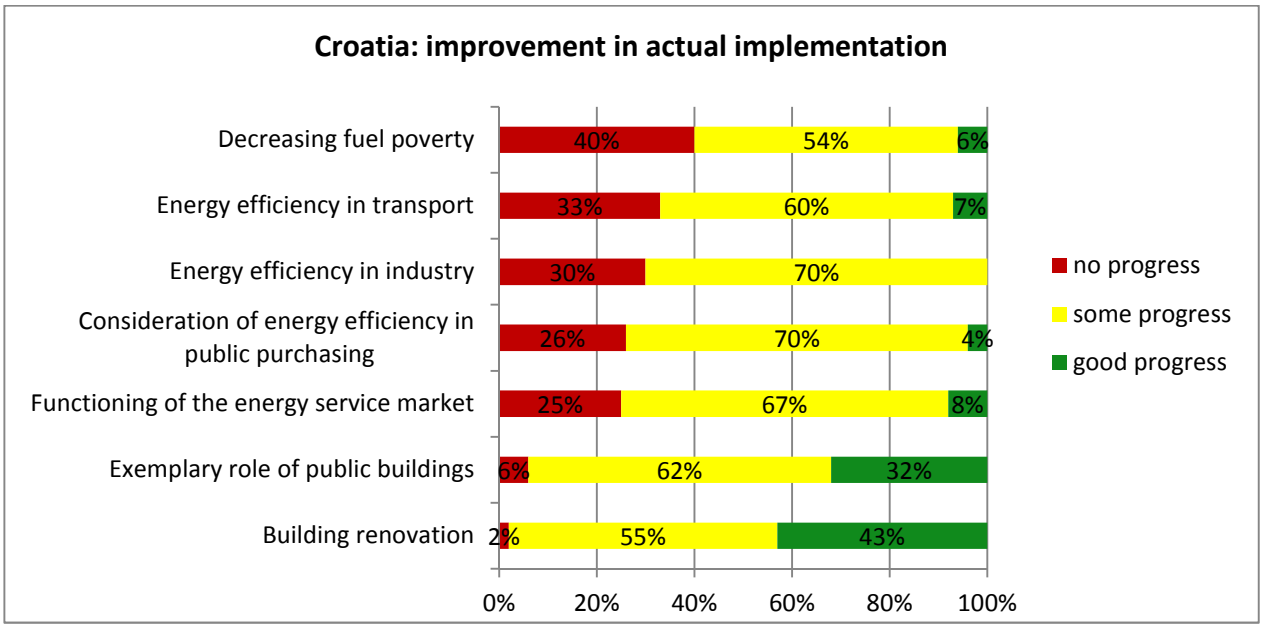




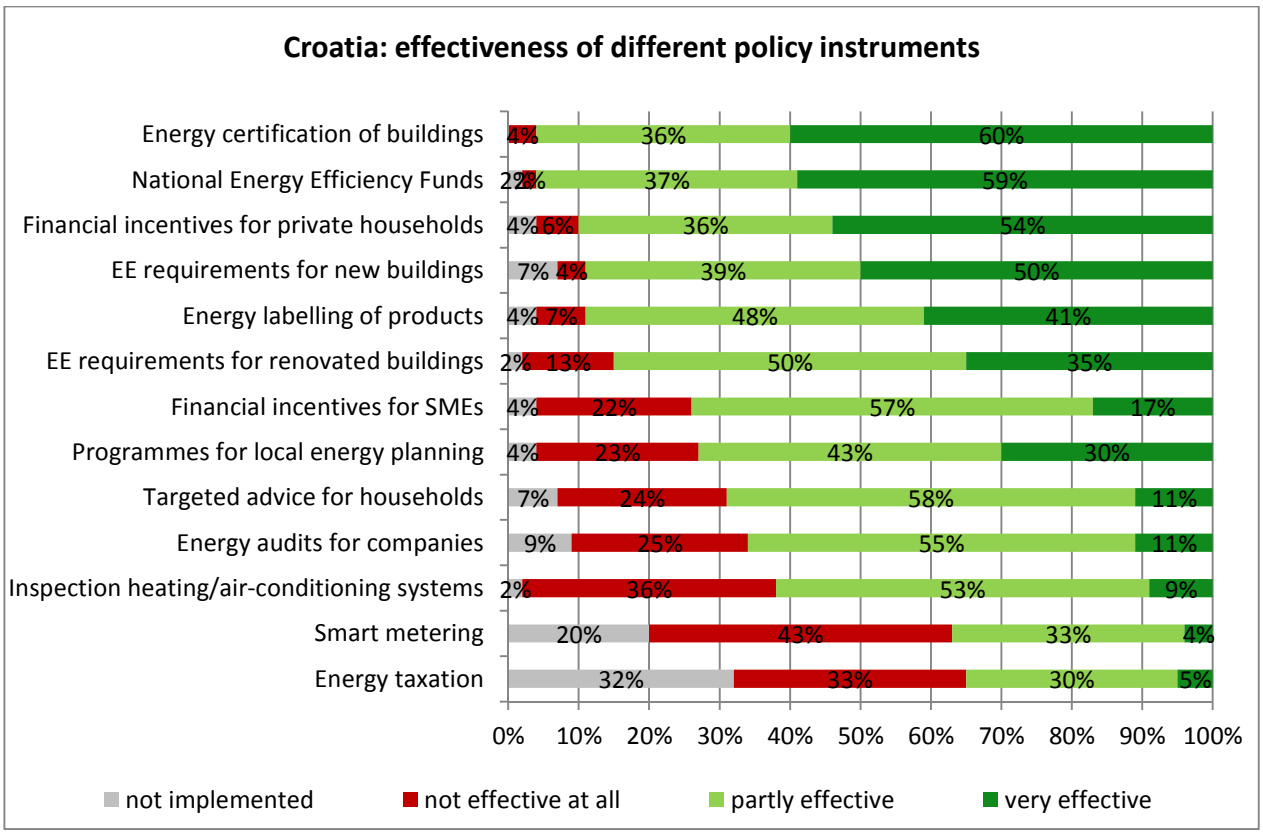
Regarding the public sector, experts observe a lack of capacity in the field of energy efficiency as well as low progress in the renovation of buildings on national level. In the residential sector, positive developments are reported in building renovation and renewable energy heating, also thanks to the availability of funding programmes.

Despite the availability of funding programmes, the economic crisis negatively affected the service and industry sectors' ability to invest in energy efficiency.

For the transport sector, an increased interest in electric mobility and the availability of a funding programme was mentioned by the experts. Nevertheless, market development is still in an early stage.



In terms of specific energy efficiency instruments, experts consider energy certification of buildings and national energy efficiency funds as the most effective in the Croatian context. Also, financial incentives for private households and energy efficiency requirements are perceived as effective. The highest ratings for "not effective at all" are given to smart metering (43 %), inspection of heating/air-conditioning systems (36 %) and energy taxation (33 %).

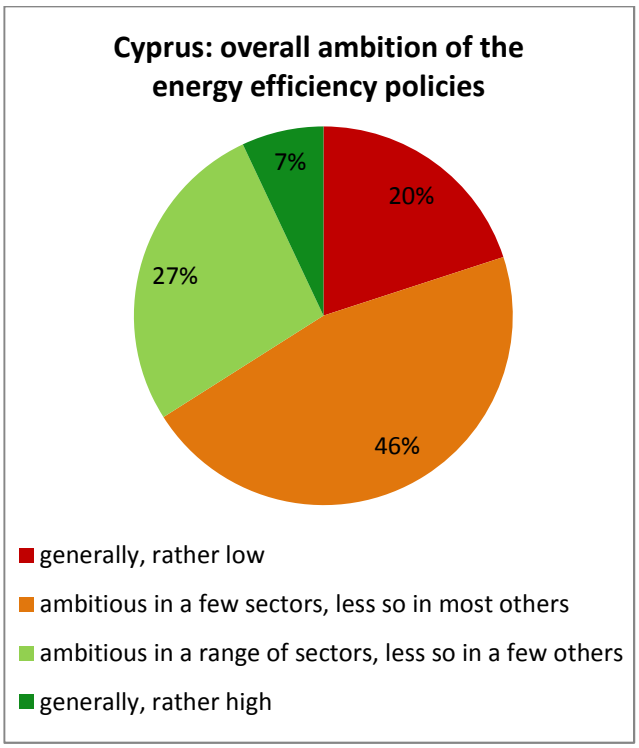


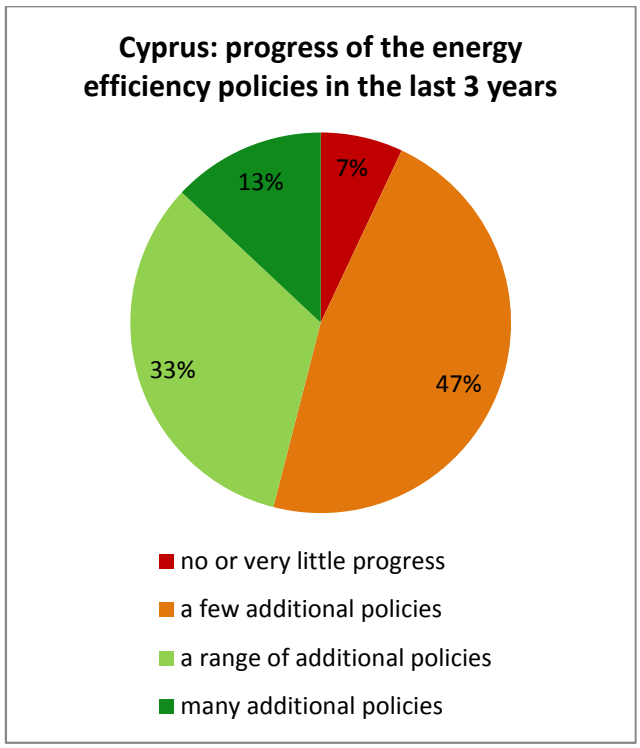
Cyprus

According to the Cypriot experts, Cyprus is among the Member States that have progressed relatively well since the second NEEAPs (country progress indicator: 5 out of 28 - see page 103). Relatively, it has seen the strongest increase in progress across EU Member States compared to the three preceding years (2012 survey: country progress indicator: 22 out of 27).

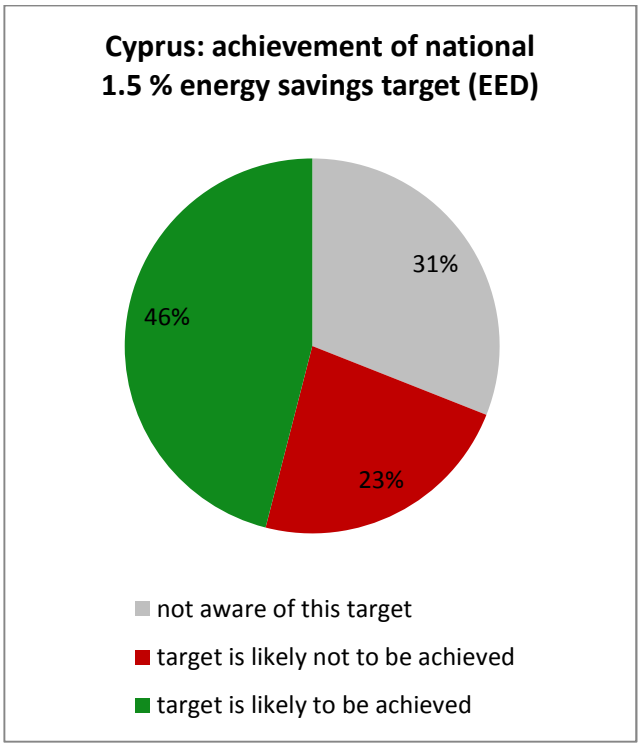
Although two thirds of the experts consider the overall ambition of the energy efficiency as relatively low in most sectors, almost half (46 %) think that at least a range of additional policies were implemented in the past years.

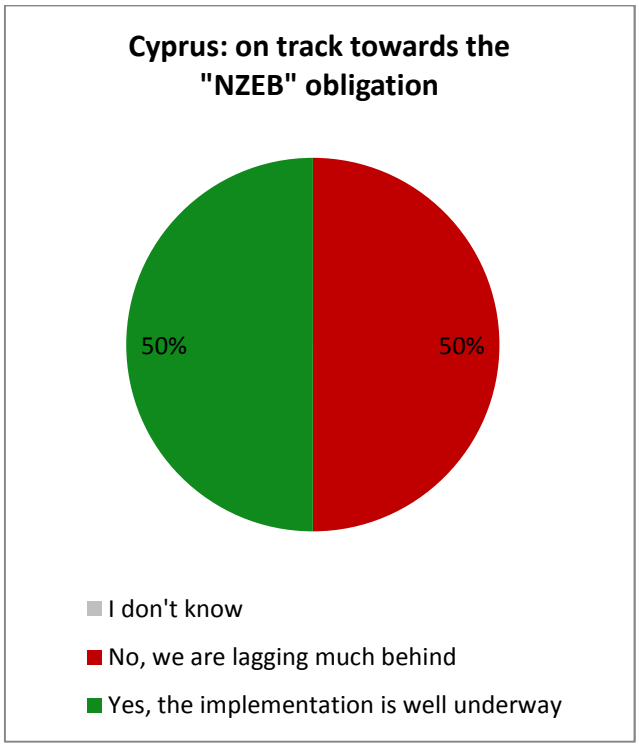
Experts see increasing the efficiency of the existing inefficient building stock as well as the transport sector as main challenges. They report the authorities' increased awareness and activities on energy efficiency as a positive development. Experts agree that EU legislation and financial support are the driving forces in energy efficiency issues for the Cyprus energy efficiency policies. The EU support group set up to support the Cypriot authorities in overcoming the economic crisis was perceived to make positive contributions in this field.





Almost half of the experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved. Similarly, half believe that Cyprus is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.





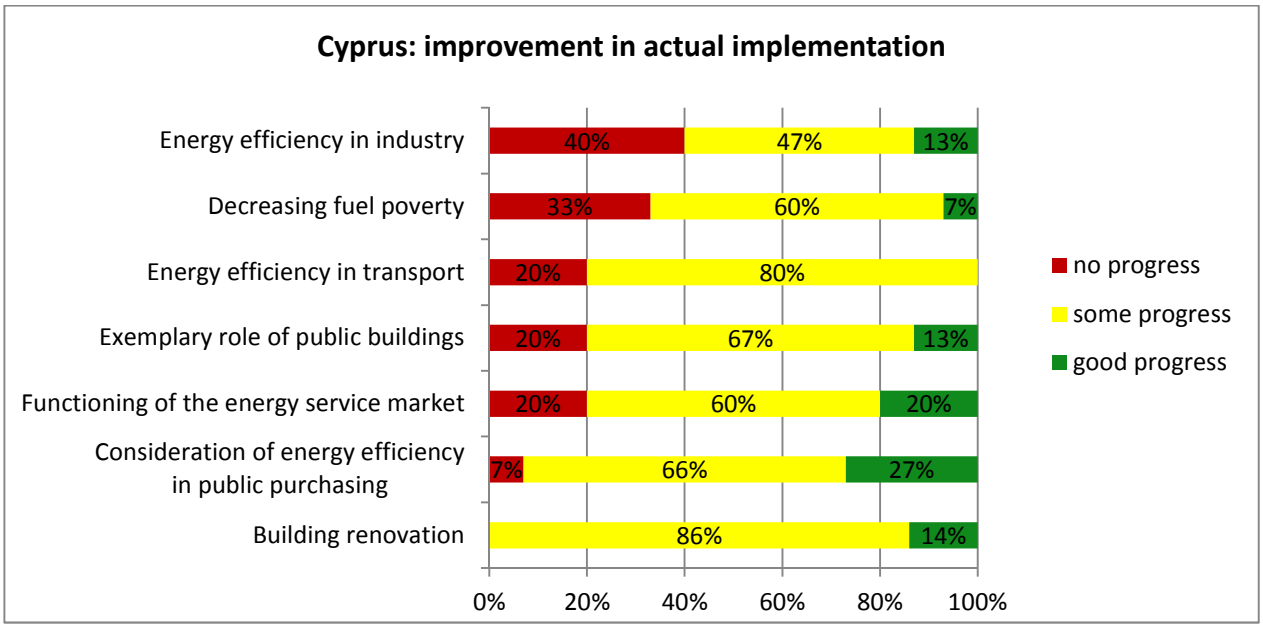
In the public sector, experts report that local authorities becoming more active in energy efficiency issues.

For the residential sector, the efficiency level of existing buildings remains a key challenge. However, experts report that energy efficiency standards in line with the EPBD requirements are being applied for new buildings.

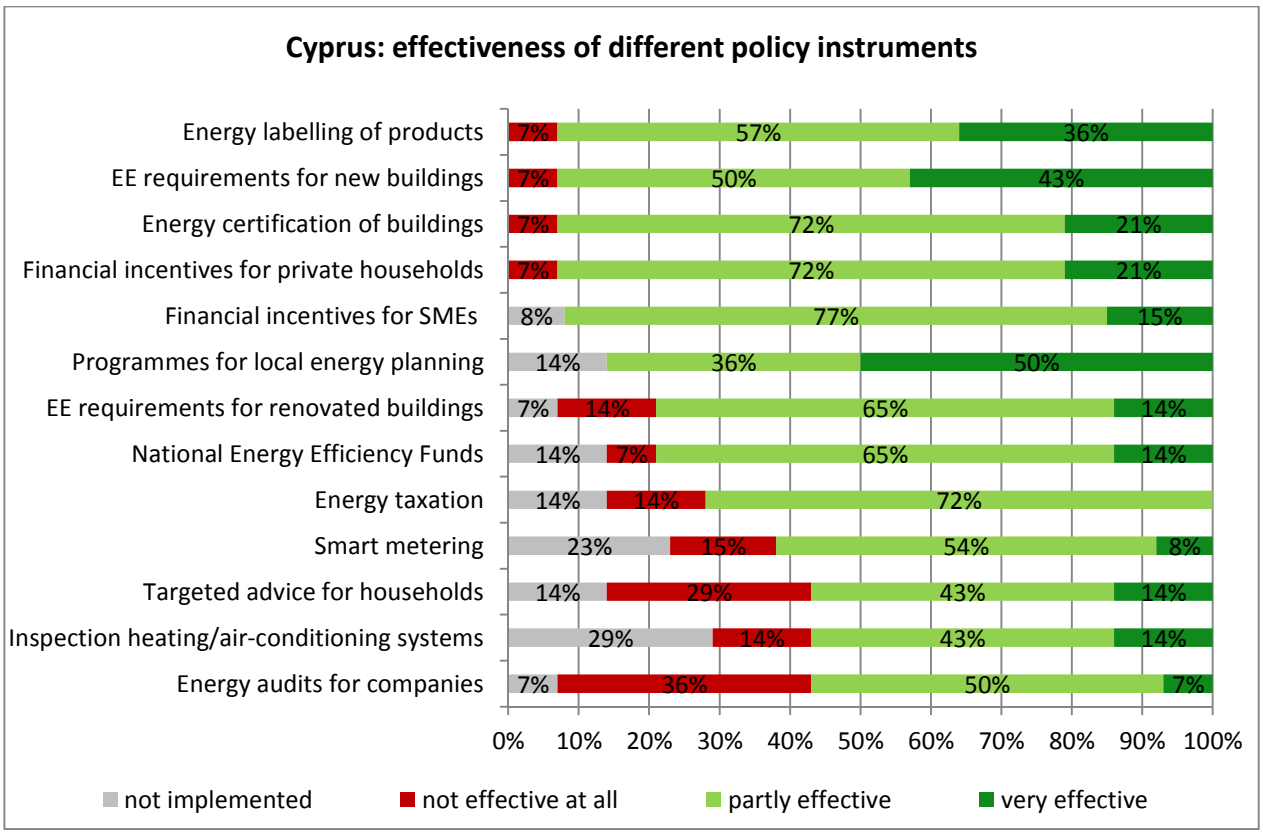
At the time of the survey, experts were expecting new funding programmes (funded by Structural Funds) to be announced in the near future to support energy efficiency investments in the public and residential sectors.

Experts notice high unused efficiency potentials in the service and industry sectors which still need to be addressed.

In the transport sector, some investments in new infrastructure as well as a change in fuel taxation are reported. However, the dependency on cars as main means of transport continues to be the key challenge.



The Cypriot energy experts see progress in a range of specific energy efficiency policy intruments (over 90 % rate several instruments as partly or very effective in the Cypriot context), in several cases among the highest in the EU. This is presumably due to the fact that few such programmes existed in the past. The highest rating for "not effective at all" was given to energy audits for companies (36 %).

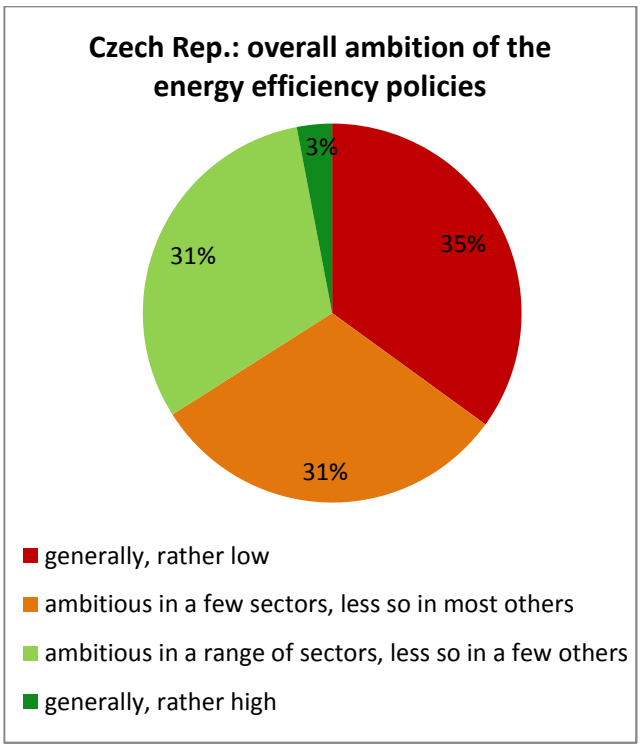


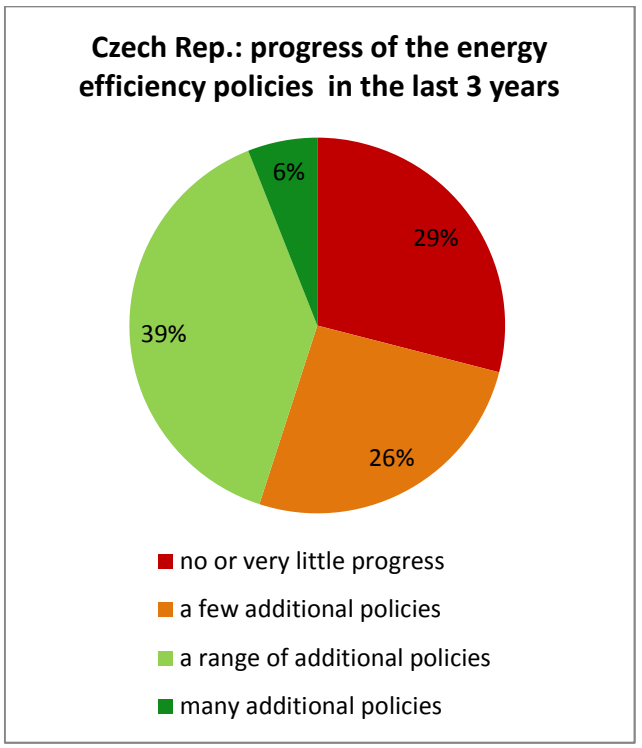
Czech Republic

According to the Czech experts, the Czech Republic is among the Member States that have made medium progress in energy efficiency policies since the second NEEAP (country progress indicator: 15 out of 28 - see page 81). The rate of progress was significantly higher than in the three preceding years (2012 survey: country progress indicator: 25 out of 27).

Although the majority of experts considers the overall ambition of the energy efficiency policies as rather low, one third consider it at least ambitious in a range of sectors - significantly more than in the 2012 survey. Regarding progress, 45 % see at least a range of additional policies in the past years.

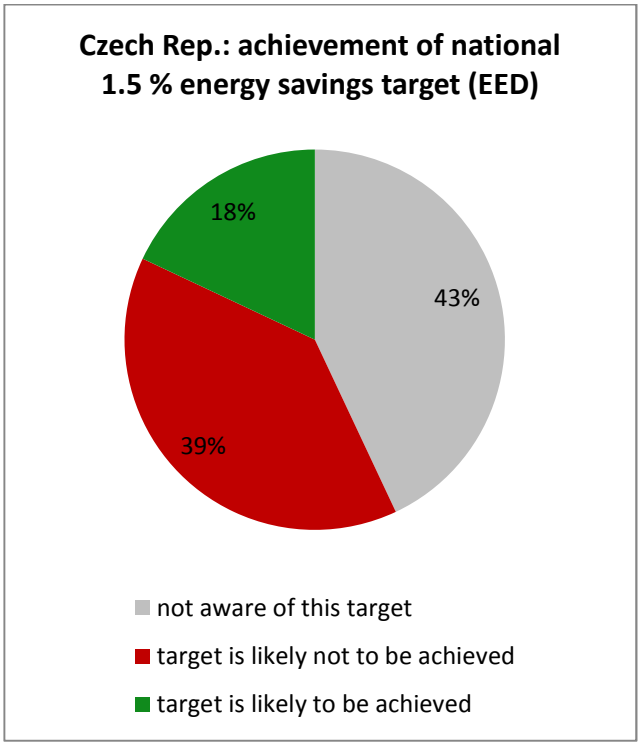
Given the current policy and institutional framework, experts consider the implementation of the EED as very challenging. At the time of the survey, new programmes and also some institutional changes were under preparation. As a positive development, experts observe an increased awareness of energy efficiency in different sectors.

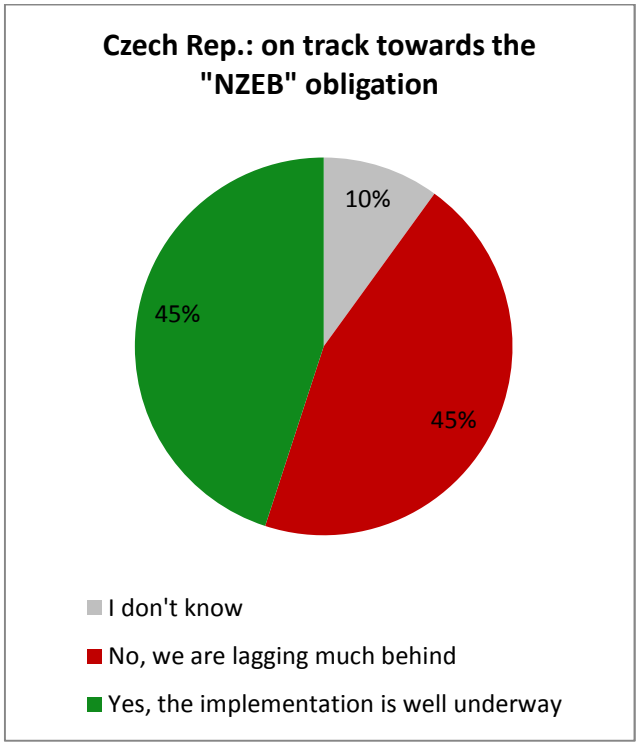




Only 18 % of experts believe that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved, while 39 % consider this unlikely. Experts report that the Czech Republic decided not to introduce an Energy Efficiency Obligation scheme for the moment with the option of introducing it at a later time should current measures turn out to be insufficient to meet the savings target.

Opinions among the interviewees are divided as to whether the Czech Republic is on track or not to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

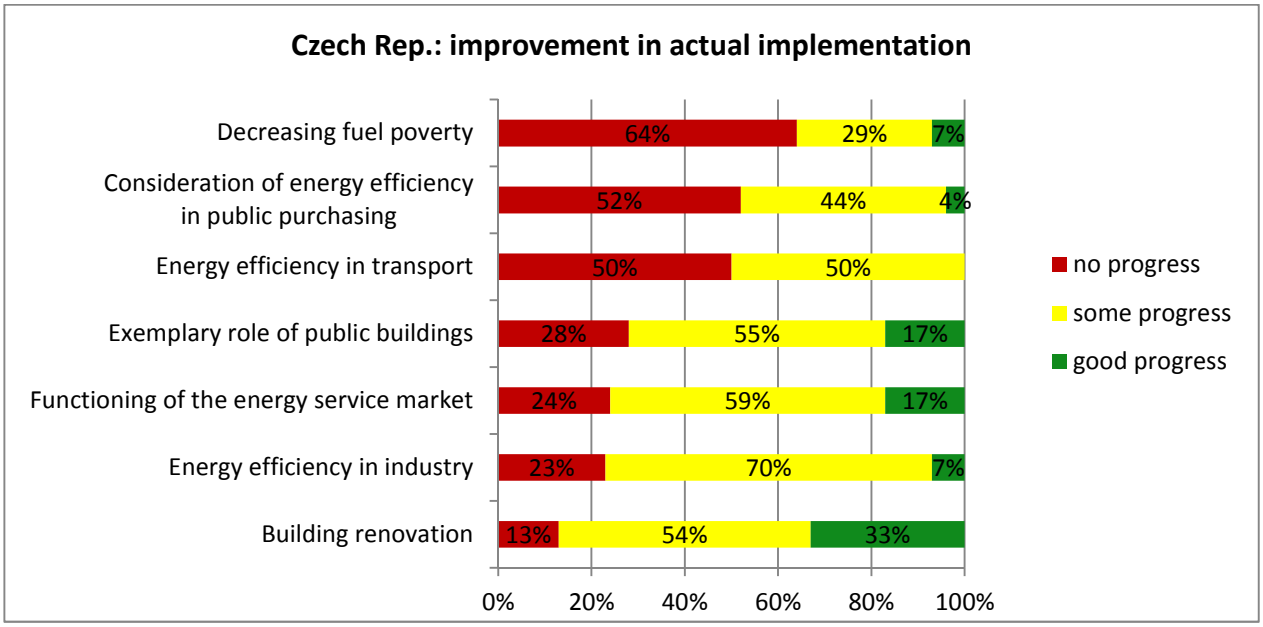




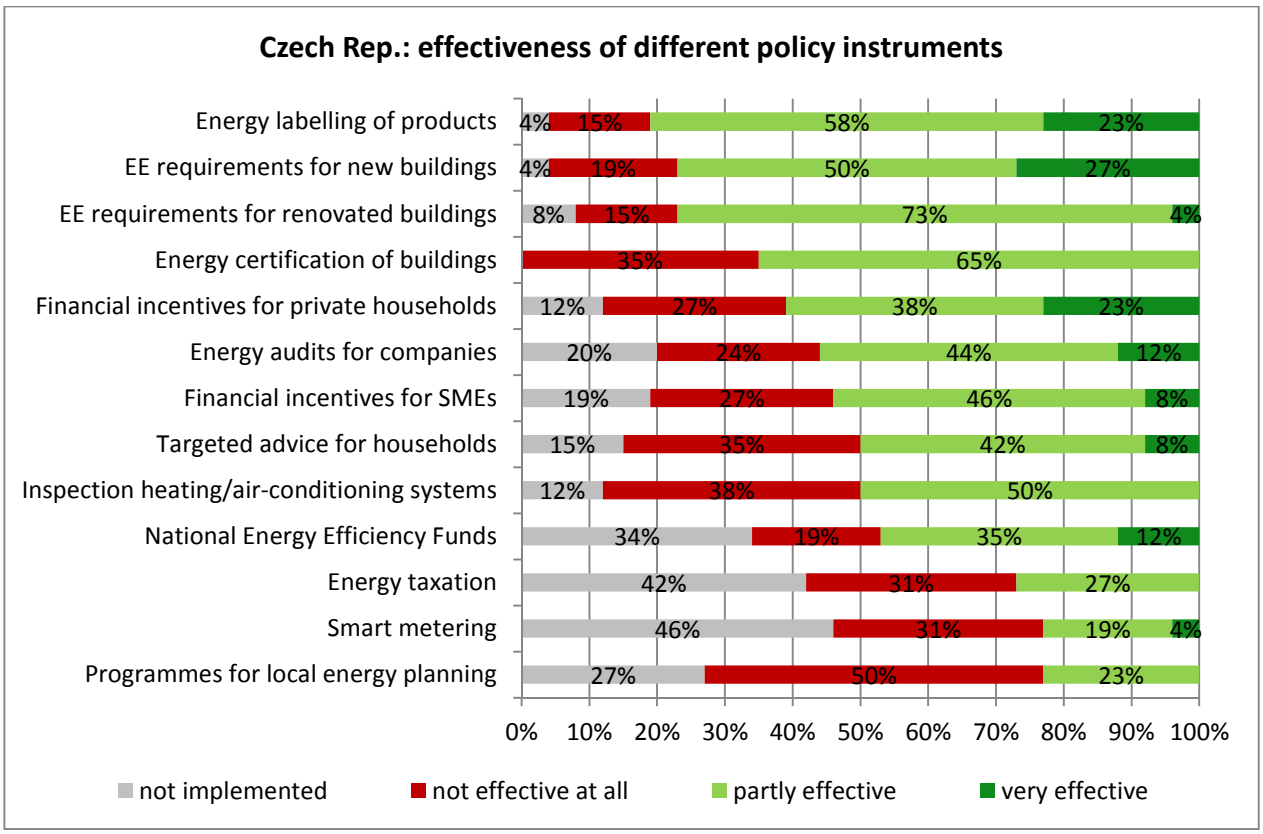
In the field of public buildings, experts reported the finalising of the list of central government buildings (as a basis for the 3 % renovation obligation foreseen in the EED). They observe a lack of activity in building renovation in many municipalities. On the positive side, a change in procurement rules should support an increase in energy efficient public buildings in the future.

The "Green for Savings Programme" continues to play an important role in triggering investment in residential buildings.

Operational programmes that provide energy efficiency funding for the service and industry sector were mentioned.



Regarding specific energy efficiency instruments, energy labelling of products as well as energy efficiency requirements for new and renovated buildings are seen as the most effective in the Czech context (rated respectively 81 %, 77 % and 77 % partly or very effective). The highest rating for "not effective at all" was given to programmes for local energy planning (50 % "not effective at all" – among the lowest ratings of all Member States).



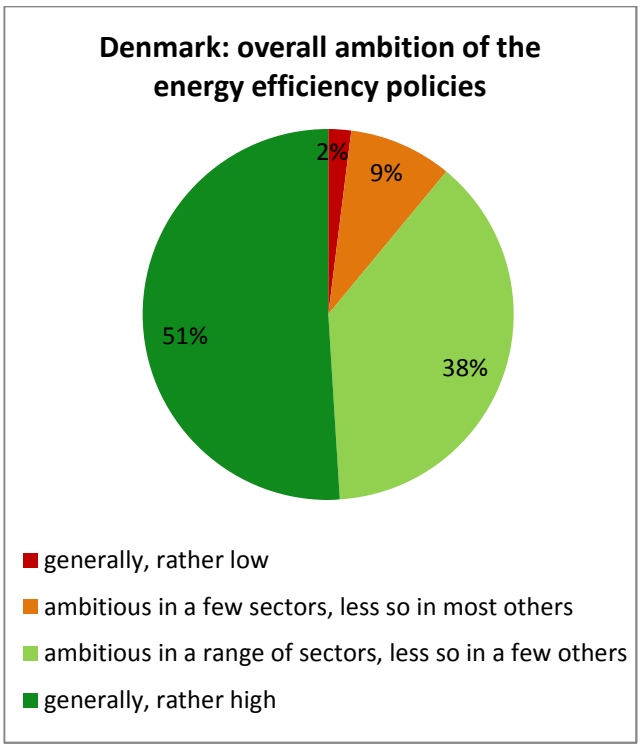
Denmark

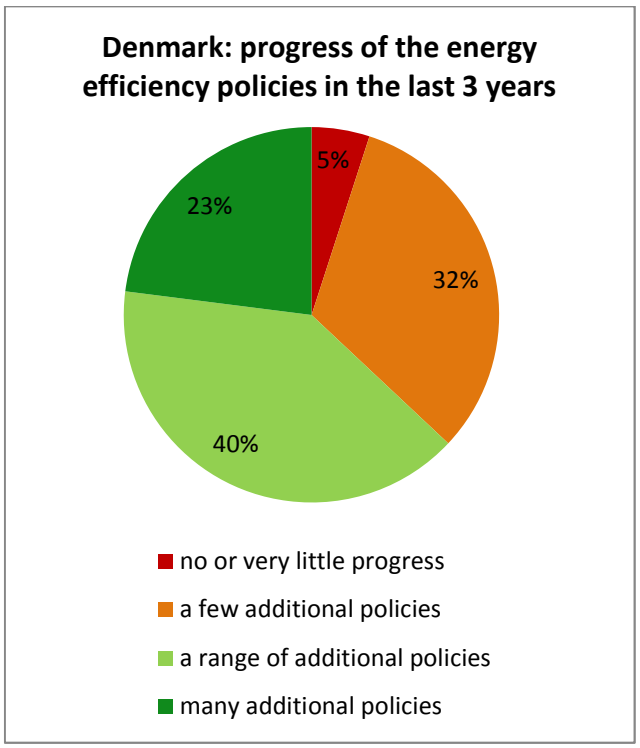
Denmark is the Member State that has made the most progress in energy efficiency policies since the second NEEAP (country progress indicator: 1 out of 28 - see page 81). Denmark had also progressed very well in the three preceding years (2012 survey: country progress indicator: 2 out of 27).

Danish experts see a high overall ambition in energy efficiency policies – almost 90 % consider it at least ambitious in a range of sectors. However, only around two thirds see a range or many additional policies in the last three years. These results indicate that experts find the energy efficiency policies are not quite living up to ambitions (however, both values are among the highest across the EU).

Critical issues mentioned by experts include the lack of progress in the transport sector as well as the need for more action in building renovation.

On the positive side, experts report a strengthening of energy efficiency policies since 2012 and the goal to become fossil-fuel free by 2050. Also, the building codes were reinforced.

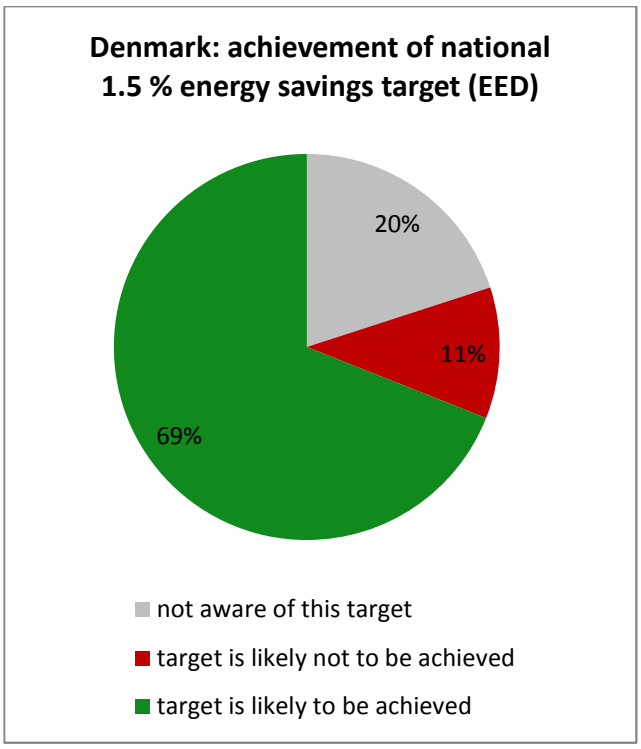


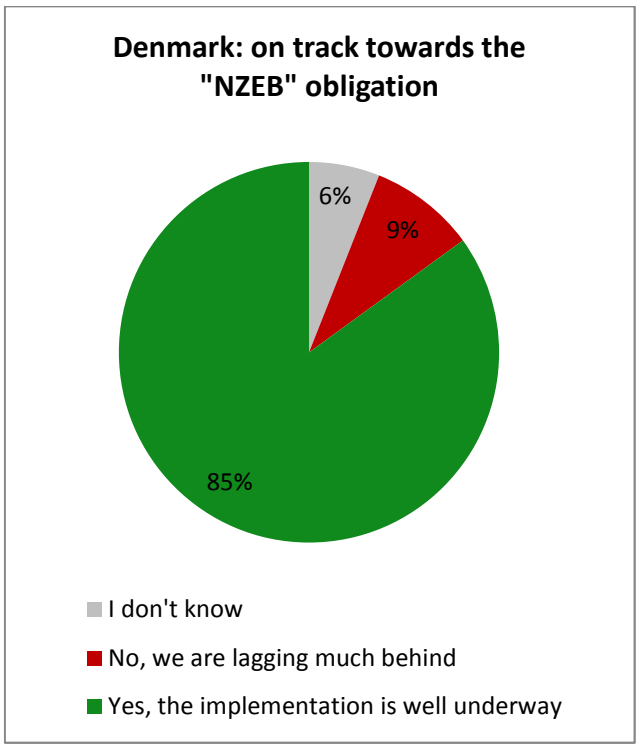


Almost 70 % of experts believe that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved. Regarding energy efficiency obligation programmes, experts mention the scheme that has existed in Denmark for a number of years with clear positive impacts. At the time of the survey an amendment process was reported as being underway.

85 % of the interviewees think that Denmark is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

Both for the EED and the EPBD, these are among the highest ratings of all Member States.

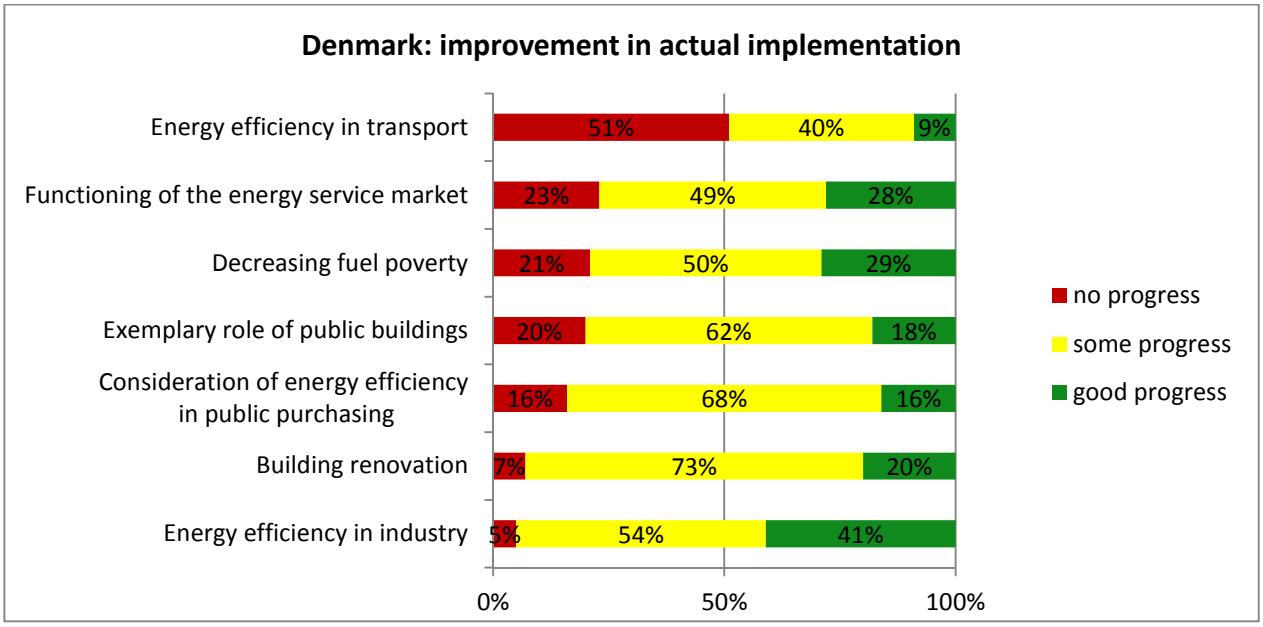




For the residential sector, experts mention the "Better Housing Programme" that promotes energy renovation for the private housing sector. Engaging more homeowners in building renovation remains a significant challenge.

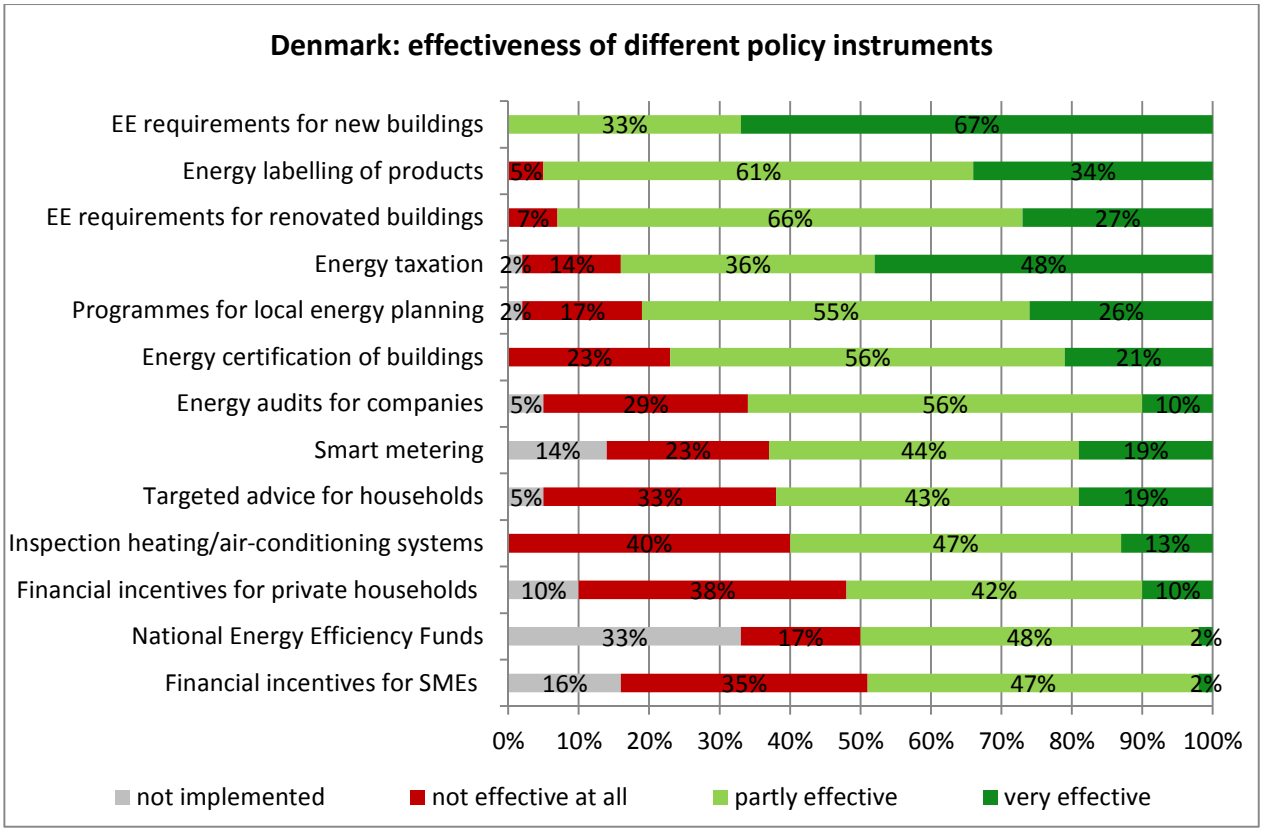
Experts report the introduction of an energy audit obligation scheme for large companies, and they call for more action in the industry and service sectors.

The increasing role played by regions and cities in energy efficiency progress is observed by the experts as well as the important role of the Danish Energy Agency.



Among specific policy instruments, energy efficiency requirements for new and renovated buildings (rated at least partly effective by 100 % and 93 % of experts respectively) and

energy labelling of products (95 % partly or very effective) are seen as the most effective in the Danish context. Energy taxation is also seen positively in Denmark, a very high ranking compared to other Member States. The highest ratings for "not effective at all" are given to the inspection of heating/air-conditioning systems (40 %) and to financial incentives for private households and SMEs (38 % and 35 % respectively).



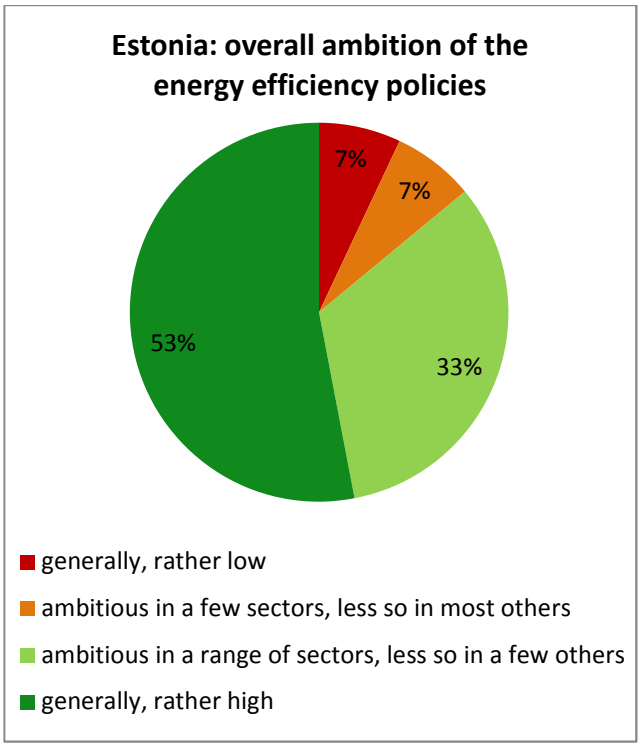
Estonia

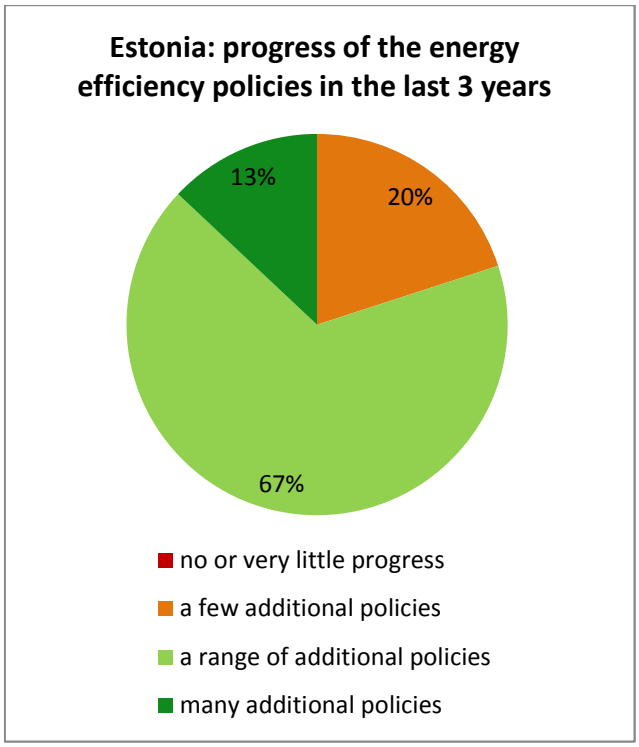
In the opinion of Estonian experts, Estonia is among those Member States that have progressed very well since the second NEEAP (country progress indicator: 3 out of 28 - see page 103). The rate of progress was similar as in the three preceding years (2012 survey: country progress indicator: 3 out of 27).

Experts consider the overall ambition of energy efficiency policies as very high. 86 % consider it at least ambitious in a range of sectors – among the highest ratings in the EU and a large increase since the previous survey in 2012. 80 % saw the introduction of a range or many additional policies in the last 3 years (the highest rating of all Member States).

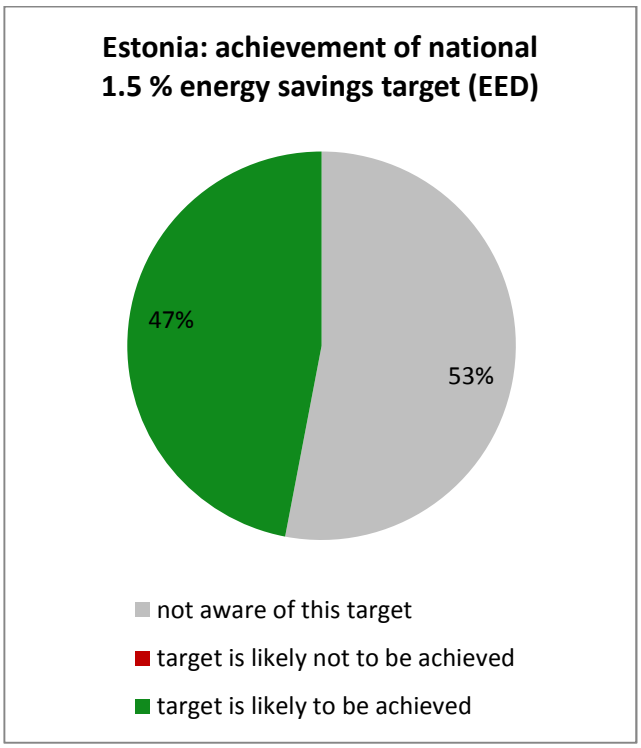
Among the positive developments reported is that investments in different sectors in energy efficiency improvements have started to take place, including building renovation.

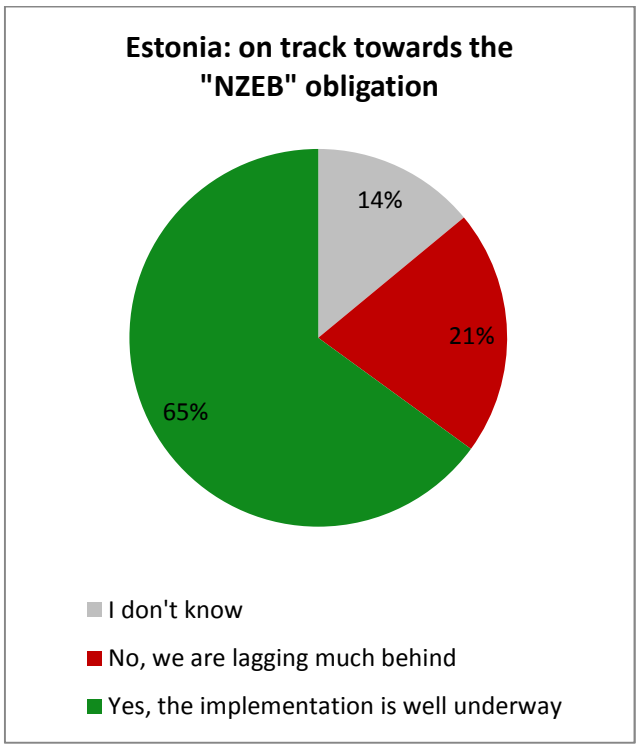
Moreover, the understanding of the economic benefits of energy efficiency has improved in the public sector. It is, however, clear that investments need to be significantly increased.





The EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not well known among the Estonian experts, however, those who are aware of it think it is likely to be achieved. At the time of the survey, there were no specific plans to introduce an energy efficiency obligation scheme (Art. 7 EED). Two thirds of all interviewees think that Estonia is on track to meet its obligation that all new buildings be "nearly zero-energy buildings" by 2020 (EPBD).

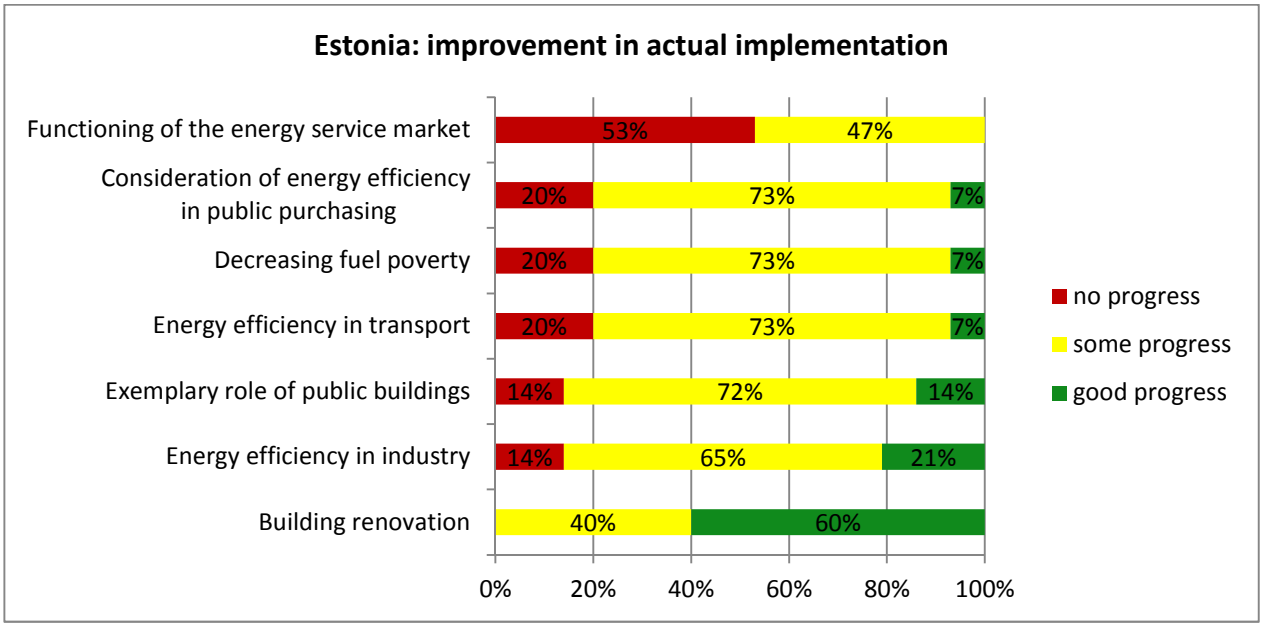




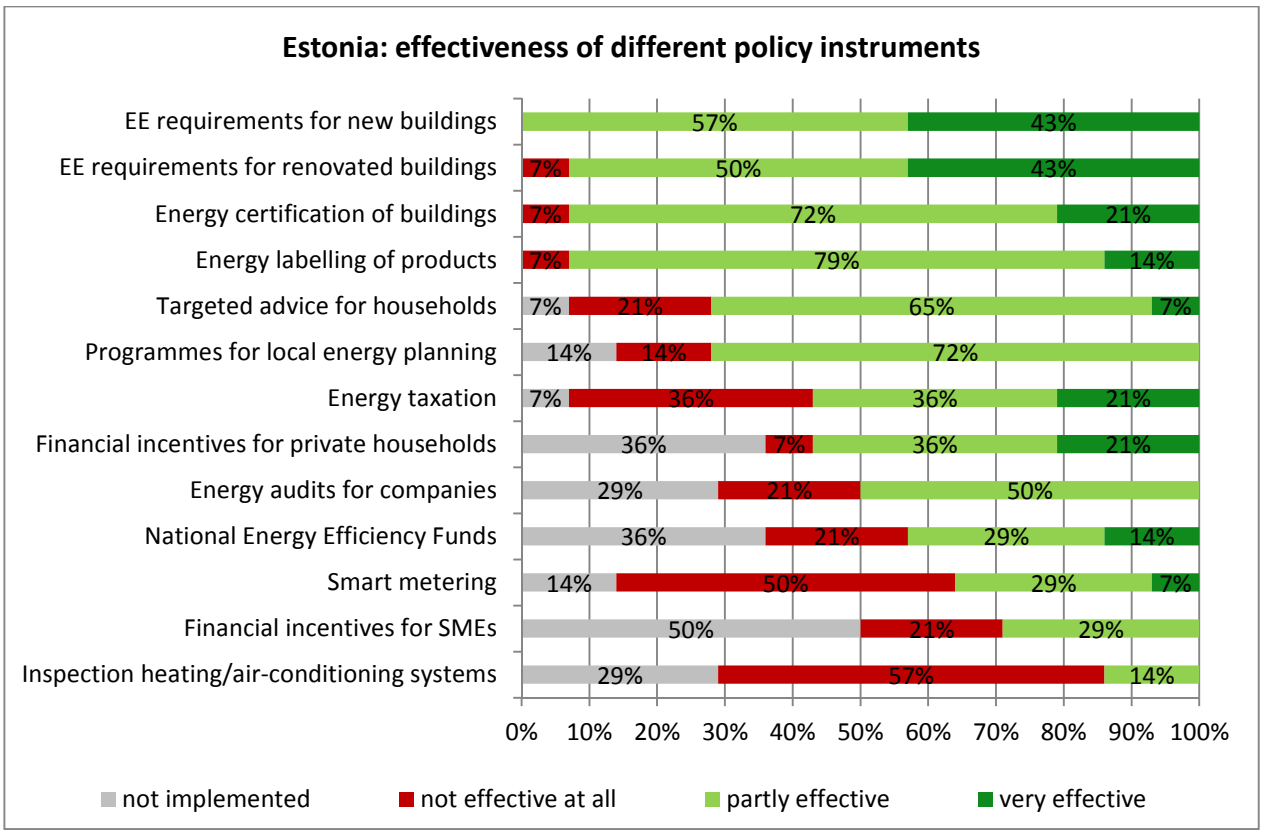
A renovation fund has triggered positive and noticeable market developments in the residential sector (Estonia has the highest progress indicator of all EU countries in this sector). However, renovation rates still need to increase significantly, according to the experts, especially for single-family homes.

Experts report that the market for energy efficiency services does not yet function very well. They call for support to ESCOs in developing and implementing energy efficiency projects, e.g. in the form of information and possibly guarantees.

There is a significant need for action in the transport sector, including the conversion to car fleets with lower consumption.



In terms of specific energy efficiency policy instruments, energy efficiency requirements for new and renovated buildings (rated at least partly effective by 100 % and 93 % of experts respectively - among the highest ratings of all Member States), energy certification of buildings and energy labelling of products (both 93 % at least partly effective) are seen as the most effective by the Estonian experts. The highest ratings for "not effective at all" are given to the inspection of heating/air-conditioning systems (57 %) and smart metering (50 %) - both are among the lowest ratings of all Member States.

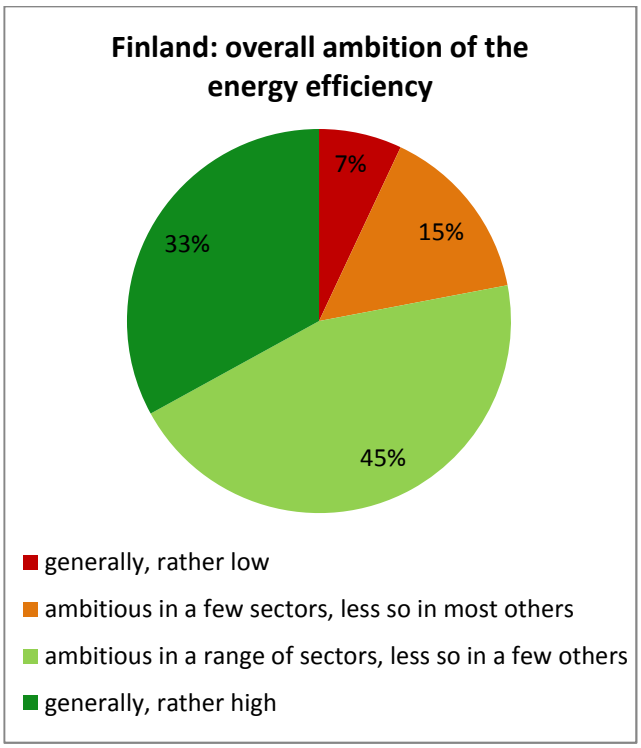


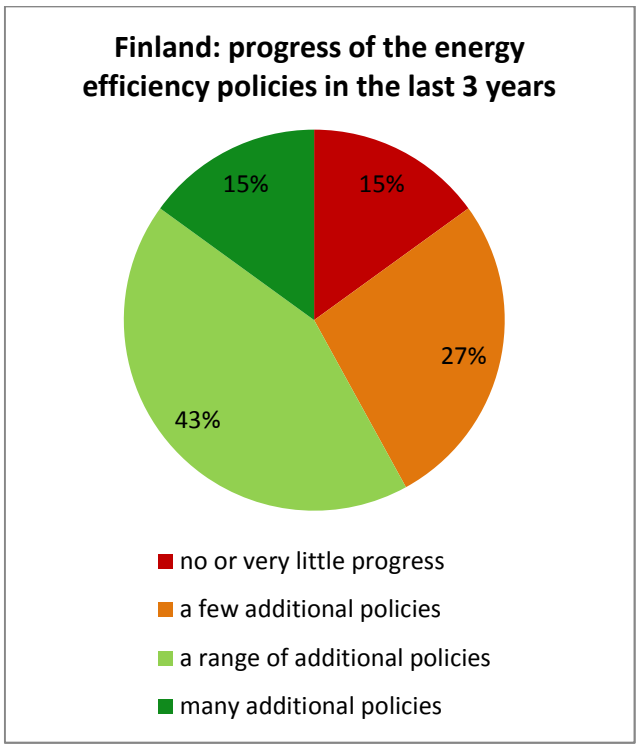
Finland

According to Finish experts, Finland is among those Member States that have progressed very well since the second NEEAP (country progress indicator: 2 out of 28 - see page 103). This is a continuation of the progress made in the three preceding years (2012 survey: country progress indicator: 1 out of 27).

The experts consider the overall ambition of energy efficiency policies as relatively high – more than 75 % consider it at least ambitious in a range of sectors. Almost 60 % state that a range or many additional policies were introduced in the last three years.

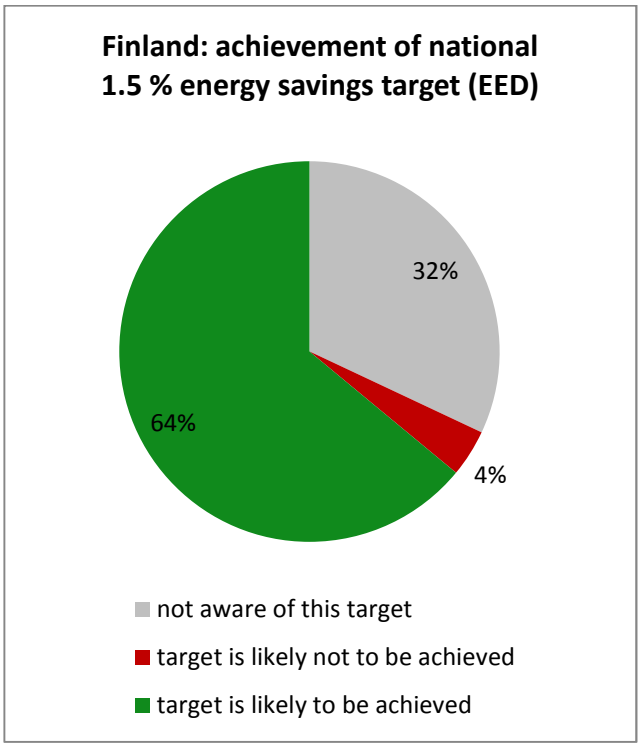
Experts mention Finland's long tradition of energy audit programmes and voluntary agreements for energy efficiency. Nevertheless, they also see European directives as drivers of energy efficiency policies.

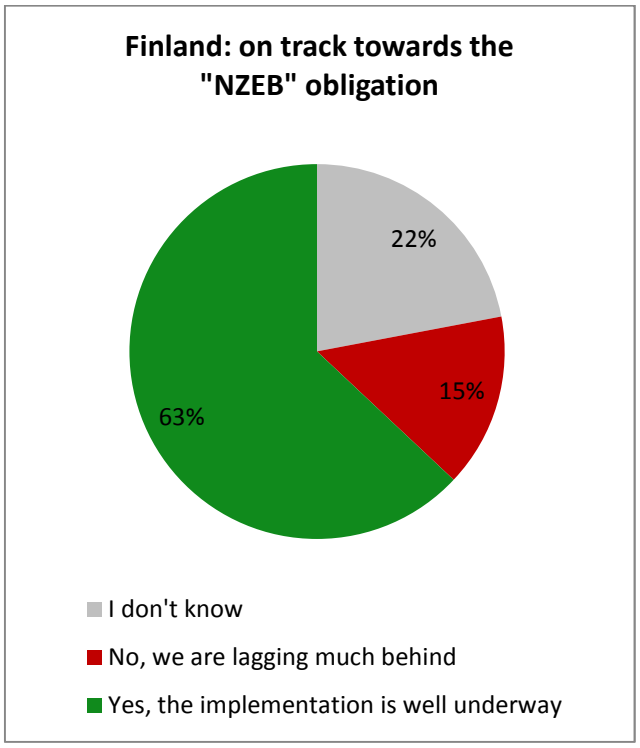




64 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved (among the highest ratings of all Member States).

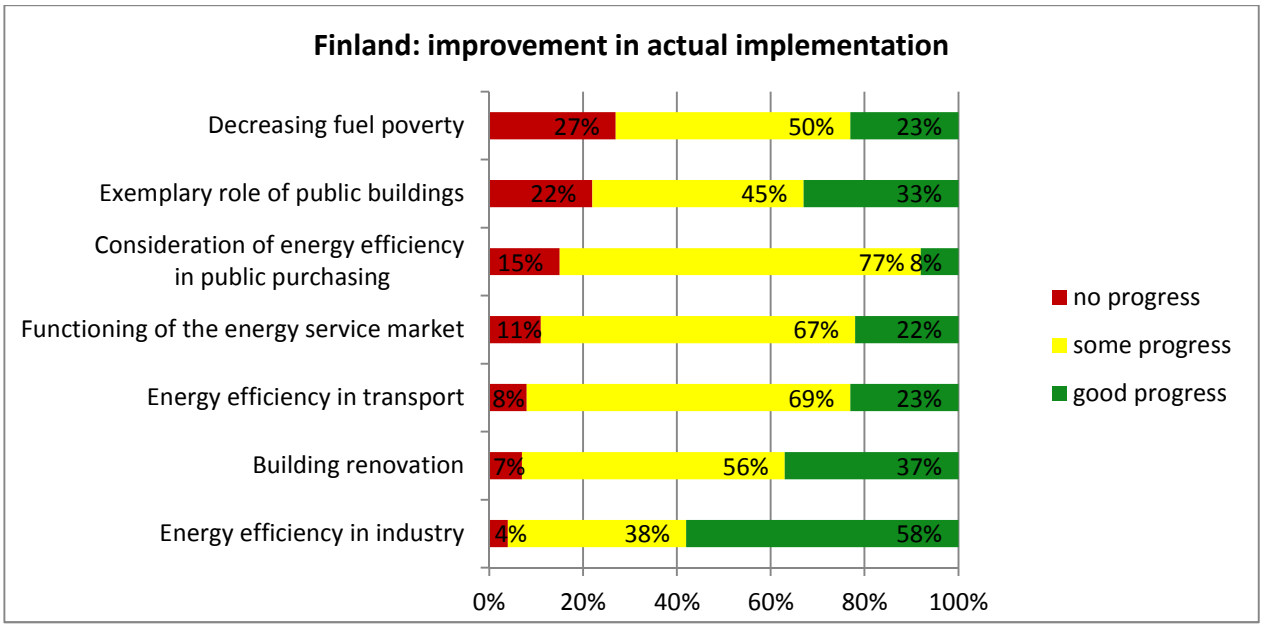
A similar percentage believes that Finland is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.



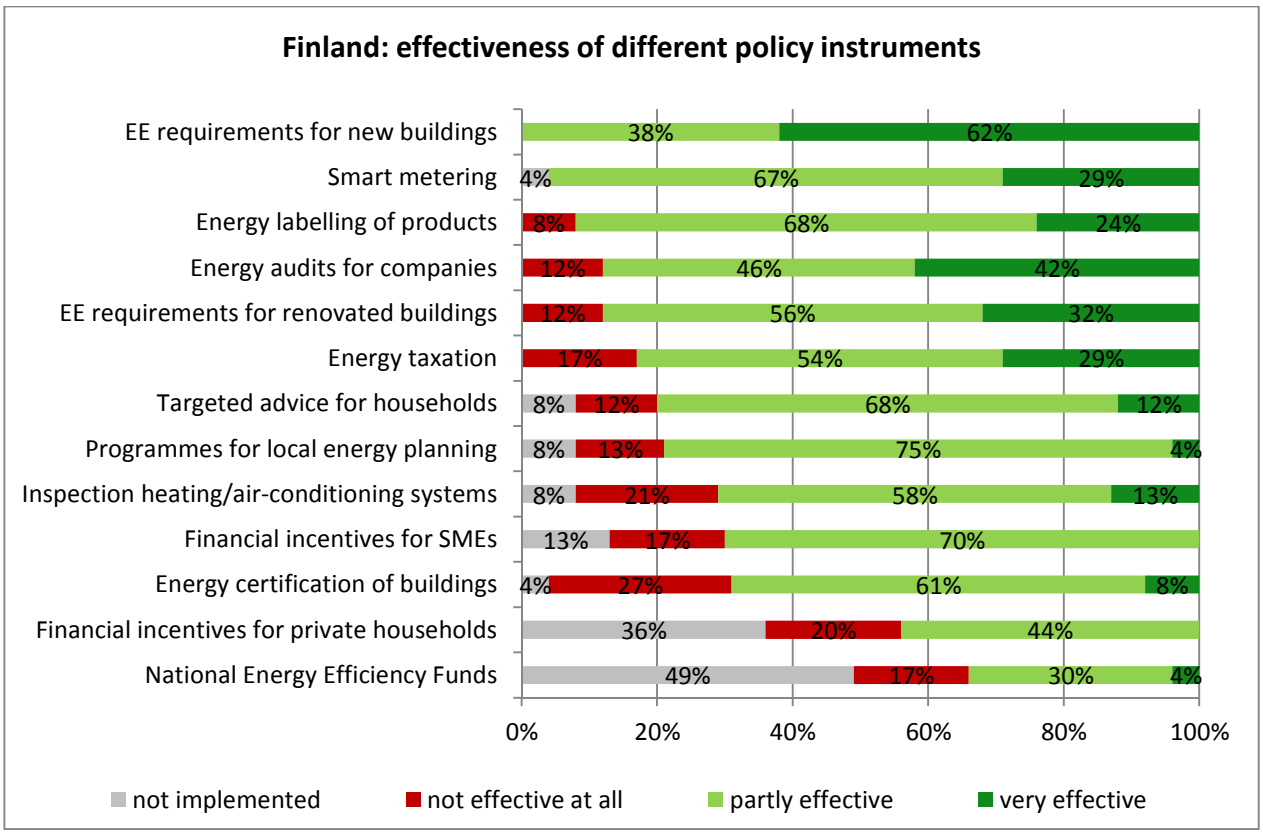


Experts note the importance of voluntary agreements for the different sectors. They also comment on some progress in the public and the residential sectors.

In contrast to many other EU countries, experts see strong progress in several sectors, including energy efficiency in industry.



Finish experts think rather positively of a range of energy efficiency policy instruments. Energy efficiency requirements for new buildings, smart metering and energy labelling of products are rated as partly or very effective by 100 %, 96 % and 92 % of experts respectively. As in the 2012 survey, smart metering received here the most positive rating of all countries. Energy audits for companies were also attributed by far the highest rating of all countries. The instrument with the highest percentage of "not effective" is energy certification of buildings.



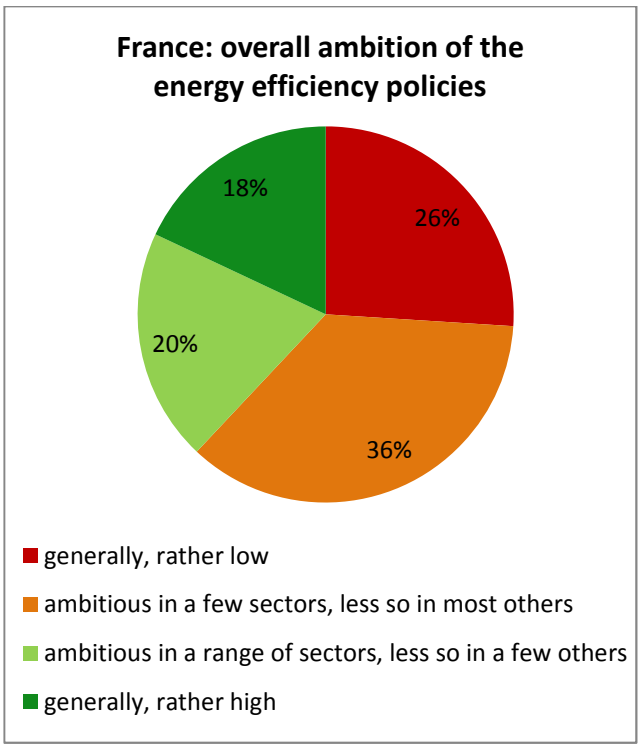
France

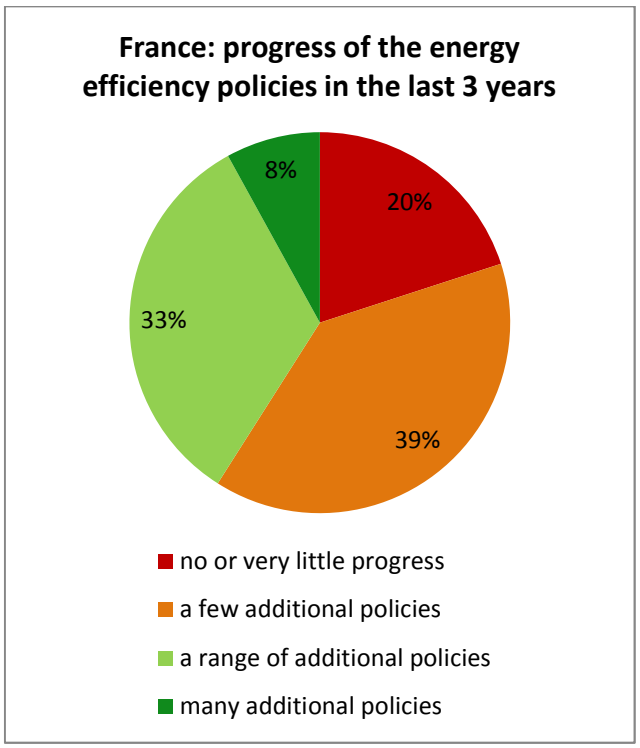
France is among the Member States that has made medium progress since the second NEEAP (country progress indicator: 12 out of 28 - see page 103). The rate of progress remains more or less unchanged compared to the three preceding years (2012 survey: country progress indicator: 10 out of 27).

Nearly two thirds of the experts believe that the overall level of ambition of the energy efficiency policies is low or only ambitious in a few sectors. 41 % think that a range or many additional policies were implemented in the last three years, while 59 % see only a few or no additional policies.

Experts consider triggering large-scale building renovation as a crucial issue. Energy Saving Certificates are perceived to be successful and important to the energy efficiency development in France. A recently approved law on the energy transition reflects the government's heightened priority for energy efficiency.

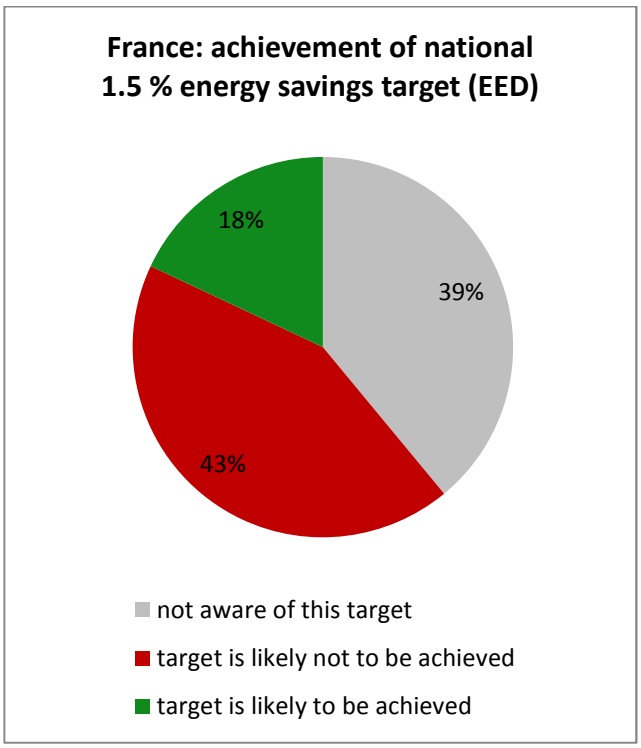
Experts mention that the role of the national energy agency ADEME has grown in the past few years. The regional and local levels have also seen an increase in importance in energy efficiency issues, for example through the "Air, Climate and Energy" plans.

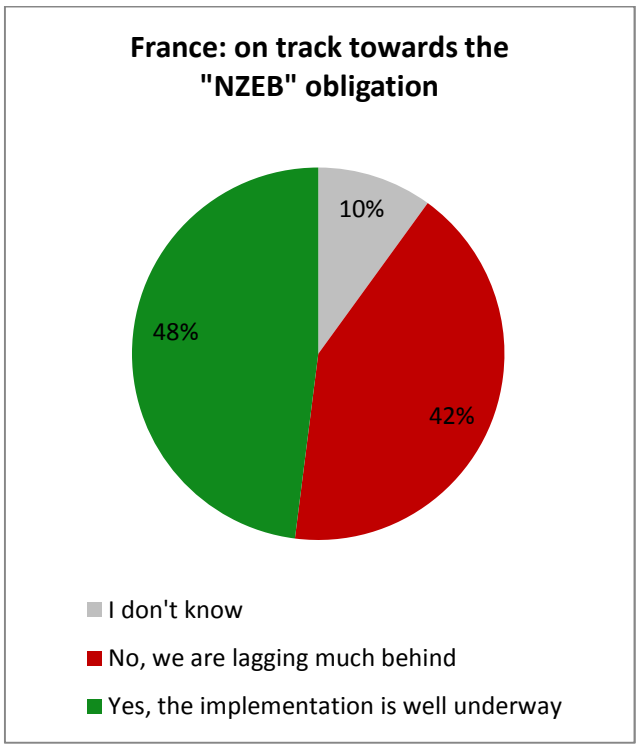




Less than 20 % of the experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved which is among the lower ratings of the Member States. France already had an Energy Saving Certificates scheme pre-dating the EED. No new energy efficiency obligation scheme was introduced, but the requirements were increased and the calculation method updated.

Opinions among interviewees are divided as to whether France is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020 (48% yes versus 42 % no).



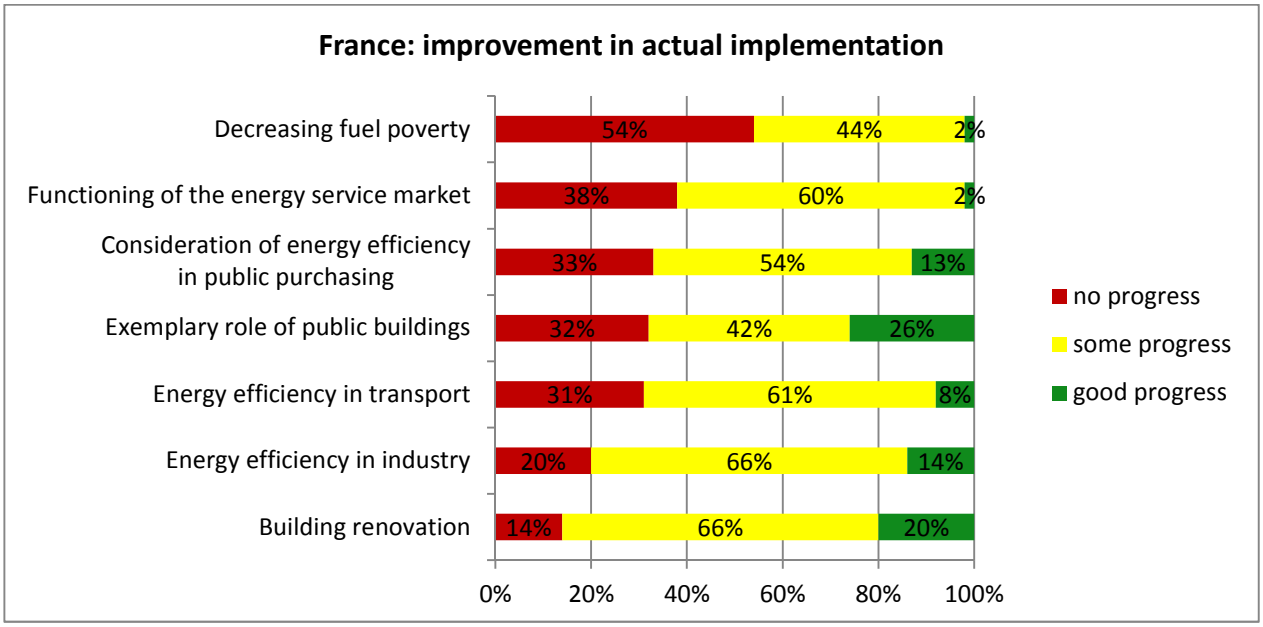


For the public sector, experts report progress in building renovation. However, the data collection for the central government buildings presents a challenge.

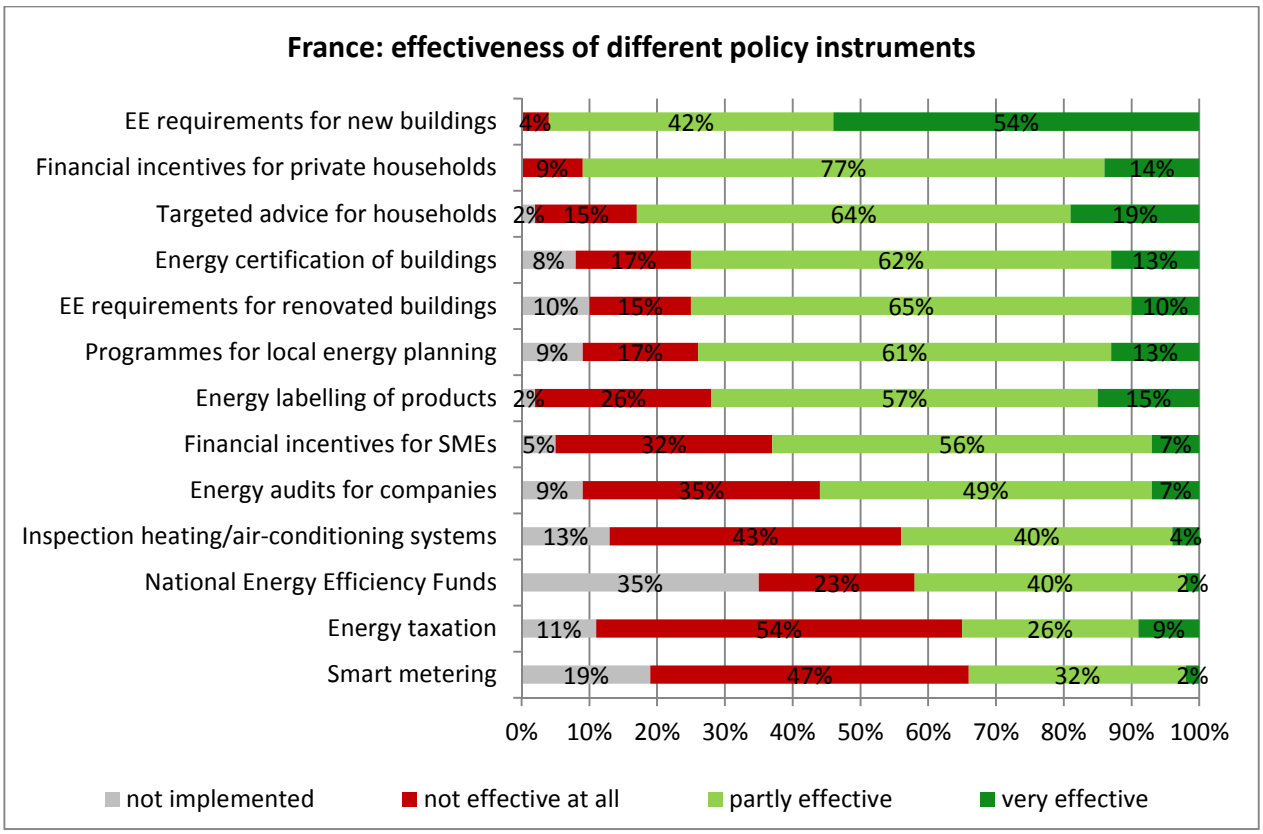
Experts mention a range of policies and programmes to support energy efficiency in the residential sector, for both new buildings and building renovation.

A lack of specific measures is observed for the service sector, however, many of the policies of the residential sector are also applied for the service sector.

For the transport sector, experts report on the existence of a successful bonus-penalty scheme.



In terms of specific policy instruments, experts consider energy efficiency requirements for new buildings, financial incentives for private households and targeted advice for households as the most effective in the French context (rated at least partly effective by 96 %, 91 % and 83 % respectively). The perceived level of effectiveness for energy advice for households is among the highest in the EU. The instruments seen to be the least effective are energy taxation (54 % "not at all effective") and smart metering (47 % "not at all effective") - both among the lowest ratings of all countries.

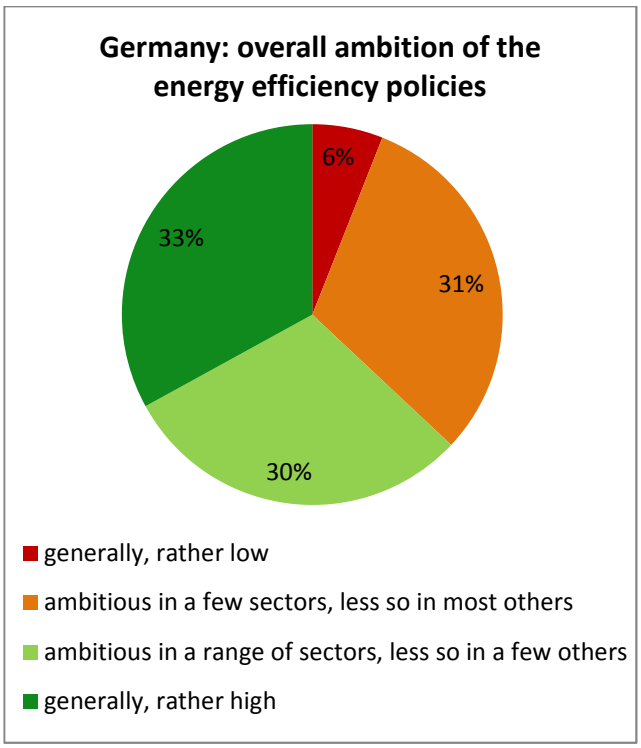


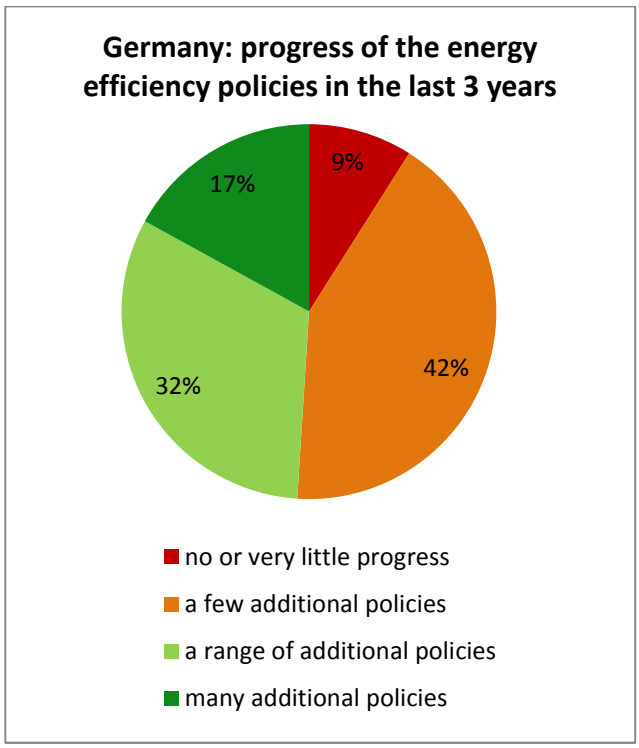
Germany

According to the German experts, Germany is among those countries that have progressed relatively well since the second NEEAP (country progress indicator: 5 out of 28 - see page 103). There was a small increase in the rate of progress compared to the preceding three years (2012 survey: country progress indicator: 8 out of 27).

Experts see a relatively high overall ambition of energy efficiency policies - 63 % consider it at least ambitious in a range of sectors. Opinions are divided regarding the introduction of new policies: one half see a range or many additional policies, the other only a few additional policies. These results indicate that experts find that energy efficiency policies are not sufficiently living up to the ambitions.

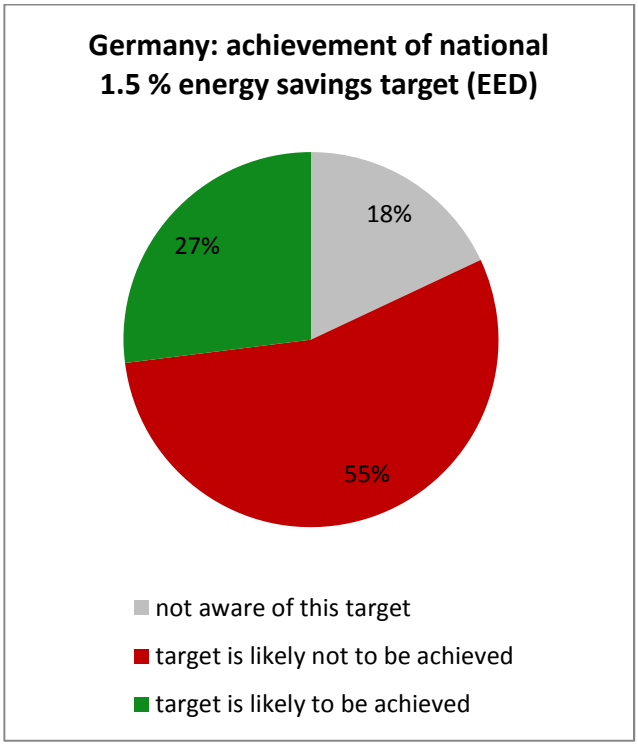
The main critical issue mentioned by the experts is the concrete implementation of the recently approved German National Action Plan Energy Efficiency ("Nationaler Aktionsplan Energieeffizienz"). The most important positive development reported is that energy efficiency is recognised today as the second pillar of Germany's energy strategy and that reorganisation of the responsibilities in the respective federal ministries has created new dynamics in energy efficiency policies.

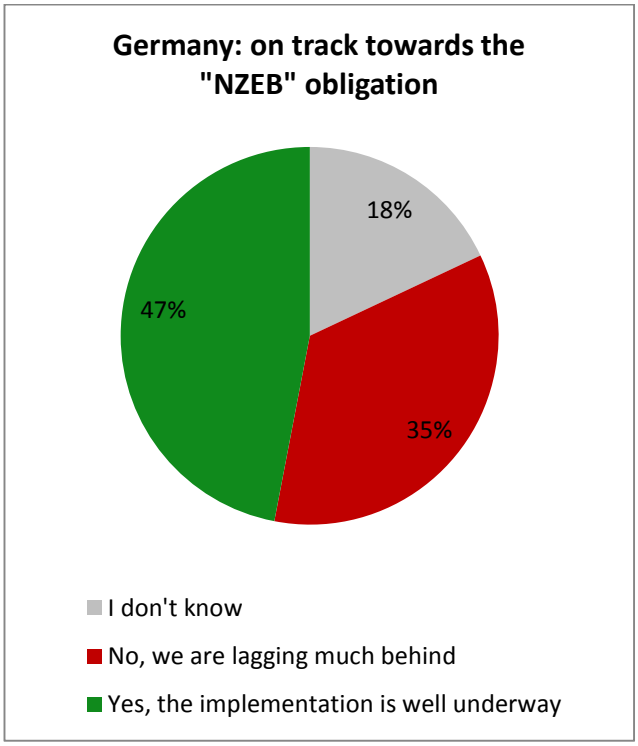




More than half of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. The experts report that Germany has decided not to introduce an energy efficiency obligation scheme for energy distributors/retailers, but to opt for other policy measures to achieve energy savings among final customers, such as competitive bidding for the implementation of electricity saving measures.

About half of the experts believe that Germany is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.



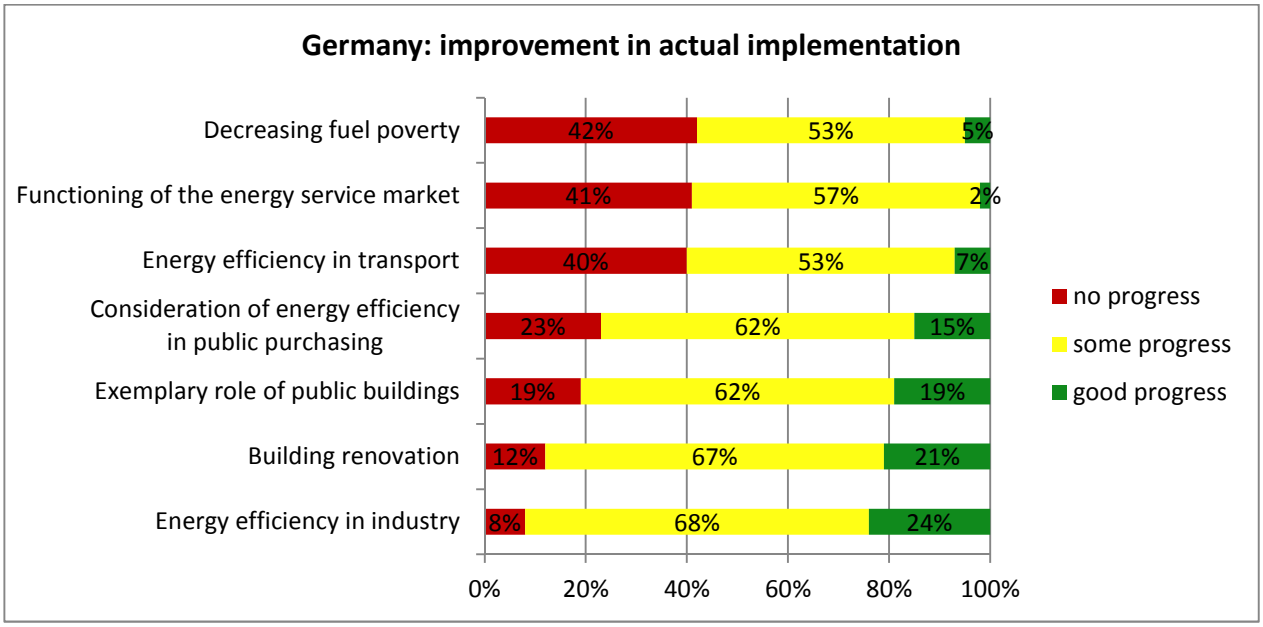


The "3% renovation rate" (as foreseen in the EED) for the public sector is widely discussed, resulting in a delay in fixing and implementing effective strategies for the renovation of government buildings. The Länder (regions) have an important role in achieving increased efficiency in the public building stock. There is a good number of implemented projects in the public sector, but priorities vary greatly between the different Länder.

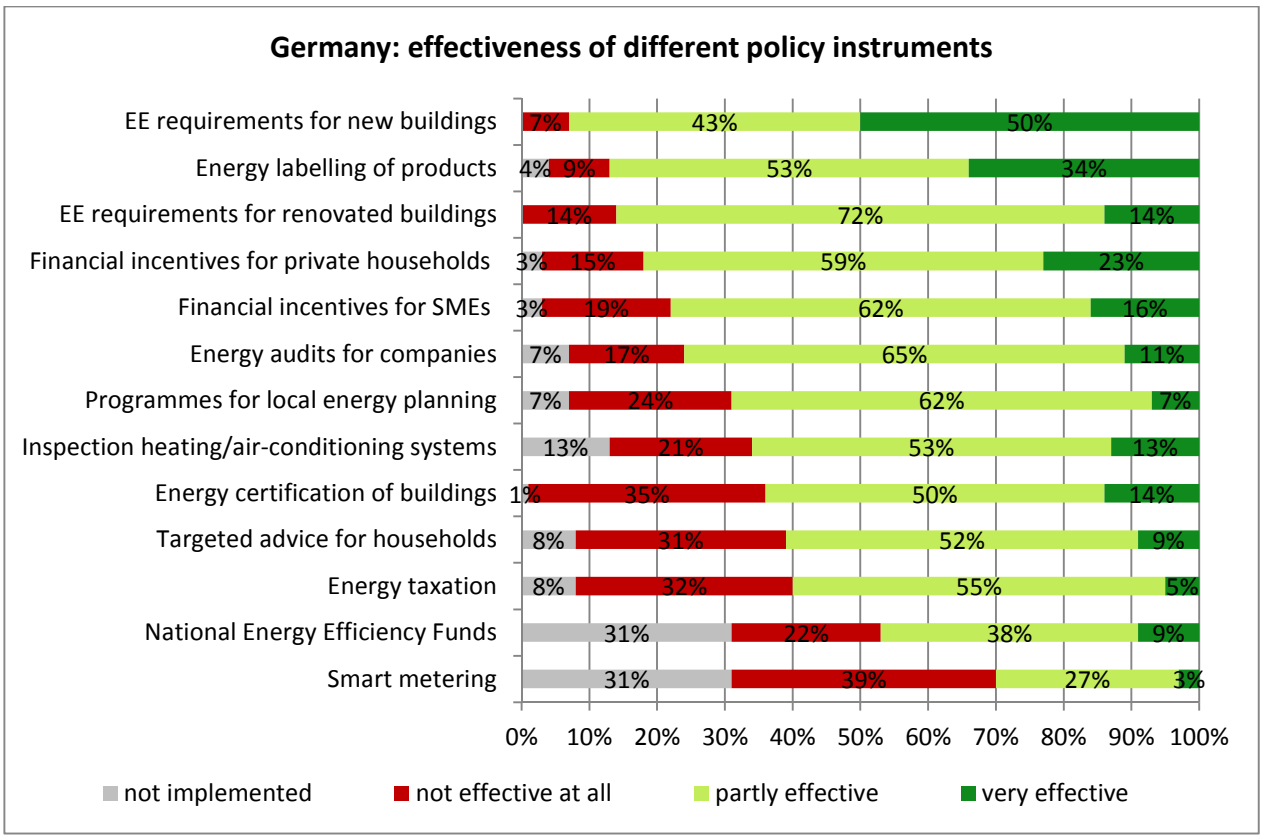
In the residential sector, the KfW funding programme continues to be the key policy instrument for deep renovation and construction of low energy homes. It has succeeded in setting up widely-recognised standards. However, a decreasing interest in renovation is currently observed. Experts also call for more support for low income households.

According to the experts, the industry sector is the sector that has seen the most progress in the last three years. Important drivers were the obligations to implement energy audits or energy management systems in exchange for energy tax rebates. Local and regional energy efficiency networks were among the positive developments mentioned by the experts.

In contrast, the experts find that insufficient progress was made in the transport sector.



Among specific policy instruments, energy efficiency requirements for new and renovated buildings and energy labelling of products (rated at least partly effective by 93 %, 86 % and 87 % respectively) as well as financial incentives for private households (82 % partly or very effective) are perceived as the most effective by the German experts. The highest ratings for "not effective at all" are given to smart metering and energy certification of buildings (39 % and 35 % respectively).



Greece

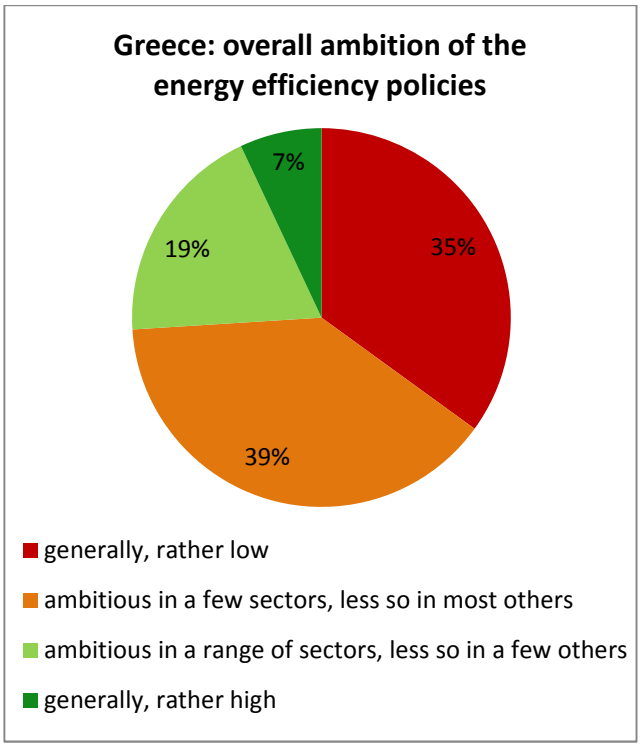
In the opinion of Greek experts, Greece is among those countries that have made relatively little progress since the second NEEAP (country progress indicator: 24 out of 28 - see page 103). The rate of progress has slowed down considerably compared to the period after the first NEEAP (2012 survey: country progress indicator: 16 out of 27).

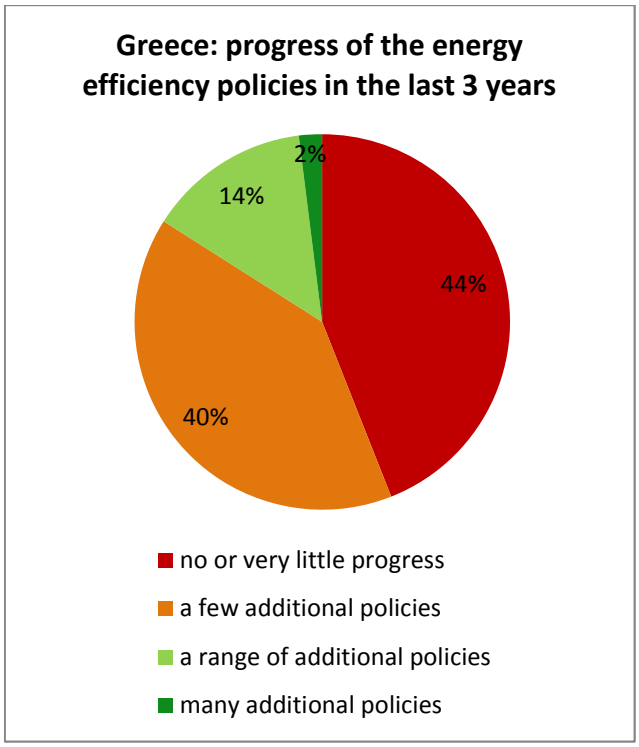
Almost three quarters of the experts see a relatively low overall ambition of energy efficiency policies - 74 % consider the ambition rather low or ambitious in only a few sectors. 84 % think that no or only a few additional policies were introduced in the last three years.

The economic and financial crisis has resulted in a decrease of energy consumption in the domestic sector. Moreover, the reduced activities in the service and industry sectors are causing lower energy demands. This reduction in energy consumption is contributing to the achievement of the energy efficiency targets, although with serious social impacts, such as fuel poverty.

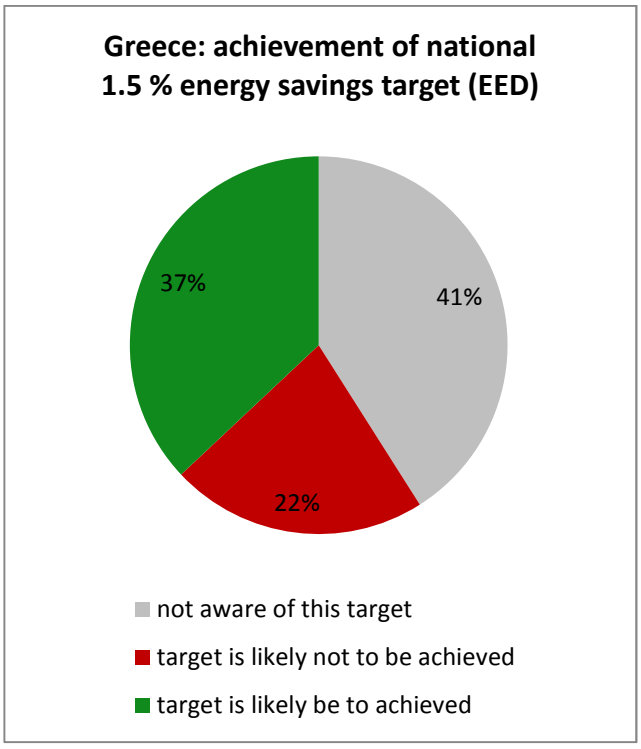
Experts call for a new policy strategy and actions to stimulate energy efficiency. They also hope for an improvement by using Structural Funds from the new programming period.

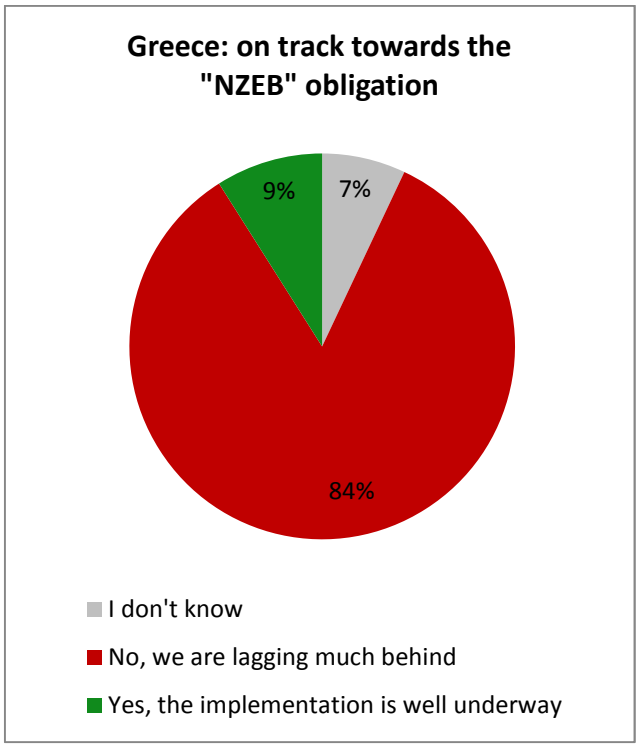
Regarding the implementation of the EPBD, the experts mention the introduction of a catalogue of registered building auditors and certifiers of energy performance certificates.





37 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved, in comparison to 22 % that believe it will not be achieved. The large majority (84 %) finds that Greece is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

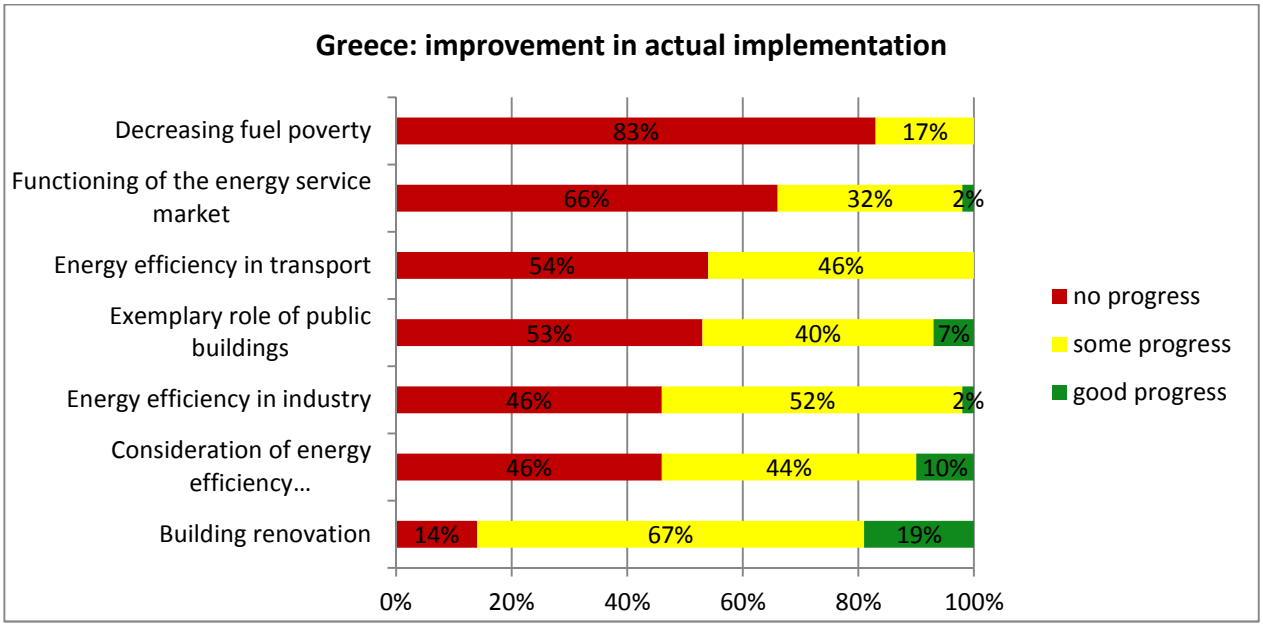




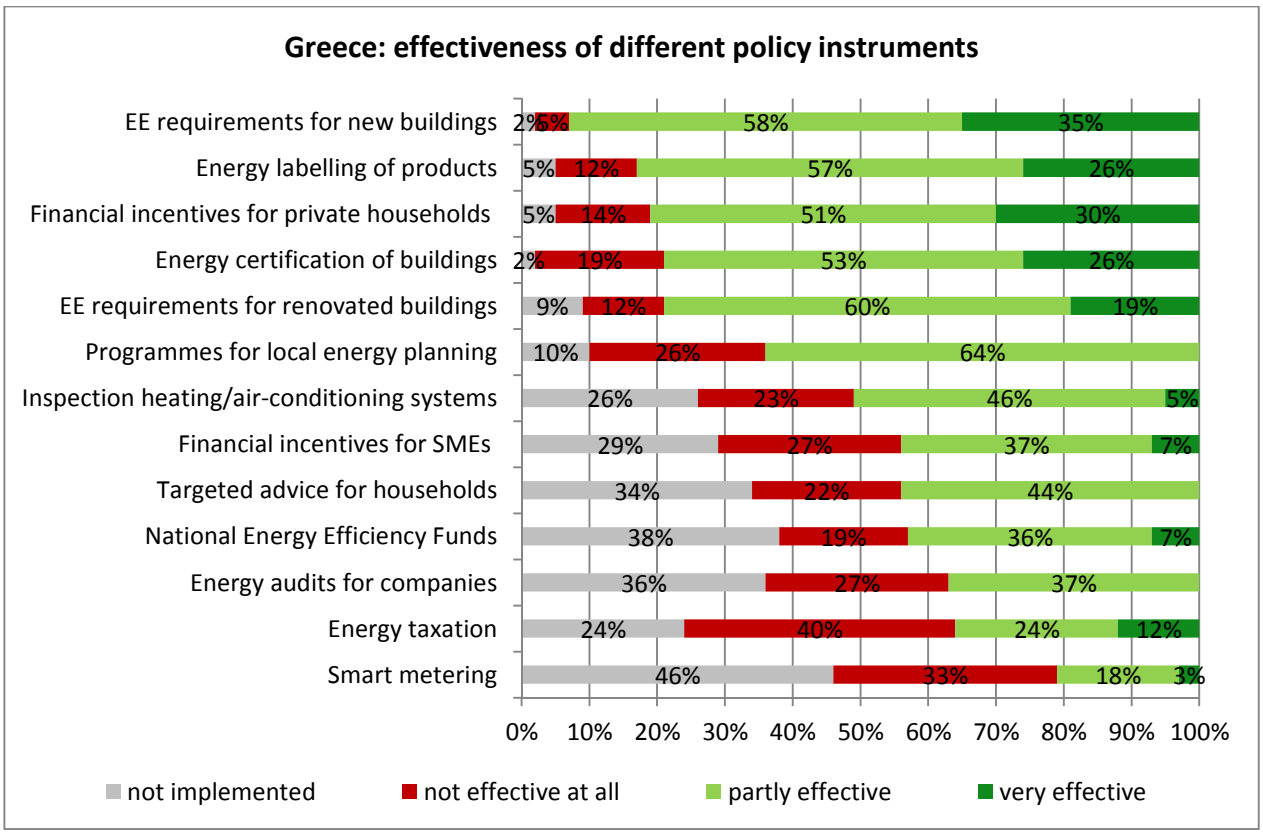
In the public sector, the lack of funding is a key challenge. Another obstacle is that many governmental buildings are not owned but rented which makes energy efficiency investments even more difficult.

A funding programme for building renovation is in place for the residential sector.

Experts report on significant improvements due to investments in the public transport sector which are partly being continued. The economic crisis has also resulted in a reduced use of cars.



In terms of specific policy instruments, energy efficiency requirements for new buildings, energy labelling of products and financial incentives for private households are seen as the most effective by the Greek experts (rated as partly to very effective by 93 %, 83 % and 81 % respectively). The instruments considered to be the least effective are energy taxation and smart metering, rated "not effective at all" by 40 % and 33 % respectively.



Hungary

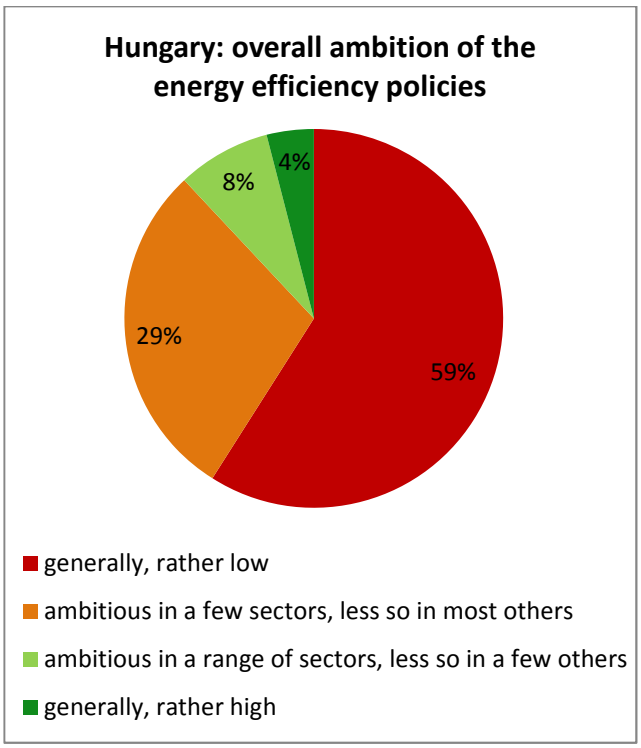
According to the Hungarian experts, Hungary is among the Member States that have made relatively little progress since the second NEEAP (country progress indicator: 26 out of 28 - see page 103). The rate of progress has slowed down somewhat compared to the period after the first NEEAP (2012 survey: country progress indicator: 20 out of 27).

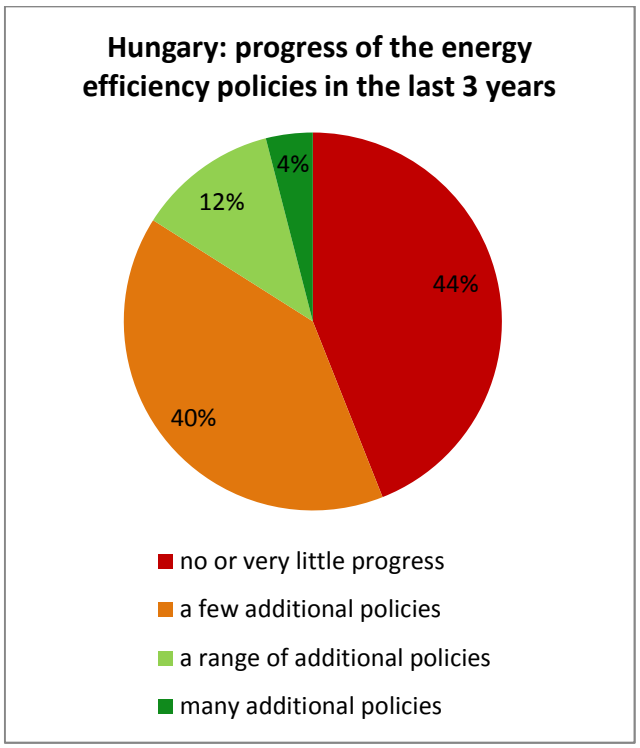
Almost 90 % of interviewed experts consider the overall ambition of energy efficiency policies as rather low (59 %) or ambitious in only a few sectors (29 %). Similarly, 84 % think that no or only a few additional policies were introduced in the last three years (both ratings are among the lowest in the EU).

Among the critical issues observed by the experts are that energy efficiency is not a policy priority and there is a focus on the supply side. They also regret the impact that regulatory measures for keeping energy prices low have on energy efficiency.

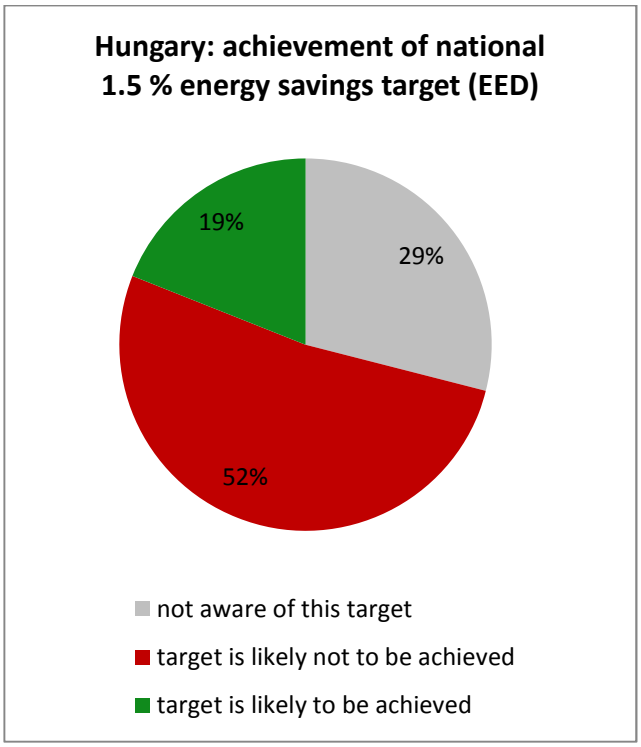
As positive developments, the experts see the financing provided by European Funds as well as increased awareness of energy efficiency among citizens and municipalities.

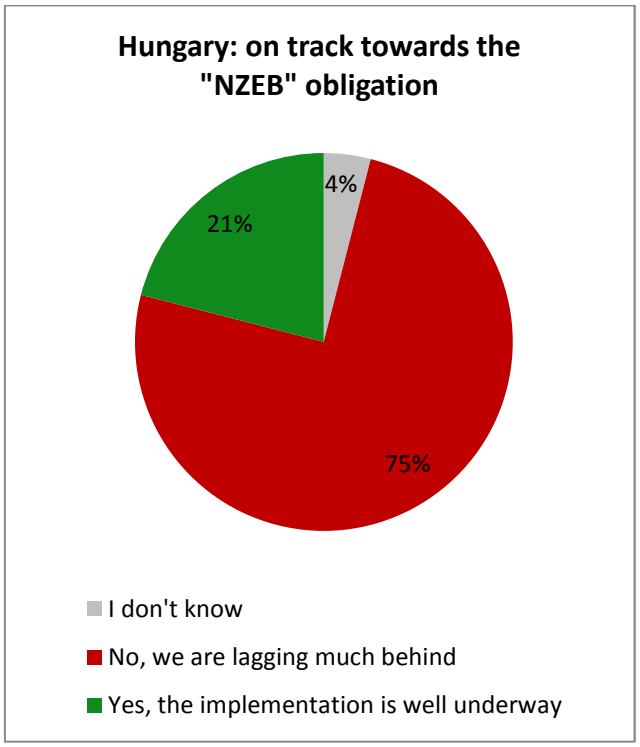
The experts also mention a centralisation process in the field of energy efficiency.





More than half of the interviewed experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Three quarters believe that Hungary is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

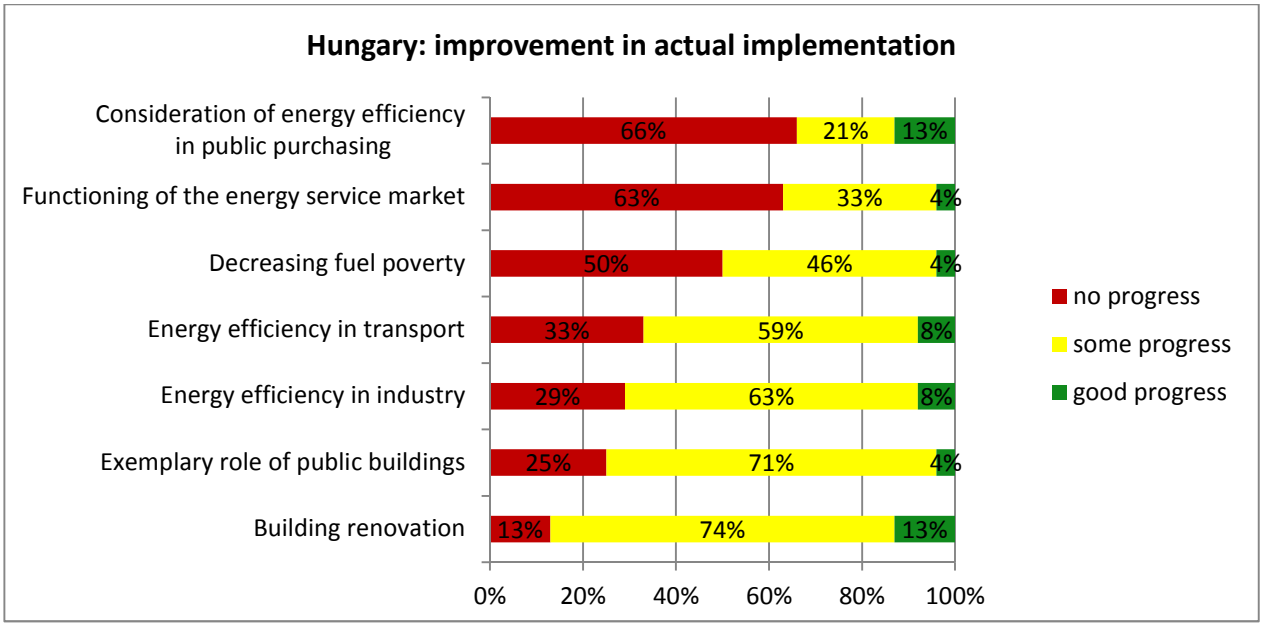




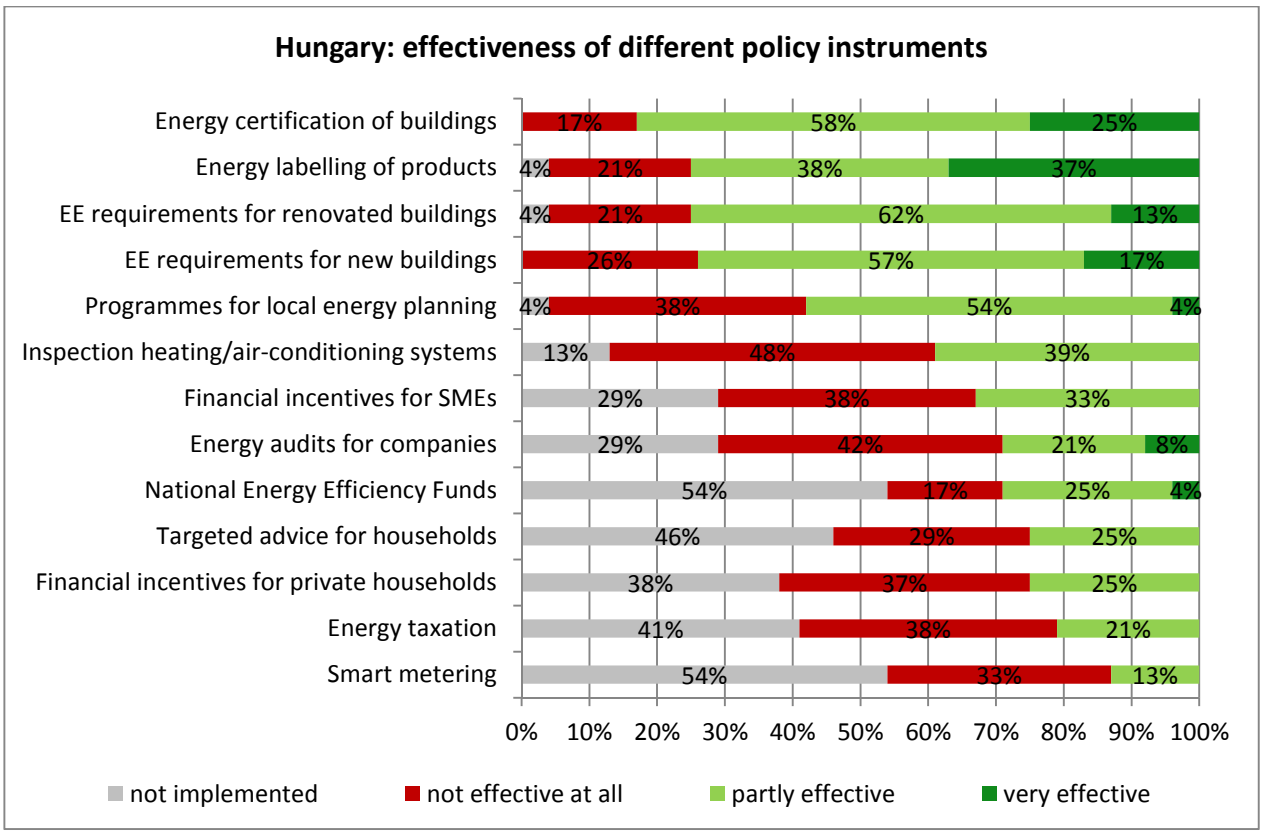
For the public sector, experts mention the cut of municipal budgets. The ownership of many municipal buildings changed from the local level to the national government with operating costs continuing to be paid by the municipalities. This is seen as an additional barrier to energy efficiency improvements in the public building stock.

Some funds were available in the residential sector, though only sporadically. Also, the policy measures to keep energy costs low slowed the progress in energy efficiency across sectors.

For the transport sector, experts report on the existance of programmes to increase electric cars and the historically high use of public transport. However, they also see a high need for investments in modernisation.



Among specific energy efficiency policy instruments, energy certification of buildings and energy labelling of products are seen as the most effective in the Hungarian context (rated at least partly effective by 83 % and 75 % respectively). Also, experts perceive energy efficiency requirements for new and renovated buildings as similarly effective (74 % and 75 % at least partly effective). The highest rating for "not effective at all" is given to the inspection of heating/air-conditioning systems (almost 50 %).

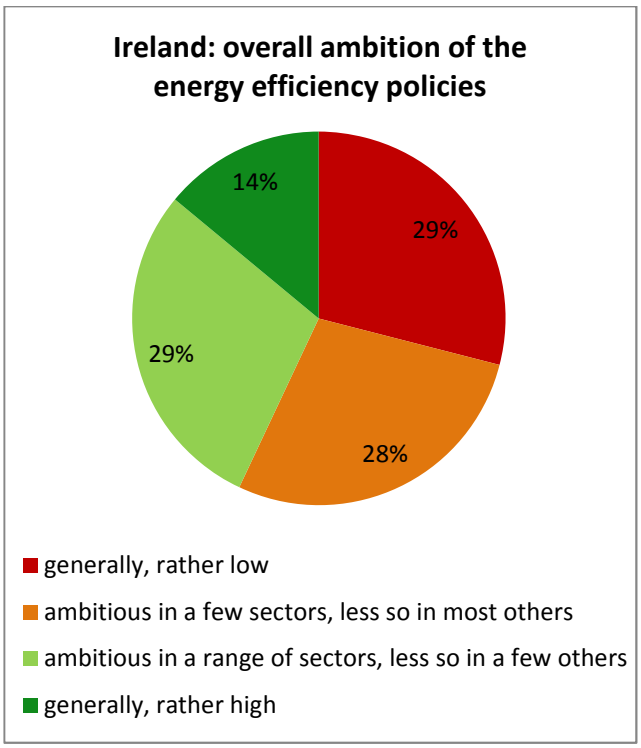


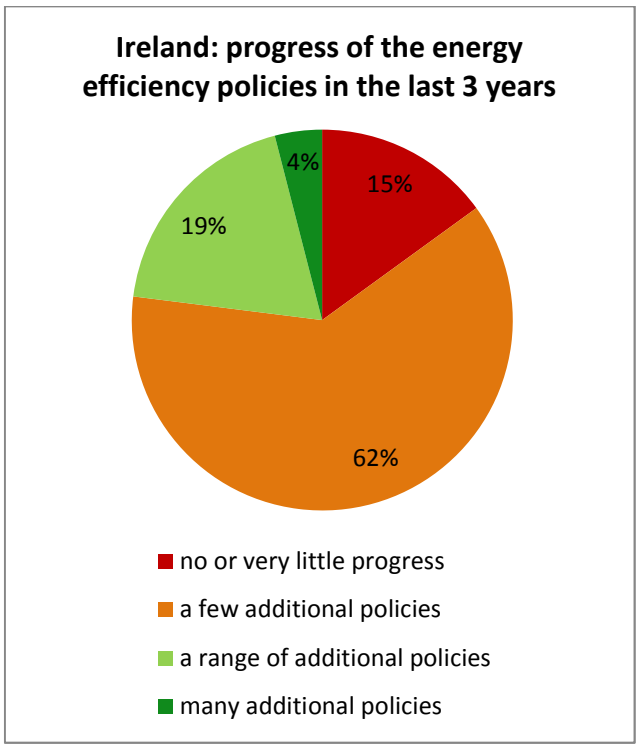
Ireland

Ireland is among the Member States that has made medium progress in energy efficiency policies since the second NEEAP (country progress indicator: 15 out of 28 - see page 103). The rate of progress was somewhat lower than in the three preceding years (2012 survey: country progress indicator: 11 out of 27).

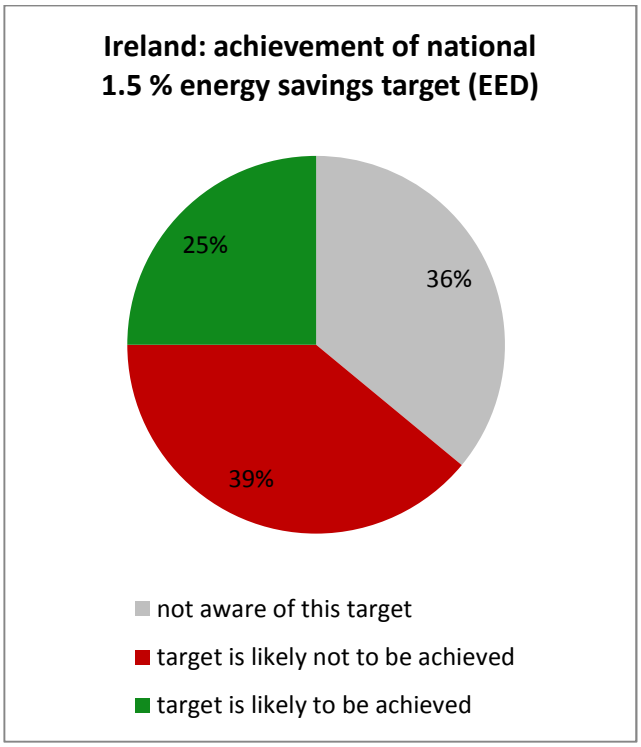
Opinions on the level of overall ambition in energy efficiency policies are divided among experts: 43 % think it is ambitious in a range of sectors or even generally rather high, whereas more than 50 % find it ambitious only in a few sectors or generally rather low. Over three quarters of the interviewees say that only a few or no additional policies were introduced in the last three years.

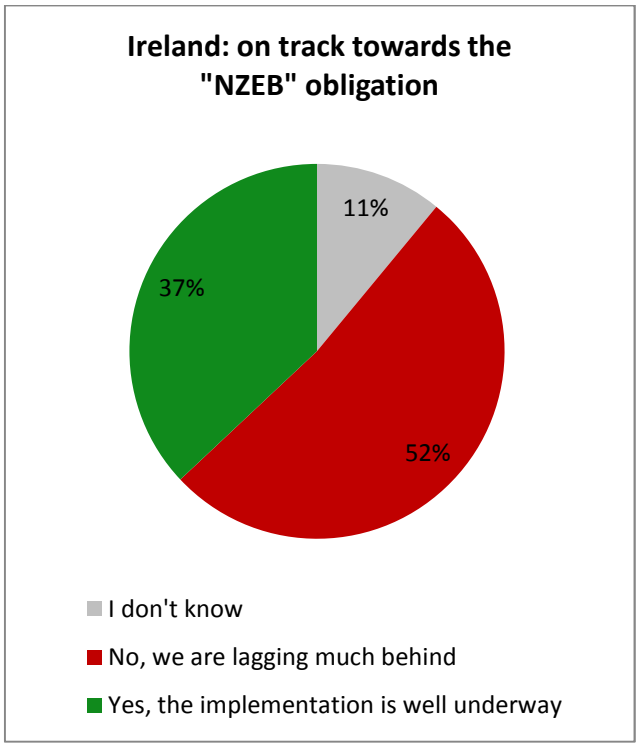
Experts report on the positive impacts of the energy efficiency obligation scheme as well as the availability of building renovation schemes. However, they see the need to stimulate deep retrofitting of buildings.





Almost 40 % of interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. More than half believe that Ireland is behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.



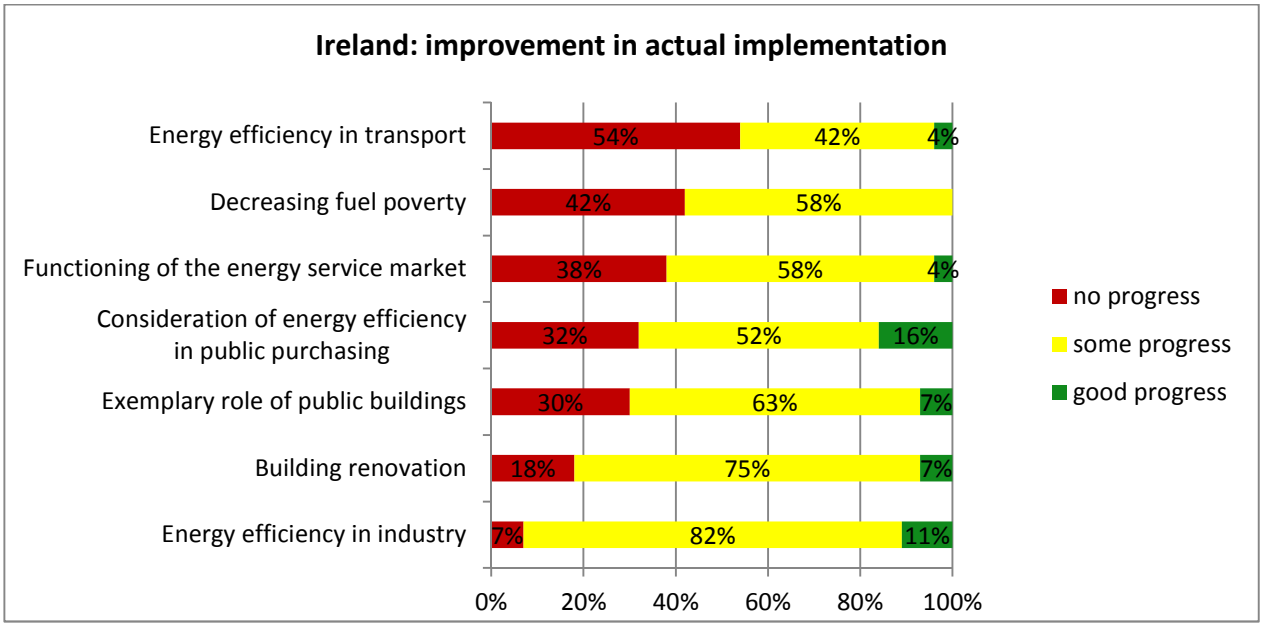


In the public sector, experts note that all public bodies must report their energy use and their progress in energy efficiency on an annual basis. They see a large disparity in progress, with some public bodies championing energy efficiency and others lagging behind.

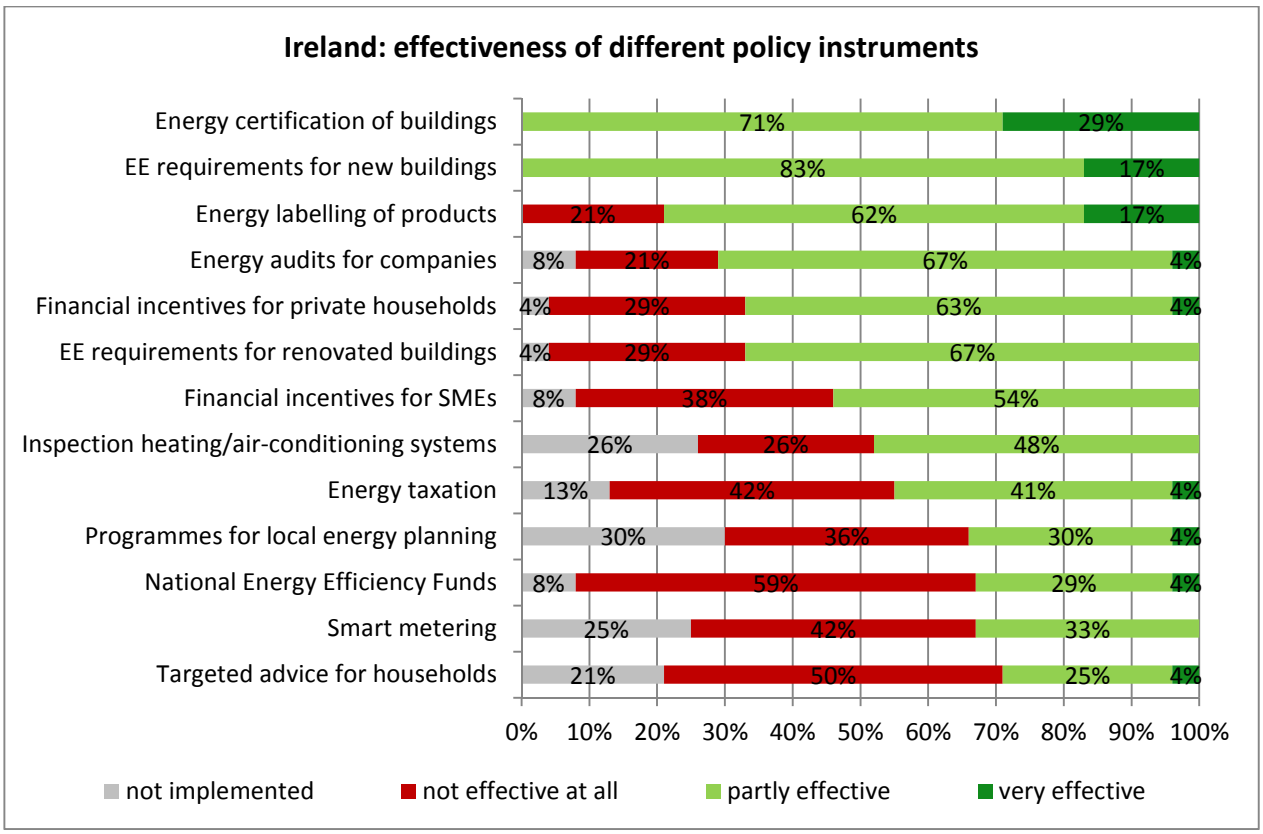
Programmes have had a positive impact on building renovation in the residential sector. Nevertheless, experts see the need for policies supporting deep renovation.

Experts also request programmes targeting the service sector, previous programmes have been cut due to austerity measures.

In the transport sector, a programme was available for electric cars. In general, experts notice a lack of strategic action, especially in relation to special planning, as well as not enough investments being made in public transport.



Among specific energy efficiency policy instruments, Irish experts are very much in favour of energy certification of buildings (among the most positive ratings of all countries) and energy efficiency requirements for new buildings (100 % rate them as partly or very effective). National energy efficiency funds and targeted advice for households are seen as the least effective measures (rated "not effective at all" by 59 % and 50 % of experts respectively).



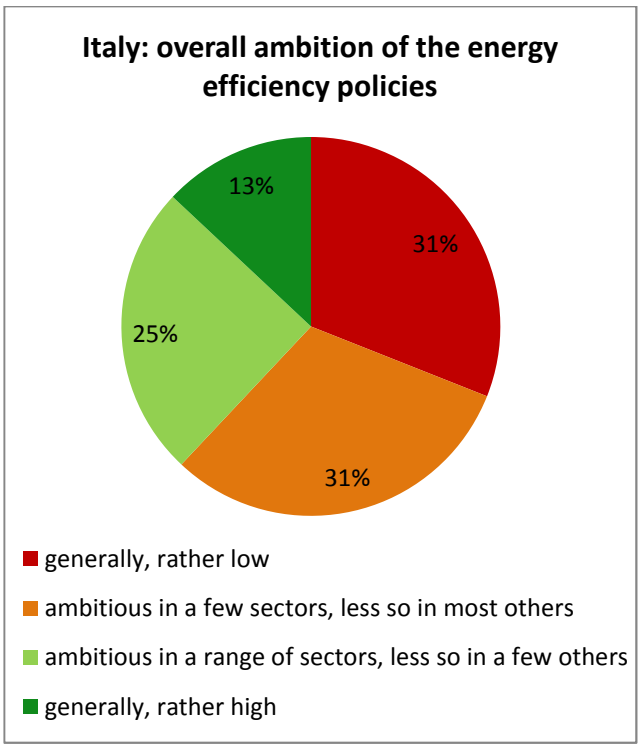
Italy

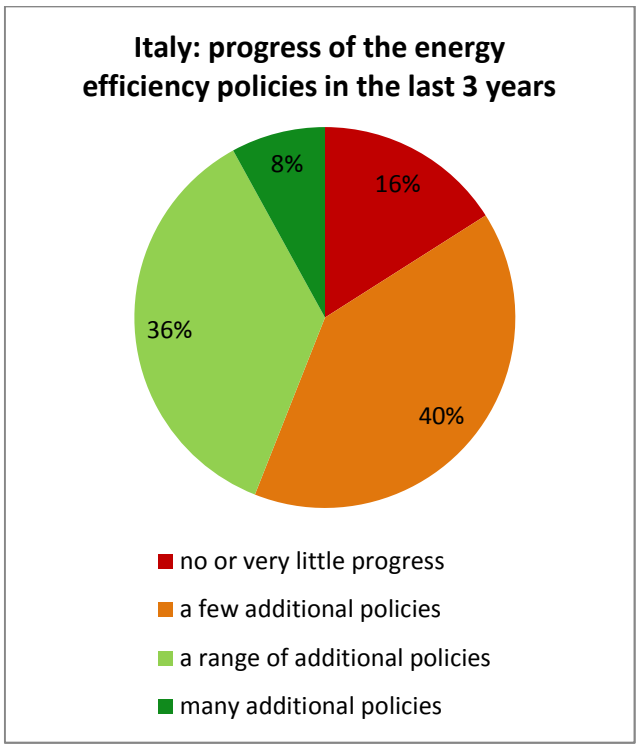
In the opinion of Italian experts, Italy is among those countries that have made medium progress since the second NEEAP (country progress indicator: 13 out of 28 - see page 103). The rate of progress was significantly higher than in the three preceding years (2012 survey: country progress indicator: 27 out of 27). This is the second highest increase of all Member States.

Nevertheless, the overall level of ambition is still considered to be relatively low: 62 % of the experts find it ambitious in only a few sectors or rather low. Regarding the introduction of new policies, a little more than half saw very few additional policies in the past three years, the others see a range or many additional policies.

Experts perceive financing to be a critical issue and the main constraint to energy efficiency progress. On the positive side, they agree on the good functioning of the White Certificate Systems, the timely transposition of the EED and the availability of a number of support instruments for energy efficiency. This is a result of the increased priority attributed to energy efficiency by the national government.

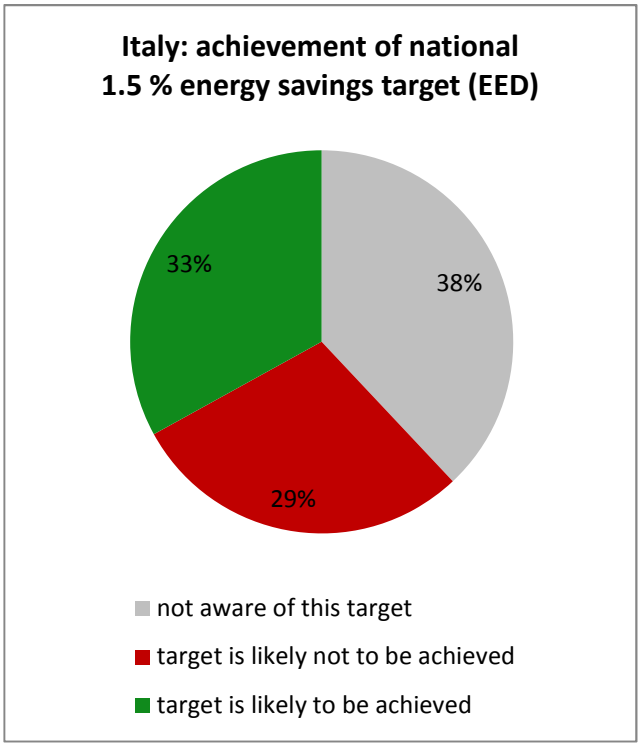
The importance of the Covenant of Mayors was mentioned as well as the increased role of regions in energy efficiency policies.

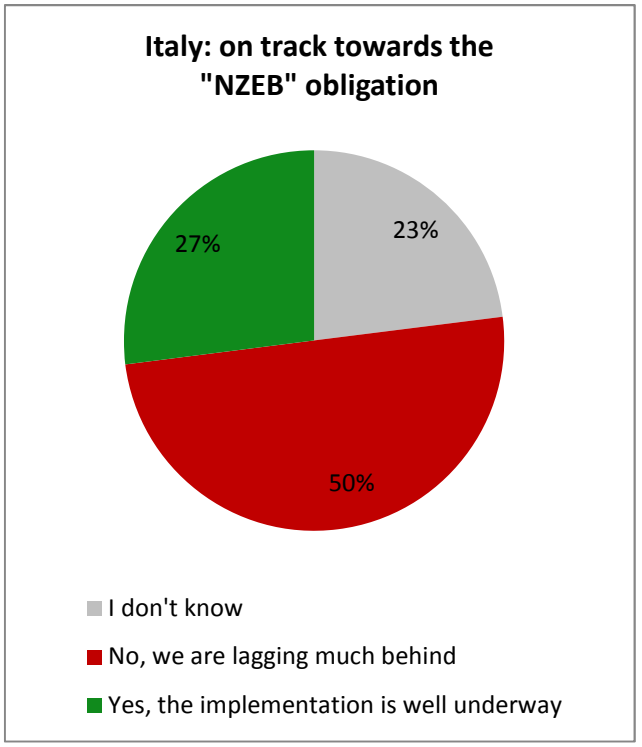




Opinions are divided regarding the achievement of the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers): 33 % think it is likely to be achieved while 29 % believe it is not likely. An energy efficiency obligation scheme (the White Certificate scheme) has already been in place in Italy for a number of years.

Half of the interviewed experts think that Italy is lagging behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

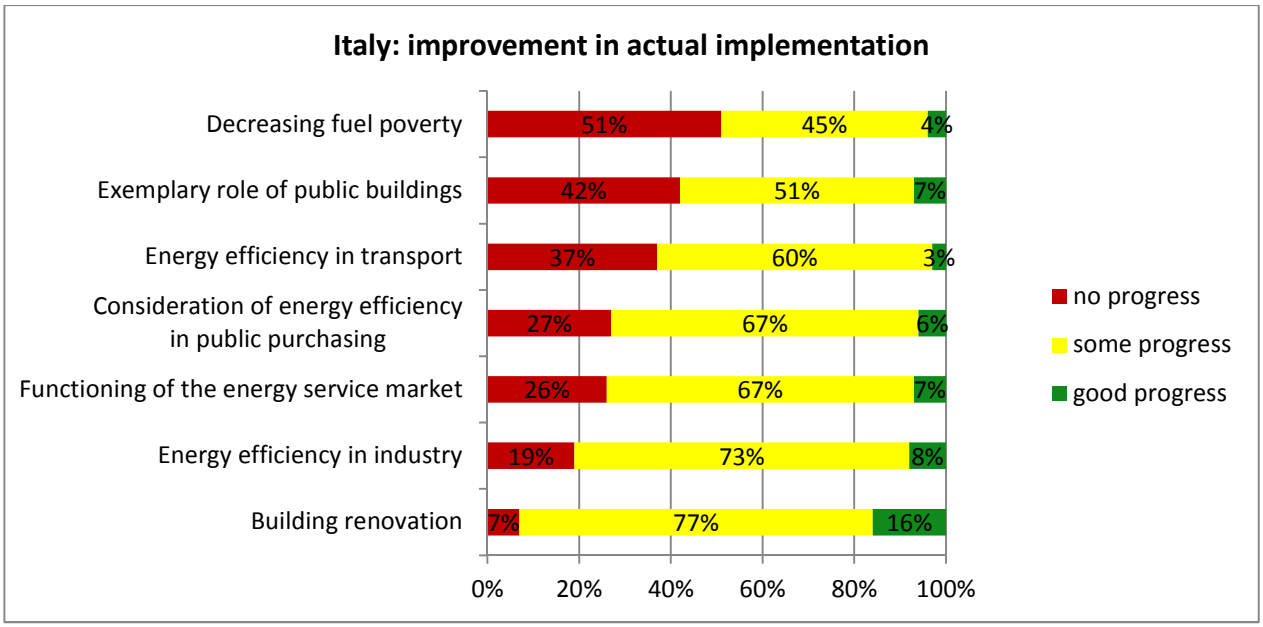




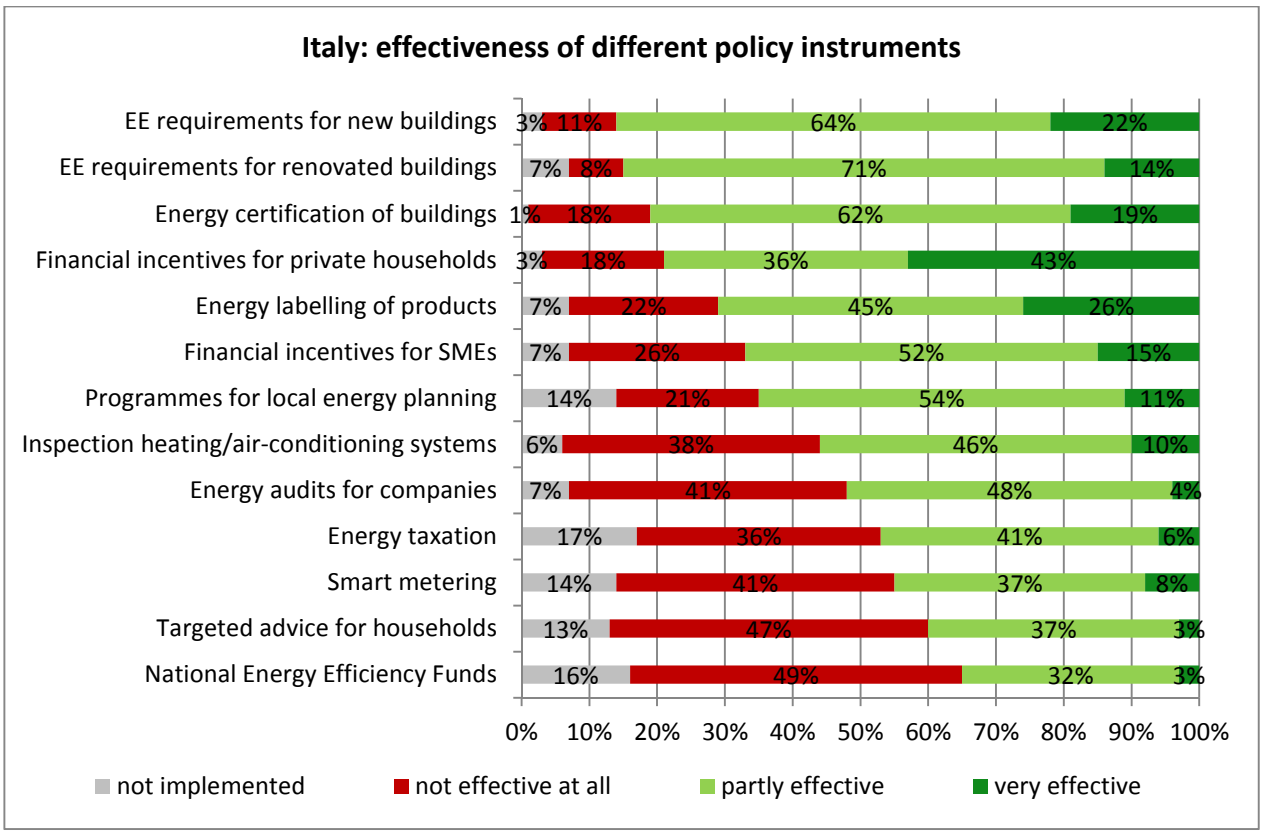
In the public sector, an emphasis is put on energy performance contracting for building renovation, funding instruments are also in place. However, the lack of knowledge and understanding of banks limits the provision of financing. This is seen as a significantly constraining factor for energy efficiency implementation.

Fiscal instruments to promote energy efficiency are in place in the residential sector. Experts also note positive developments in energy efficiency in industry.

In contrast, experts see the need for significantly increased action in energy efficiency in the transport sector.



Regarding specific policy instruments, energy efficiency requirements for new and renovated buildings are considered the most effective by the Italian experts (rated partly to very effective by 86 % and 85 % respectively). The highest ratings for "not effective at all" are given to national energy efficiency funds and targeted advice for households (49 % and 47 %).

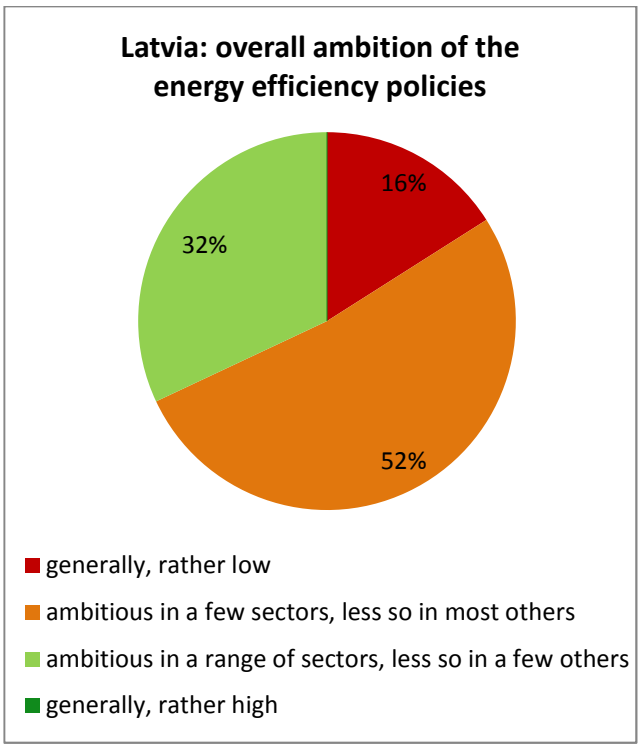


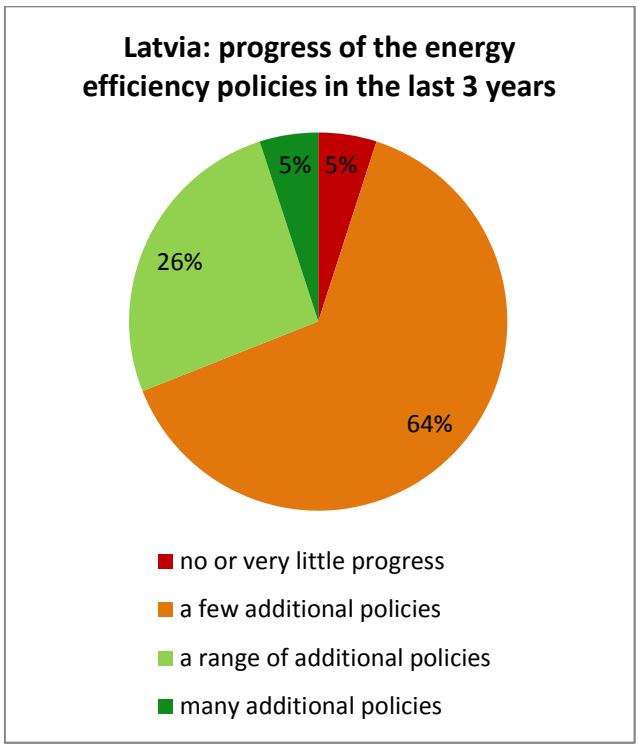
Latvia

According to the Latvian experts, Latvia is among the Member States that have made medium progress since the second NEEAP (country progress indicator: 15 out of 28 - see page 103). The rate of progress was slightly lower than in the three preceding years (2012 survey: country progress indicator: 12 out of 27).

Two thirds of the experts perceive the ambition of the energy efficiency policies as rather low or consider it ambitious in only a few sectors. Nearly 70 % see very few additional policies in the last three years.

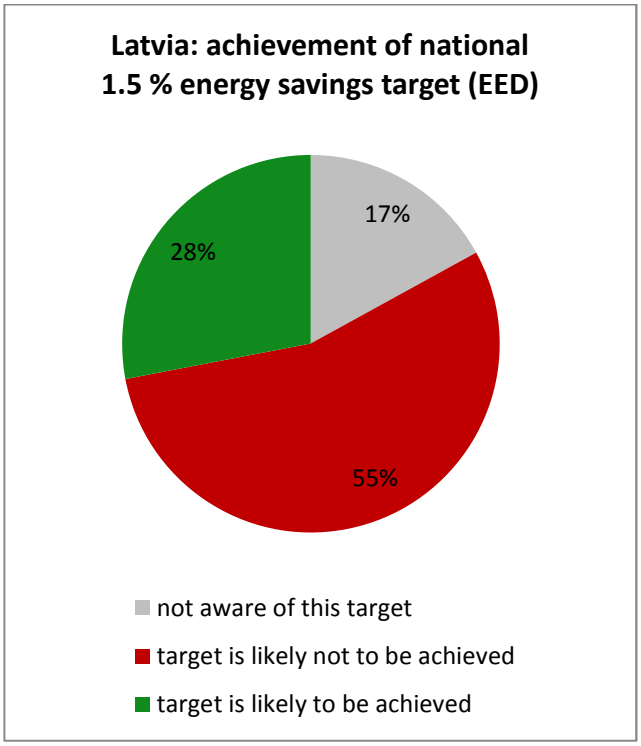
As in the 2012 survey, building renovation and its progress are seen as crucial issue by the experts. Even though some progress is made, the scale of renovation is considered to be insufficient, also due to the lack of funding. Here the experts ask for an increased role of ESCOs. The positive impact of the Green Investment Scheme was reported and a new funding mechanism was under preparation at the time of the survey. Also positively mentioned was the role of some local energy agencies in energy efficiency progress.

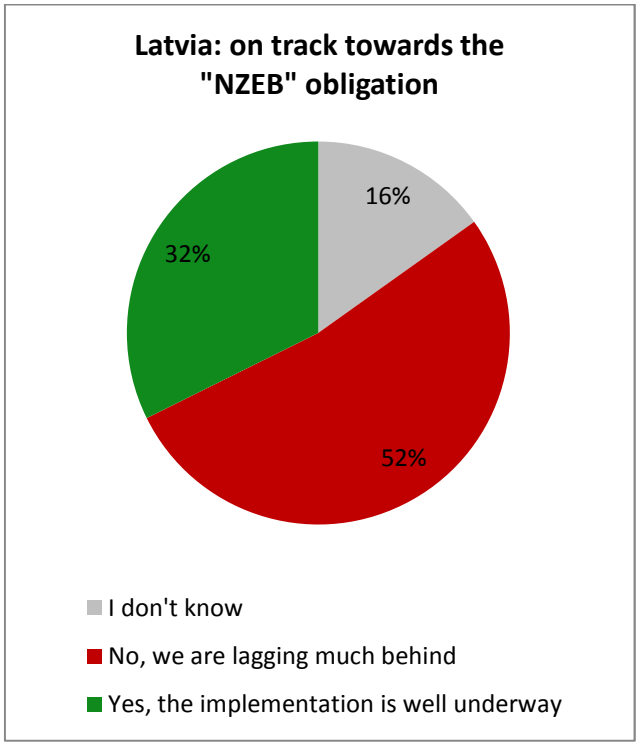




More than half of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Relating to the introduction of an energy efficiency obligation scheme for energy distributors/retailers, experts report that at the time of survey, a draft law was under discussion to introduce such an obligation scheme.

Similarly to the EED targets, more than half believe that Latvia is behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

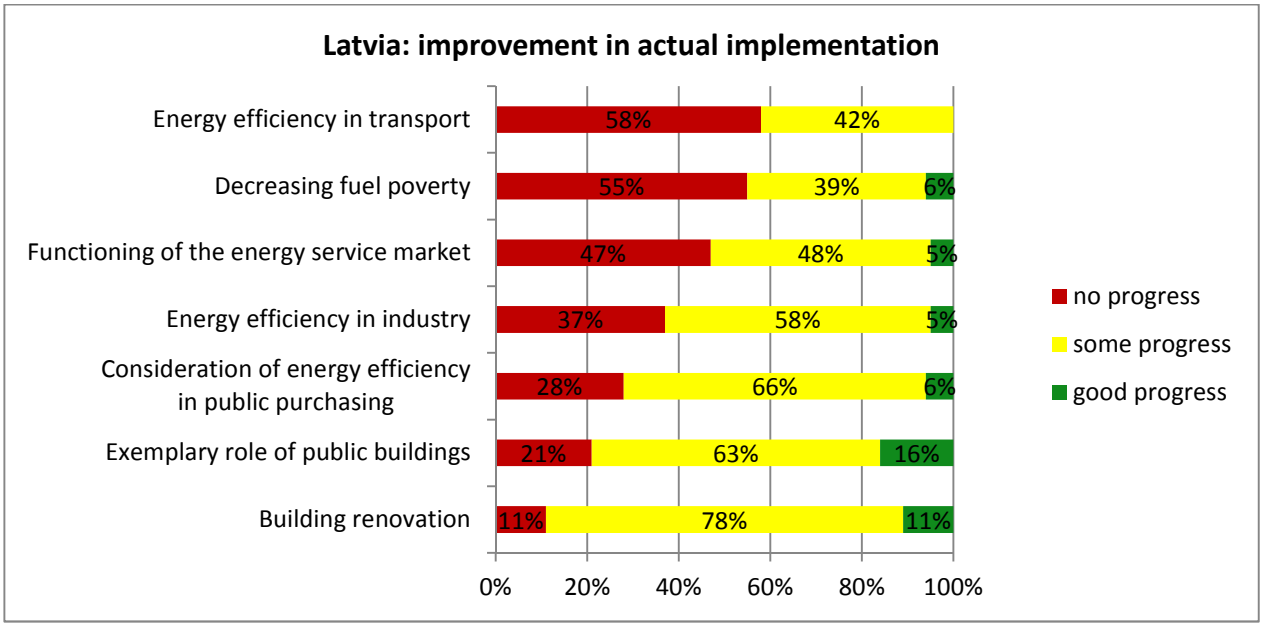




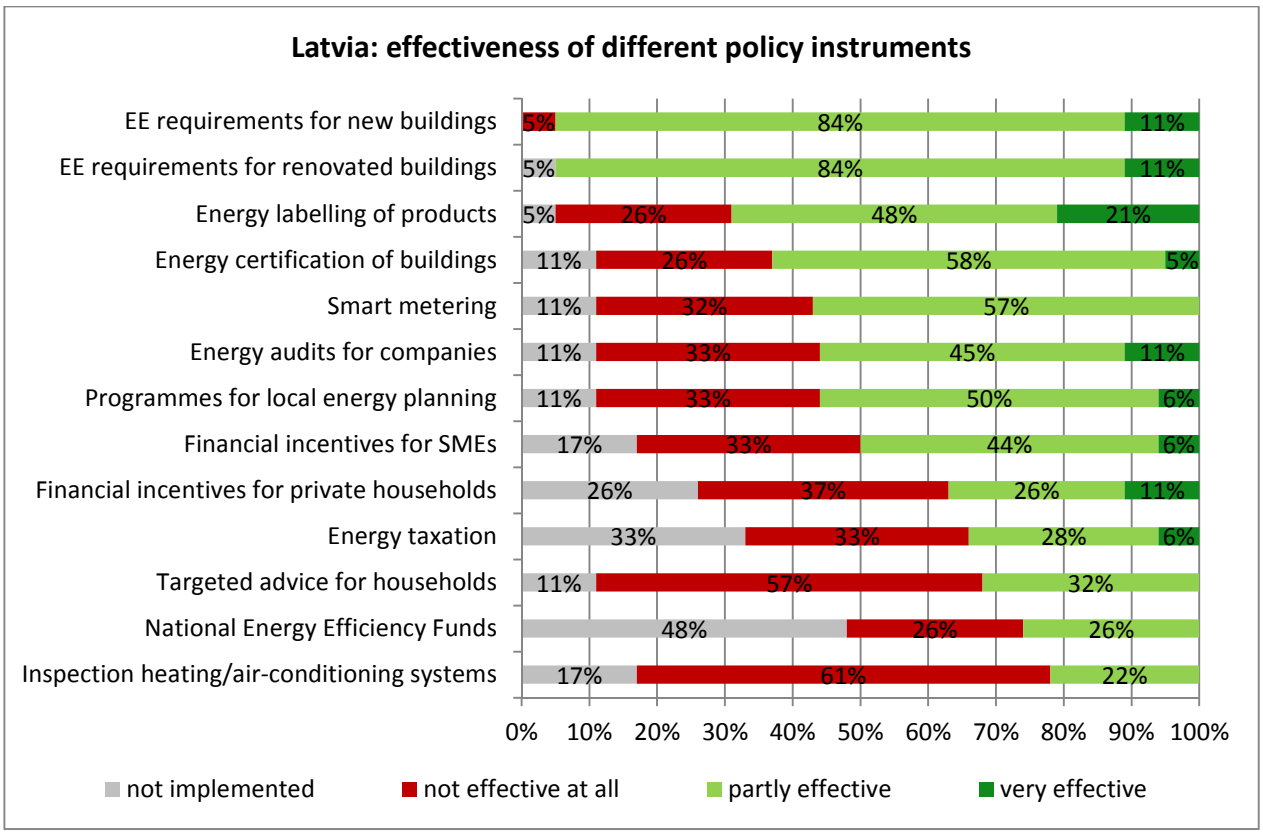
In the public sector, some cities have become active in building renovation and implemented successful projects. However, the lack of funding remains a critical factor.

Similarly, in the residential sector, financing energy efficiency investments is a key obstacle. Also ownership issues hamper the progress in multi-family buildings (getting the majority of owners to agree to a renovation project).

Progress in energy efficiency in Latvia's transport sector remains slow (it is perceived to be amongst the lowest across the EU countries).



In terms of specific policy instruments, energy efficiency requirements for new and renovated buildings are viewed very positively by experts (both rated at least partly effective by 95 %). Opinions are divided regarding financial incentives for private households, energy taxation and national energy efficiency funds, where similar percentages of experts consider them "partly to very effective" and "not effective at all". The highest ratings for "not effective at all" are given to inspection of heating/air-conditioning systems (61 %) and targeted advice for private households (57 %).

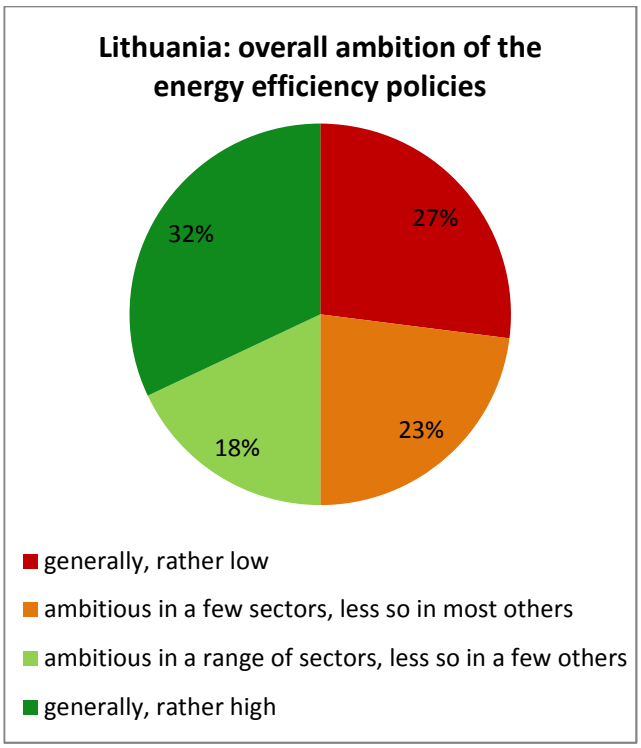


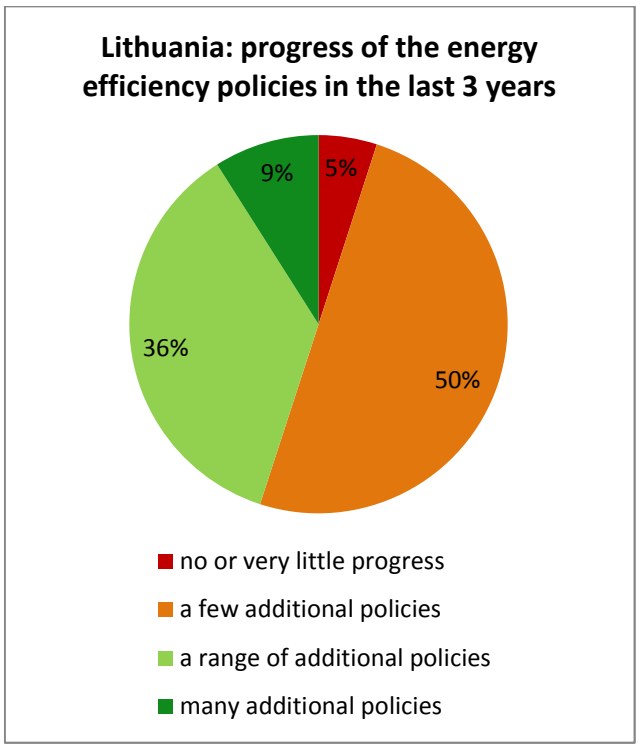
Lithuania

In the opinion of Lithuanian experts, Lithuania has made good-to-medium progress since the second NEEAP (country progress indicator: 9 out of 28 - see page 103). The rate of progress has significantly increased compared to the three preceding years (2012 survey: country progress indicator: 18 out of 27).

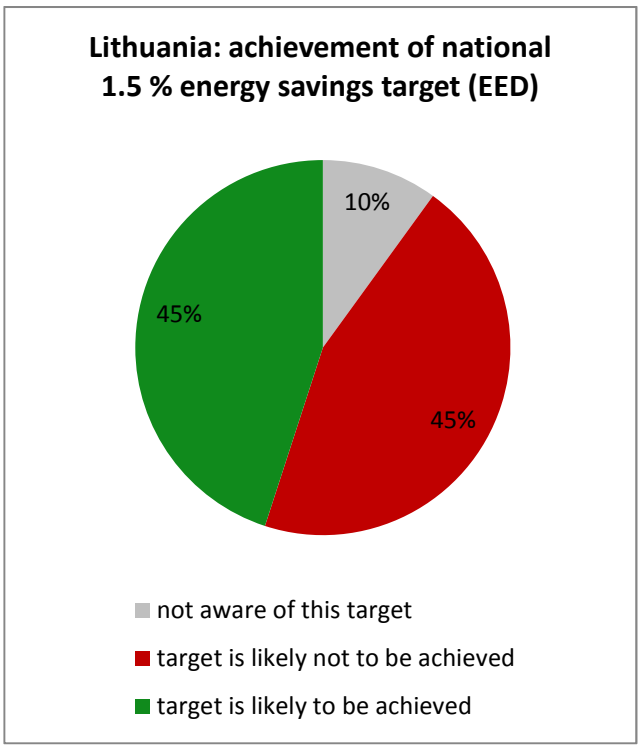
Opinions among the interviewees are divided regarding the overall ambition of the energy efficiency policies: one half finds it at least ambitious in a range of sectors, the other half sees the ambition as rather low or considers it ambitious in only a few sectors. Opinions are similarly divided regarding the introduction of new policies: around 50 % see a range or many additional policies, the others only a few additional policies in the past three years.

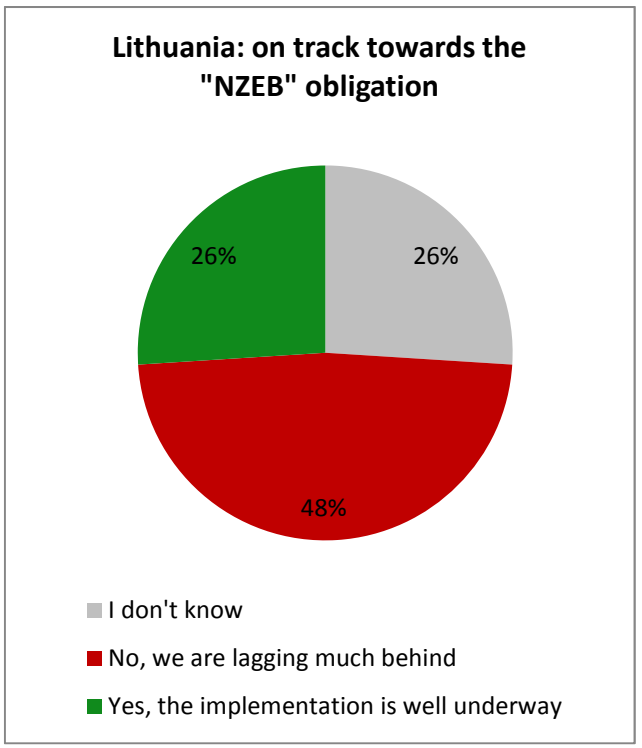
The main challenges brought up by the experts include fuel poverty and the renovation of the existing building stock. As a positive development, they mention that energy audits have been made mandatory in the industry sector.





Opinions are divided as to whether the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved, one of the higher ratings in the EU. Nearly 50 % of experts believe that Lithuania is behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020. This is among the lower values across Member States.





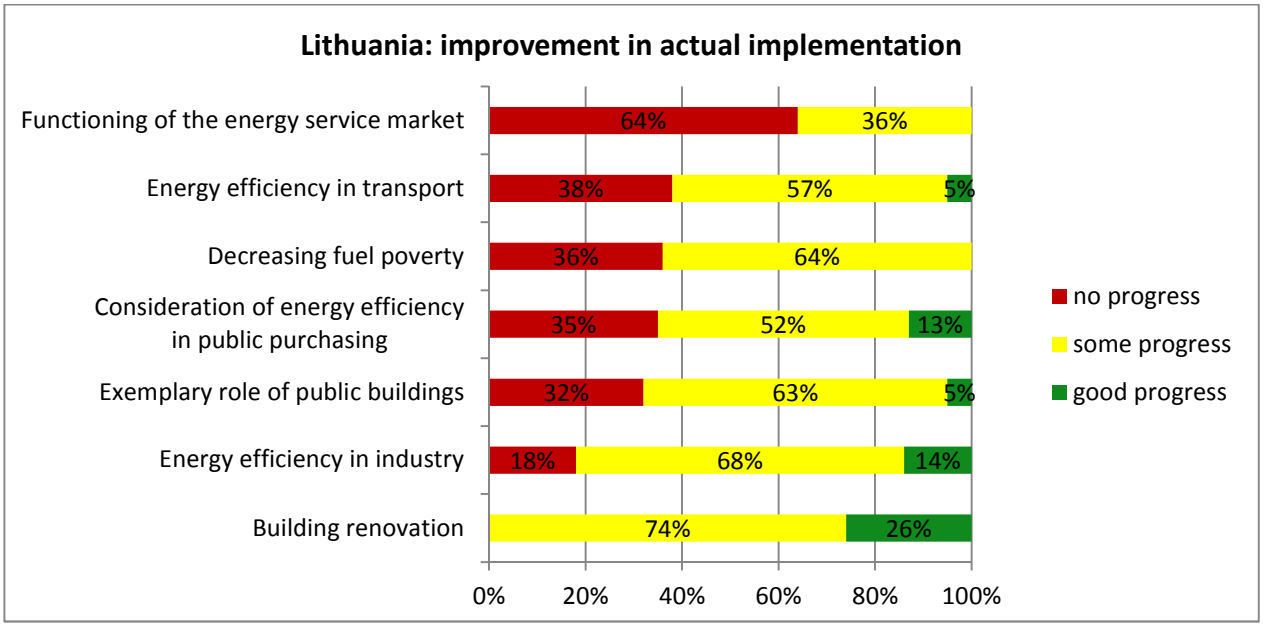
In the public sector, structural funds were used to initiate building renovations. Experts report that, at the time of the survey, new legislation was under preparation which they

hope will support the market development of energy performance contracting (which had not progressed significantly so far).

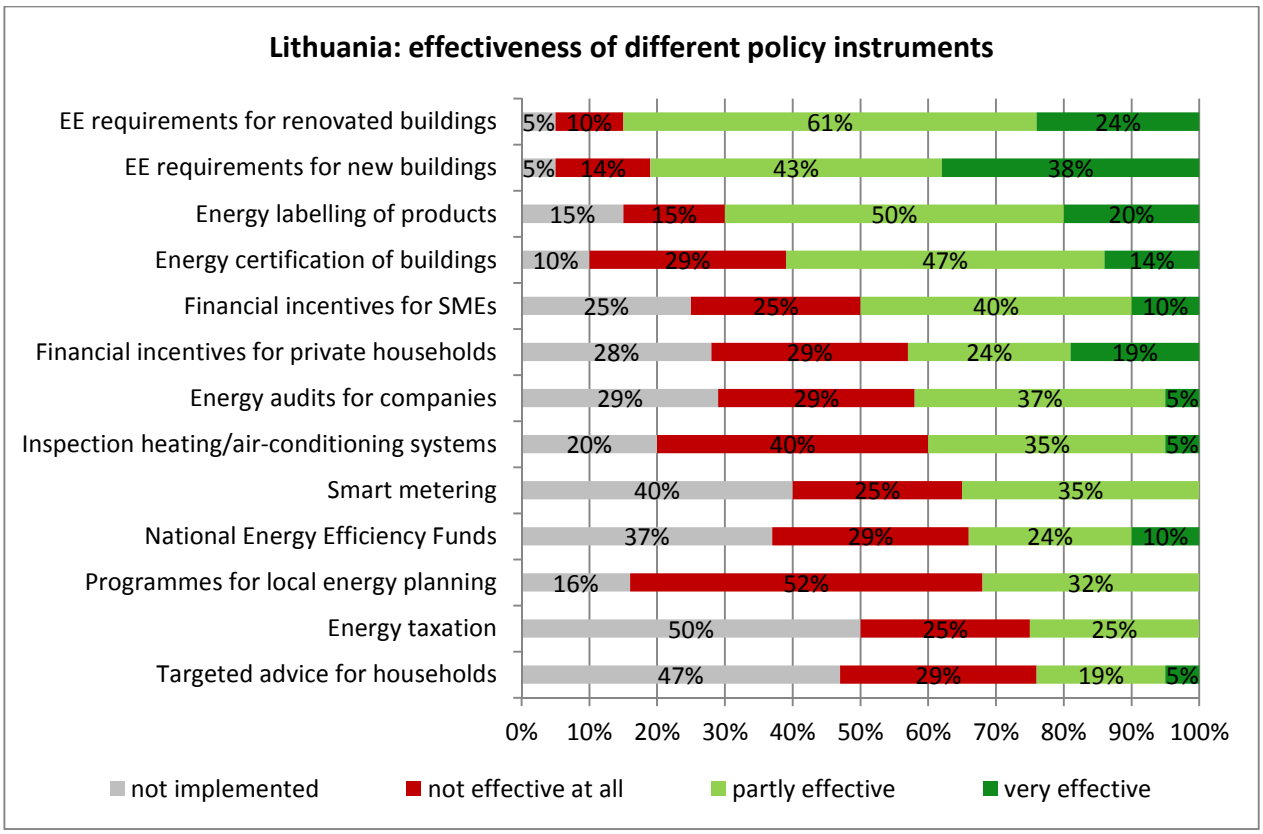
Experts report that renovation rates are increasing in the residential sector.

Energy efficiency in the service sector was not a priority in previous years. For energy efficiency in industry, funding programmes were available.

For the transport sector, experts mention a lack of financial support for public transport.



In terms of specific policy instruments, energy efficiency requirements for new and renovated buildings are considered the most effective by the Lithuanian experts (rated at least partly effective by 81 % and 85 % respectively). Opinions are divided regarding the inspection of heating/air-conditioning systems and energy taxation, where similar percentages of experts consider them "at least partly effective" and "not effective at all". The highest rating for "not effective at all" is given to programmes for local energy planning (52 % - among the lowest ratings of all Member States).

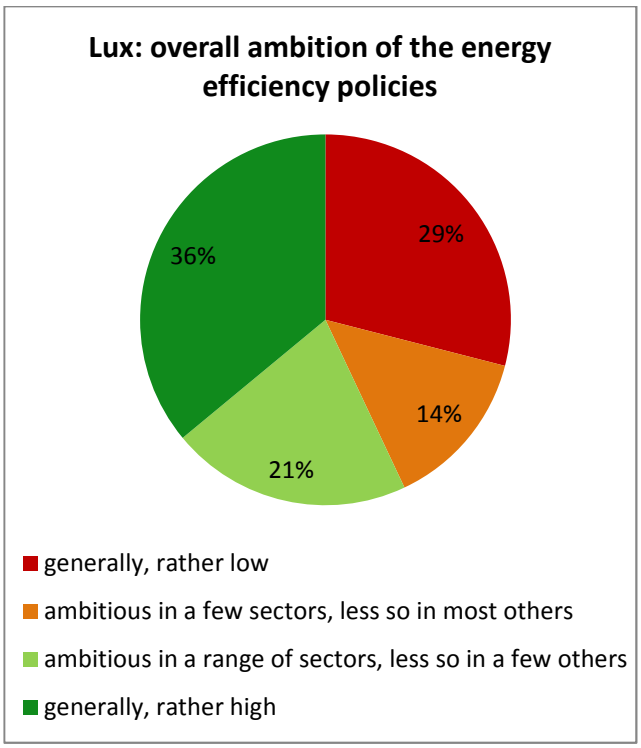


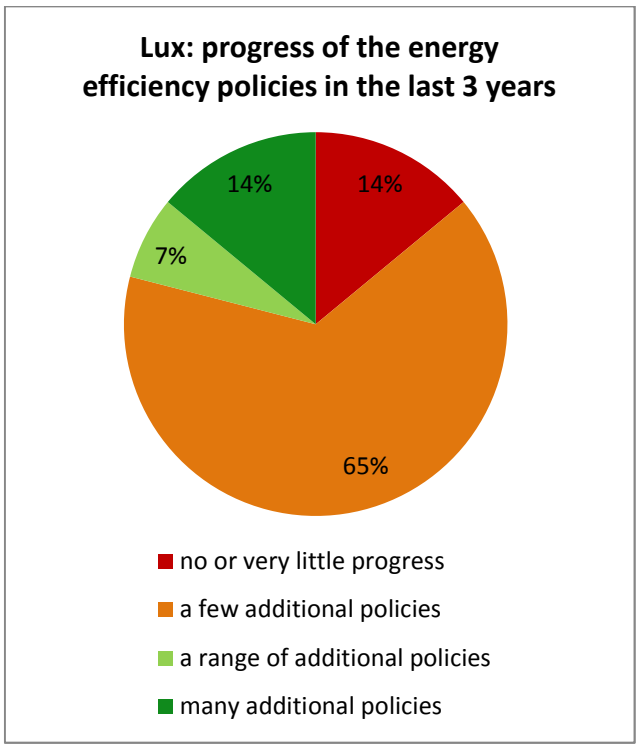
Luxembourg

According to the Luxembourgish experts, Luxembourg is among the Member States that have made medium progress since the second NEEAP (country progress indicator: 10 out of 28 - see page 103). The rate of progress was clearly lower than in the three preceding years (2012 survey: country progress indicator: 3 out of 27).

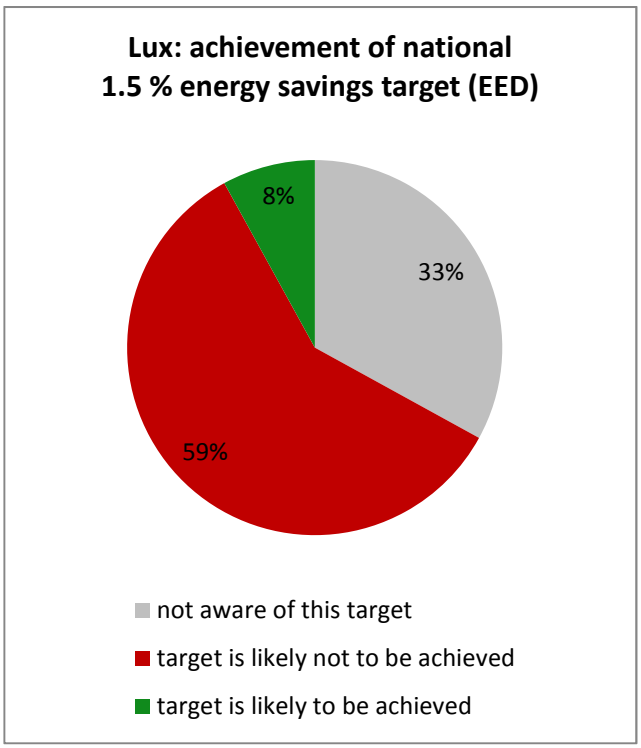
Experts perceive a relatively high overall ambition of energy efficiency policies: 57 % consider it at least ambitious in a range of sectors. Regarding the progress of energy efficiency policies, over three quarters of the interviewees see very few additional policies implemented in the past three years. These results indicate that experts think the energy efficiency policy is not sufficiently living up to ambitions.

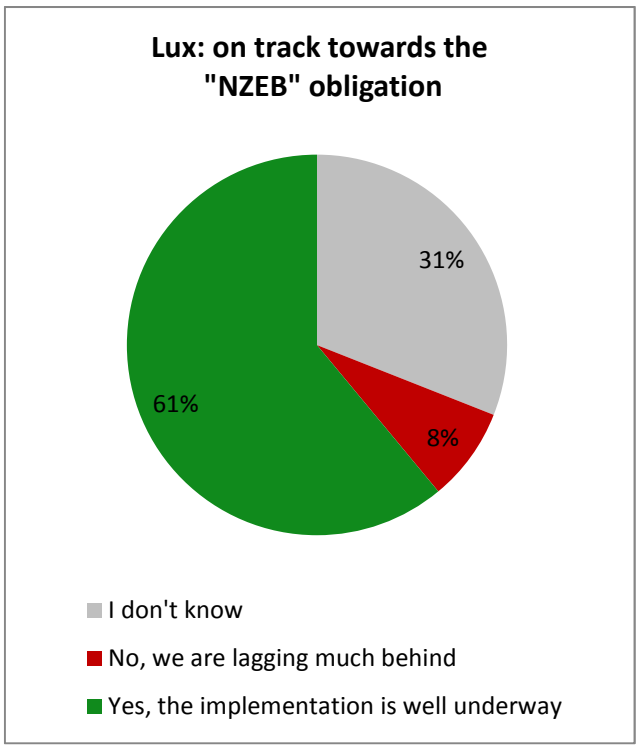
As a critical issue, experts mention insufficient progress in building renovation rates. Public support is in place but achieving more significant market development shows to be challenging. On the positive side, ambitious building standards for new construction were highlighted as an area of strong energy efficiency policies.





Nearly 60 % of experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved (among the lowest ratings of all Member States). However, nearly 60 % consider Luxembourg on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020 (among the higher country ratings).



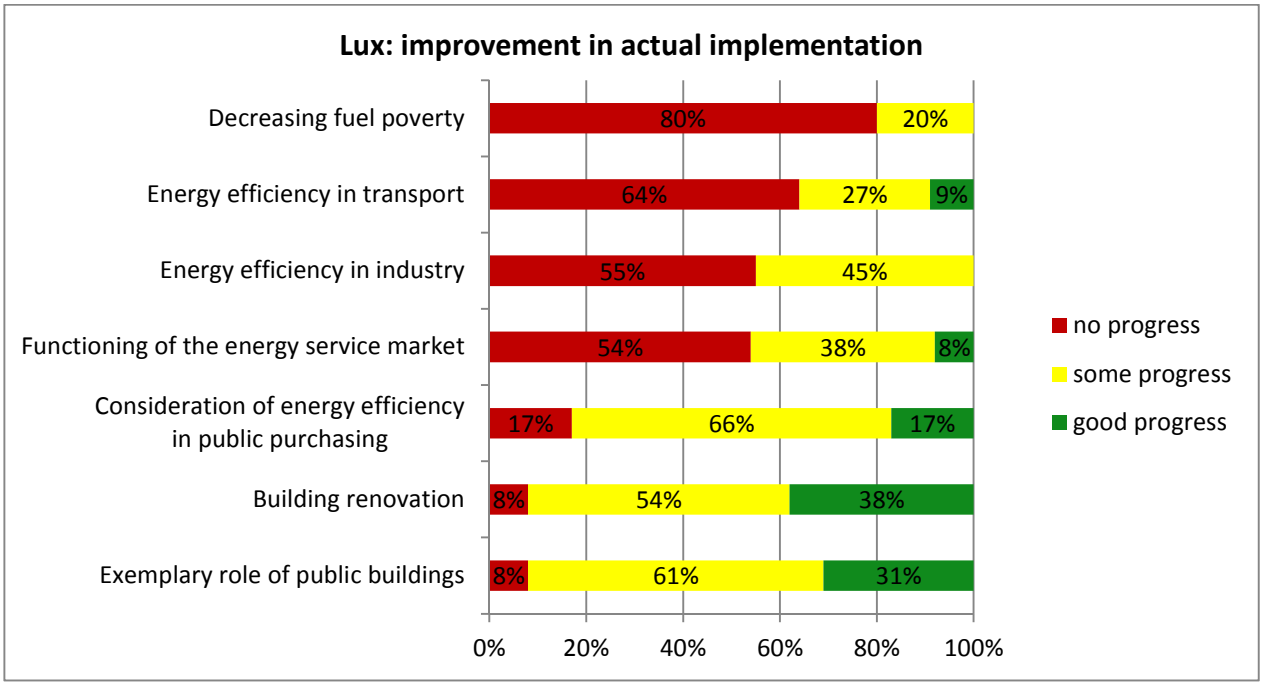


Experts see some progress in the field of building renovation in the public sector. At the municipal level, they report mixed developments, with some very active local authorities and others lagging behind.

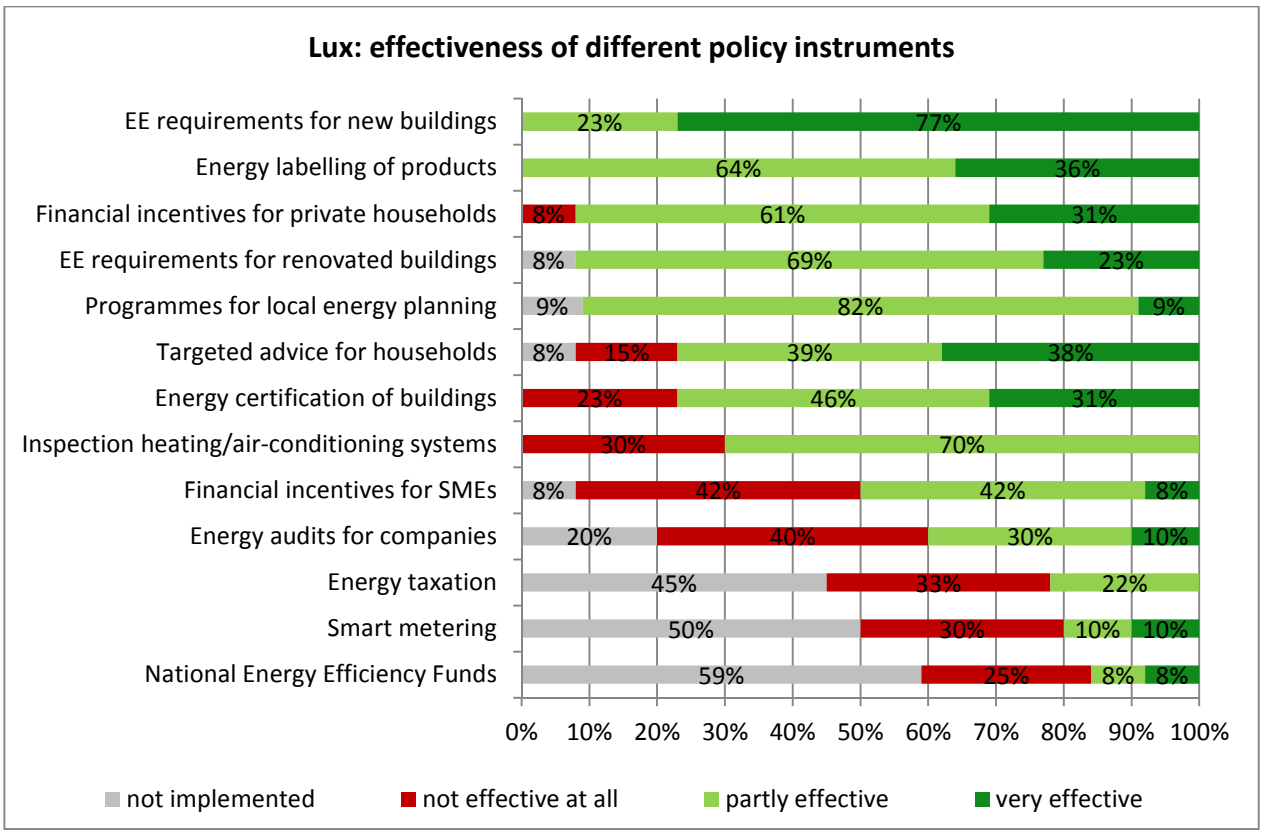
Experts see very positive developments in the residential sector where high standards are applied to new construction. However, critical mass in building renovation remains a big issue, including apartment buildings with multiple ownership and rented buildings.

The strict building standards for new construction are also applied in the service sector and experts observe that high efficiency standards are increasingly used as a sales argument.

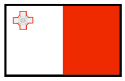
The level of progress seen by the Luxembourgish experts in the field of fuel poverty as well as in energy efficiency in industry and transport are among the lowest across EU countries.



In terms of specific policy instruments, energy efficiency requirements for new and renovated buildings are rated at least partly effective by 100 % and 92 % of experts (among the highest ratings of all Member States). Energy labelling of products and programmes for local energy planning are also seen very positively. According to the experts, among the least effective instruments are financial incentives for SMEs and energy audits for companies (respectively 42 % and 40 % "not effective at all").



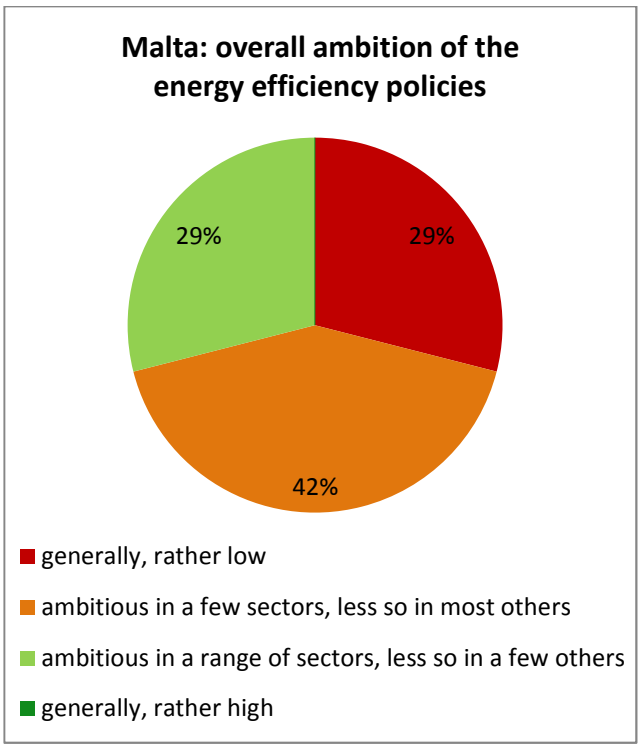
Malta

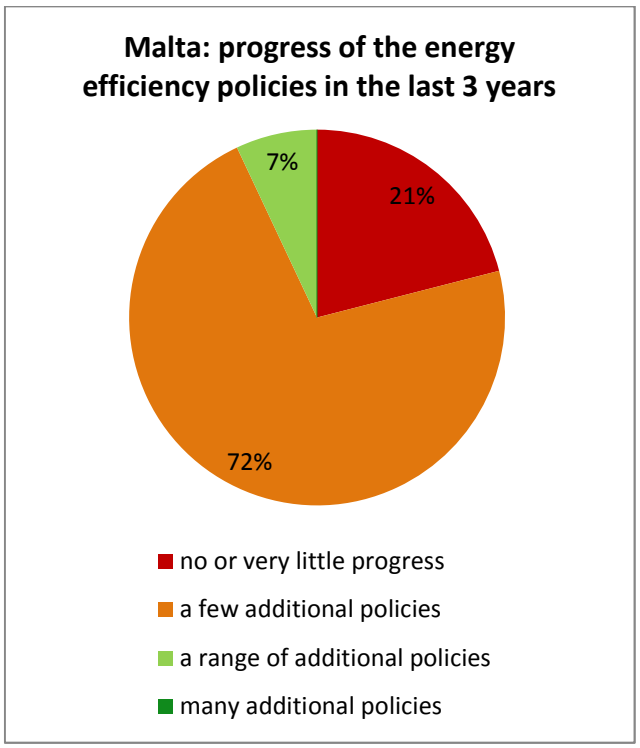


According to the Maltese experts, Malta is among those countries that have progressed relatively little since the second NEEAP (country progress indicator: 25 out of 28 - see page 103). The rate of progress is perceived to be very much lower than in the three preceding years (2012 survey: country progress indicator: 3 out of 27). This is among the most significant decreases in progress rates of all Member States.

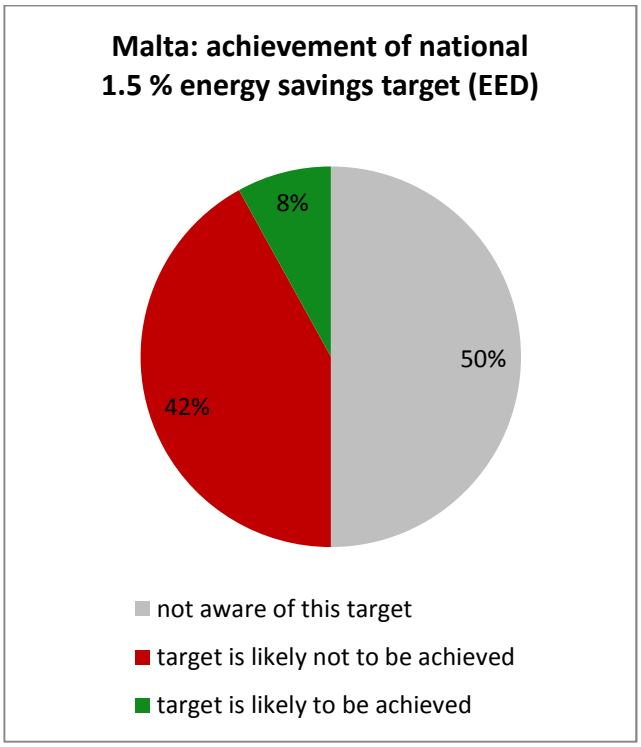
Compared to experts in other EU countries, Maltese experts see a rather low overall ambition of energy efficiency policies in their country - over 70 % consider it as rather low or ambitious in only a few sectors. Over 90 % of experts saw very little progress in energy efficiency policies or few additional policies in the last three years.

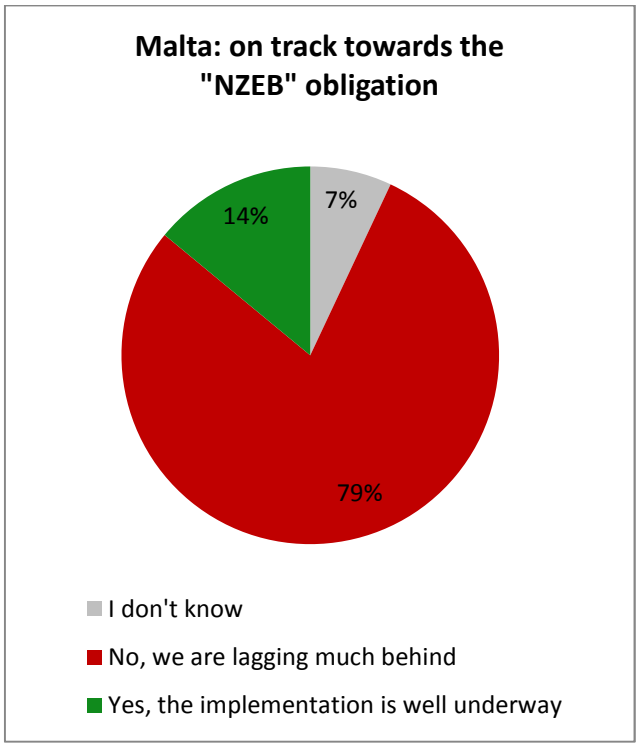
Experts report on the lack of sufficient funding for energy efficiency investments. They also observe the need for more energy efficiency standards as well as for monitoring and enforcement of energy efficiency policies. As positive developments, the experts mention the strengthening of the energy efficiency capacities on the national level as well as financial incentives for the domestic sector.





Over 40 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Nearly 80 % believe that Malta is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.



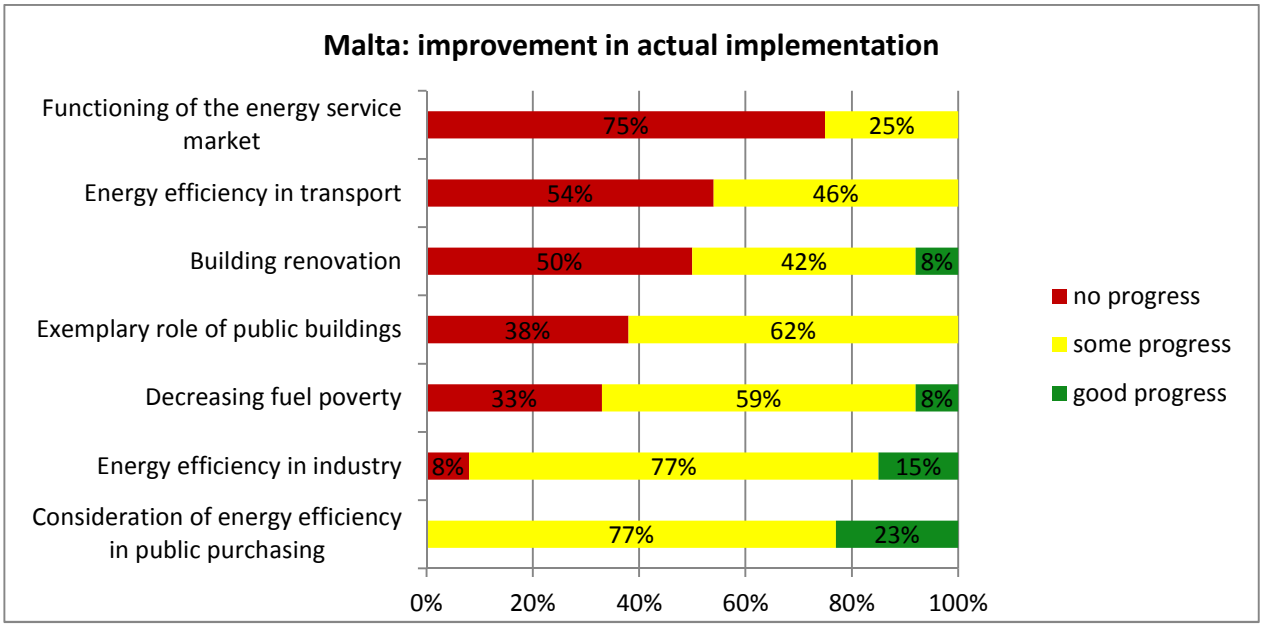


For the public sector, experts observe a lack of a policy framework and progress supporting building renovation but they mention plans for improvements at national level.

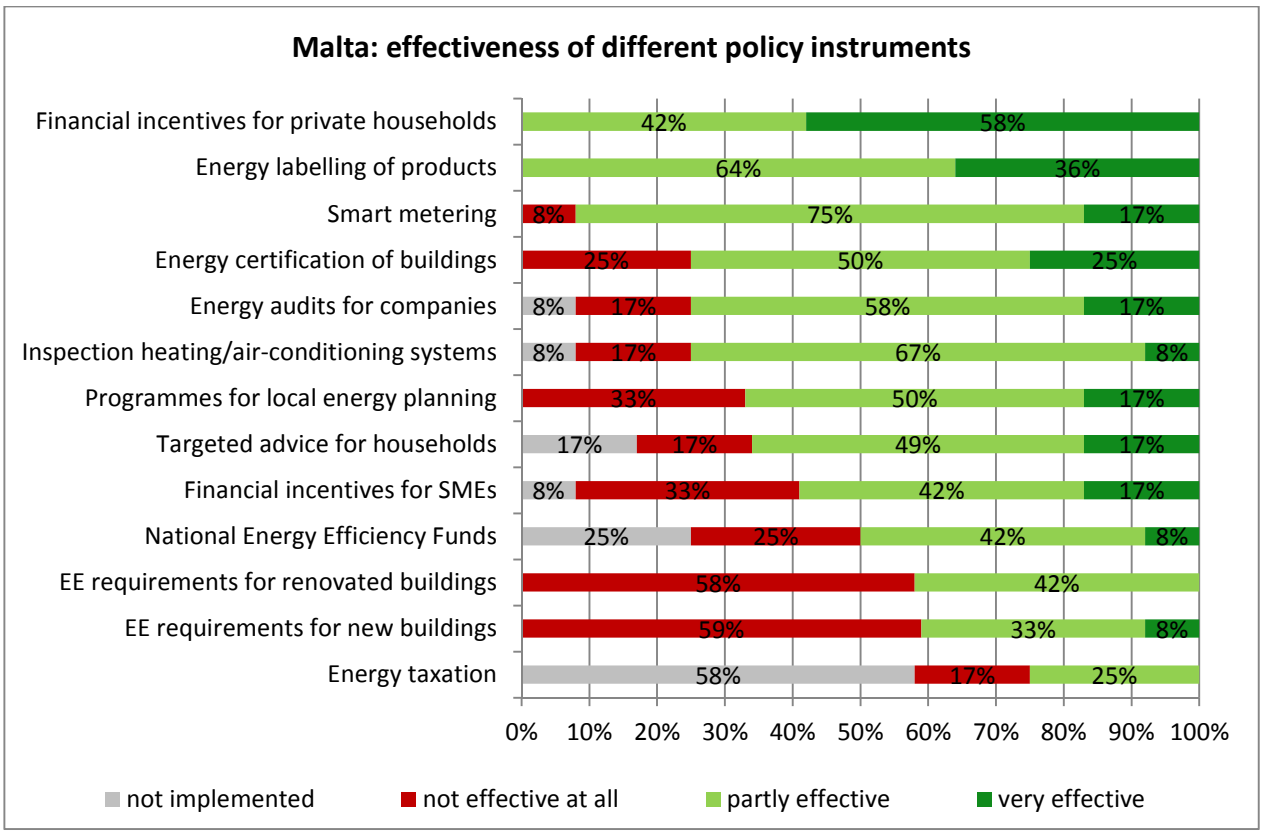
The introduction of energy performance certificates is seen as a positive development for the residential sector, however, the enforcement of energy efficiency standards presents a challenge. Another positive development is the availability of funding programmes for energy efficiency improvements. Experts also comment on a lack of relevant skills in the building industry.

In the service sector, hotels play an important role and experts mention a number of initiatives in this field. However, available grants are very limited.

An increased taxation of inefficient vehicles is reported for the transport sector which supports the modernisation of the existing car fleets. Experts see a significant need for improvements in public transport. In comparison to other EU countries, Malta's progress in energy efficiency in transport is among the lowest.



Among specific policy instruments, financial incentives for private households and energy labelling of products are seen as the most effective by the Maltese experts (both rated at least partly to very effective by 100 %), followed by smart metering (92 % partly or very effective) – all among the most positive ratings of all countries. The highest ratings for "not effective at all" are given to energy efficiency requirements for new and renovated buildings (59 % and 58 % respectively, among the lowest of all Member States).

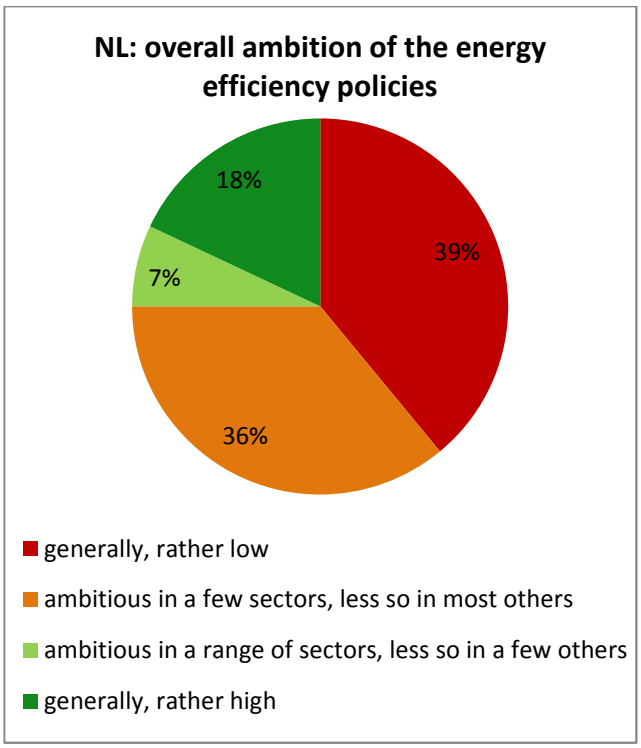


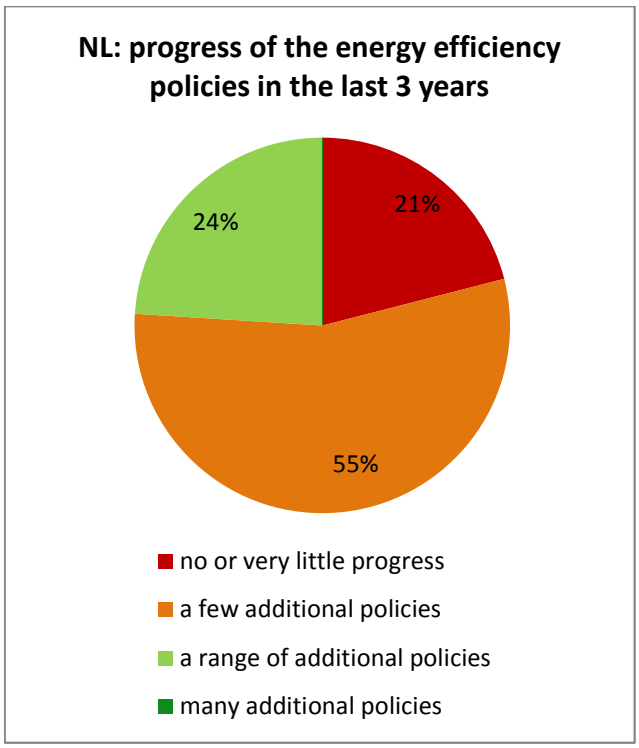
The Netherlands

According to the Dutch experts, the Netherlands have made medium-to-low progress in energy efficiency policies since the second NEEAP (country progress indicator: 19 out of 28 - see page 103). The rate of progress was somewhat higher than in the three preceding years (2012 survey: country progress indicator: 24 out of 27).

Experts see a relatively low overall ambition of energy efficiency policies - 75% consider it rather low or ambitious in only a few sectors. Similarly, around three quarters saw very little progress in energy efficiency policies or few additional policies in the last three years.

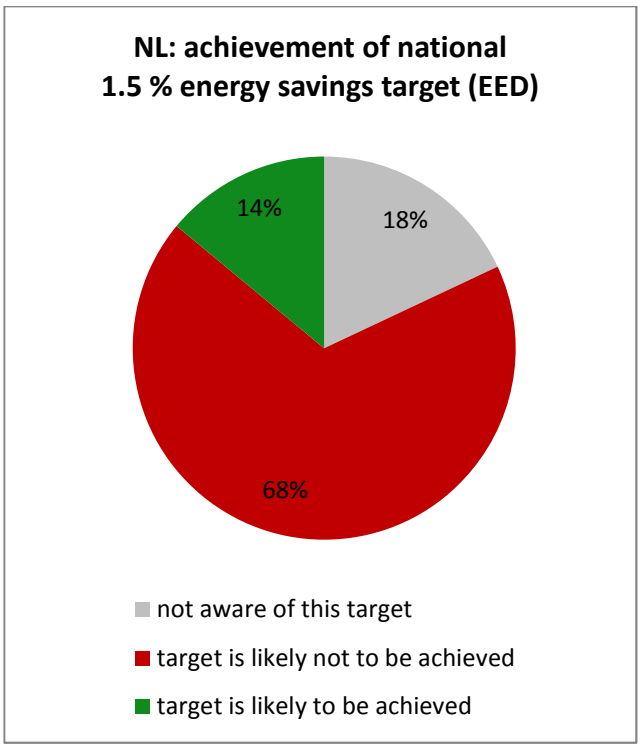
An "Energy Agreement for Sustainable Growth" that encompasses a wide range of measures was concluded by the Dutch government with employers, trade unions, environmental organisations and others. This has led to a mutual understanding among policy makers, institutional representatives and interest groups. It is also seen as positive that a monitoring system was set up that provides regular reports on progress. According to the experts, it is now critical these measures be further designed, promoted and implemented with a significant speeding up of this process.

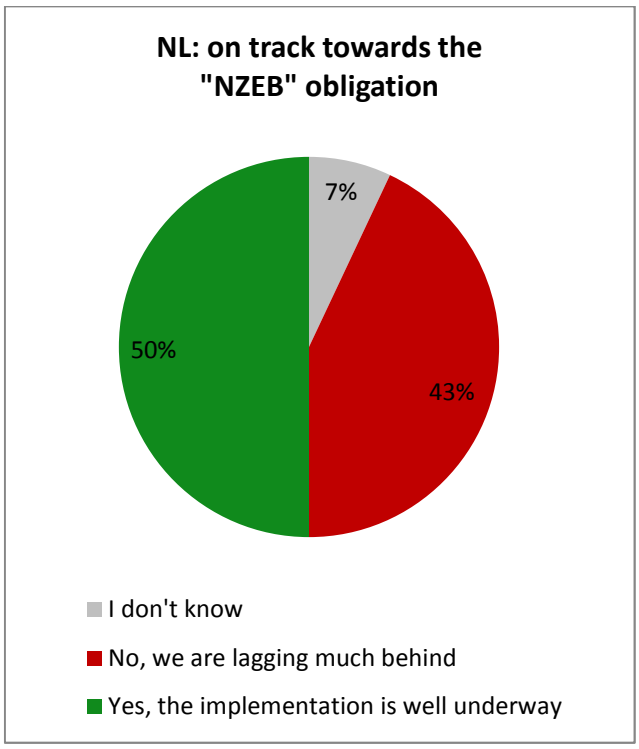




Nearly 70 % think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved (among the lowest ratings in the EU). In regards to energy efficiency obligation schemes, experts report that the Netherlands opts for "other policy measures to achieve energy savings among final consumers" which presents a significant challenge.

Opinions among the interviewees are divided as to whether the Netherlands are on track or not to meet their obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020: 50 % believe the implementation is well underway while 43 % think the country is lagging behind in this field.



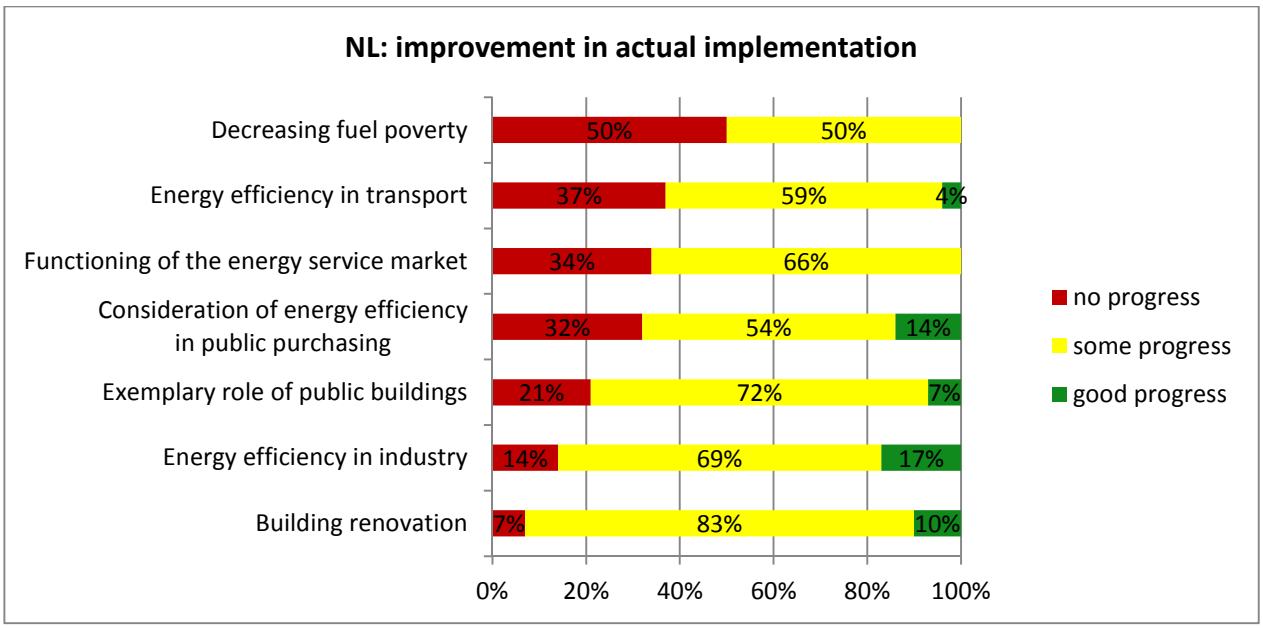


The public and residential sectors are focus areas of the a.m. "Energy Agreement". A subsidy programme for homeowners and social housing is in place.

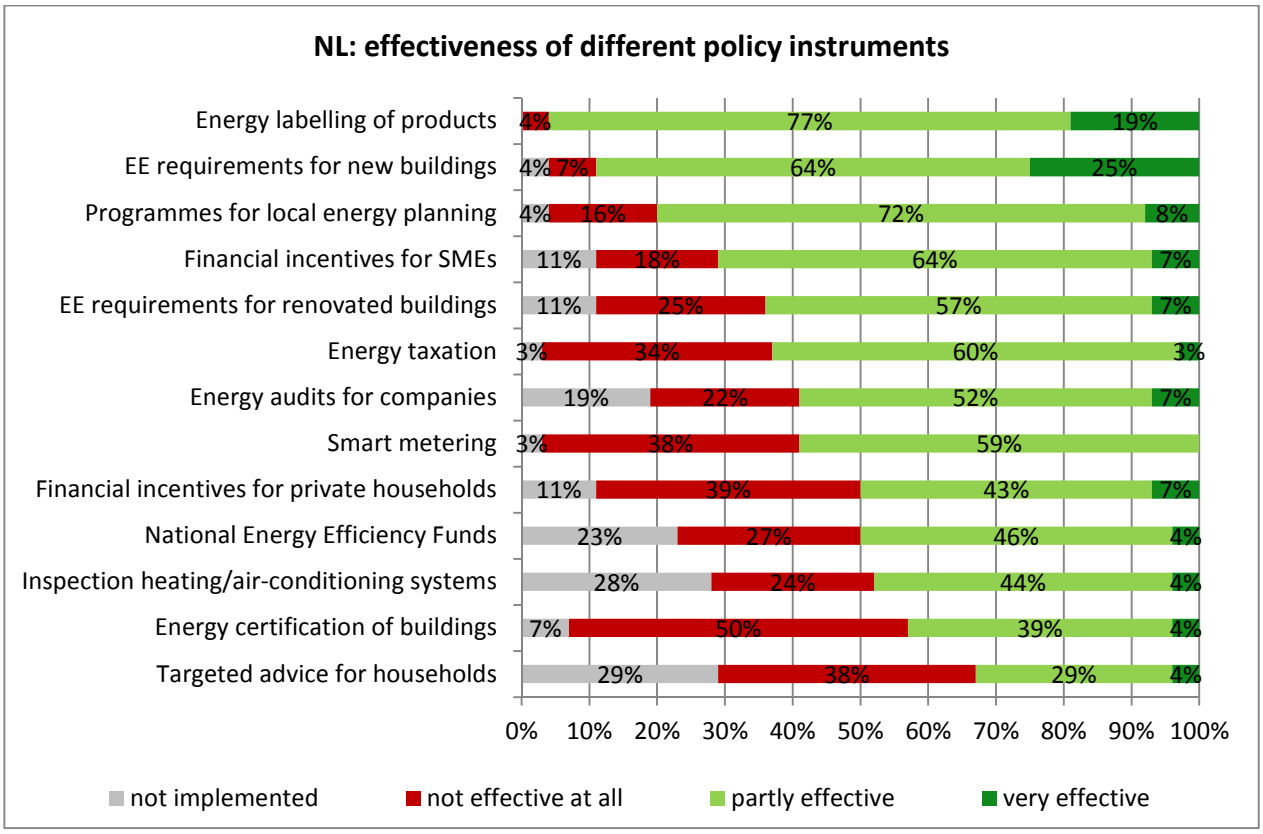
The agreement also includes a list of measures for the service sector, the impact of which still remains to be seen. Energy efficiency progress in industry is hampered by the low carbon price.

In the transport sector, the experts mention an ambitious plan for the introduction of e-mobility with continuous improvements of the infrastructure.

The quantitative survey shows that the least progress was made in addressing fuel poverty and best progress in building renovation and increasing energy efficiency in industry.



Among specific policy instruments, energy labelling of products and energy efficiency requirements for new buildings are seen as the most effective in the Dutch context. The highest rating for "not effective at all" is given to energy certification of buildings (50 %) - among the lowest ratings of all Member States.



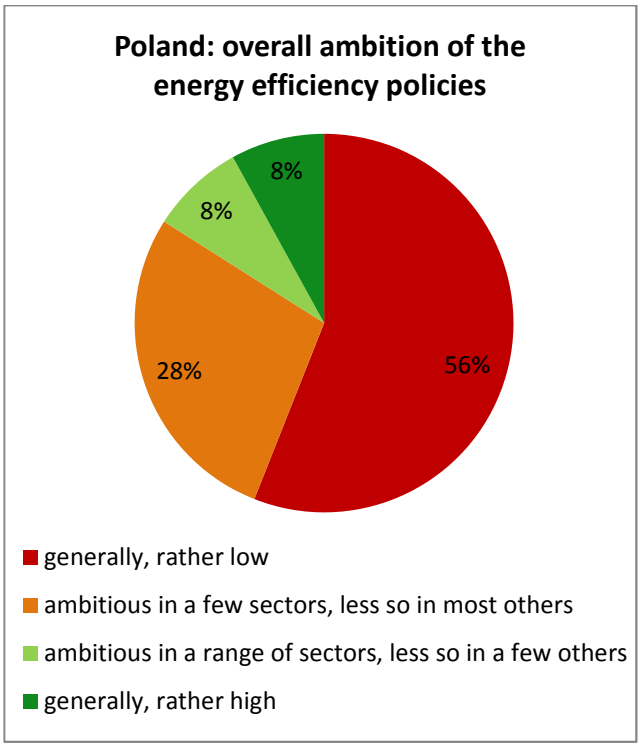
Poland

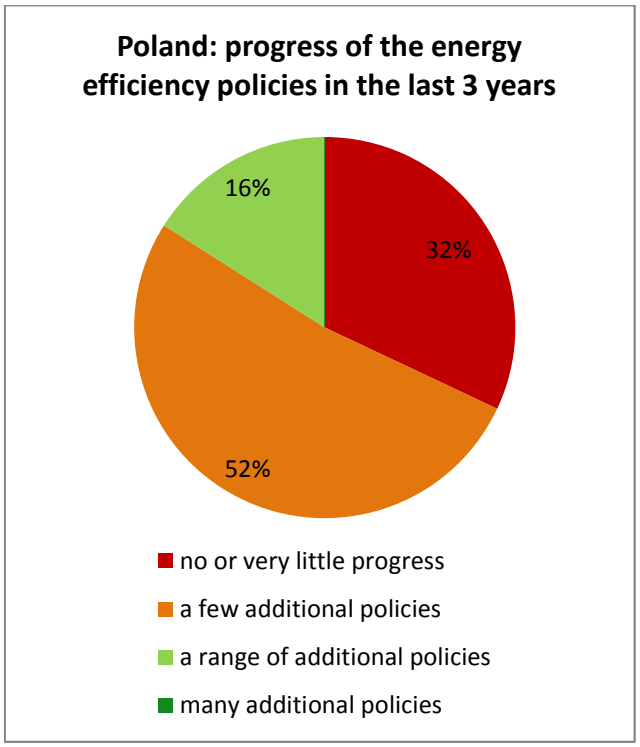
According to the Polish experts, Poland is among the Member States that have made relatively little progress in energy efficiency policies since the second NEEAP (country progress indicator: 22 out of 28 - see page 103). Poland maintained a similar ranking as in the three preceding years (2012 survey: country progress indicator: 21 out of 27).

Experts see a relatively low overall ambition of energy efficiency policies: over 80 % consider it rather low or ambitious in only a few sectors. A similar percentage of experts report having seen very little progress in energy efficiency policies or few additional policies in the last three years.

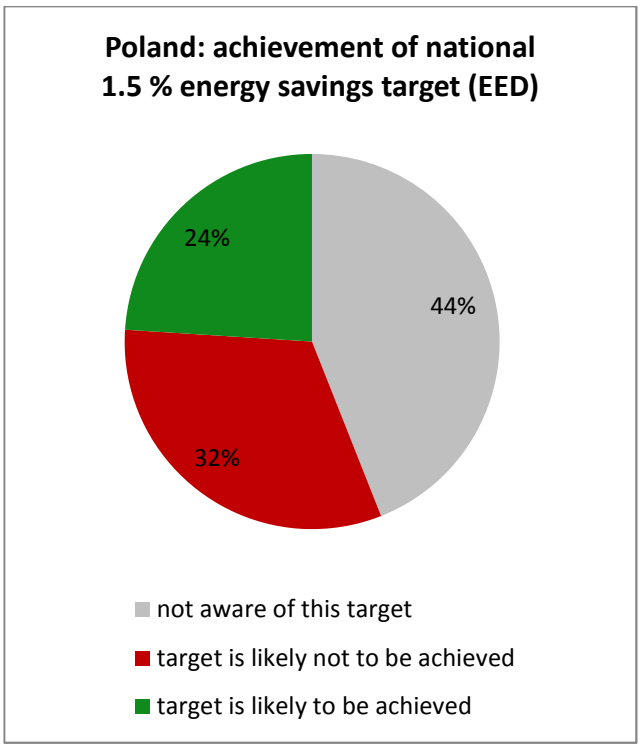
A main concern expressed by the experts is the general direction of energy policies: they continue to be supply-side focused, also related to the social issues in the coal mining sector. Energy efficiency is neglected and policies are often not well designed and implemented.

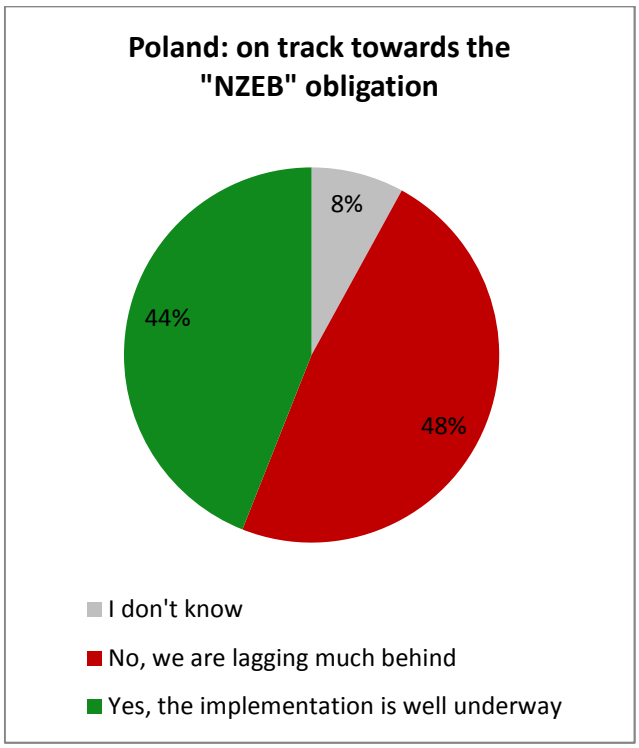
On the positive side, experts mention the recently adopted Energy Efficiency Act, Energy Performance of Buildings Act and the "Thermomodernisation Act" as well as the availability of financing initiatives, including White Certificates and funds at regional and local levels.





One third of interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved, while only one quarter believe it to be likely. Opinions among the experts are also divided as to whether Poland is on track or not to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.



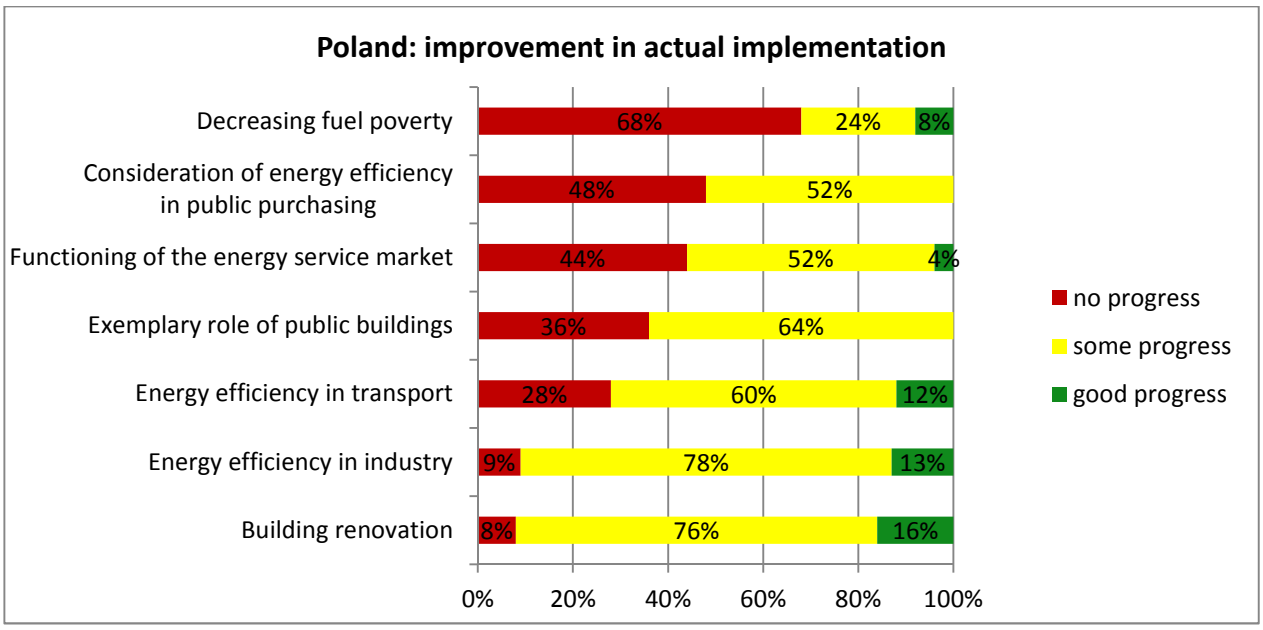


In the public sector, experts report on the availability of funding and financing opportunities. However, a lack of capacities and skills to implement energy efficiency projects as well as a high level of debt hinders many municipalities from profiting from these opportunities.

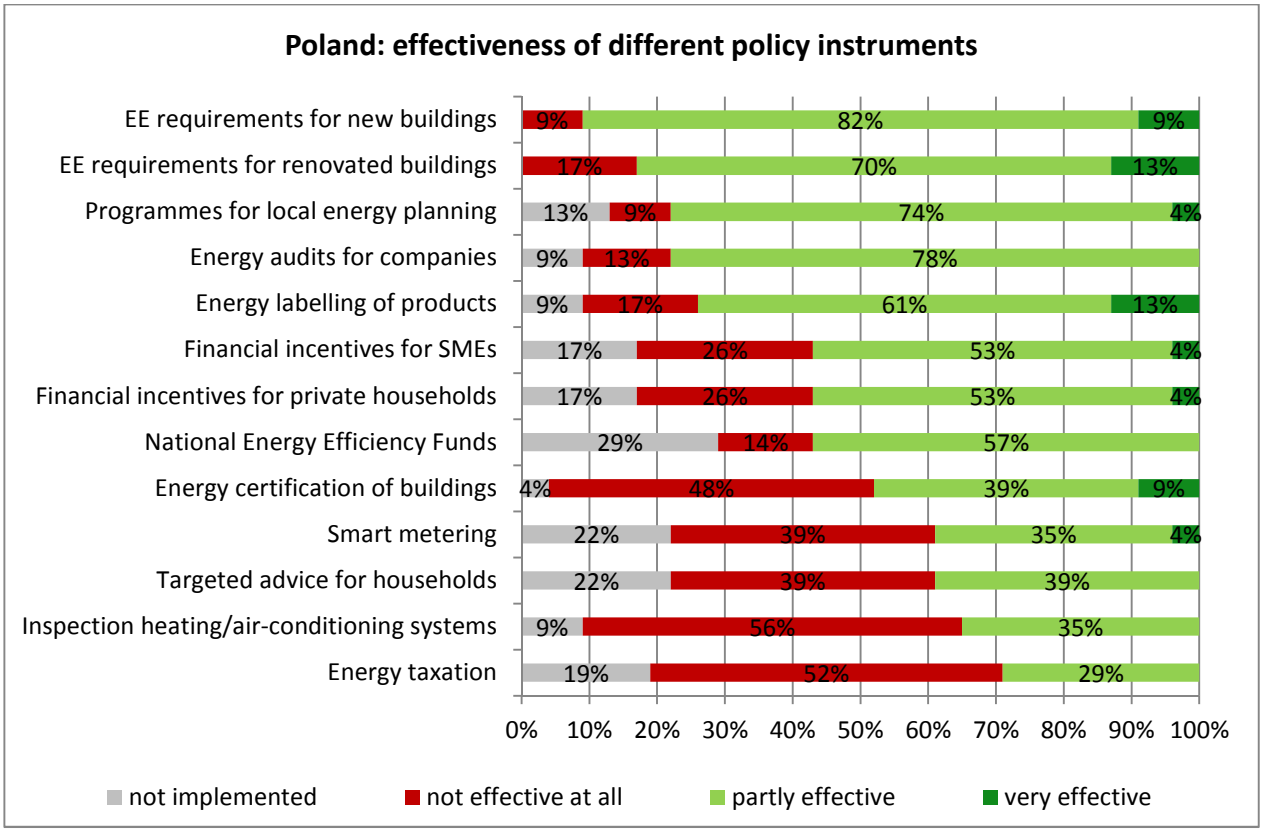
Despite the availability of funding programmes in the residential sector, the low coal prices (which is still a very important heating fuel) and low incomes prevent a stronger progress in building renovation, especially single-family houses. According to the experts, energy certificates are currently mandatory only for new buildings and are often perceived as an unnecessary extra cost.

In the service sector, funding programmes that can be used by SMEs for energy efficiency investments are in place, however, their focus is on innovation and job creation.

Experts observe that government policies focus on road transport and insufficient investment is made in the renovation of public transport fleets.



In terms of specific policy instruments, energy requirements for new and renovated buildings are seen as the most effective in the Polish context (rated at least partly by 91 % and 83 % respectively). The highest ratings for "not effective at all" are given to the inspection of heating/air-conditioning systems (56 %) and energy taxation (52 %).

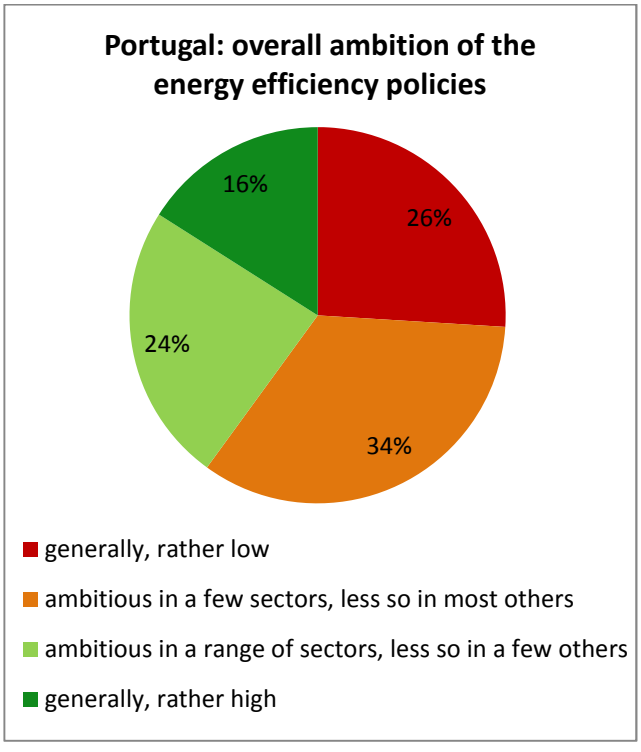


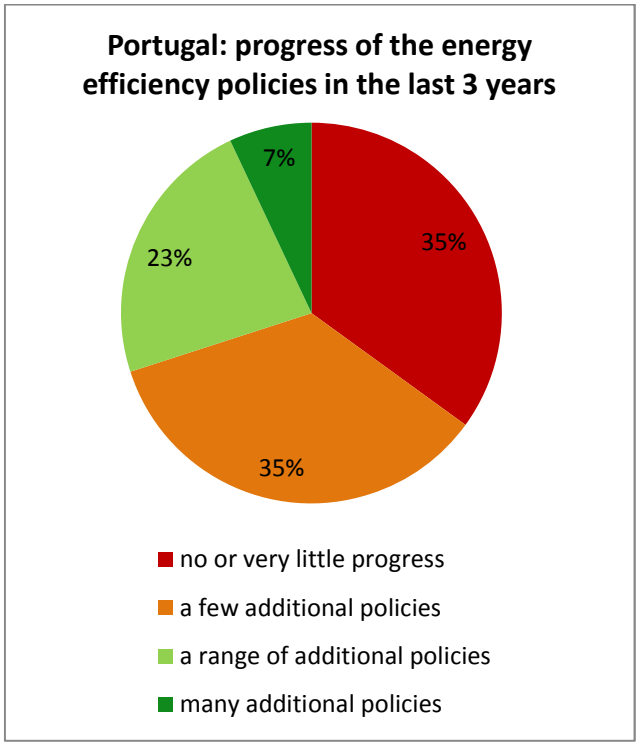
Portugal

According to the Portuguese experts, Portugal is among those countries that have progressed relatively little since the second NEEAP (country progress indicator: 21 out of 28 - see page 103). The rate of progress has significantly slowed compared to the three preceding years (2012 survey: country progress indicator: 6 out of 27). This is the second most significant decrease of all Member States.

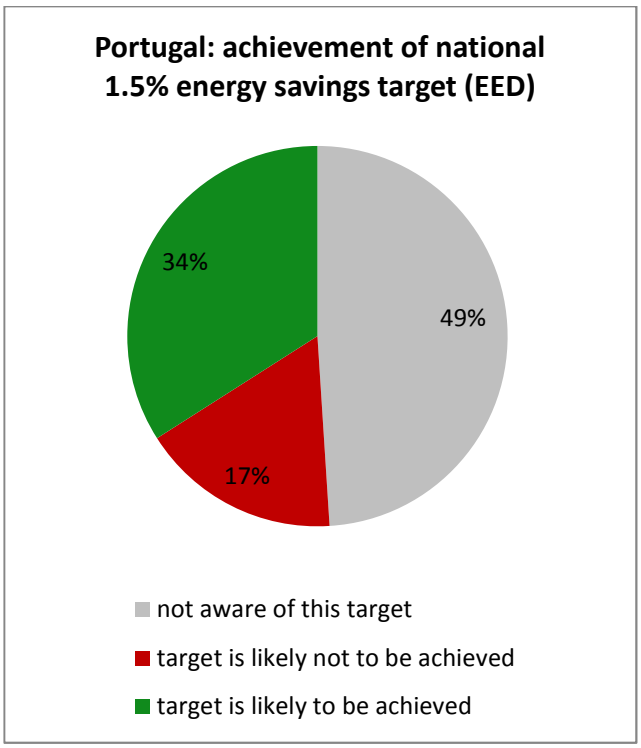
Opinions are divided regarding the overall ambition of energy efficiency policies, though 60 % consider it rather low or ambitious in only a few sectors. 70 % of experts saw very little progress in energy efficiency policies or few additional policies in the last three years.

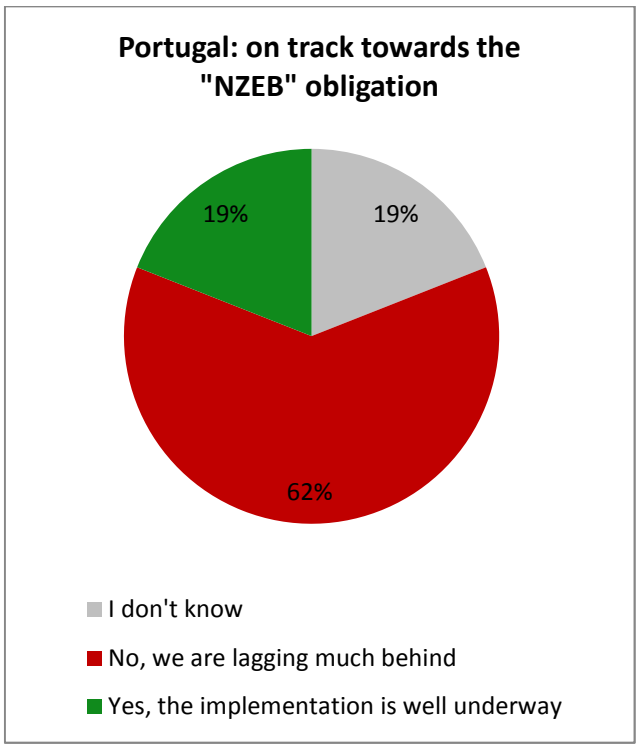
Experts report that the economic crisis and the resulting austerity policies have been main barriers to progress in energy efficiency, including the reduction of financing provided by banks. At the time of the survey, a set of new programmes was being prepared from which a new impulse was anticipated.





One third of interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved, while less than 20 % consider it unlikely. Over 60 % believe that Portugal is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

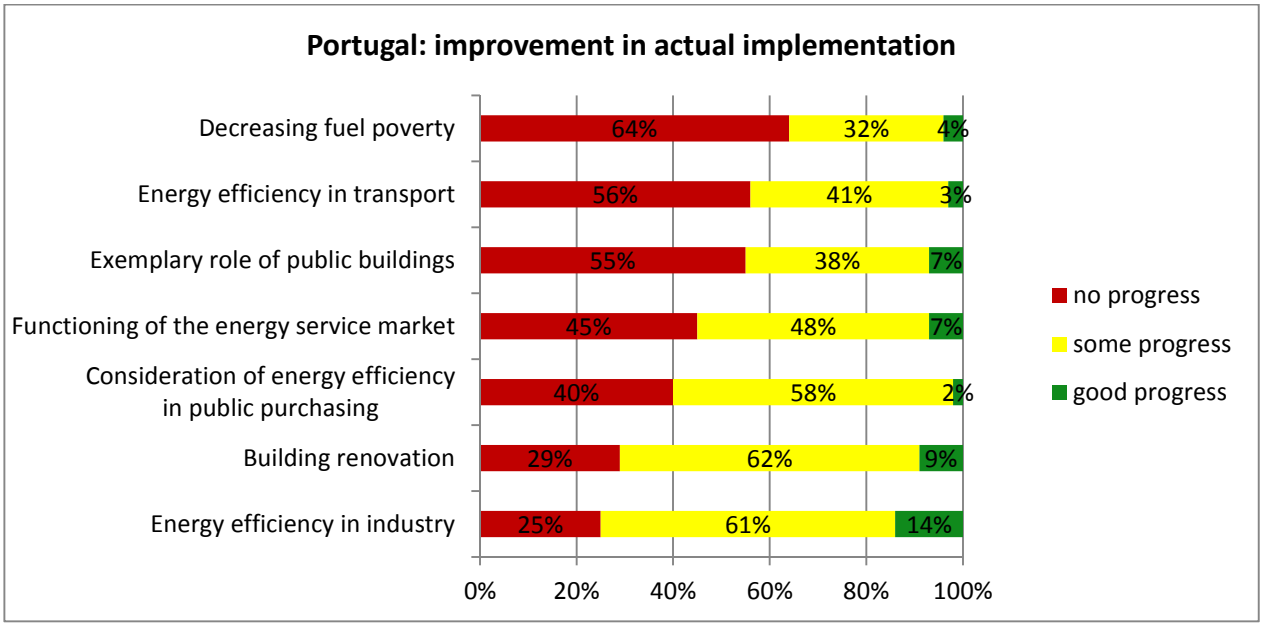




In the public sector, the lack of funding caused by the financial crisis is particularly challenging. The rating for the progress on the "exemplary role of public buildings" was among the lowest in the EU. However, progress in implementing ESCO projects was observed by the experts.

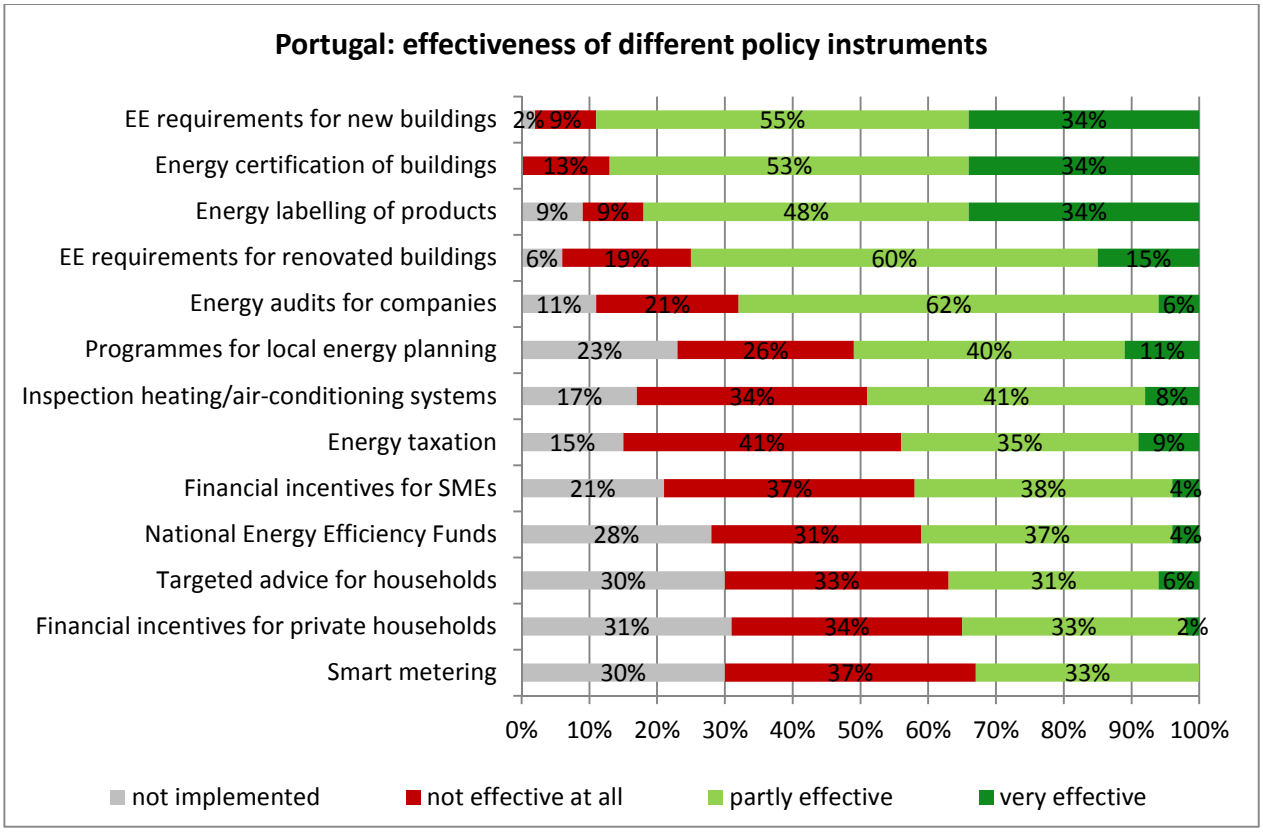
Experts mention the lack of significant financial incentives in the residential and service sectors.

In the transport sector, the support programmes for electric cars were decreased.



Regarding specific policy instruments, energy efficiency requirements for new buildings, energy certification of buildings and energy labelling of products are seen as the most

effective by the Portuguese experts (rated partly or very effective by 89 %, 87 % and 82 % respectively). For a range of instruments, opinions are divided: similar percentages of experts rated them "partly or very effective" and "not effective at all". The highest rating for "not effective at all" is given to energy taxation (41 %). The perceived level of effectiveness for "financial incentives for private households" was among the lowest in the EU.

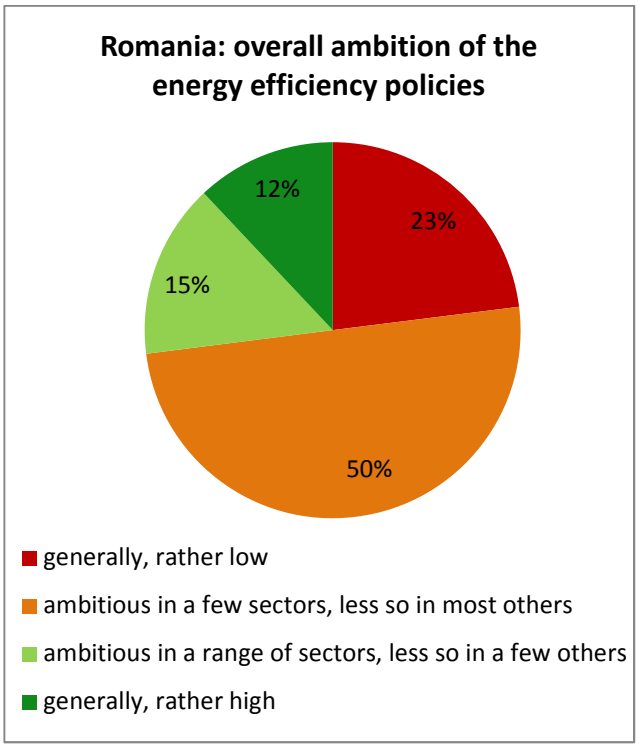


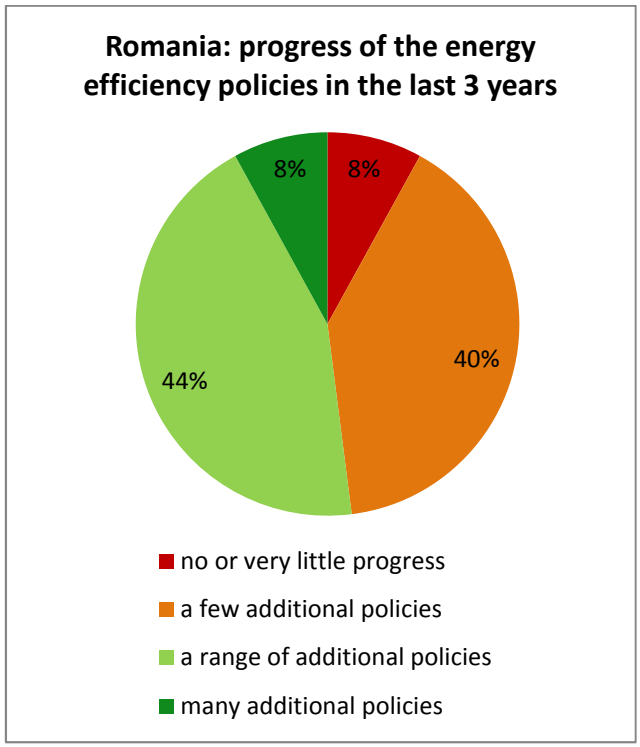
Romania

According to the Romanian experts, Romania has made relatively little progress in energy efficiency policies since the second NEEAP (country progress indicator: 20 out of 28 - see page 103). The rate of progress is slightly higher than in the three preceding years (2012 survey: country progress indicator: 23 out of 27).

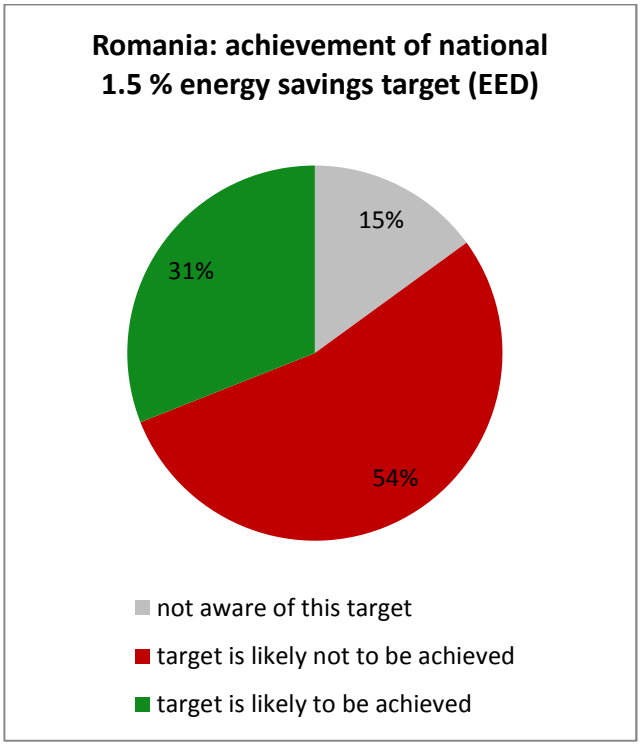
The interviewees perceive a rather low overall ambition of energy efficiency policies - nearly 75% consider it rather low or ambitious in only a few sectors. In terms of progress in energy efficiency policy over the last few years, opinions are divided: half of the interviewed experts see a range or many additional policies, whereas the other half finds that no or only a few additional policies were implemented. These results indicate that experts consider the progress in energy efficiency policies has surpassed the ambitions in the past three years.

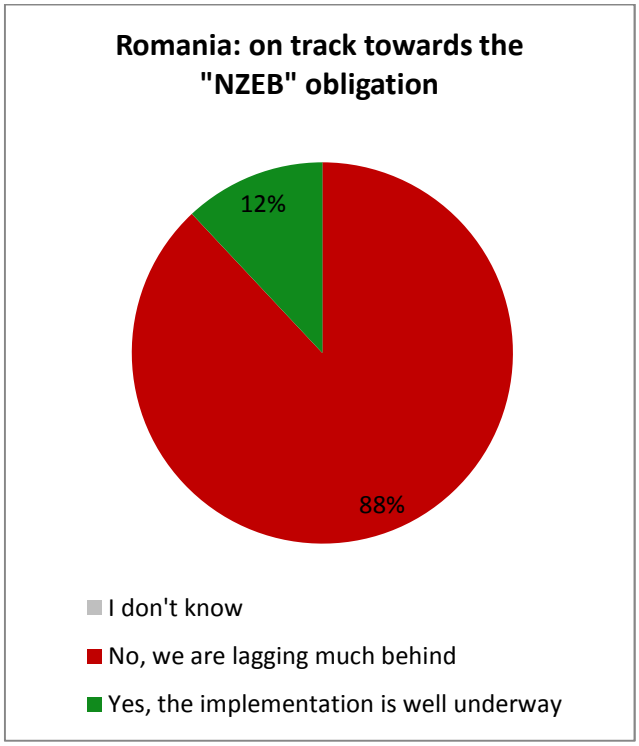
Experts see the full implementation of all provisions of the EED as a crucial issue at the moment and they mention bureaucratic burdens in accessing funding. Programmes for the renovation of apartment buildings were reported as having a positive impact.





Over 50 % of experts think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Nearly 90 % consider Romania is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020 (among the lowest ratings of all Member States).

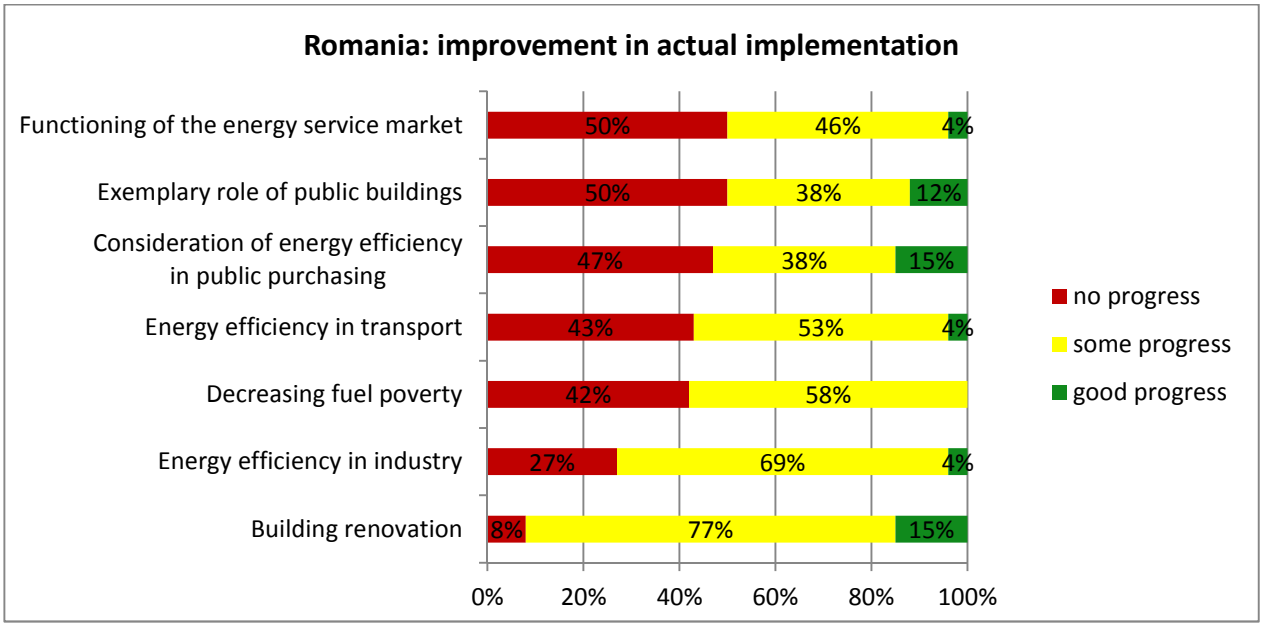




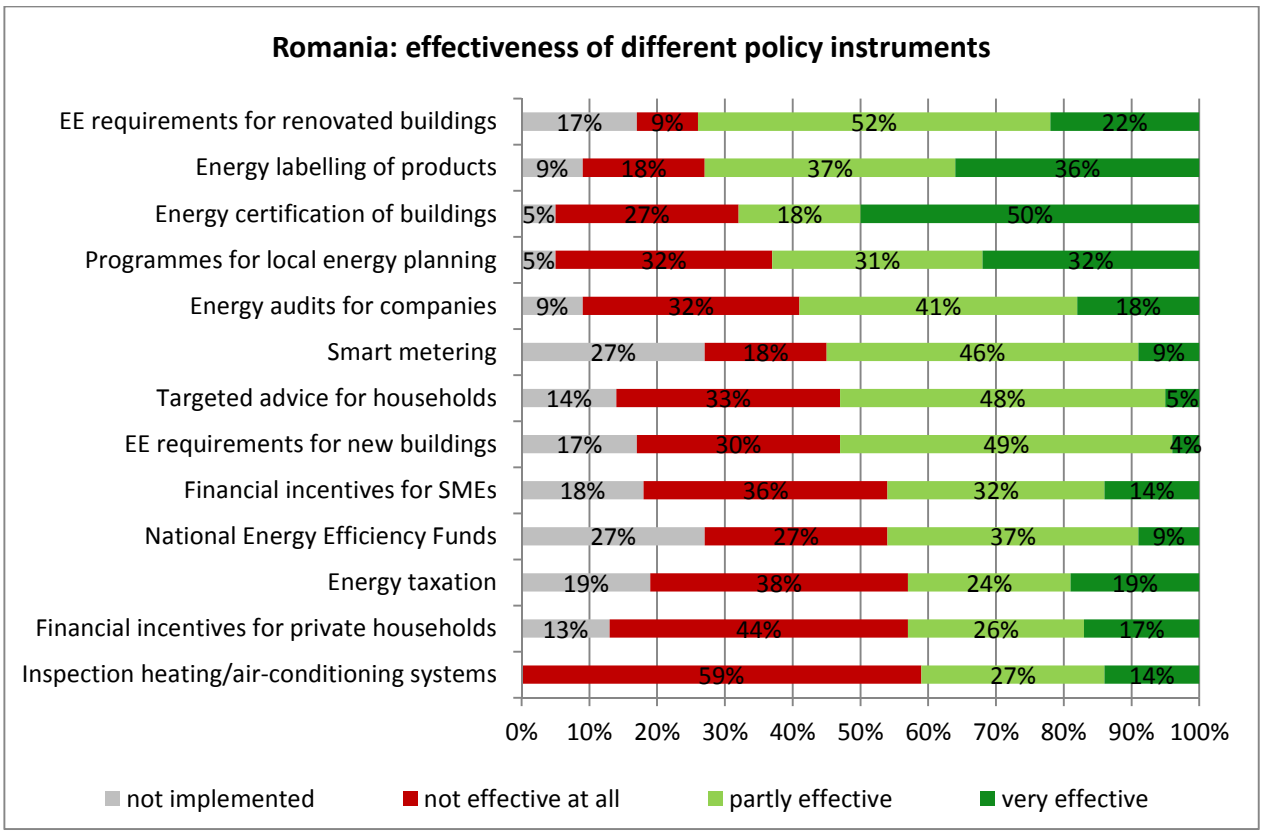
Increasing energy efficiency in the public sector is seen as very challenging and the 3 % renovation target as very hard to achieve. Also, it has not yet been possible to establish a significant market for ESCOs.

Building renovation in the residential sector has seen some progress due to funding programmes.

For the industry sector, experts report that there is a legal requirement to carry out regular audits and mention the availability of funding programmes for energy efficiency.



Among specific policy instruments, requirements for renovated buildings and energy labelling of products are seen as the most effective in the Romanian context (rated at least partly effective by 74 % and 73 % respectively). Energy efficiency requirements for new buildings - although perceived as rather effective in the Romanian context - received among the lowest ratings of all countries with 30 % rating them "not effective at all". The inspection of heating/air-conditioning systems is considered as the least effective instrument (59 % "not effective at all").

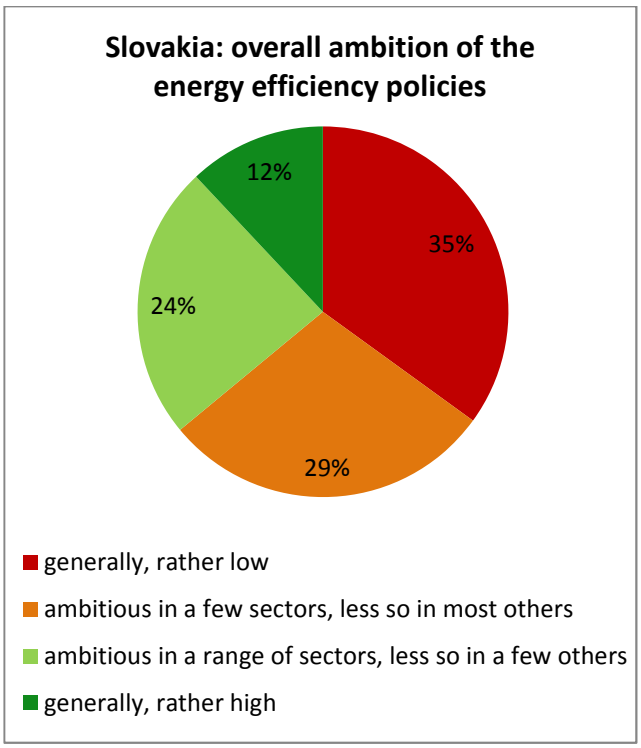


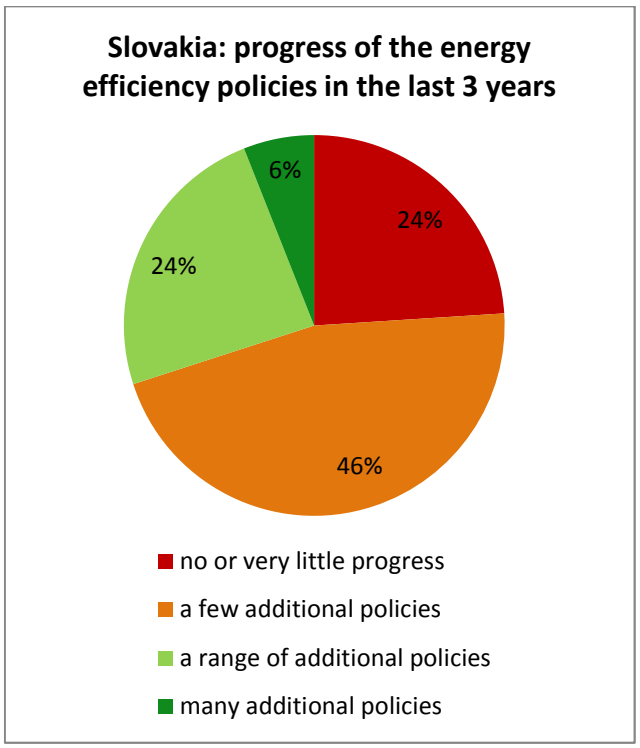
Slovakia

In the opinion of Slovak experts, Slovakia is among the Member States that have made medium progress in energy efficiency policies since the second NEEAP (country progress indicator: 15 out of 28 - see page 103). The rate of progress has significantly increased compared to the three preceding years (2012 survey: country progress indicator: 26 out of 27).

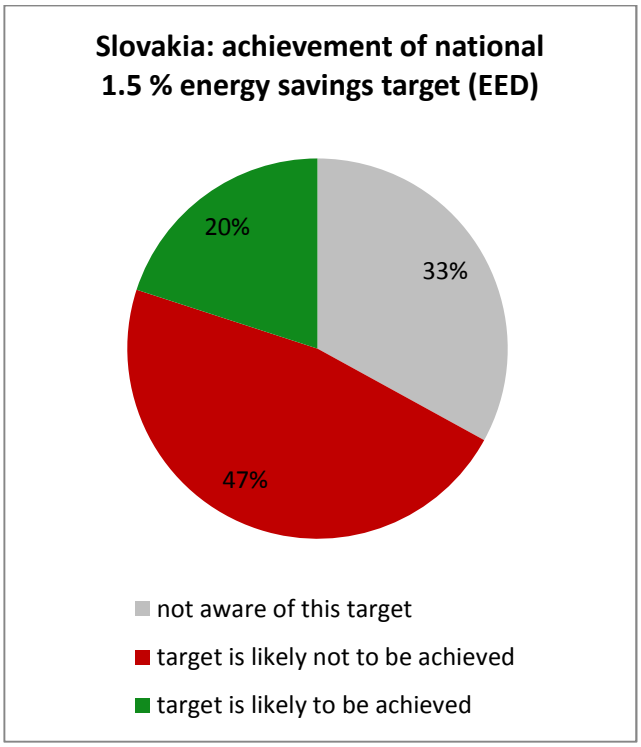
Despite these improvements, experts still see a relatively low overall ambition of energy efficiency policies: around two thirds consider it rather low or ambitious in only a few sectors. Nearly 70 % believe that there was very little progress in energy efficiency policies or few additional policies in the last three years.

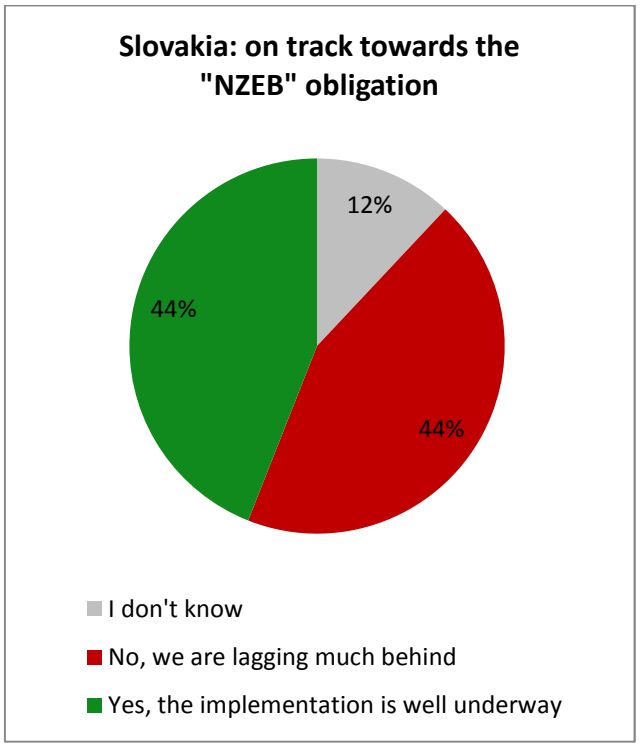
Experts see fulfilling all requirements of the EED in a relatively short time period and setting up the relating monitoring as well as financing issues as critical issues. On the positive side, they report the adoption of a range of legislative measures, including a new Energy Efficiency Act, which sets a positive framework for energy efficiency.





Nearly 50 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Opinions among the experts are divided as to whether Slovakia is on track or not to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

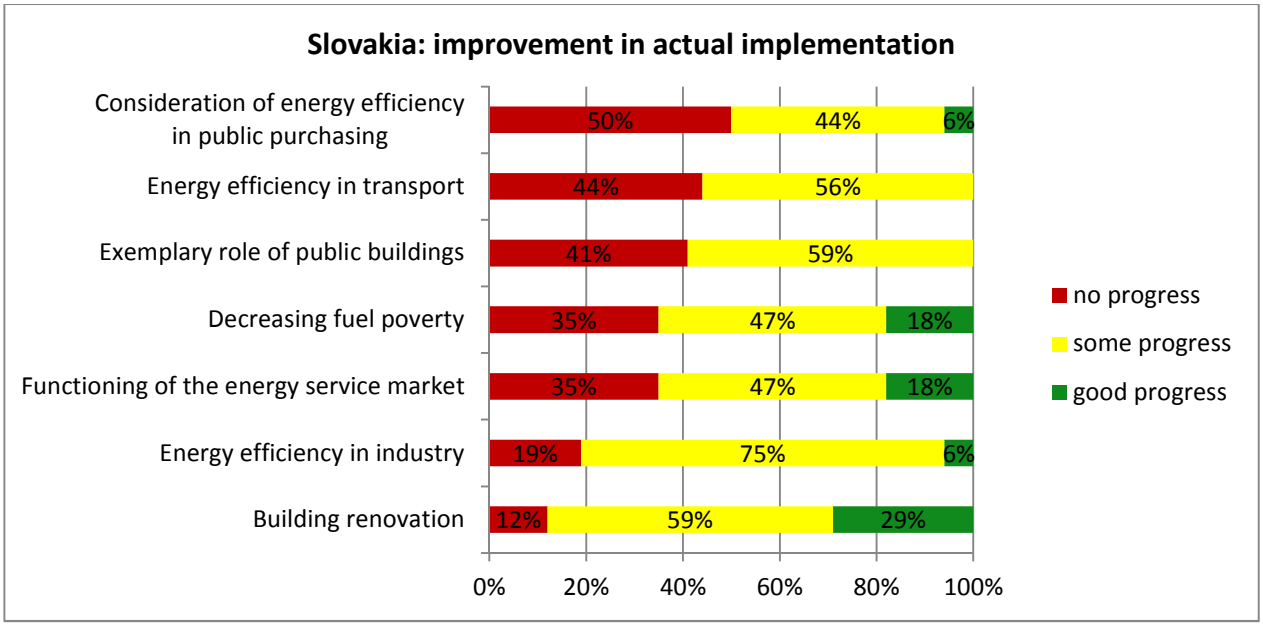




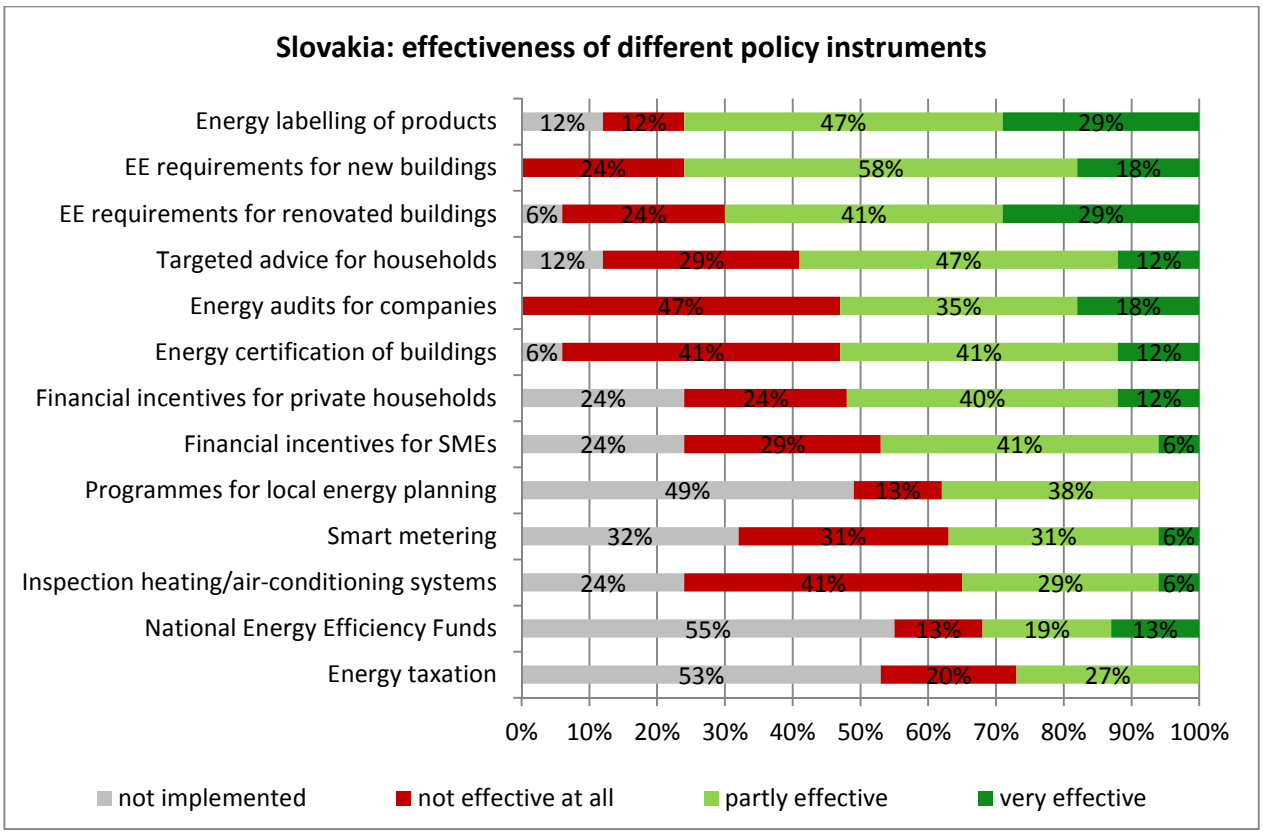
In the public sector, financing remains the key challenge for the renovation of public buildings.

Programmes for building renovation are in place in the residential and service sectors since a number of years. The availability of funding could be increased with upcoming funding from Structural Funds.

In the transport sector, programmes supported the improvement of public transport.



Among specific policy instruments, energy labelling of products and energy efficiency requirements for new and renovated buildings are seen as the most effective in the Slovak context (rated at least partly effective by 76 %, 76 % and 70 % respectively). The highest ratings for "not effective at all" are given to energy audits for companies, the inspection of heating/air-conditioning systems and energy certification of buildings (47 %, 41 % and 41 % respectively).

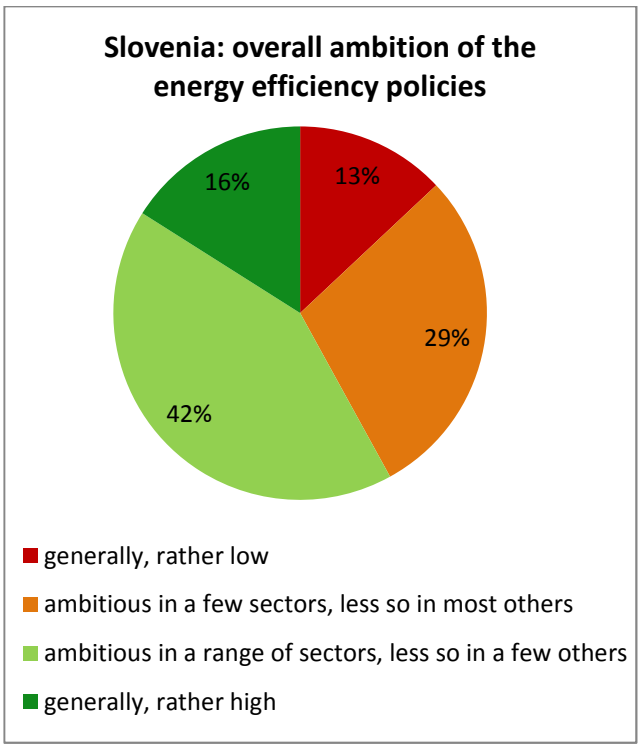


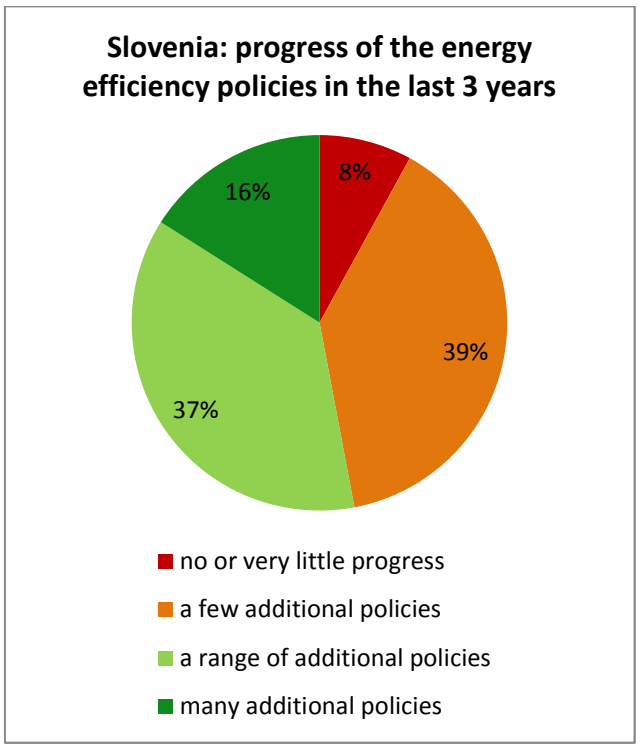
Slovenia

According to the Slovene experts, Slovenia in among those Member States that have progressed comparatively well in energy efficiency policies since the second NEEAP (country progress indicator: 5 out of 28 - see page 103). Slovenia maintained a rather similar ranking as in the three preceding years (2012 survey: country progress indicator: 7 out of 27).

Experts see a relatively high overall ambition of energy efficiency policies – nearly 60 % consider it at least ambitious in a range of sectors. Over 50 % find that a range or many additional energy policies were introduced in the last three years.

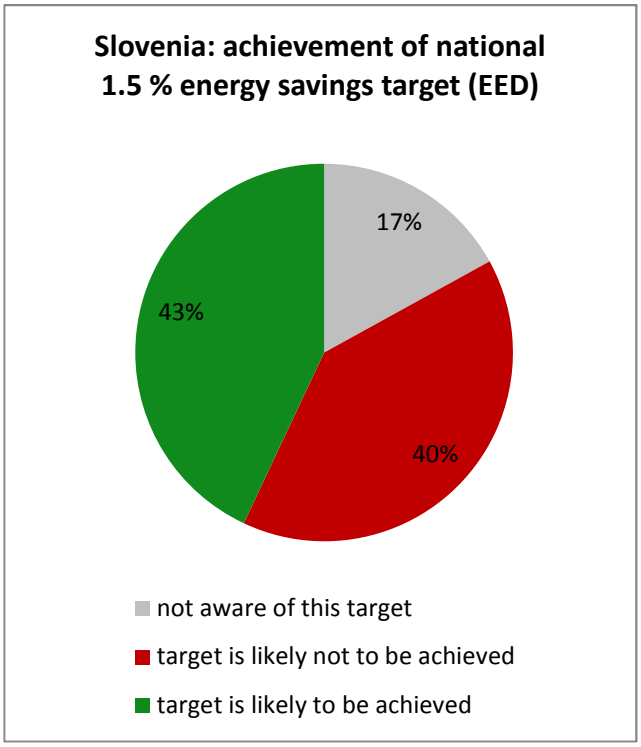
Experts continue to be concerned about the market implementation of building energy performance certificates. Also they mention the challenge of accessing financing as well as interesting owners in building renovation. They report about the availability of funding schemes, such as the Ecofund, and activities in the public sector.

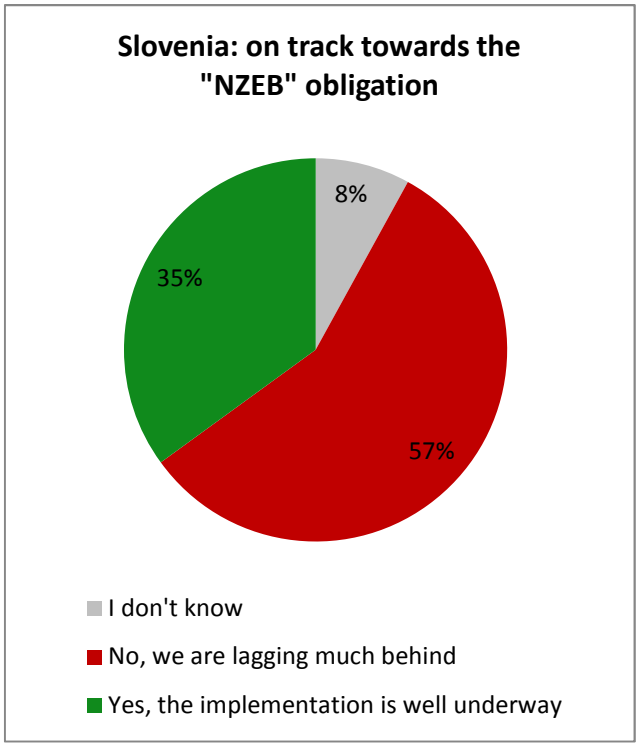




Opinions among the interviewees are divided regarding the achievement of the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers). Slovenia had already introduced an energy efficiency obligation scheme a few years ago which is expected to undergo significant changes.

Nearly 60 % think Slovenia is lagging behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

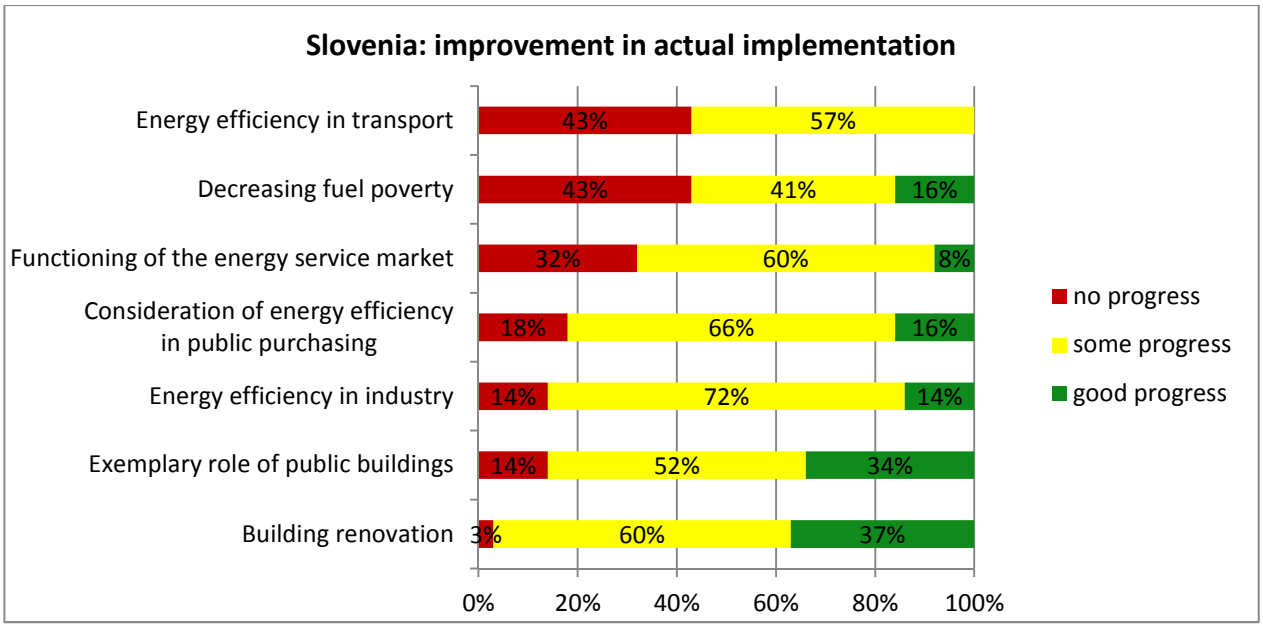




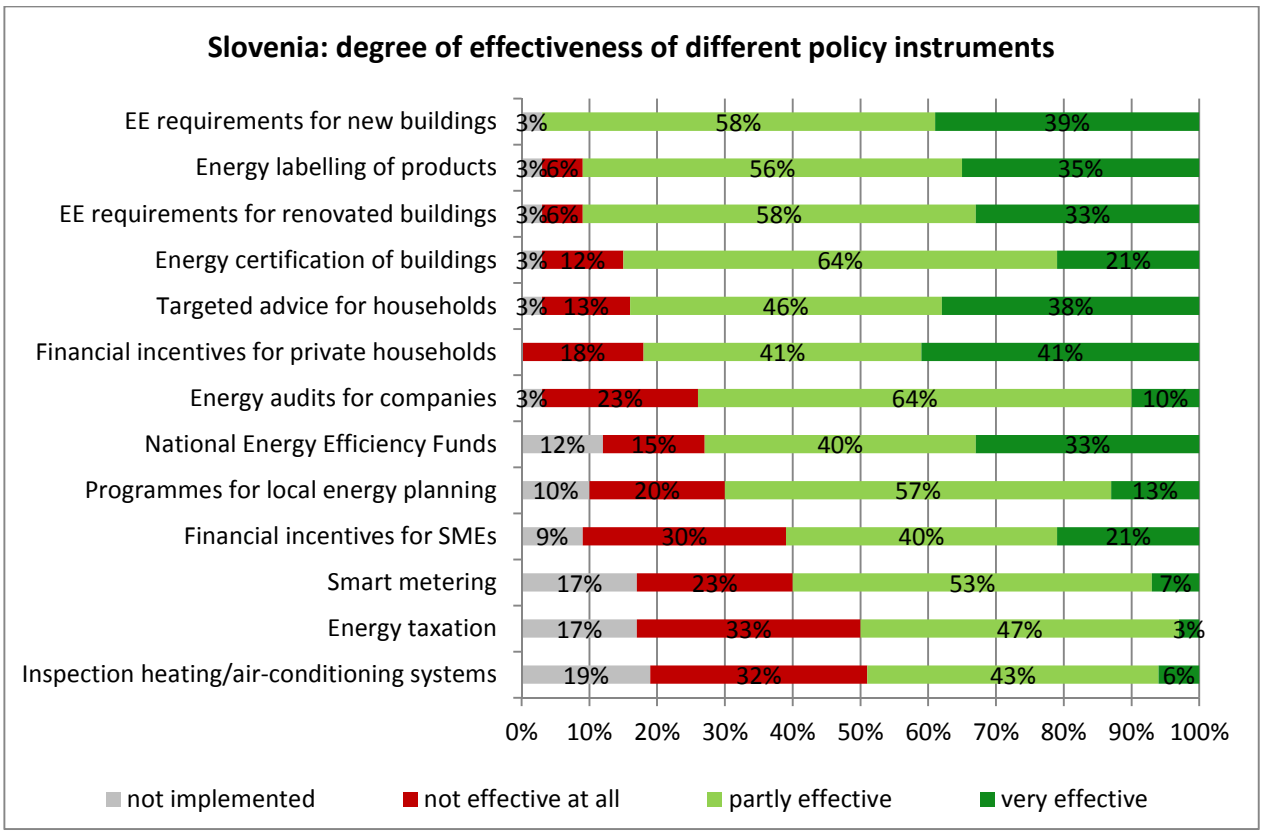
For the public sector, experts report on a range of well implemented public buildings with high energy efficiency standards and renewable energy supply, both in new construction and renovation. However, more could be done in procurement. They also mention initiatives for "energy book keeping" at local level.

In the residential sector, experts see a good development in the standards for new buildings. They also mention the introduction of heat metering in apartment buildings.

The experts see a significant need for improvements in the public transport system. They also mention initiatives to promote electric mobility.



Slovene experts think rather positively about the effectiveness of a range of energy efficiency policy instruments. Those seen as the most effective in the Slovene context are energy efficiency requirements for new and renovated buildings and energy labelling of products (rated at least partly effective by 97 %, 91 % and 91 % respectively). Among the Member States, the Slovene experts give targeted advice for households the highest effectiveness rating. The instruments which are attributed the highest ratings for "not effective" were energy taxation, the inspection of heating/air-conditioning systems and financial incentives for SMEs (respectively 33 %, 32 % and 30 % "not effective at all").



Spain

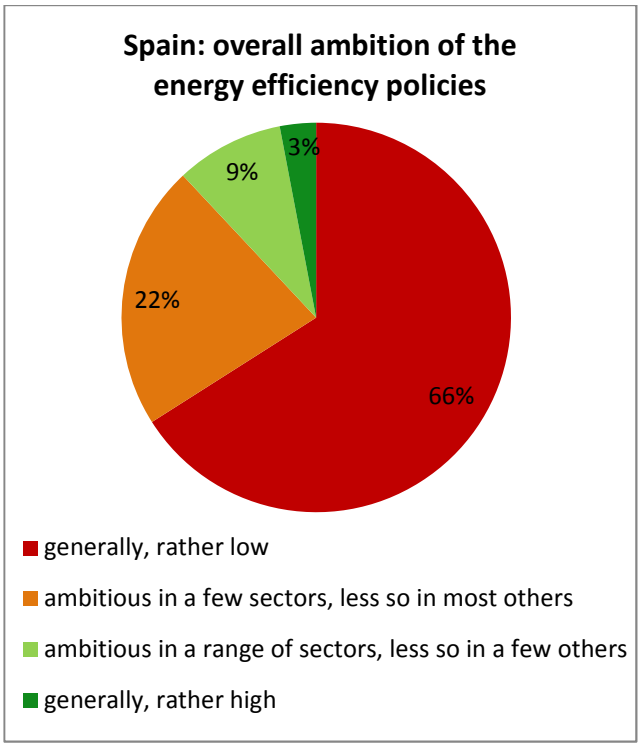
According to Spanish experts, Spain is the country that has made the least progress in energy efficiency policies since the second NEEAP among all Member States (country progress indicator: 28 out of 28 - see page 103). The rate of progress has strongly slowed down compared to the three preceding years (2012 survey: country progress indicator: 15 out of 27).

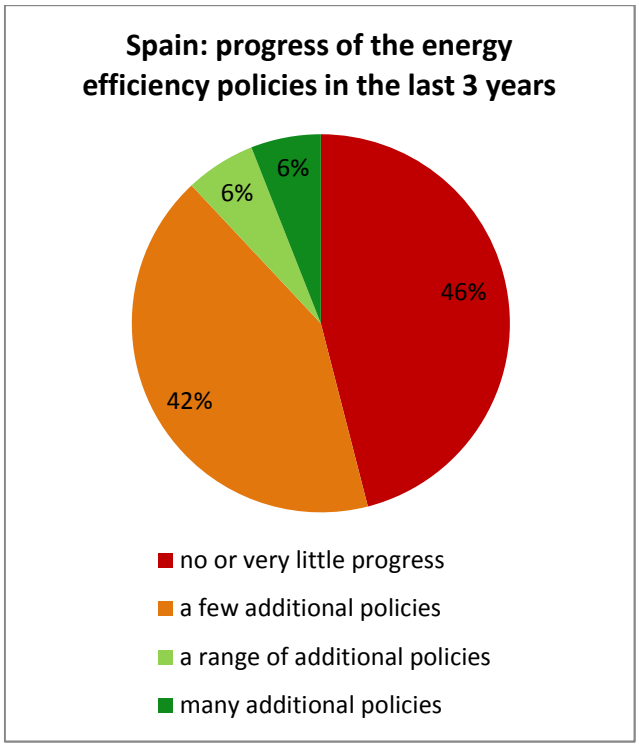
Experts consider the overall ambition of energy efficiency policies as very low - 88 % believe it, at best, to be ambitious in only a few sectors (among the lowest ratings of all Member States). Similarly, 88 % see very little progress in energy efficiency policies or few additional policies in the last three years. Experts rated both the overall ambition and the progress much lower than in the 2012 survey.

It seems that the economic and financial crisis had a strong impact on energy efficiency policies. It has led to a significant decrease of the budgets available to the national and regional energy agencies that had a key role in previous years - though this is expected to increase again.

The building sector is seen as a crucial sector for energy efficiency policies. Also a lack of specific knowledge and specific support of energy efficiency is observed by the experts in

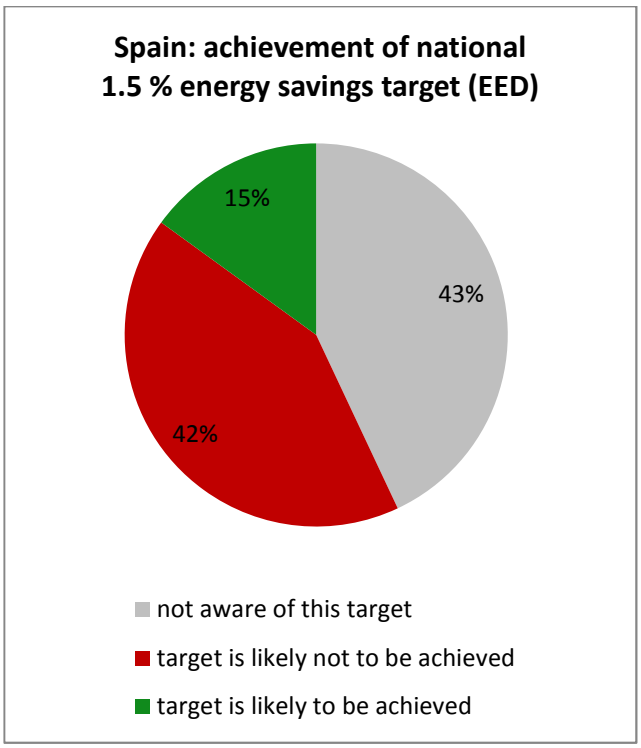
many sectors. As a positive development, experts report on funding programmes for different sectors, including transport.

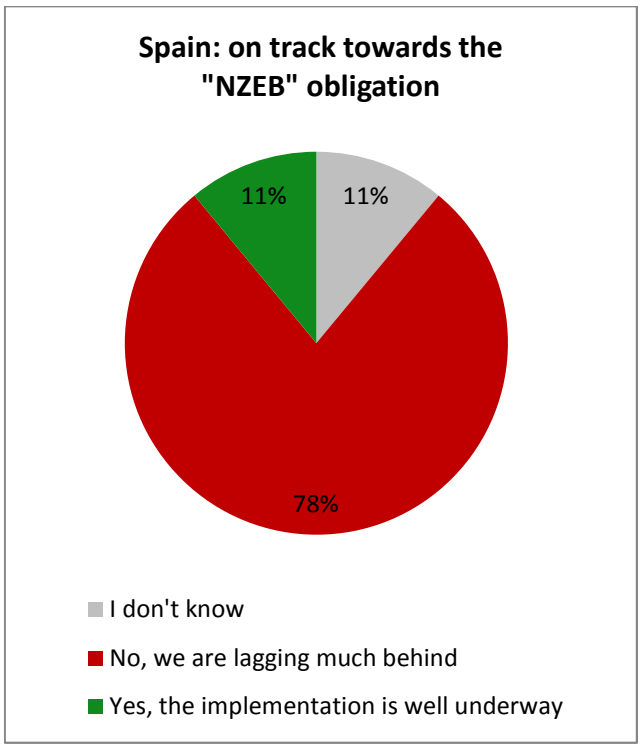




Over 40 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Relating to the implementation of Art. 7 of the EED, experts report that Spain adopted a regulation creating a national fund for energy efficiency funded by parties obligated under Art. 7. The fund is managed by the national energy agency IDAE.

Nearly 80 % believe that Spain is not on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.



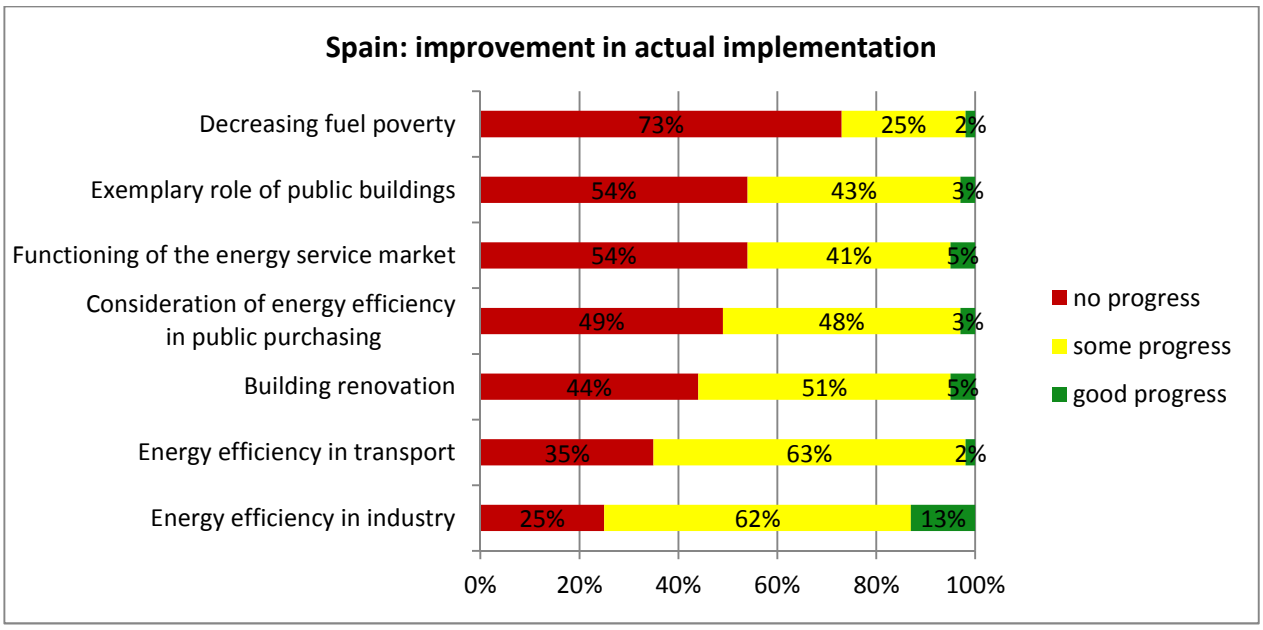


The economic crisis has presented a major barrier to investments in the public sector. Strategic activities to support ESCO market development are reported.

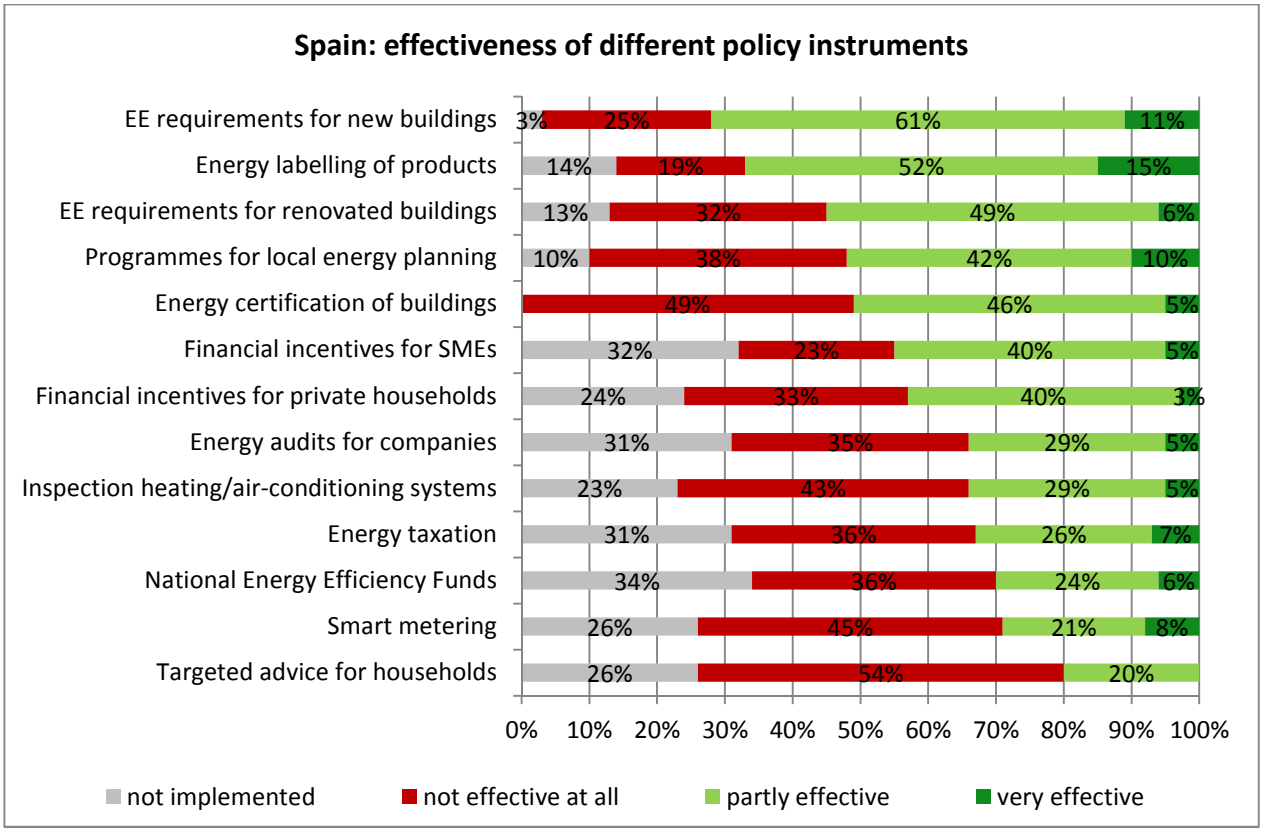
In the residential sector, the challenge of very long pay-back times for building renovation (due the climate) are mentioned. Experts express hope for an increase in funding as well as for awareness raising activities. The level of progress in implementation over the last three years is among the lowest in the EU.

Experts observe a lack of specialised knowledge on energy efficiency in the service and industry sectors.

In the transport sector, a funding programme supports the switch to more efficient vehicles.



In terms of specific policy instruments, energy requirements for new buildings and energy labelling of products are seen as the most effective in the Spanish context (rated partly or very effective by 72 % and 67 % respectively). Targeted advice for households is currently seen as not very effective (54 % "not effective at all") which is among the lowest in the EU.

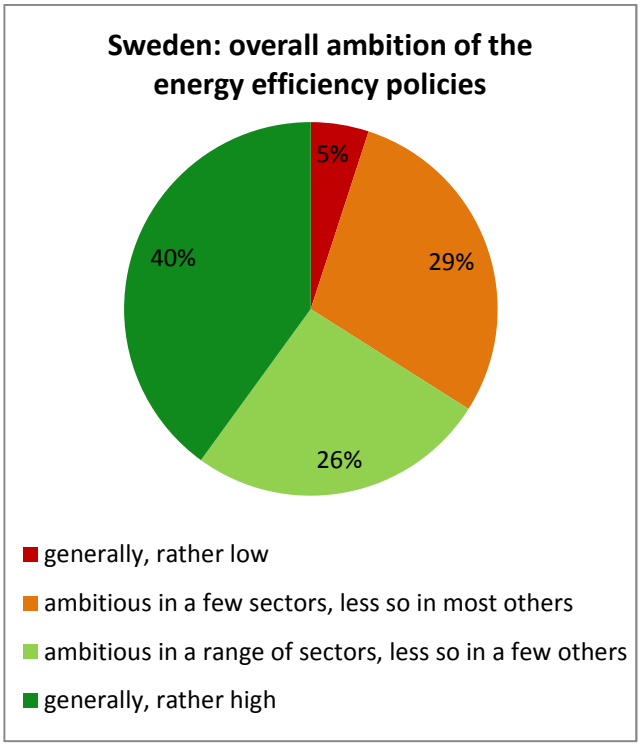


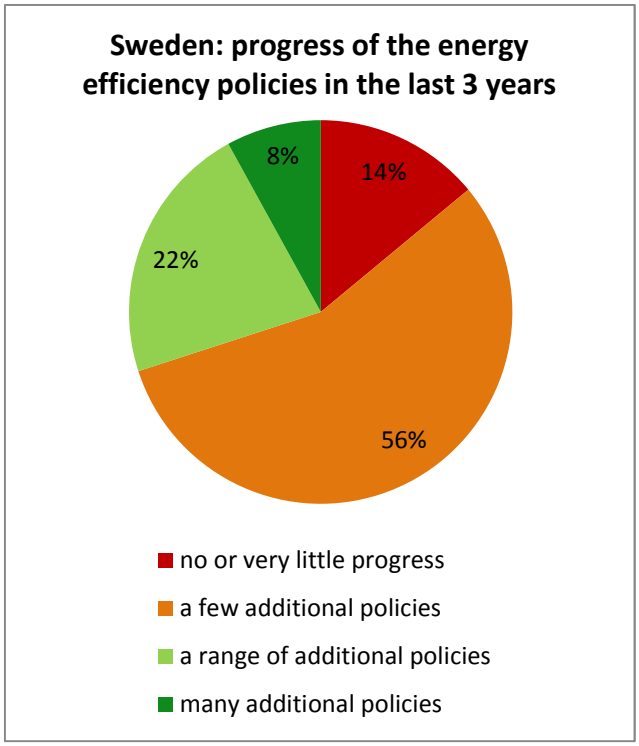
Sweden

In the opinion of Swedish experts, Sweden has made good progress in energy efficiency policies since the second NEEAP (country progress indicator: 4 out of 28 - see page 103). The rate of progress was somewhat higher than in the three preceding years (2012 survey: country progress indicator: 9 out of 27).

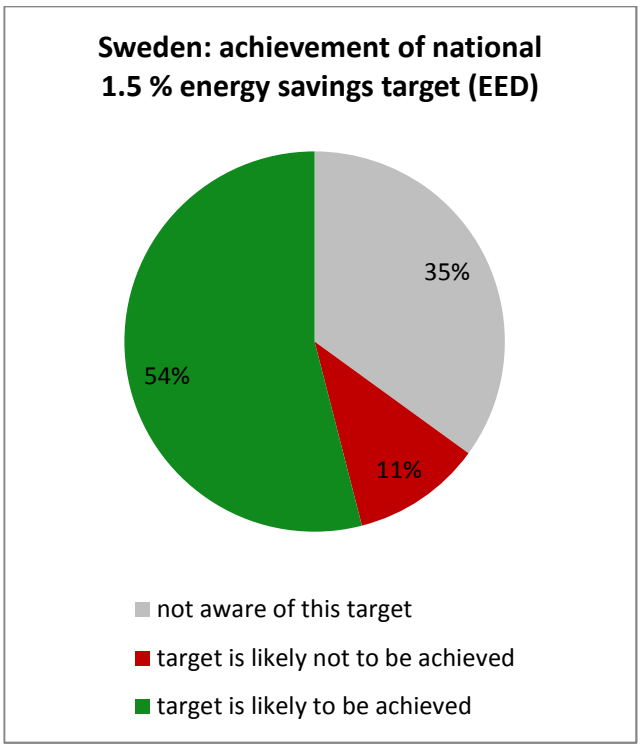
Experts perceive a relatively high overall ambition of energy efficiency policies: 66 % consider it at least ambitious in a range of sectors or generally rather high. However, 70 % see very little progress in energy efficiency policies or few additional policies in the last three years. These results indicate that experts think energy efficiency policy is not sufficiently living up to ambitions.

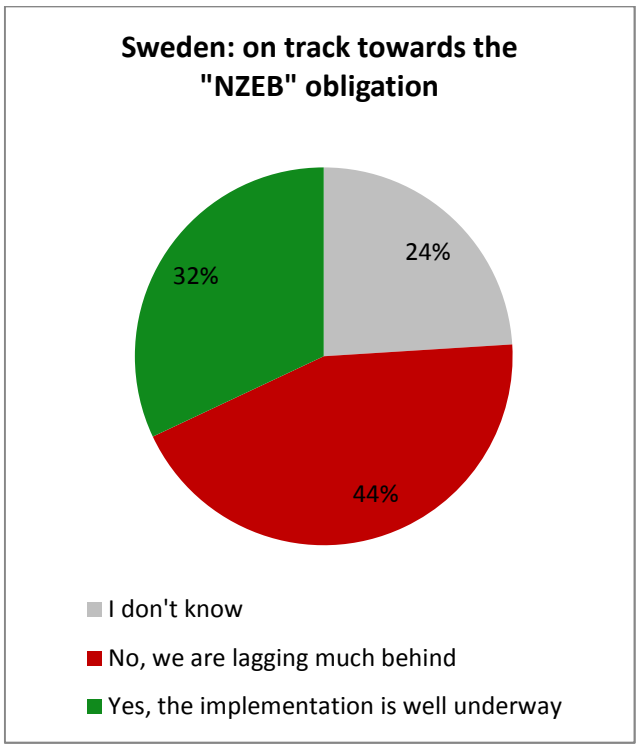
Critical issues reported by the experts include the implementation of the "nearly zero energy buildings" requirements. As positive examples, technology procurement initiatives and product policies are mentioned.





54 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is likely to be achieved (among the highest ratings of all Member States). However, only one third believe that Sweden is on track to meet its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

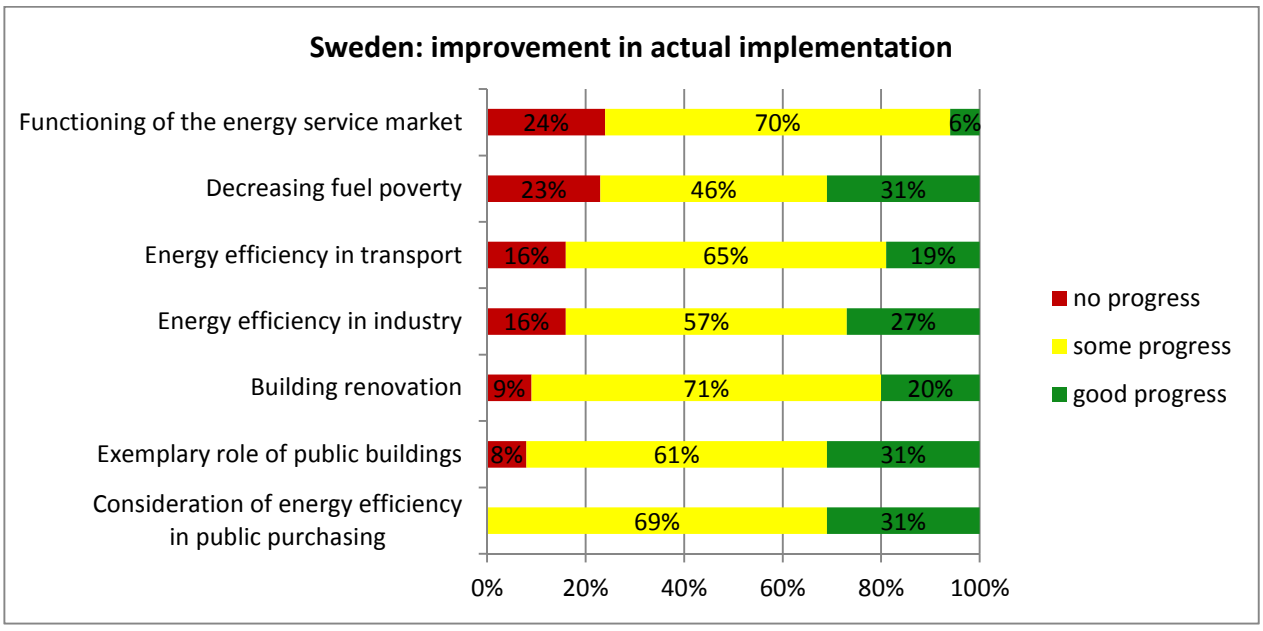




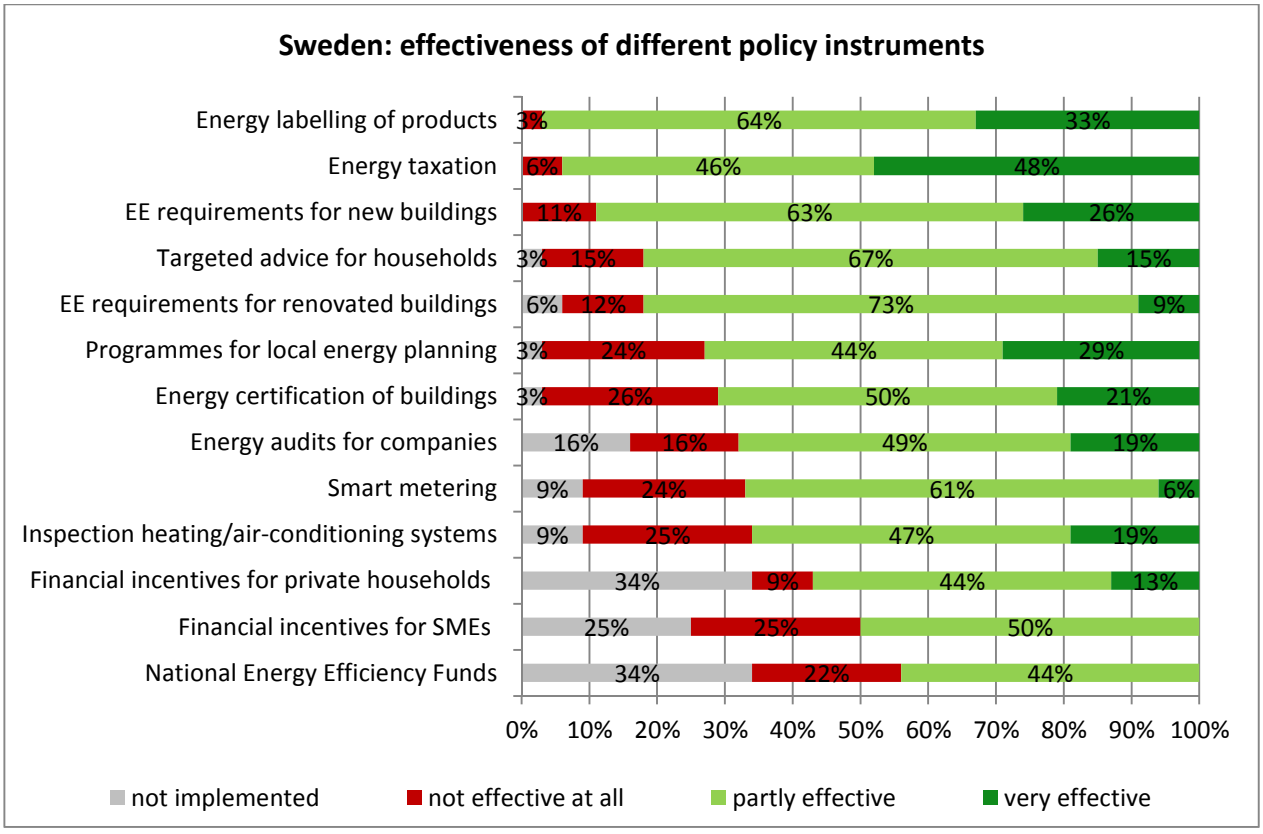
In the public sector, experts see a push for energy efficiency at the local level with many on-going initiatives, including "buyers groups". Among the Member States, Swedish experts see the largest improvements in public procurement. However, they are concerned that the implementation of the "3 % renovation target" will not have a significant impact.

Experts report on a debate over increased energy efficiency standards in the residential sector and whether those result in higher investment costs of much needed new dwellings.

In the service sector, experts see the need for more action. Similarly, in the industry sector, they regret that the successful PFE programme (tax discounts for auditing, energy management systems and reporting) was discontinued.



Experts harbour a positive opinion of the effectiveness of a range of energy efficiency policy instruments. Energy taxation, energy labelling of products and energy efficiency requirements for new buildings are seen as the most effective in the Swedish context (rated at least partly effective by 94 %, 97 % and 89 % respectively). For energy taxation, this is the most positive rating of all Member States. National energy efficiency funds and financial incentives for SMEs and private households are considered as the least effective instruments.

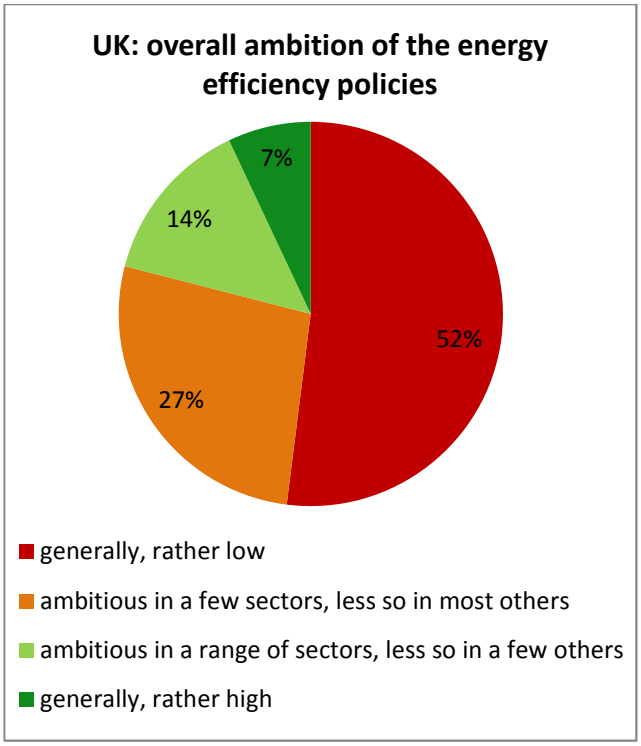


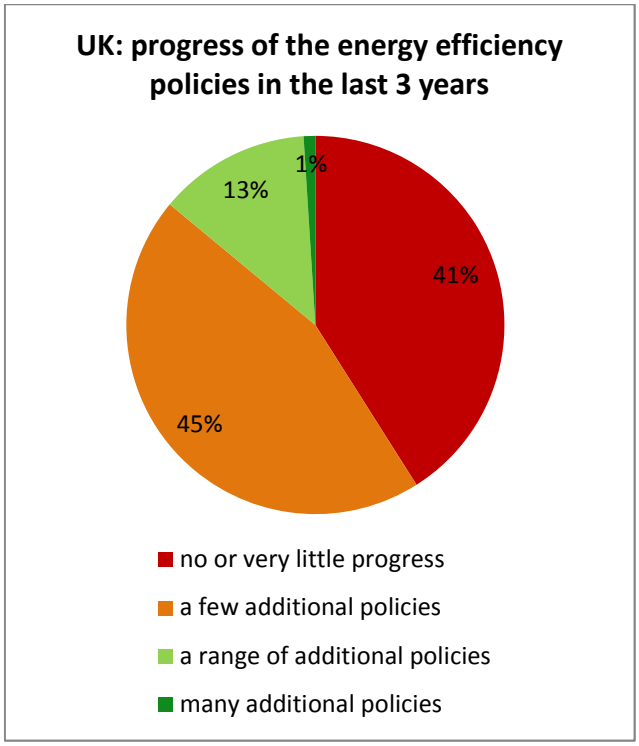
United Kingdom

According to the country's experts, the UK is among the Member States that have made relatively little progress in energy efficiency policies since the second NEEAP (country progress indicator: 27 out of 28 - see page 103). The rate of progress was significantly lower than in the three preceding years (2012 survey: country progress indicator: 13 out of 27).

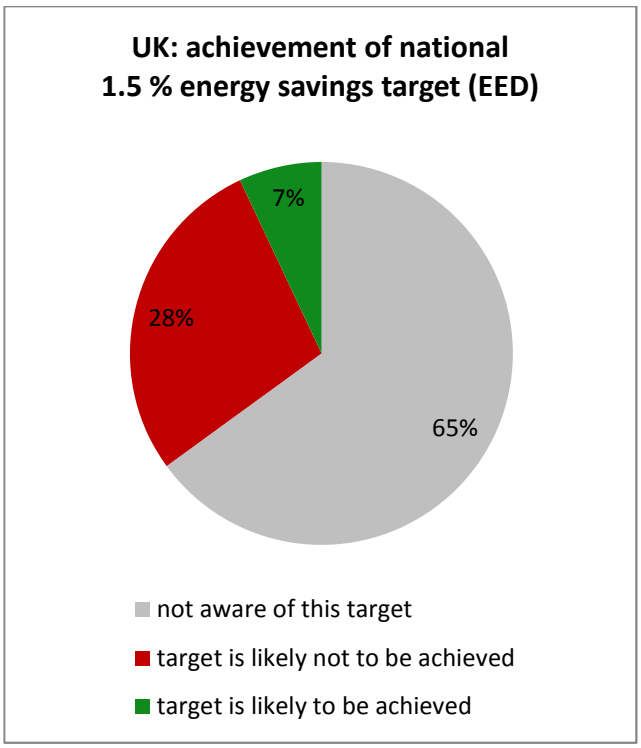
Experts see a rather low overall ambition of energy efficiency policies: nearly 80 % consider it ambitious in only a few sectors or generally rather low. Similarly, over 80 % see very little progress in energy efficiency policies or few additional policies in the last three years. The overall ambition and progress were rated much lower than in the 2012 survey.

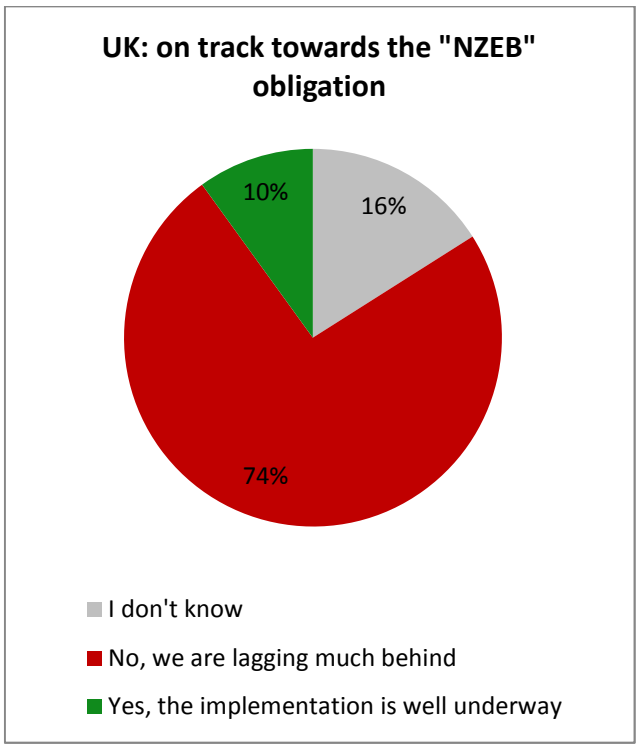
A main concern expressed by the experts is that present policy and decision makers do not see energy efficiency as an opportunity and focus on the supply side. They are also worried by the lack of systematic approach in energy efficiency policies. On the positive side, they observe that the implementation of the EPBD is improving and the energy certification is being taken up. At the time of the survey, new legislation was under discussion which would place penalties on landlords of buildings with low energy performance.





Nearly 30 % of the interviewees think that the EED savings target (new savings of 1.5 % of the annual energy sales to final consumers) is not likely to be achieved. Three quarters of experts consider that the UK is lagging much behind in meeting its obligation under the EPBD that all new buildings be "nearly zero-energy buildings" by 2020.

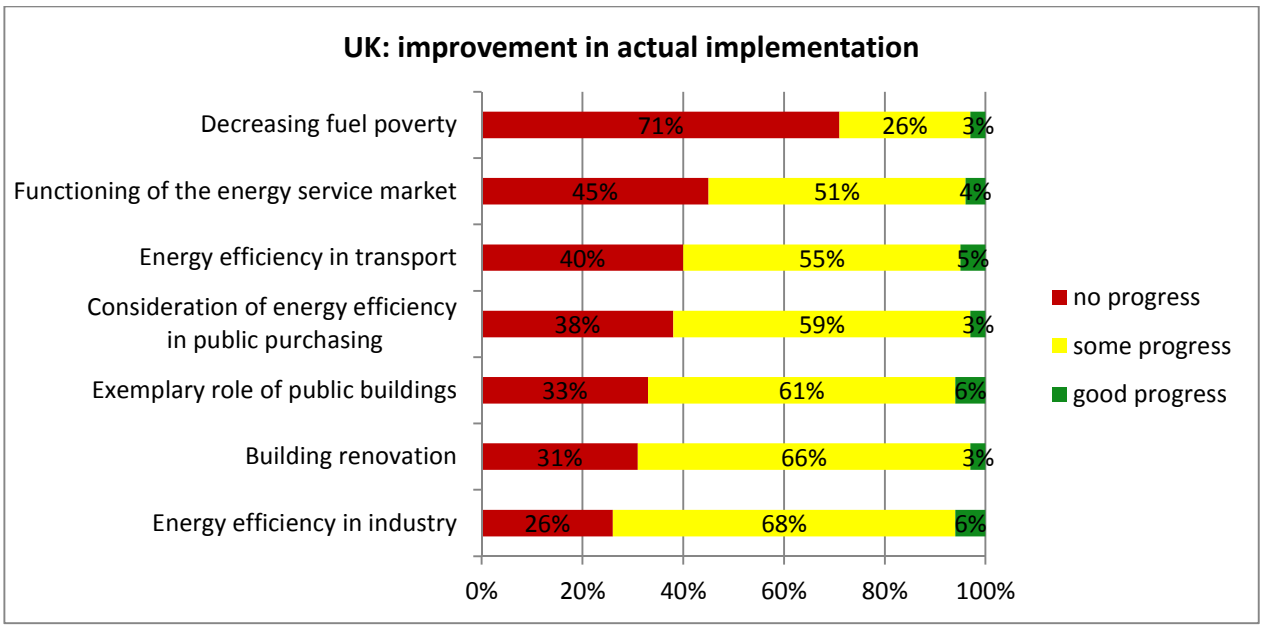




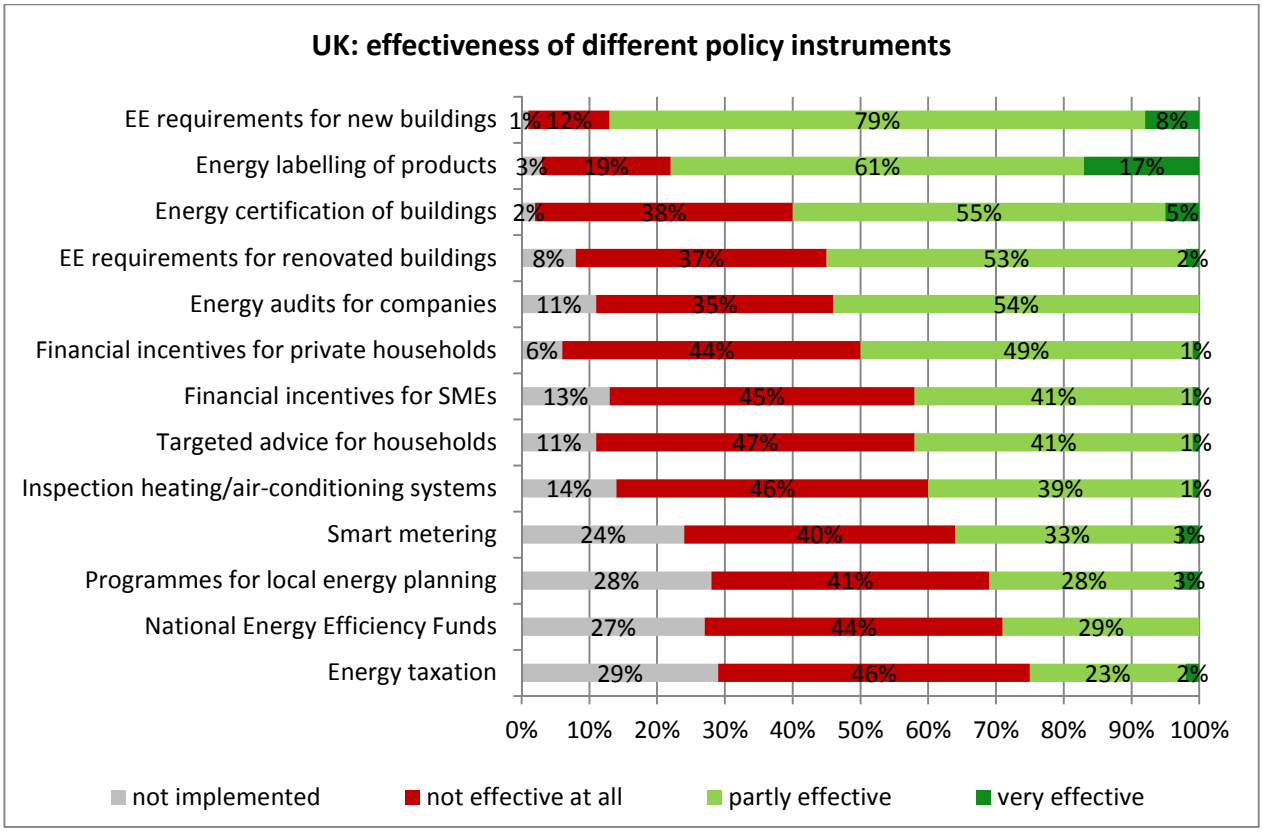
For the public sector, experts regret that the energy efficiency refurbishment targets for local authorities were recently removed. According to them, there is little use of energy performance contracting and public spending cuts create significant uncertainty.

The renovation of residential buildings was financed mostly through the "Green Deal" and the Energy Company Obligation (ECO) scheme. Among all Member States, the UK experts see the lowest level of progress in building renovation. They therefore call for more systemic incentives to generate demand for energy efficiency in both the residential and service sectors (e.g. a tax scheme).

For the transport sector, a focus on alternative fuels rather than on energy efficiency improvements is reported.



Among specific policy instruments, energy efficiency requirements for new buildings and energy labelling of products are seen as the most effective in the context of the UK (rated at least partly effective by 87 % and 78 % respectively). In general, opinions are divided on the effectiveness of a range of instruments with similar percentages of experts rating them "at least partly effective" and "not effective at all". In comparison to other Member States, the effectiveness of energy efficiency requirements for renovated buildings is rated quite low.



Survey Results across Member States

Quantitative survey

Progress indicator

In order to compare the progress across countries and policy fields, a "progress indicator" was calculated from five relevant questions of the quantitative survey (see annex for the questionnaire), namely question 1 (ambition of energy efficiency policies), question 2 (progress in the last 3 years), question 4 (annual savings target), question 7 (NZEB target) and question 8 (improvements in key energy policy areas). The answers were weighted (the most positive answer by 100, the least positive one by 0).

The ranking resulting from this calculation shows Denmark, Finland and Estonia as the three countries where energy efficiency policies progressed most since the second NEEAP and Spain, UK and Hungary as the three where the least progress was made.

Progress indicator 2015 - Ranking of Member States

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

In the 2012 survey, a progress indicator was also calculated using the same methodology. It was partly based on the same questions as in 2015 (relating to the ambition and the overall progress) and partly on other questions (relating to the then different energy policy context set by the ESD). Despite these differences, it seems justified to compare these results as an indicator for overall policy progress.

While the "top group" remains virtually unchanged (Denmark, Finland, Estonia) , there are some significant "up-and-down" movements for many Member States. A significant slowing-down of progress was reported for Malta, Portugal, the UK and Spain. Significantly increased progress was reported for Cyprus, Italy, Slovakia and the Czech Republic.

Progress indicator 2015 - **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	↗
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	↓

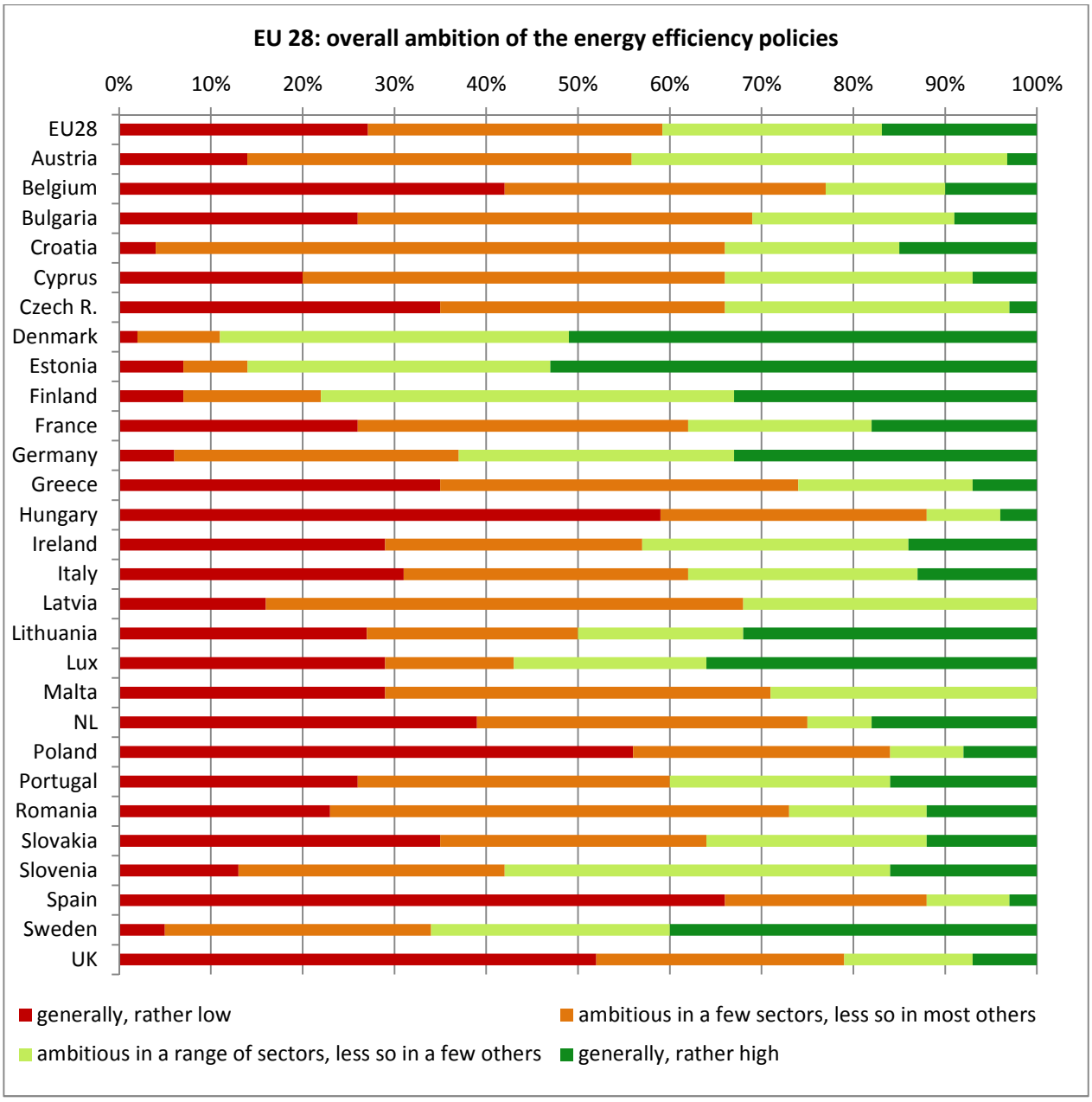
Overall ambition

The first question of the survey aimed to get an impression of the "energy efficiency policy climate" in each country and a feeling of how the experts see the general aspirations of their country in energy efficiency policies.

A very varied picture presents itself: Combining those that see the ambition as "generally rather low" and as "ambitious in a few sectors, less so in most others", the following picture emerges: Spain, Hungary and Poland are seen as the least ambitious by the experts from the respective countries. On the other end, Denmark, Estonia and Finland are rated highest by their country experts ("ambitious in a range of sectors" combined with "generally, rather high ambition"). This very mixed picture across Member States results in an EU average with 60 % with rather low levels of ambition and 40 % with higher levels of ambition.

Compared to the 2012 survey, the average remains quite unchanged. However, there are some significant changes for some of the countries: Italy, the Slovak Republic, Cyprus and the Czech Republic are now in the mid-field (compared to rather low levels of ambition in 2012) whereas Estonia - which was significantly below the European average in 2012 - is

now seen as very ambitious by its energy efficiency experts. The most significant decreases in the level of ambition are seen for the UK and Spain.

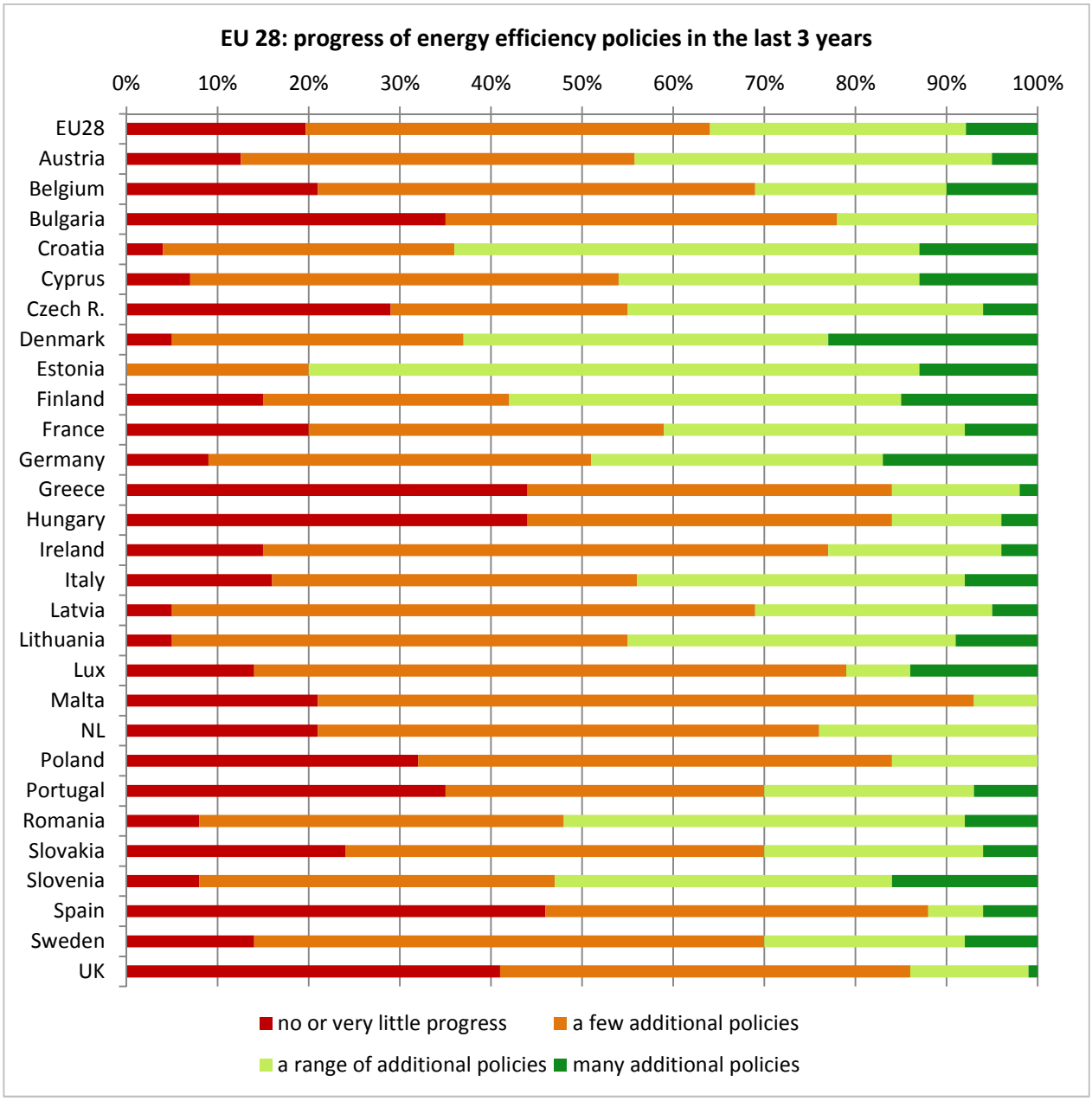


Progress in the last 3 years

The second question focuses on the specific progress in the last 3 years (this was roughly the period of the implementation of the second NEEAPs).

The highest values for "no or very little progress" combined with "a few additional policies" are given by the experts from Malta, Spain and the UK, followed by Poland, Hungary and Greece. On the other end of the spectrum, the experts from Estonia, Croatia and Denmark see the highest recent progress.

The most significant positive changes compared to 2012 are reported for the Czech Republic, Lithuania and Romania, the most negatives ones for Malta, Spain, Luxembourg and Ireland.



Targets and obligations

The next block of questions relates to Member State targets and obligations foreseen in the EED and EPBD.

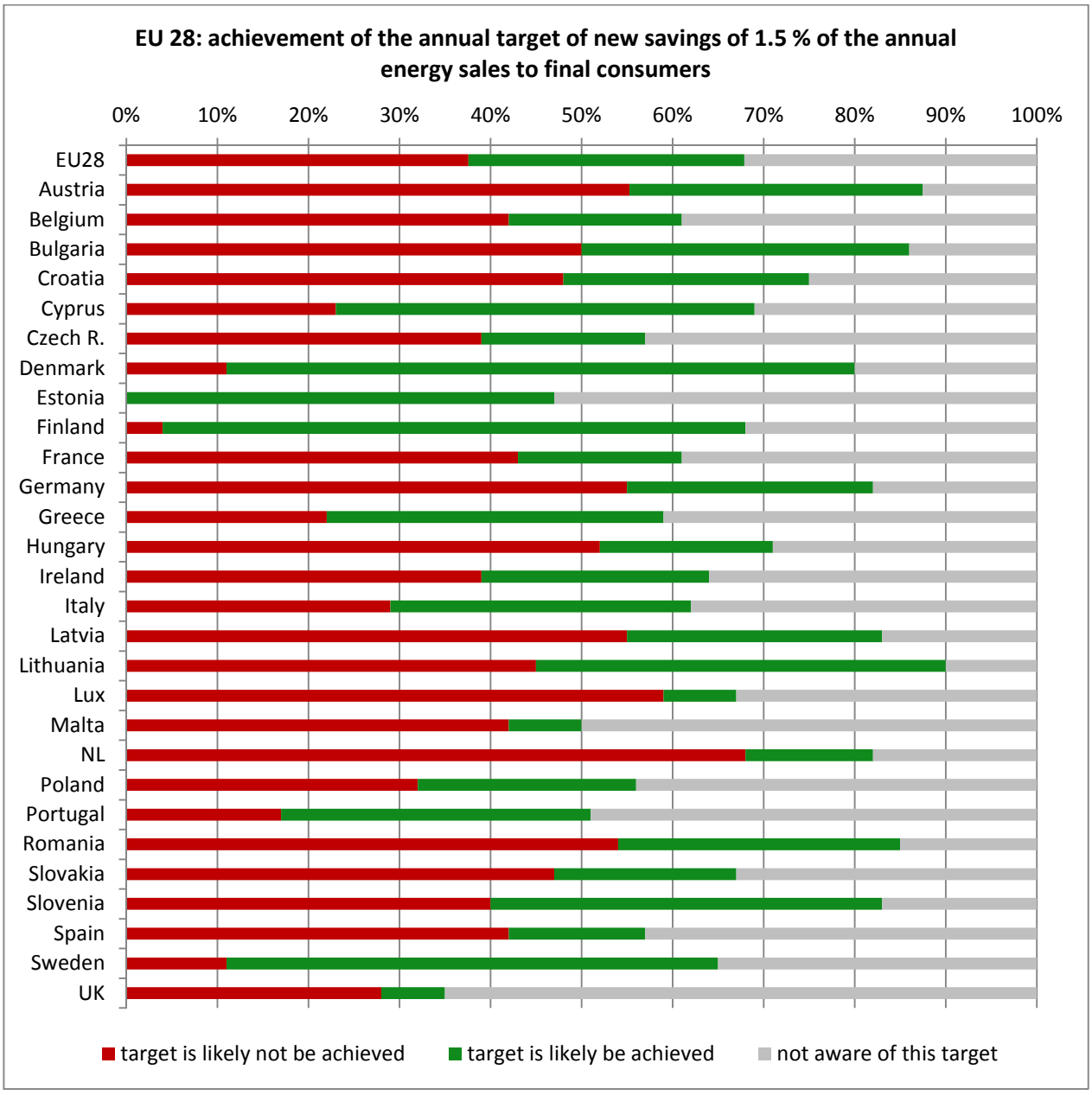
The first one concerns the annual target of new savings of 1.5 % of the annual sales to final consumers (Art. 7 of the EED). This target is not well known among the experts, among others because it is being implemented in the respective policy context with a

variety of programmes. Also, in some countries, there was a stronger public debate on policy measures relating to this target and the obligation schemes than in others.

The most pessimistic experts are those from the Netherlands, followed by Luxemburg, Austria, Germany, Latvia, Romania and Hungary - in these countries more than 50 % believe that the target will not be achieved.

Most optimistic are the experts from Denmark and Finland where more than two thirds think that the target will be achieved, followed by Sweden. Estonian experts are also very positive: all experts who are aware of the target believe that it will be achieved (47 %). Only in 10 countries more than a third of the experts deem the target to be achievable.

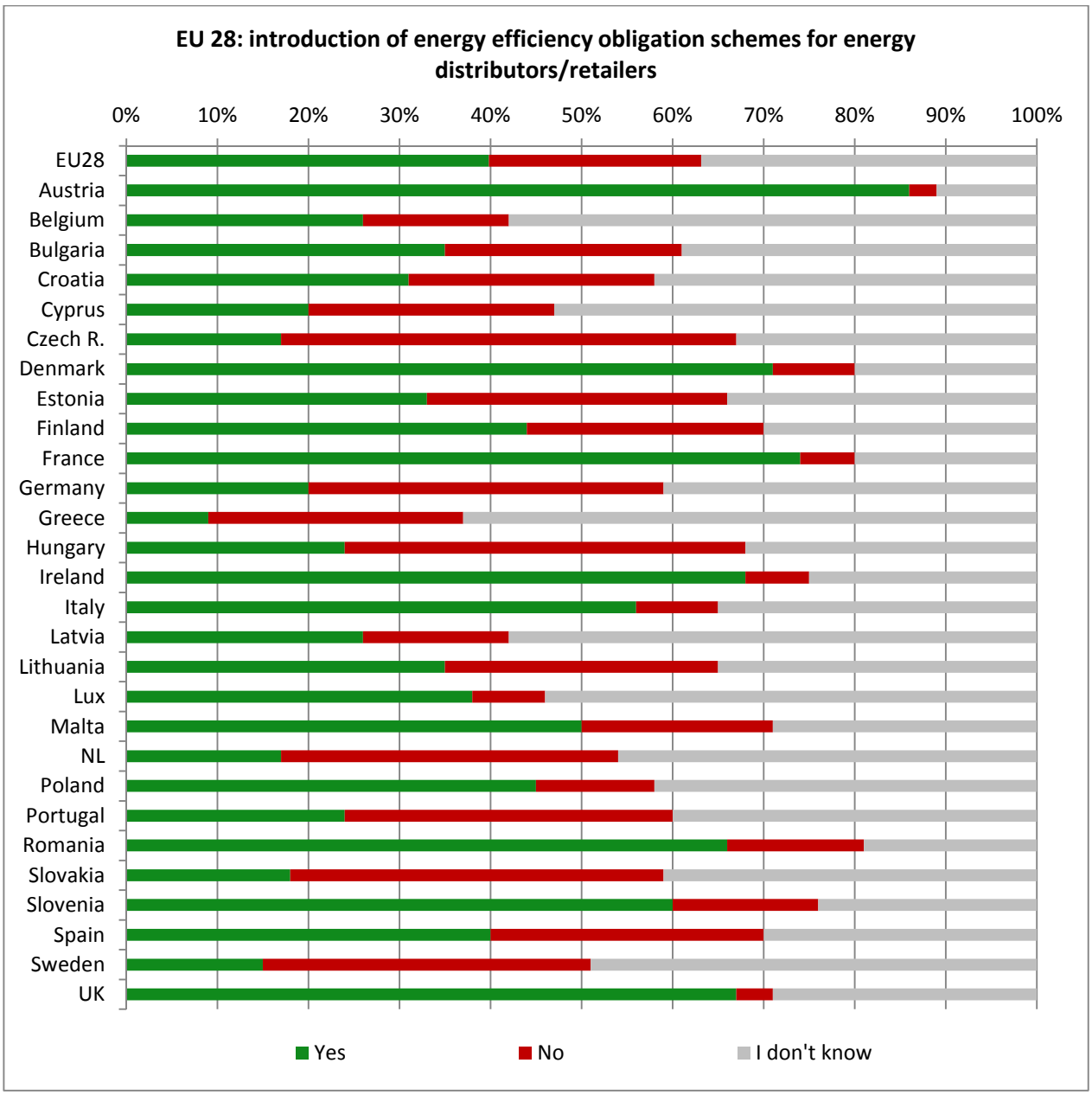
The level of awareness of the 1.5 % target is highest in Lithuania, Austria and Bulgaria and lowest in the UK, Estonia and Malta.



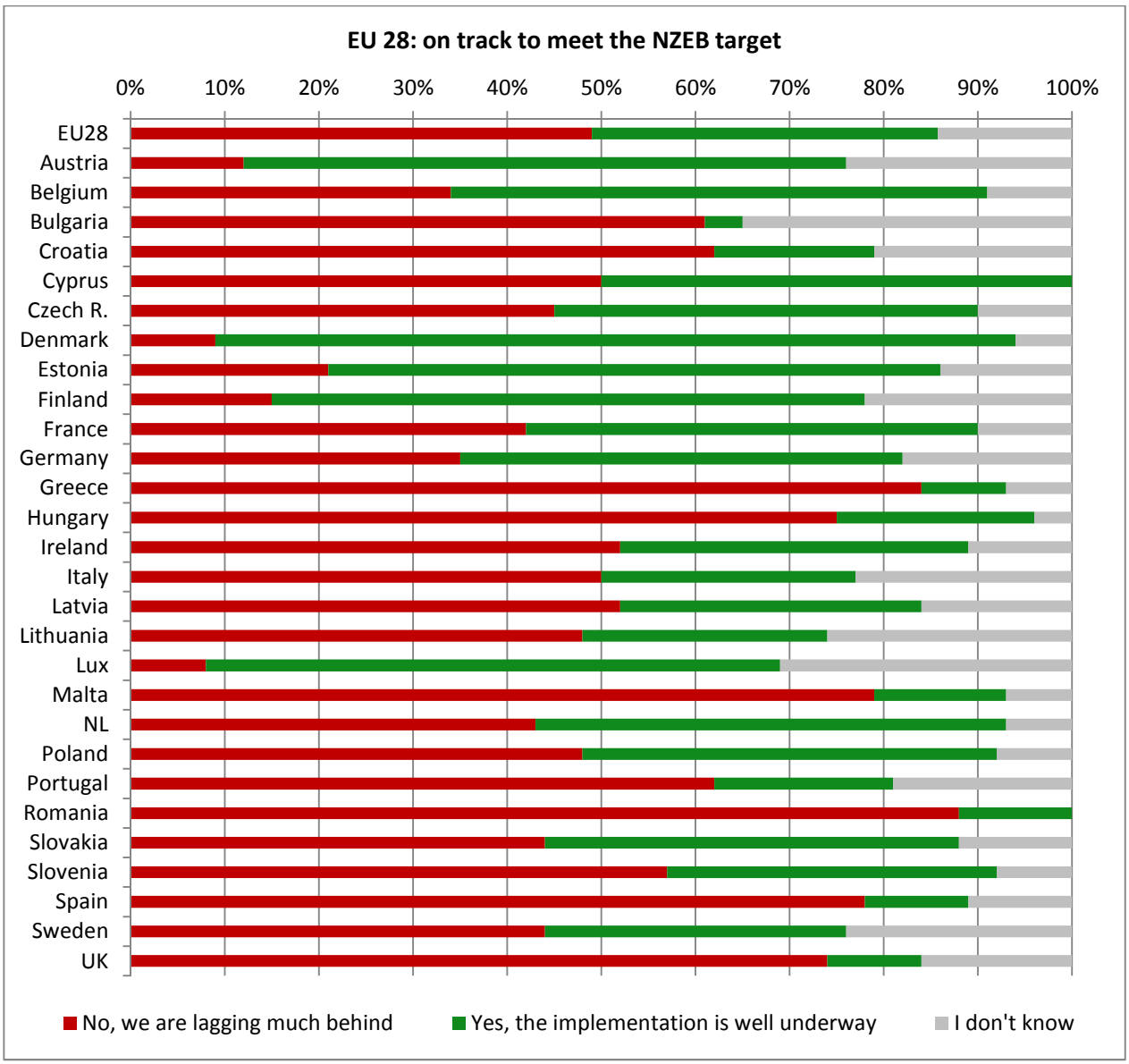
The second question in this bloc relates to the introduction of energy efficiency obligation schemes (Art. 7 of the EED). As this is one of the core elements of the EED, a decision was taken to include this article in the survey despite the two-fold challenge with this question. The first is the term used for it. There are a number of countries with obligations schemes predating the EED which are widely known among the experts but under other names (e.g. White Certificates). Therefore, many experts probably did not associate them with the Article 7. The second was the timing of the survey which coincided with a period of decision making in many Member States in relation to this article. The results of this question should therefore be seen under these caveats.

The countries where the most experts observe the introduction of energy efficiency obligation scheme are Austria, France and Denmark. The countries with highest percentages with negative answers were the Czech Republic, Hungary and Slovakia.

Again, there is a rather high number of experts who are not familiar with this issue. However, there is a rather big difference in many Member States - for example in Latvia, the target is very well known whereas energy efficiency obligations are not. On the other hand, in the UK, more than two thirds of the experts are familiar with the obligation scheme but also two thirds are not aware of the 1.5 % target.

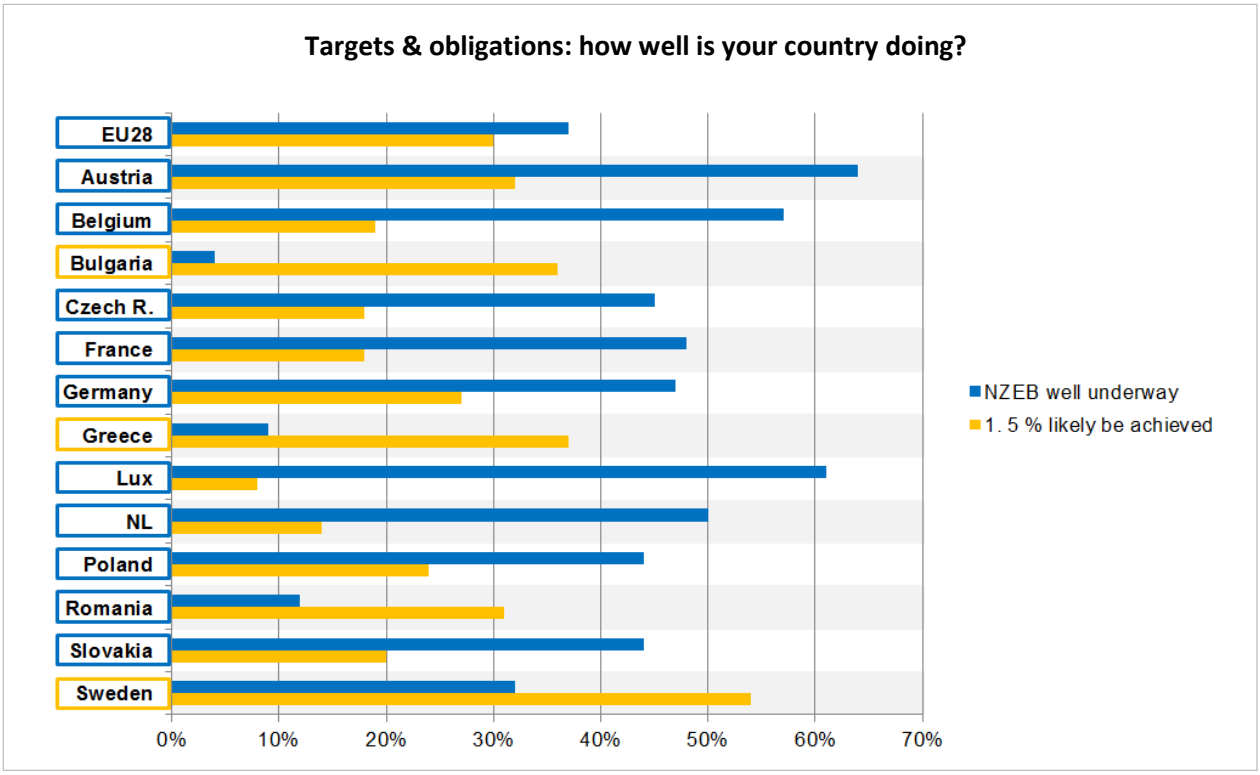


A rather different picture presents itself for the next question. It relates to Article 9 of the EPBD which requires all new buildings to be nearly zero-energy buildings (NZEB) by the end of 2020, public buildings already in 2018. In Romania, Greece, Malta, Spain, Hungary and the UK more than 70 % of experts believe that their country is lagging very much behind in achieving this target. The most optimistic are the Danish experts: 85 % think that the implementation is well underway, followed by Estonia, Austria, Finland and Luxembourg.



By comparing the opinions on achieving the 1.5 % and the NZEB targets a variance in policy progress can be seen: Only in 10 countries do more than a third of the experts deem the 1.5 % target to be achievable whereas this is the case in 15 countries for the NZEB target.

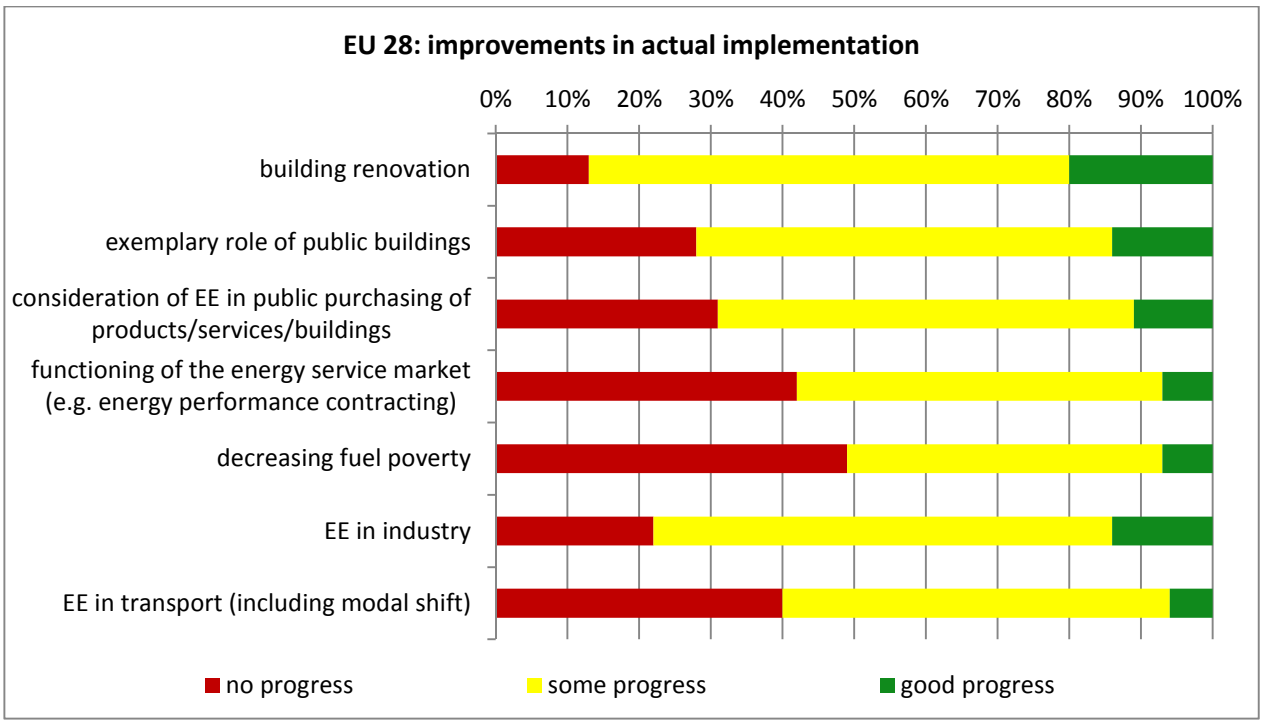
Also, there is a number of countries that reported making significantly more progress in one of the two targets. Ranking the progress among Member States, Bulgaria, Greece and Sweden are seen to be doing much better with the 1.5 % target than the NZEB target, whereas it is the other way around for Luxembourg, Belgium, the Netherlands, Austria, France and the Czech Republic.



Specific policies, measures and sectors

The third block of questions focuses on policy areas recognised as important in the EED and the EPBD.

The first asks for the progress made in actual implementation in a range of energy efficiency fields. Across instruments and Member States, the least progress is being observed in decreasing fuel poverty, the functioning of the energy service markets and energy efficiency in transport. The fields where relatively the most progress is being made are building renovation, energy efficiency in industry and in public buildings - three areas with significant European policy activities in the past years.



In **building renovation**, the country with highest progress is Estonia (60 % "good progress"), followed by Croatia and Luxembourg (43 and 38 % respectively). The countries with the most answers for "no progress" are Malta (50 %), Spain (44 %), the UK (31 %) and Portugal (29%).

Relatively the most progress in the "**exemplary role of public buildings**" is reported from Slovenia, Finland, Croatia, Luxembourg and Sweden (between 34 and 31 % "good progress). The highest percentages for "no progress" are given by experts from Portugal, Spain, Greece and Romania (between 55 and 50 %).

Considering **energy efficiency in public purchasing** of products, services and buildings has progressed most in Sweden (31 % "good progress"), followed by Cyprus and Malta (27 and 23 % respectively). Most "no progress" answers are given by the experts from Hungary (66 %), Bulgaria, the Czech Republic and Slovakia (between 55 and 50 %).

Relatively the most "good progress" in the **functioning of the energy service market** is observed by the experts from Denmark, Finland and Cyprus (between 28 and 20% "good progress") whereas more than two thirds of the Maltese, Bulgarian and Greek experts see "no progress" in this field.

In addressing **fuel poverty**, the most experts reporting "good progress" are from Sweden, Denmark and Finland (between 31 and 23 %). In Greece, Luxembourg, Bulgaria, Spain and the UK, more than 70 % of the experts see no progress.

Good progress for **energy efficiency in industry** is reported from Finland (58 % "good progress"), followed by Denmark and Sweden (41 % and 27 % respectively) whereas more than 50 % of the Luxembourgish experts see no progress, followed by Greece and Cyprus (46 % and 40 % respectively).

Progress in **energy efficiency in transport** remains a challenge in most Member States: the highest percentage of "good progress" is 23 % for Finland, followed by 19 % for Sweden and 14 % for Bulgaria. On the other end of the spectrum are Luxembourg, Belgium, Latvia, Portugal, Ireland, Greece, Malta and Denmark - where more than 50 % of the experts see no progress.

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

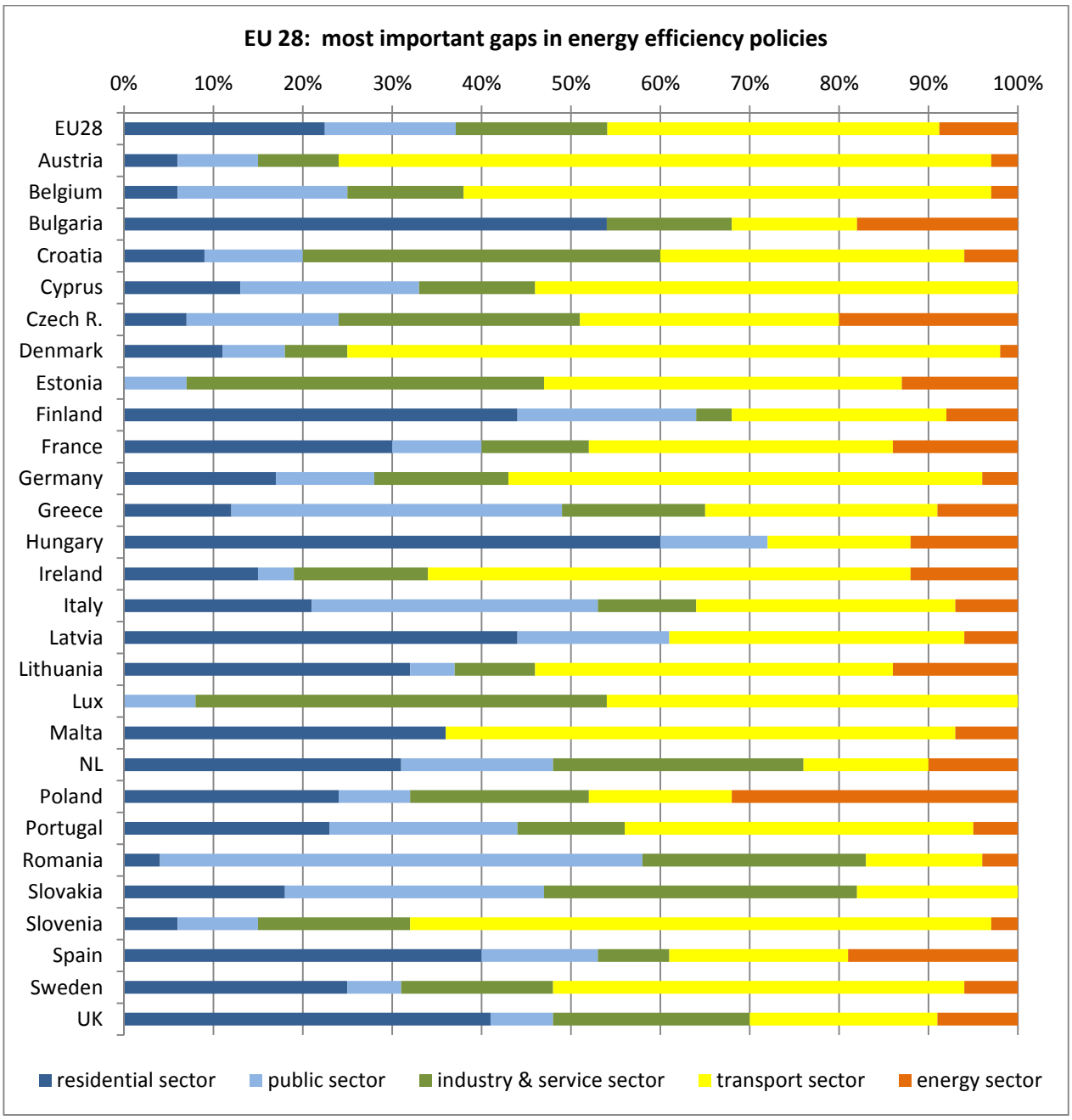
	good progress	no progress
Building Renovation	1. Estonia 2. Croatia 3. Lux	26. UK 27. Spain 28. Malta
Public Buildings	1. Slovenia 2. Finland 3. Croatia	26. Greece 27. Spain 28. Portugal
Public Purchasing	1. Sweden 2. Cyprus 3. Malta	26. Czech R. 27. Bulgaria 28. Hungary
EE in transport	1. Finland 2.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

The detailed results per Member State are included in the annex.

Gaps in energy efficiency policies

Experts were also asked in which sector they saw the most important gap in the energy efficiency policies in their respective country. In the average across EU countries, transport is in the lead (38 % see the largest gaps in this field), followed by the residential sector with 21 %. There was virtually no change in these perceived gaps (average across the EU) compared to the 2012 survey.

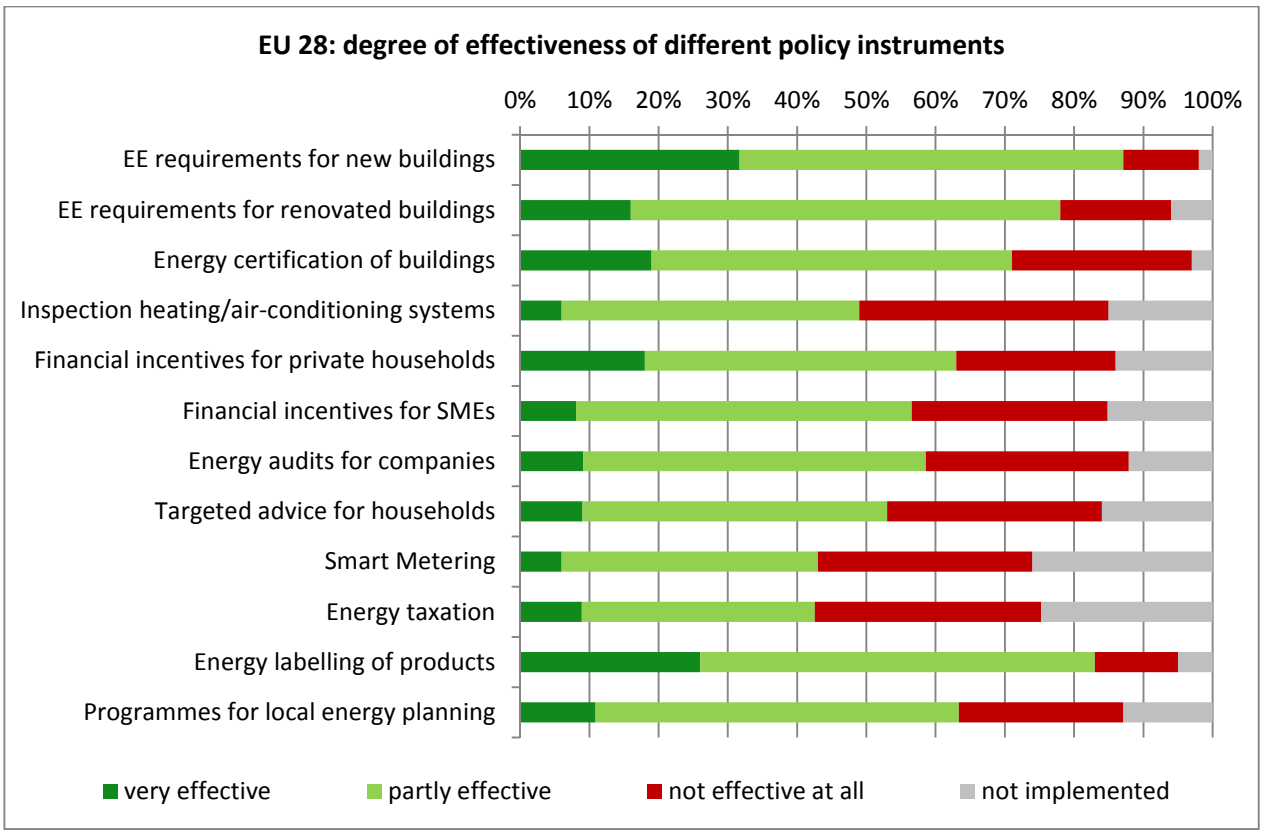
There are some significant differences across countries in where the experts see the biggest gap in energy efficiency policies: By far the largest gap is found in the transport sector in Denmark and in Austria: in both countries, 73 % see energy efficiency in transport as the most important policy gap (again, no change at all since 2012). Also large gaps in residential sector are reported from Hungary (60 %) and Bulgaria (54 %). In a number of countries, the percentage for the residential sector as the weakest energy efficiency policies has decreased.



Specific energy efficiency policy instruments

A set of questions relates to a range of specific energy efficiency policy instruments mentioned in the ESD or the EPBD. They look at the perception of the effectiveness of these instruments in the Member States.

In overall terms, energy efficiency requirements for new and renovated buildings and labelling of products are the instruments with the highest positive impact - between 87 and 78 % of the experts agree that they are at least partly effective. On the other end of the spectrum, more than a third of the experts considers the inspection of heating and air-conditioning systems as not effective.



Energy efficiency requirements for new buildings are seen very positively in many countries. The highest ratings for "very effective" are given by the experts from Luxembourg (77 %) and Denmark (67 %). In Malta, 59 % of the experts think that they are not effective at all.

Rather good ratings are also given to **energy efficiency requirements for renovated buildings.** More than 90 % of the experts from Latvia, Denmark, Estonia and Luxembourg consider them as at least partly effective. 43 % of the Estonian and 35 % of the Croatian experts see them as very effective. Again, more than 50 % of the Maltese experts rate them as "not effective at all".

Energy certification of buildings has also become a well-established instrument in most European countries - although with a larger variance between countries. 100 % of the Irish and 96 % of the Croatian experts see them as at least partly effective. More than 50 % of the Bulgarian and Dutch experts see this instrument as not effective at all.

Less positive are the results for the **inspection of heating and air-conditioning systems**. Only in Malta, Finland and Luxembourg, do 70 % of the experts or more consider them as at least partly effective. In Latvia, Romania, Estonia and Poland, over 50 % of the experts see this instrument as not effective at all.

Financial incentives for private households for energy efficiency investments are seen most positively by experts from Malta, Cyprus, Luxembourg and France: more than 90 % consider them as at least partly effective. 44 % of British and Dutch experts see them as not effective at all.

Experts from Cyprus, Germany, Austria and Croatia see **financial incentives for SMEs** for energy efficiency investments most positively - 92 %, 78 % and 74 % see them as at least partly effective. More than 40 % of the UK and Luxembourg experts consider them as not effective at all.

Finnish, Polish and German experts have the most positive view of the effectiveness of **energy audits for companies**. 88 %, 78 % and 76 % respectively see them as at least partly effective. They are least positively seen in Bulgaria, Slovakia, Hungary, Italy and Luxembourg: between 47 and 40 % see them as not effective at all.

Energy advice for households is most successful in Slovenia, France, Sweden and Finland: more than 80 % of the experts in these countries see it as at least partly effective. More than half of the Latvian, Bulgarian, Spanish and Irish expert see it as not effective at all.

Smart metering as an energy efficiency policy instrument is seen as most effective by the experts from Finland and Malta: more than 90 % see it as at least partly effective. 50 % of the Estonian experts consider it as not effective at all, followed by those from France (47 %) and Spain (45 %).

94 % of the Swedish, 84 % of the Danish and 83 % of the Finish experts see **energy taxation** as at least partly effective - nearly 50 % of the Swedish and Danish experts even as very effective. More than 50 % of the French and the Polish experts see it as not effective at all.

Energy labelling of products is a very popular instrument among energy efficiency experts: 100 % of the experts from Luxembourg and Malta see it as at least partly effective. In France and Latvia, about a quarter of the experts see it as not effective at all.

More than 80 % of the experts from Luxembourg, Cyprus, Austria and Denmark consider **policies and programmes for local energy planning** (e.g. the Covenant of Mayors) as at least partly effective.

When analysing the overall perception of effectiveness of the different policy instruments, the following picture emerges: Energy efficiency requirements for new buildings and energy labelling of products as seen as effective policy instruments by more than 70 % of the experts in more than 25 Members States. Also energy efficiency requirements for renovated buildings are perceived to be effective by 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 are to be found - in 21 respectively 17 Member States more than 30 % of the experts so them as not effective at all.

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 new buildings	26	2
Energy labelling of products	25	0
EE requirements for renovated buildings	23	2
Energy certification of buildings	15	8
Programmes for local energy planning	12	10
Financial incentives for private households	11	9
Financial incentives for SMEs	6	11
Energy audits for companies	6	12
Targeted advice for households	6	13
Inspection heating/air-conditioning	2	17
Smart metering	2	17
Energy taxation	4	21

Experts also stressed that with the paradigm shift of decentralisation of energy production and the changing role of energy consumers to prosumers, the involvement of the regional and local level becomes even more important.

Need to act on European level

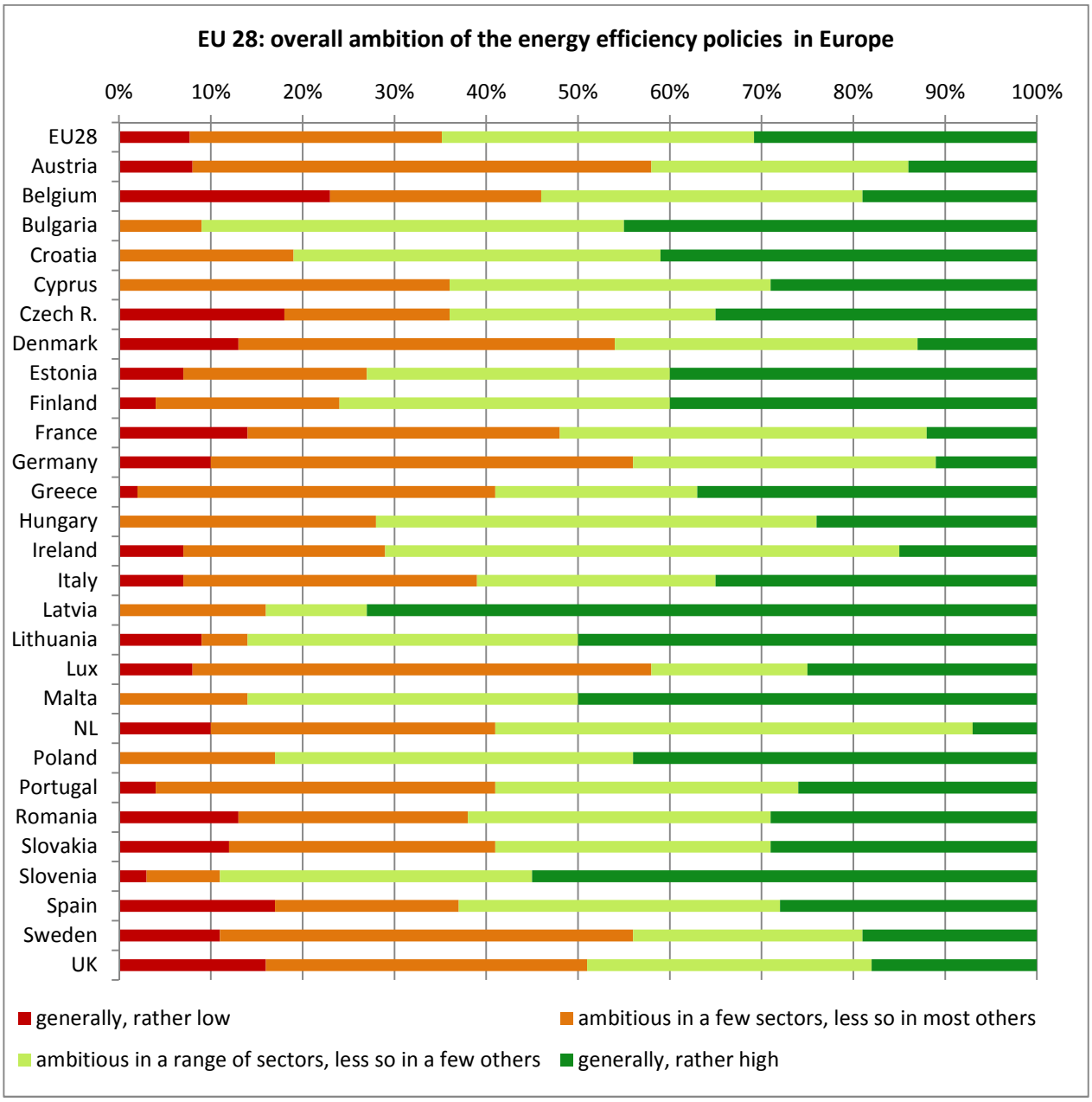
The final set of questions aimed at assessing the progress on European level and where the experts see the highest need to act on European level.

The first one related to the level of ambition in energy efficiency policies in Europe.

It seems that experts from countries with long-standing energy efficiency policy tend to have a lower opinion of the level of EU ambition than those from countries where the impact of European energy efficiency policy was more visible over the last decade: In Austria, Luxembourg, Germany, Sweden and Denmark, more than 50 % of the experts see the European energy efficiency policies as ambitious only in a few sectors or generally rather low. On the other hand, more than 80 % of the experts from Bulgaria, Slovenia, Lithuania, Malta, Latvia, Poland and Croatia think that it is ambitious in a range of sectors or generally rather high. Across countries, about a third of the experts consider European energy efficiency policy as not very ambitious whereas two thirds think they are.

Compared to how they see the level of ambition in their own country, experts from 19 countries see European policies as more or even significantly more ambitious. In 7

countries, the ambition level is seen as rather similar. Only the experts from Denmark and Sweden consider it significantly less ambitious.



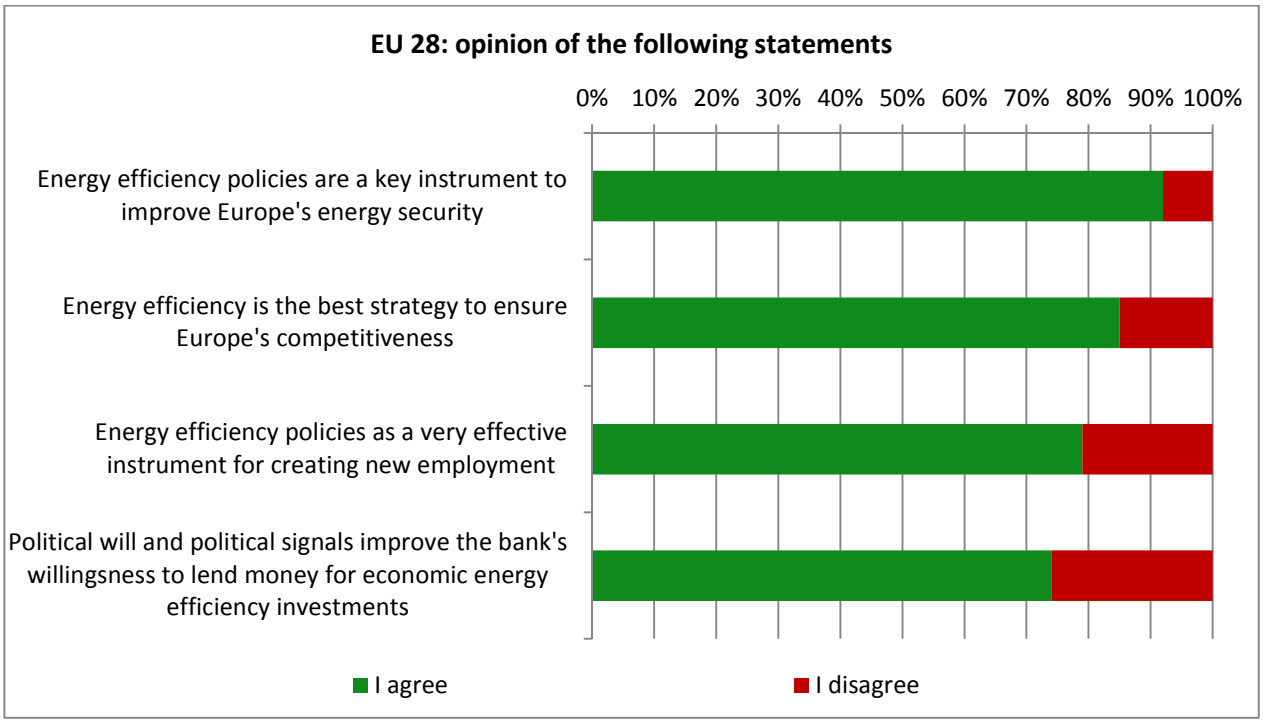
The next question looks at overall economic impacts of energy efficiency policies. The highest level of agreement by experts was with the statement: "Ambitious energy efficiency policies are a key instrument to improve Europe's energy security". 92 % of all experts agree. In Austria, Denmark, France, Malta and Portugal, it was even 100 %. In comparison, the countries with the highest "disagreement" levels are Finland and Poland (30 and 26 % respectively disagree with the statement.

Very positive opinions were also expressed on the statement "Given the relatively high energy prices in Europe (compared to the US and Asia), energy efficiency is the best strategy to ensure Europe's competitiveness". 85 % of all experts agree. Looking at Member State level results, Luxembourg, Malta, Italy, Denmark, Slovakia and Estonia

have the highest agreement levels (more than 90 % agree with it). The highest level of disagreement was voiced by the experts from Finland (46 % disagree), followed by the Czech Republic (32 %) and Cyprus (29 %).

Overall, 79 % of the experts agreed with the statement "Ambitious energy efficiency policies are a very effective instrument for creating new employment". More than 90 % of the experts agreed in Cyprus, Belgium, the Netherlands, France, Denmark, Romania and Spain. However, in Finland, Estonia, Latvia, Lithuania, Luxembourg and Germany, more than 30 % disagreed.

The statement "Political will and clear political signals significantly improve the bank's willingness to lend money for economic energy efficiency investments" was met with approval by 74 % of the experts. More than 85 % agreed in Hungary, Malta, Poland and Bulgaria whereas in Estonia, 50 % disagreed, followed by 43 % in Belgium.



The final question asked about policy measures taken at EU level.

The measure that was most popular among the energy efficiency experts was "a large European energy efficiency fund (giving both grants and loans)" - 84 % are in favour of it. In Cyprus, Latvia and Romania even 100 % support this idea. In comparison, 50 % of the Swedish experts are against it, followed by Austria (43 %) and Germany (35 %). Explanations for this difference in opinions include the concern from these experts that their country would pay more into this fund than it would receive out of it or that such an EU fund would replace well-established national funding programmes.

Nearly as popular among the experts were "stricter minimum standards for buildings and appliances" - 78 % support this. In Bulgaria, 100 % are in favour of it, followed by Romania

(96 %), Latvia (95 %), Ireland (93 %) and the UK (90 %). On the other hand, 52 % of the Lithuanian experts are against it.

Also the next potentially very far-reaching measure found support among the experts: 76 % are in favour of an instrument to foresee the "mandatory implementation of cost-effective measures identified in energy audits in industry". The highest levels of agreement come from Romania (95 % agreement), Hungary (87 %) and Spain (86 %). The highest levels of disagreement were from Finland (56 % against such a measure), followed by Estonia (47 %) and Germany (37 %).

Two thirds of the experts would like to see the introduction of a European CO_2-tax. This measure has the highest support in Sweden (92 % in favour), followed by France (88 %), Belgium and Ireland (both 86 %). By contrast, 62 % of the Slovak experts are against such a measure, followed by Latvia (61 %).