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Re-energising Europe

MAKING MORE EFFECTIVE ENERGY SAVINGS POLICY AT EU LEVEL

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This briefing paper is based on research by The Institute for European Environmental Policy commissioned by WWF. This research included individual interviews with key participants in negotiations over EU energy efficiency policy.

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WWF is one of the world's largest and most experienced independent conservation organizations, with over 5 million supporters and a global network active in more than 100 countries.

WWF's mission is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by: conserving the world's biological diversity, ensuring that the use of renewable natural resources is sustainable, and promoting the reduction of pollution and wasteful consumption.

KEY FINDINGS

1. Energy savings are vital for decarbonising Europe's energy systems with studies suggesting that savings of up to 51% by 2030 are cost-effective.
2. The EU is not on track to meet its 20% energy savings target by 2020 because energy efficiency policy-making has been dragged into a cycle of under-achievement (page 19).
3. But all is not lost. This study is based on interviews with key players in negotiations over EU energy efficiency policy from which three key positive insights emerge (page 35):
    - The new context of prolonged economic crisis puts a greater premium on saving money by saving energy – for example, meeting the 20% energy savings target would save households over €1,000 each;
    - Measures whose primary aim is addressing the economic crisis also provide new opportunities for delivering energy savings;
    - These new opportunities are bringing new actors into the energy savings policy sphere.
4. The energy savings advocacy community has grown and become better coordinated in recent years (page 32).
5. However, it needs to ensure that its positions are adopted by a critical mass of decision makers at EU level (page 7).
6. The energy savings advocacy community can achieve this aim by convincing new actors of its arguments and evidence (page 11).
7. The energy savings advocacy community should also take the actions required to ensure that saving money by saving energy becomes a central part of addressing today's economic challenges (page 35).

Energy savings are vital to combatting both the economic and climate crises.

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Policy makers should not wait until the 2014 EED review of progress on the EU 2020 energy savings target before preparing options for the 2030 framework.

HOW TO ACHIEVE MORE MOMENTUM AND GREATER AMBITION?

Energy savings are vital to combatting both the economic and climate crises. WWF is committed to working with the wider energy savings community and engaging with key decision makers on the following principles:

THE EFFECTIVE AND TIMELY IMPLEMENTATION OF THE EED BY EU MEMBER STATES IS CRUCIAL TO REALISING THE LONG TERM POTENTIAL FOR ENERGY SAVINGS.

1. The development of future energy savings policy must be coordinated with the development of other climate and energy policies, within a 2030 framework;
2. Policy makers should not wait until the 2014 EED review of progress on the EU 2020 energy savings target before preparing options for the 2030 framework. This would mean missing, yet again, the timeline of the other energy and climate policies. It is simply asking for failure;
3. Coordinated climate and energy policy development must include detailed modelling of the interaction of binding targets on energy savings, renewable energy, and CO2 emissions reductions (including through the EU ETS);
4. The effective and timely implementation of the EED by EU Member States is crucial to realising the long term potential for energy savings;
5. A binding EU target does not exclude binding measures - the two approaches can be complementary;
6. The agreement to spend at least 20% of the EU's Multiannual Financial Framework (MFF) 2014-2020 on climate action must be implemented, with appropriate funding channelled towards the delivery of energy savings.

In order to deliver on these principles and achieve greater momentum and more ambition on EU energy savings policy, this report has found that a number of important strategic threads must be brought together:

1. Understanding changes in context and related policy framing;
2. Clarity on opportunities for new policies and levers;
3. Clarity on the need for long-term targets and accompanying measures;
4. Building the support base, including new actors;
5. Addressing barriers related to the financing of energy savings;
6. Maintaining attention to good implementation and removal of legal barriers.

Understanding of changes in context and related policy framing

The global economic crisis continues to affect the motivation of Heads of State and Government to address climate change, as their focus remains on financial stability and unemployment. However, the crisis has also increased household and business consumers' concerns about the cost of energy – and therefore, potentially, the general level of interest in energy efficiency and energy savings options.

The high-level response to the crisis has also changed the context, through the introduction of the Europe 2020 process. Both the European Semester[i] and the 2014-2020 EU MFF provide opportunities by seeking to tackle climate change while also enhancing European prosperity. For example, EU decision makers have agreed that at least 20% of the almost 1 trillion Euro 2014-2020 EU Multiannual Financial Framework (MFF) will be spent on climate action, including on energy efficiency. Ensuring that this accord is implemented and delivered will be vital.

It appears from the European Commission's recent Green Paper on a 2030 Framework for Climate and Energy Policies[2] and related European Council conclusions[3] that international negotiations on climate change in 2015 could motivate European leaders to return their focus to climate action in an effort to secure an adequate international deal.

Finally, a less well defined but potentially powerful change in the context is the emerging interest in the EU of moving to a circular, resource-efficient economy, embedded in the Europe 2020 initiative[4] and the 2050 Roadmap on Resource Efficiency[5]. Positioning energy savings within this broader resource saving context should, over time, help to develop additional political leverage for energy savings.

Clarity on opportunities for new policies and levers

The European Semester includes a regular review of Member State progress on reducing primary energy consumption, and provides a window of opportunity to focus attention on the insufficient action to cut energy use at national level. It will be important to maximise the links between job creation, prosperity and energy savings measures in order to make most use of this mechanism for high-level policy coordination.

In particular, energy savings options need to play a prominent role in the National Reform Programmes[6] and the European Commission's country-specific recommendations. As a minimum, all Commission Staff Working Documents accompanying such recommendations should clearly address how energy efficiency can be advanced in the Member States to create jobs and prosperity.

Finally, proposals for fund-specific regulations in the next EU MFF, such as those for Cohesion and Structural Funds, are also characterised by greater ambition for climate in general and energy savings in particular than was the case in previous rounds. This includes climate mainstreaming obligations and mandatory earmarking of a part of the European Regional

Development Fund for energy efficiency and renewable energy. It will be critical to ensure that this drive is not lost, and that suitable and good quality projects are designed and then implemented.

Clarity on the need for long-term targets and accompanying measures

Ultimately, the case for EU energy saving targets in the near future rests on a combination of climate change imperatives and solid economic arguments. However, this is most likely to succeed if a broad suite of arguments are deployed to secure a broad policy mix for the post-2020 period. Energy savings measures are more likely to be taken up if they are threaded through other strands of a balanced set of policies, rather than being isolated and potentially excluded from a new package.

It is also essential to avoid the problem of the lack of synchronisation that was suffered by the first climate and energy package. In 2006 the Energy Services Directive (ESD) had just been agreed and the Energy Efficiency Action Plan, with a long list of detailed actions, had just been adopted. Subsequently, it proved impossible to win support for the idea of a binding energy savings target as part of the 2008 Package. The adoption of the Energy Efficiency Directive (EED) in 2012 and the potential implementation of further remedial measures in 2014 following an assessment of progress towards the 20% energy savings target cannot be used as an excuse to exclude energy savings from a 2030 framework on climate and energy. Delivering the 20% energy savings by 2020 goal is a separate matter to the need to include energy savings in a 2030 climate and energy framework, and should remain as such.

Finally, it is vital to make a strong case against the argument that a binding energy savings target would work against the EU ETS, which should therefore stand alone. Even a well-functioning and improved EU ETS will not be sufficient on its own to trigger enough investment in energy efficiency. This is because of multiple barriers, particularly non-economic ones,

which hamper the implementation of energy savings projects and measures. Proper modelling of three binding targets will be needed from the beginning of the policy development exercise in order to ensure their effective and complementary[7] interaction when they are implemented.

The failure to model all three elements of the first package together, because energy savings did not have a binding target, has led to a criticism that the implementation of energy savings measures has contributed to a low ETS price. However, to the extent that this is true, the problem arises not from the interaction of the two measures per se, but from the fact that the role of energy savings was not fully modelled with the other two elements of the package. The failure to properly manage the relationship between energy savings, renewable energy, and emissions reduction policies and instruments is one of the key weaknesses of the 20-20-20 climate and energy package.

Building the support base, including new actors

More needs to be done to broaden the actor base and better communicate the benefits of ambitious energy savings policy. For example, the Directorate General for Environment could be encouraged to play a constructive role by emphasising the link to resource efficiency, for which it is responsible. In addition, the Directorate General for the Regions is likely to become more involved as energy savings are increasingly prominent within the regional and structural funding streams which it administers[8]. Finally, the Directorate General for Employment may also become more interested in the energy savings file, given the growing understanding of the job creation potential of actions to save energy.

Among Member States, the circle of support needs to be widened very considerably. For example, the relevance of the energy savings agenda to Southern Europe, to finance ministries, to regional development authorities, to skills agencies and others needs to be articulated. Individual Member States will also remain important. In particular, Poland, which

has shown a general scepticism towards climate policies, could become an advocate for energy efficiency, towards which it has been generally less sceptical. Poland's more progressive attitude in this area could, separately, also be taken as an 'entry point' to convincing this least ambitious of Member States on overall climate policy to play a more constructive role in the transition to a low carbon economy.

There has been substantial progress in establishing and reinforcing industry fora in support of energy efficiency and savings in recent years. These fora include businesses that dominate their markets and recognise the considerable business opportunities in this area. More awareness about these opportunities is needed to make both the established but also new players consider new opportunities, including business models selling services instead of energy.

Finally, there is a significant opportunity to be grasped by better aligning the interests of renewable energy and energy savings communities. The more energy consumption can be reduced through energy savings measures, the more cost-effectively and quickly renewable energy systems can be developed and maintained as there would be less demand to meet. The interest that the renewable energy community should therefore have in a binding and ambitious energy savings target should be better harnessed.

Addressing barriers related to the financing of energy savings

The delivery of energy savings requires the more effective tapping of EU funds for energy savings as well as greater efforts to attract the financial sector to invest in savings measures. The EED clearly states that 'Member States and regions should be encouraged to make full use of the Structural Funds and the Cohesion Fund to trigger investments in energy efficiency improvement measures'. In addition, it will be necessary to achieve cultural change and awareness raising in the finance sector in order to address their concerns. A strategy that seeks

to activate the potential support from this sector needs to look into the opportunities and needs for better bundling of projects, risk sharing between public and private finance and new investment models more generally.

Maintaining attention to good implementation and removal of legal barriers

As European stakeholders start to debate a 2030 framework for climate and energy policies, it is essential that attention is maintained to the effective implementation of existing energy savings legislation. It is therefore encouraging that, following the recent adoption of the EED, many stakeholders, including NGOs, are working to support an ambitious approach to implementation. In the same vein, work on the Ecodesign Directive constitutes a major opportunity to advance energy savings at EU level as many Member States such as the UK, Sweden and the Netherlands, some of which were less enthusiastic during the negotiations on the EED, are very supportive of further action in this area.

Any 2030 energy savings targets must complement existing EU energy efficiency legislation. It is therefore concerning that the recent European Commission Green Paper on a 2030 Framework for climate and energy policies seems to imply that if a binding energy savings target for 2030 were agreed, this could be considered a possible alternative to further EU legislation.

Achieving significant levels of energy savings can provide real benefits to European competitiveness at a time when Member State economies are under sustained pressure.

SAVING ENERGY IS *THE* PRE-REQUISITE FOR DECARBONISATION

The European Commission's Energy Roadmap 2050 identifies energy savings as crucial throughout the system. It is a requirement of all decarbonisation scenarios.

Data from the Energy Roadmap impact assessments suggest that savings of up to 29% are required by 2030 to achieve its decarbonisation scenarios[9]. Other studies have been more ambitious. WWF finds that a minimum of 38% energy savings are needed in the EU by 2030 in order to keep the region on track with a global vision of 100% renewable energy by 2050[10,11]. The respected Fraunhofer Institute went even further, suggesting that 51% energy savings are possible by 2030[12], by carrying out a bottom-up analysis of cost–effective energy savings potentials.

WITHOUT ENERGY SAVINGS, IT WILL BE IMPOSSIBLE TO DECARBONISE EUROPE'S ENERGY SYSTEMS AT THE PACE NECESSARY TO CUT OVERALL EMISSIONS BY THE REQUIRED 80-95%

Achieving significant levels of energy savings can provide real benefits to European competitiveness at a time when Member States' economies are under sustained pressure. If the EU reduces its energy consumption in 2030 by around 40% compared to business as usual projections, total net energy cost savings of up to €250 billion are expected per year for consumers in 2030[13]. An energy efficient renovation of European buildings could deliver benefits of between €61 and 87bn a year of which €52-75bn come from lower energy bills and €9-12bn from the co-benefits of lower spending on subsidies for the consumption and the deployment of renewables and reduced air pollution[14]. These annual benefits could be doubled in value by 2030 if investments are continued after 2020[15].

Without energy savings, it will be impossible to decarbonise Europe's energy systems at the pace necessary to cut overall emissions by the required 80-95%. The World Bank recently

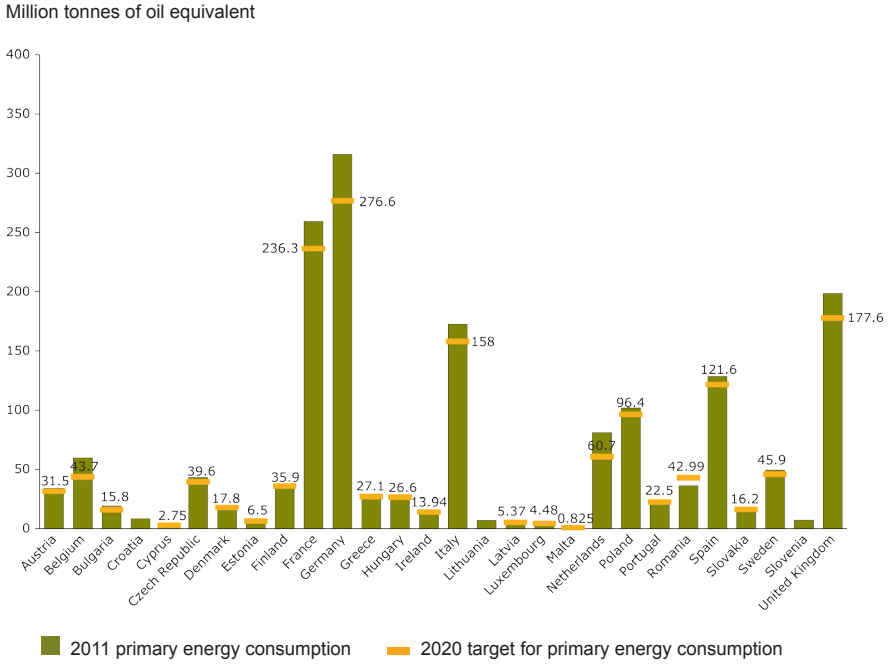
highlighted the catastrophic impacts of failing to limit global average temperature rises to less than 2oC[16]. In a complementary finding, The 2012 World Energy Outlook stated that "energy efficiency can keep the door to 2°C open for just a bit longer" by helping to ensure that the majority of global fossil fuel reserves remain unused[17].

Despite these clear advantages, politicians continue to resist adequate energy savings policies at the EU level. Modelling by the European Commission showed that significant social and economic benefits could have flowed from its original proposal for an Energy Efficiency Directive (EED) by 2020, including an increase in EU GDP of €34bn and increased net employment of 400,000 jobs[18]. However, these benefits were reduced as politicians finalised a less ambitious proposal.

Furthermore, Member States still need to speed up the pace of domestic action on energy efficiency. In April 2011, reporting on National Reform Programmes, Member States expected energy savings by 2020 of roughly 207 mega tonnes of oil equivalent (Mtoe) – around 160 Mtoe short of the agreed 368 Mtoe target[19]. Latest National Reform Programmes reported in April 2013 show a slight, but still insufficient improvement, with the EU expected to achieve a reduction of primary energy consumption of about 16% by 2020, instead of the required 20%[20]. Recent analysis by the European Environment Agency also concludes that the 20% objective will not be achieved and that the ambition of the national energy savings targets differ national circumstances, including economic outlook and the scale of early action. 5 years after signing-up to the overall aim of 20% energy savings by 2020, in spite of the reduction of energy consumption brought by the economic crisis, EU Member States have so far not delivered the necessary policies to achieve sufficient energy savings. It is clear that, despite its accepted importance, EU energy savings policy making is not sufficiently ambitious and is failing to deliver adequate outcomes.

Primary energy consumption in 2011 and national targets for 2020 in EU Member States

Source: EEA based on Eurostat data extracted 17 August 2013



This graph shows at what level each Member State has set its target for 2020 compared to its primary energy consumption in 2011.

In March 2013, the EU began a debate on those climate and energy policies the Union should agree for the post-2020 period. There is a significant risk that the failure to prioritise energy savings in the past will be repeated.

THE SITUATION SO FAR

Despite delivering some of the cheapest and quickest decarbonisation options, saving energy remains relatively undervalued. While renewable energy generation and greenhouse gas emissions reductions benefit from binding EU-wide targets, energy savings has no such support. As a result, this most important of decarbonisation tools is the one aspect of the EU's three 2020 climate and energy goals[22] that seems least likely to be achieved.

It is clear that EU Member States value energy savings. Many European governments have developed national energy efficiency programmes. All but one Member State have approved the European Commission's Energy Roadmap 2050[23], which affirms that energy savings throughout the system are crucial and are a no-regret decarbonisation option. Furthermore, a number of recent reports have shown that the benefits of energy savings could be even greater than suggested by the European Commission.

However there exist a number of barriers to the agreement of adequate energy savings policies at EU level:

- The development of energy savings policy on a different cycle to other EU level energy policies;
- Some Member States' apparent preference for individual domestic approaches;
- Some Member States' tendency to focus on the promotion of renewable energy;
- Political concerns about the effort required to deliver savings; and
- The relative immaturity of both energy efficiency policy and of a constituency to promote it.

These barriers have led to repeated failures to agree adequate energy savings policies at the European level. Particularly unhelpfully, Member States began EED negotiations by rejecting proposals for a binding target to be met through independent domestic action. However, when an alternative of no target but adequate binding measures was proposed, it too was resisted as being too prescriptive on national policy. It seems as though Member States sought to avoid any EU level energy savings policy, and failed to appreciate that rejecting a binding target could lead to EU legislation that was more prescriptive at the national level.

In March 2013, the EU began a debate on those climate and energy policies the Union should agree for the post-2020 period[24]. There is a significant risk that the failure to prioritise energy savings in the past will be repeated.

Yet opportunities remain. This report shows that this time the context is sufficiently different that an adequate outcome is possible. It also reaffirms WWF's commitment to working with a growing and increasingly influential energy savings community to ensure that, in a 2030 framework for climate and energy policies, energy savings takes its rightful central role.

Achieving an adequate outcome will require the concerted effort of a wide range of stakeholders, but, ultimately, any final success will rely on the support of EU Member States. Therefore, this report presents a challenge to European governments, asking what they will do to help their citizens both protect the planet and save money by cutting energy consumption.

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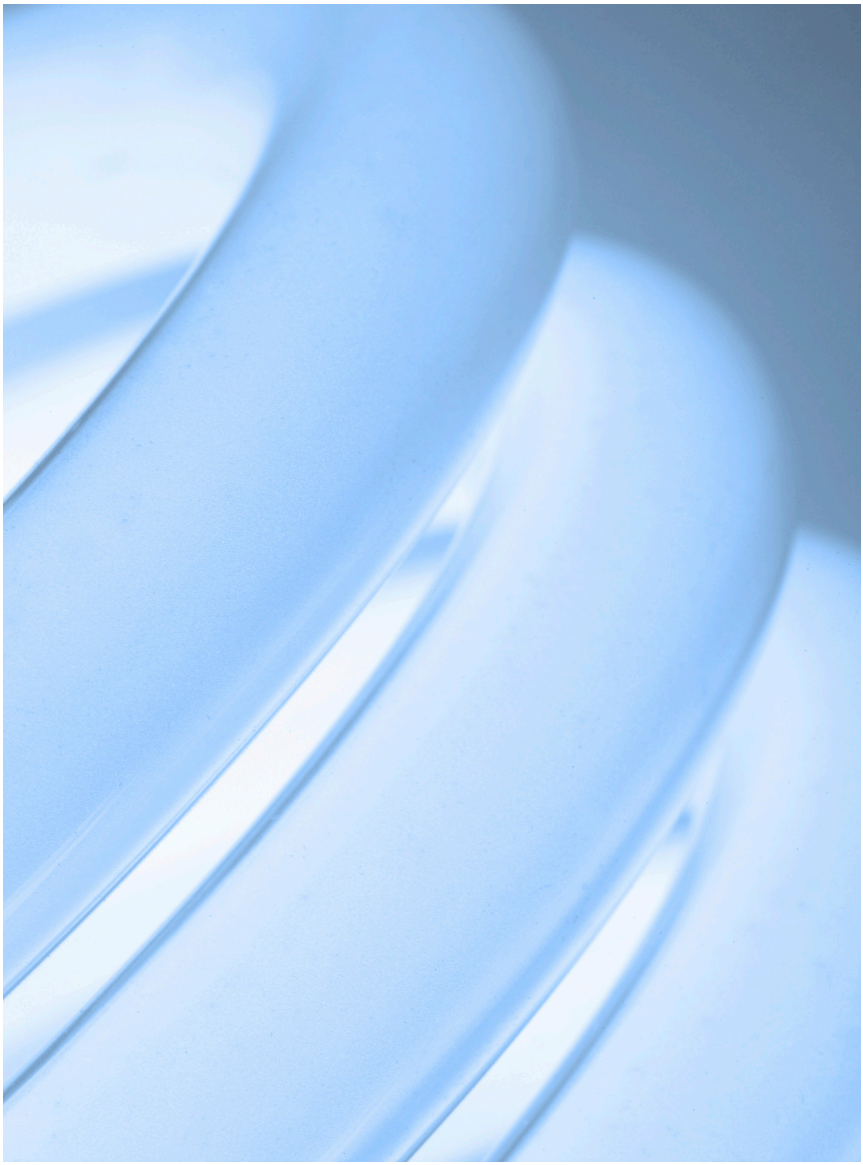


Numerous best practice projects throughout Europe have shown that improving both public and political understanding of the opportunities that energy savings present is central to success.

A VICIOUS CYCLE OF ENERGY SAVINGS POLICY MAKING AND DELIVERY

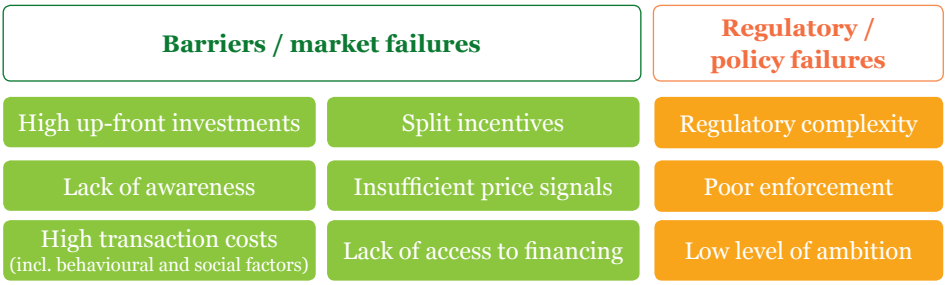
EU energy savings policy faces well-known and significant barriers that influence the direction of policy making in addition to a lack of political interest. These barriers include:

- High up-front investment costs and the difficulty to obtain finance on reasonable terms, especially during the economic crisis;
- The high number of dispersed actors that need to be mobilised and involved;
- Low consumer awareness of potential benefits;
- High transaction costs (i.e. the search for reliable and relevant information) in the implementation of efficiency measures;
- Fiscal and regulatory policies which distort investment choices;
- Low energy prices do not motivate investments to cutting energy use;
- Split incentives between landlord/buyer & tenant/operator of energy assets; and
- Energy savings measures lack visibility and savings opportunity are often not known or underestimated.

While challenging, these barriers are surmountable. Numerous best practice projects throughout Europe have shown that improving both public and political understanding of the opportunities that energy savings present is central to success. For example, with energy prices rising, energy efficiency

measures have increasingly short payback periods, starting from as low as two years for electrical equipment to eight years for space and water heating[25]. However, these timescales will be more difficult to attain if non-technical barriers are not addressed[26], such as the high transaction costs that can be incurred by the search for reliable and relevant information. In addition, 'hidden costs' such as management overheads or disruptions to production are considered a leading cause of the failure to maximise energy efficiency in the industrial sector and, most importantly, for SMEs[27]. The different barriers and failures explaining the large untapped energy savings potentials are summarised in Figure 1.

Figure 1: Barriers and failures to exploit energy savings potentials[28]

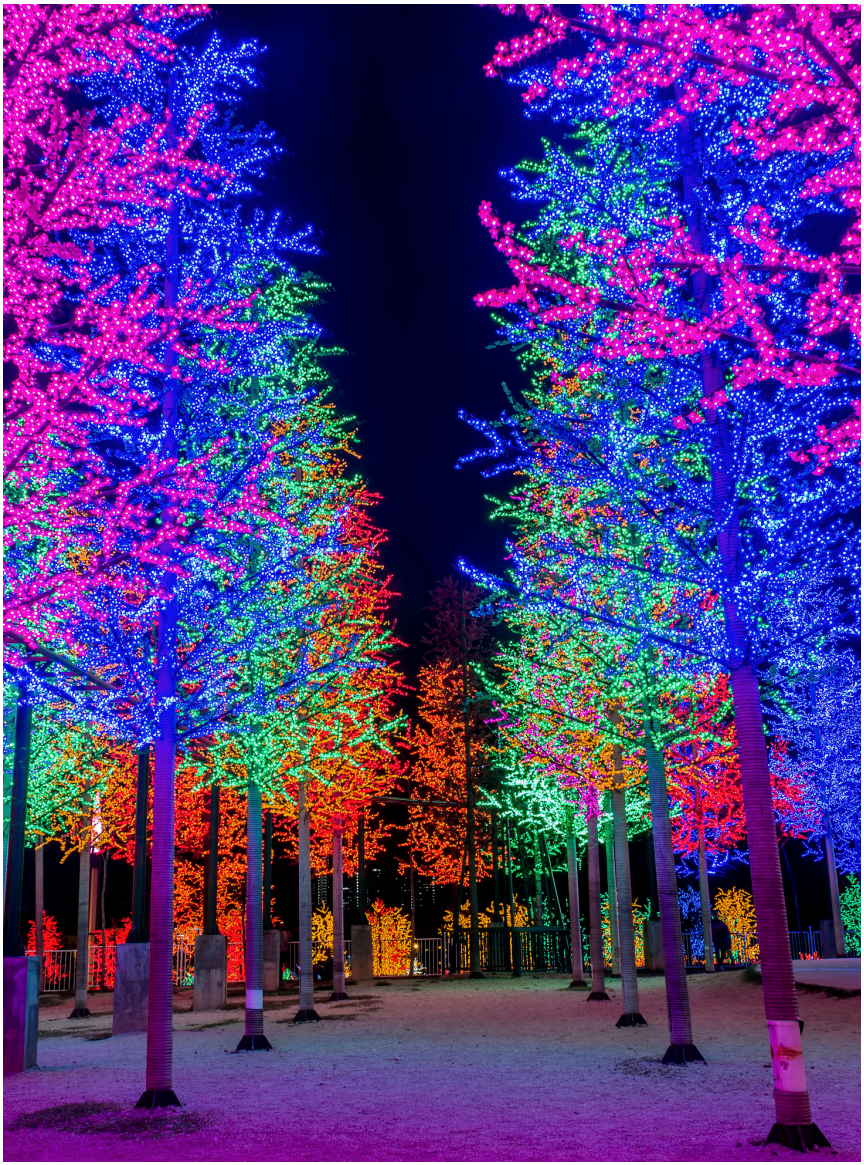


To varying degrees, Member States have made some effort to overcome these barriers. While delivering some savings, this patchwork approach is not delivering on the EU-wide required level of ambition, not least since it fails to maximise efficiencies of scale available within the single market. These national approaches have led to 'enormous disparity among Member States in the level of ambition of their energy efficiency policies'[29] which does not assist the development of common objectives.

This lack of unified action and ambition is most serious and most clearly evident in the failure to reach political agreement on headline EU level actions, including binding targets. The

lack of political momentum for energy savings policies can be seen as early as 2006, when the second Energy Efficiency Action Plan included a detailed list of 85 measures but lacked overall headline targets[30].

The extent of the barriers facing energy savings reduces the likelihood of success from policy and thereby limits political motivation to make that policy in the first place. However, without good policy, these barriers, and their cumulative effect, will never be adequately addressed[31]. Unless this vicious cycle can be interrupted, the failures of the past are likely to be repeated in the future.



Powerful Member States were focused on the promotion of renewable energy, and failed to understand that energy savings would make a renewable energy target easier to meet.

UNDERSTANDING THE FAILURES OF THE PAST

How have the barriers and failings noted above impacted on the development of EU Energy savings policies? In order to be able to recommend ways of achieving more ambitious energy savings policy at EU level in the future, it is necessary to first understand how such laws were developed in the past.

THE EU IS CURRENTLY NOT ON TRACK TO REACH ITS 20% ENERGY EFFICIENCY TARGET BY 2020

Interviews undertaken during the development of this study have provided valuable insights into the negotiations that led to the adoption of two key (sets of) laws:

- The 2008 Climate and Energy Package (the Package); and
- The Energy Efficiency Directive (EED).

The 2008 Climate and Energy Package

Despite setting binding targets for emissions reductions and energy generation from renewable sources, the package failed to give the same political status to energy savings. Those involved in the process note that there was never a suggestion to make the proposed 20% indicative energy savings target binding[32].
In developing the package, the European Commission adopted a series of papers and related measures for cost-effective energy savings of 20% compared to business as usual projections[33, 34,35,36].
The European Council followed the approach of the European Commission and in Spring 2007 only stressed the need to reduce the EU's energy consumption by 20% as compared to projections for 2020, and did not call for a binding target[37]. As a consequence, an energy efficiency target was not evaluated in conjunction with the Package's other targets, which were binding.

Five reasons were critical in the failure to even consider a binding energy efficiency target within the 20-20-20 package:

1. Energy savings were placed on a separate policy cycle and were therefore out of sync with renewable energy and emissions reductions policies;
2. Powerful Member States were focused on the promotion of renewable energy, and failed to understand that energy savings would make a renewable energy target easier to meet;
3. Dependence on local and regional action for implementation made negotiators wary of agreeing EU-wide policy;
4. The energy savings community was not well-established as an effective lobby unlike the renewables community; and
5. Monitoring and reporting of existing EU energy savings policies were still at an early stage.

Energy savings were placed on a separate policy cycle

The 2008 Package was developed soon after the adoption of the Energy Services Directive (ESD)[38] in 2006. The ESD included an indicative target for Member States to cut energy use by 1 per cent per year between 2008 and 2016. During the ESD legislative process, Member States did discuss the possibility of binding targets, but decided against them[39]. Following tough negotiations on the ESD, Member States lacked the motivation to argue the merits of binding energy savings targets when equivalents were introduced for renewable energy and emissions reductions in the 2008 Package. One experienced participant believes that, had energy savings policy been discussed only as part of a package, and not separately under the ESD, a binding energy savings target may have been agreed[40]. Furthermore, the weakness of indicative targets for energy efficiency was only seen in practice after the 2008 Package proposal had already been published and was entering a late stage of development[41]. Negotiations on the EED concluded just as the debate on a 2030 framework for climate and energy began, and there will be an EED progress review in 2014. By this point the 2030 framework should have taken shape, and so there is a real risk that energy savings will again be sidelined.

A preference among powerful Member States to prioritise renewable energy

Despite initial opposition among most Member States, the Council of the EU did eventually support the European Commission's proposal for a binding renewable energy target[42] It is clear that the determination of Germany, which held the rotating Presidency, to secure a binding renewable energy target convinced key Member States, including the UK and France, to lend their support to this goal. The imminent departures from office of UK prime minster Blair and French president Chirac, both of whom were keen to leave a green legacy, was central to securing this support.

Dependence on local and regional action for implementation

The implementation of energy efficiency measures requires many individual decisions, including by homeowners, SMEs and public authorities. Influencing and monitoring such activities can be difficult, requiring a level of perseverance and effort to realise rewards above that which some politicians appear to have been willing to commit. Political risk was considered lower with targets for GHG emissions and renewable energy sources where a smaller number of actors would need to be incentivised to respond[43]. Even where large numbers of actors have become involved in practice, the nature of the incentive and actions taken has remained simpler for renewable energy than for energy savings. In addition, some Member States were concerned about subsidiarity and whether EU level action was justified or required in an area without significant transboundary factors and on which local authorities traditionally have taken responsibility[44].

Weak energy savings community within the EU

When the 2008 climate and energy package was discussed, the renewable energy community was already well organised at both the EU and national levels. For instance, the European Renewable Energy Council (EREC) was created in 2000 and has been a strong player in EU energy policy making since then, providing arguments and analysis about why renewable energy

targets are important at EU level[45]. By contrast, the energy savings community did not have a similar degree of overall organisation at the EU level and was instead represented mainly by sectorial actors such as the European Alliance of Companies for Energy Efficiency in Buildings (EuroACE). In the opinion of some interviewees, the energy savings community considered and presented themselves as rivals rather than as a united strong force in the policy making process[46]. Moreover, the energy savings industry didn't enjoy the same image of an innovative sector with the promise of growth that the renewable energy industry did.

Less common understanding of energy savings policies
Despite the adoption of the Energy Performance of Buildings Directive (EPBD)[47] in 2002 and the ESD in 2006, there was still insufficient progress on methodological issues such as defining 'cost optimal' energy savings or on how best to monitor and verify savings[48]. The verification of savings, in particular, requires detailed methodologies to be put in place; for instance it is much easier to calculate how much energy is produced from renewable sources than it is to estimate the quantity of energy saved due to an energy efficiency measure, as the latter calculation is made on the basis of a comparison with a non-existent counterfactual of the amount of energy that would have been consumed in the absence of any measure.

The Energy Efficiency Directive

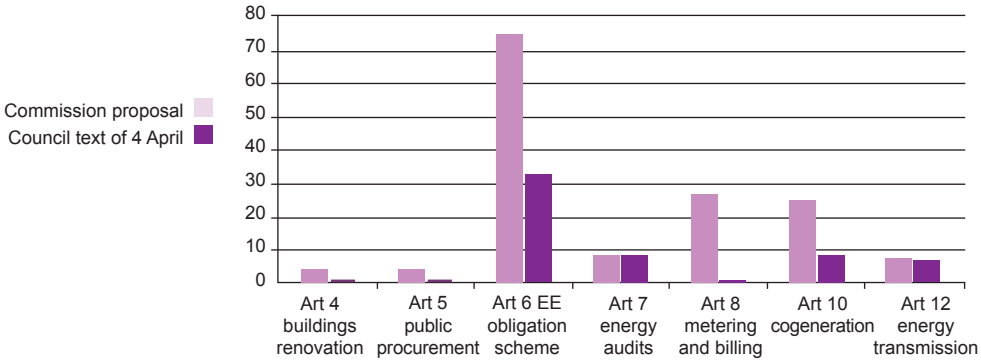
The Council of the EU lowers ambition
Even in the preparatory phases of the EED in spring and summer 2012, the same European Council conclusions which stated that the "20% energy efficiency target… which is presently not on track, must be delivered[49]" also made clear that binding targets would not be accepted[50]. Even when the option of a binding target was omitted, the Council consistently sought to amend and reduce ambition of all the main measures in the proposed Directive on the basis that they were overly prescriptive and did not sufficiently take into

account national circumstances[51,52]. However, when Member States were asked if they would prefer a binding target, which would avoid the need to change any national energy efficiency programmes, this option was also rejected[53]. This rejection of both binding measures sufficient to reaching the target and of a binding target, created a difficult basis for negotiation, in which the flexibility requested by the Council of the EU could only be achieved by further watering down the European Commission's original proposal[54]. This conservative attitude from governments was the result of:

- Subsidiarity concerns;
- An underestimation of the economic benefits that the EED implementation could trigger; and
- Strong lobbying from some of the most energy intensive industries and power companies.

The effect of the Council's proposals on the EED would have been to reduce its impact by two-thirds:

Figure 2: European Commission proposal on EED compared to Council text of 4 April: expected energy savings per measure (in Mtoe)[55]



The European Parliament supports greater ambition

In contrast to the Council of the EU, the European Parliament signalled cross-party support for significantly higher ambition, which was vital to achieving a final outcome of greater ambition than was being sought by the Council[56]. The European Parliament's rapporteur, Claude Turmes, was well respected and his report considered of high quality. In particular, his report substantially strengthened the initial Commission proposal by calling for a binding energy savings target for 2020 and a strong energy efficiency obligation scheme[57]. This timely counterweight to the Council's early opposition helped the Danish Presidency of the Council, which had made completion of the EED its key priority.

Lobbyists seek to influence the process

The vocal support of industrial interests in favour of ambitious energy efficiency measures was a major difference during the development of the EED as compared to the development of the 2008 Climate and Energy Package, when such voices were mostly absent[59]. Efficiency industry representatives, as represented by EU-ASE, EuroACE, and the Coalition for Energy Savings, lobbied very actively for an ambitious Directive[60, 61, 62, 63].

However, the major European utilities, represented by Eurelectric, remained opposed to binding measures or targets and argued instead that market mechanisms such as the EU ETS should be used to drive efficiency gains[64]. Likewise, BusinessEurope was opposed to any absolute limit on energy consumption, arguing that it would negatively impact economic growth[65]. It should be noted however, that a number of significant EU businesses, including Alstom, Siemens, and Unilever are in favour of a strong energy efficiency target and policy regime for the 2020s as it would drive growth and job opportunities, as well as improve EU competitiveness[66]. NGOs argued strongly in favour of a text that was as ambitious as possible, and which learnt from the success of the Renewable Energy Directive, by introducing binding targets. Some actors suggested that NGOs' influence varied over time, and was

only limited during the preparatory stage, which may have constituted an important missed opportunity[67]. However, the input of NGOs in private meetings and other interactions with policy makers early in the process is difficult to judge.

Who succeeded most in securing their agenda?
The adopted EED largely reflects the negotiating position of most Member States in that it provided more flexibility than the original proposal. However, the European Parliament and high-ambition lobbyists did secure the significant wins of a reference to a maximum absolute level of energy consumption in the EU in 2020; and the requirement on Member States to deliver yearly 1.5% savings[68] in end-use sectors through the setting up of national energy efficiency obligation schemes or through alternative measures.

The economic crisis has presented both considerable new challenges and some opportunities to energy savings supporters.

THE CURRENT CONTEXT AND FUTURE OPPORTUNITIES

€1000 PER HOUSEHOLD

ACCORDING TO THE EUROPEAN COMMISSION, MEETING THE 20% ENERGY SAVINGS TARGET WOULD RESULT IN A GAIN OF OVER 1000€ PER HOUSEHOLD

Changing institutional structures and actors' coalitions

Policy making in the area of energy savings or energy efficiency was somewhat restricted until the entry into force of the Lisbon Treaty in 2009. Before this, energy savings legislation could only be proposed in order to meet horizontal objectives such as the completion of the internal market and protection of the environment. However, the Lisbon Treaty introduced the aim of saving energy as an objective in its own right. This change in institutional opportunity was complemented by a change in the overall structure of the European Commission with the creation of a new Directorate General for Energy (previously the energy portfolio was coupled together with transport). This gave the European Commission a stronger institutional self-interest to pursue ambitious energy savings policy.

Despite these new opportunities, those calling for more ambitious energy savings policy continue to face considerable challenges. While the strength of the coalition of those in favour of more ambitious EU energy savings policy energy savings policy has grown, the motivation for their support differs among proponents, as does the level of ambition they seek. When compared to renewable energy policy making, there remains a relative lack of influence from dedicated interest groups working to advocate their position on energy savings. It is also worth noting that those in favour of greater ambition tended to focus their lobbying at the EU level, while those against worked more towards Member State governments. This may be particularly informative given the strength and success of the Council's position during negotiations on the EED.

The continued strengthening of pro-efficiency advocates who give greater priority to lobbying at Member State level will need to be an important part of successful energy savings policy making at EU level in the future.

Managing a diverse constituency

As shown by the barriers to energy savings policy making above, there is an interplay of market and regulatory failures which creates a complex problem structure. Moreover, many energy savings projects are inherently diverse and small-scale, especially compared to renewable energy projects, which increases transactions costs and reduces the interest of important actors, such as the finance community, in the potential of greater EU ambition in this area. This is in stark contrast to the context enjoyed by the renewable energy industry.

Furthermore, the potential for confusion between energy efficiency and energy savings can aggravate a lack of common understanding of the problem and the best measures to address it[69]. Efficiency measures can be attractive to businesses who always aim to achieve the greatest output with the least input. However, the absolute reduction in energy consumption required by energy savings unfortunately still suggests, for some, a reduction in overall economic activity. This is despite growing evidence in support of the ability to decouple GDP growth and prosperity from resource consumption.

Each of these points adds to the evidence highlighted elsewhere in this report that pro-ambition energy savings policy advocates would benefit from a more cohesive energy efficiency community, which coalesces around an agreed understanding of the problem and its potential solutions.

Responding to the economic crisis

Since the adoption of the 20/20/20 climate and energy package, European economies have suffered the effects of the international economic crisis ever more acutely. Many Member States have, as a result, curtailed ambition on energy savings on the basis that to do otherwise would negatively impact competitiveness. Furthermore, as a consequence of the increased attention to the economic crisis and as a result of major set-backs from international climate negotiations, the 'climate'-frame has become less powerful as a justification for new policy initiatives at EU level.

Before the crisis and the run up to the first climate and energy package, public awareness of and concern about climate change were the main drivers behind energy savings policy making. However, more recently, economic arguments have come to the fore for those trying to secure greater energy savings. These include reducing fossil fuel import costs and building of new costly infrastructures, create new local jobs, and increase competitiveness of European industry. For example, the European Commission's non-paper on the EED, prepared ahead of the informal Energy Council of April 2012, emphasised the economic benefits of energy savings, while the impact on emissions reductions was not mentioned at all.

The economic crisis has presented both considerable new challenges and some opportunities to energy savings supporters. Successful energy savings advocacy strategies are likely to have to continue to focus on the economic benefits of energy savings for some time to come. For instance, according to the European Commission itself, meeting the 20% energy savings target would result in a gain of over €1000 per household, of which €600 comes directly from lower energy bills[70].

The joint crises in our economy and our environment dictate that placing energy savings on the back burner can no longer be tolerated.

CONCLUSION

Development and implementation of energy savings policies at the European level has been dragged into a cycle of underachievement. The difficulty of implementing energy efficiency measures appears to have reduced the political ambition required to develop policies that are needed to unlock this important decarbonisation tool, and as a result, the implementation challenges have not been effectively addressed.

However, this cycle is not an unbreakable one. Energy savings have been recognised as central to efforts to decarbonise European energy systems. By highlighting the opportunities and proposing solutions to the challenges presented by the changing context, advocates of more ambitious energy savings policy development at EU level can help to make the cycle a virtuous one.

Ultimately though, responsibility lies with the institutions of the European Union, and the governments of its Member States. The joint crises in our economy and our environment dictate that placing energy savings on the back burner can no longer be tolerated. The suggestion in the European Commission's Green Paper on a 2030 Framework for Climate and Energy Policies that the development of energy savings policy after 2020 should await the outcome of the progress review of the Energy Efficiency Directive's 2020 objective in 2014 is both wrong-headed and dangerous.

As is evidenced by the accepted need to develop a new 2030 policy package, the pre and post 2020 policies can and should be considered separately. Leaving energy savings behind again would be fatal to the whole decarbonisation project, and consequently, to Europe's efforts to cut its greenhouse gas emissions.

Energy savings are the key that unlock affordable energy from sustainable sources. WWF will work with partners from all parts of society to ensure that saving energy is placed at the centre of Europe's efforts to prevent catastrophic climate change.

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Saving EU energy in figures

100%
RECYCLED

€1000

According to the European Commission, meeting the 20% energy savings target would result in a gain of over 1000€ per household

100%

WWF has a vision of a world powered by 100% renewable energy sources by 2050. Energy savings are a pre-requisite to achieve this goal

16%

The EU is expected to achieve a reduction of primary energy consumption of about 16% by 2020, instead of the required 20%

20%

At least 20% of the almost 1 trillion Euro 2014-2020 EU MFF will be spent on climate action, including on energy efficiency

WWF

Why we are here
To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature.

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