



# ENERGY EFFICIENCY

2030 targets: time for action

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### 2030 targets: time for action

#### The Coalition for Energy Savings

The Coalition for Energy Savings strives to make energy efficiency and savings the first consideration of energy policies and the driving force towards a secure, sustainable and competitive European Union. Its membership unites businesses, professionals, local authorities, trade unions, cooperatives and civil society organisations in pursuit of this goal.

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# Introduction

With negotiations on the Clean Energy Package concluded, the EU has now at its disposal a new set of energy legislation, as well as targets to be met until 2030.

For energy efficiency, an EU 2030 headline target of at least 32.5% compared to 2007 projections was set in the revised Energy Efficiency Directive (EED). Its achievement highly depends on Member States' commitment and ambition.

The Governance Regulation (GR), a new EU instrument, comes in to secure integrated and streamlined energy and climate planning, ensure regular reporting by Member States, as well as monitoring by the Commission. Its main instruments are the national energy and climate plans (NECPs).

Draft versions of NECPs were expected from Member States by the end of December 2018, and the final ones are due by the end of 2019. The NECPs need to respect a given template and have specific requirements in terms of information (both targets and measures), which will be assessed by the European Commission. The quality and ambition of NECPs are key in securing the achievement of EU targets.

This document provides a first analysis of the energy efficiency contributions Member States reported in the draft NECPs available at the time of writing (25 January 2019). It presents an overview and a qualitative assessment of available data, as well as findings stemming from it. National energy efficiency contributions are compared to the [benchmark](#) published by the Coalition in 2018.

This publication's objective is to launch a dialogue about the ambition of Member States' energy efficiency plans.

## Key findings

- 8 out of 28 draft NECPs have not been made publicly available at the time of writing.
- Only 11 Member States provide a clear contribution to the EU's 2030 final energy consumption target. It was possible to make estimates for 4 additional Member States.
- As a result, 15 national contributions representing 51.3% of EU final energy consumption were assessed.
- Together these 15 Member States' contributions would only reach 28.7% energy efficiency, a number to be compared to the 32.5% EU 2030 target, meaning that the current contributions are not adequate.
- 13 of these 15 contributions are less ambitious than the minimum [benchmark](#) published by the Coalition for Energy Savings, suggesting that Member States have not yet considered the impact of EU and national energy efficiency policies and measures when setting their contribution.
- More work is required at national level to evaluate the contributions against a recent bottom-up estimation of energy savings potentials, sector by sector, to assess the targets in primary energy (as our [benchmark](#) is expressed in final energy), and whether policies and measures are credible and add up to the target.

## Glossary

<b>EED</b>	Energy Efficiency Directive
<b>GR</b>	Governance Regulation
<b>NECP</b>	National energy and climate plans
<b>PEC</b>	Primary energy consumption
<b>FEC</b>	Final energy consumption

# #1 Quality of data

**Availability** – Member States have to make available to the public their draft NECPs, as to ensure early and effective public participation (Article 9.4 GR).

■ 8 out of 28 NECPs have not been made publicly available<sup>1</sup> at the time of writing: **CY, FR, HU, LU, MT, SK, ES, UK**.

**Contributions** – Member States shall set a national energy efficiency contribution to the EU’s target. This contribution needs to be expressed in terms of absolute level of primary and final energy consumption (PEC and FEC) as to enable a smooth aggregation of national contributions (Article 4 b) GR). Out of the 20 available NECPs:

■ 5 do not provide a contribution in terms of FEC, nor a method for estimating the target: **AT, LT, PL, RO, SI**.

■ 4 do not provide a clear contribution but allow an estimation of FEC<sup>2</sup> with uncertainties: **EE, DE, IE, SE**.

■ 11 provide a clear contribution to the EU's FEC target<sup>3</sup>: **BE, BG, HR, CZ, DK, FI, EL, IT, LV, NL, PT**.

<sup>1</sup> NECPs were considered as “publicly available” if they could be found on a website or if they were distributed to stakeholders. CZ & EL draft NECPs were not submitted to the Commission at the time of writing, but an initial version of the plan had been made available to stakeholders and used for this analysis.

<sup>2</sup> Contributions were considered to be “clear” when they were expressed in an absolute level of FEC and PEC. In other cases, and in order to allow a comparison with our benchmark which is set in FEC, we estimated FEC contributions when it was possible: for DE, using the reference to the national 2050 pathway; for EE, IE and SE, using the number provided even if this number was not put forward as a clear contribution.

Assessment of data quality of NECPs				
	Publicly available	Clear contribution	Estimate possible	Comments
Belgium	Y	Y	-	p.30 NECP
Bulgaria	Y	Y	-	p.31 NECP
Croatia	Y	Y	-	Section 2.2
Czechia	Y (draft)	Y	-	p.37 NECP
Denmark	Y	Y	-	p.25 NECP
Finland	Y	Y	-	p.30 NECP
Greece	Y (draft)	Y	-	p.43 NECP
Italy	Y	Y	-	p.53 NECP
Latvia	Y	Y	-	p.33 NECP
Netherlands	Y	Y	-	p.26 NECP
Portugal	Y	Y	-	p.18 NECP
Estonia	Y	N	Y	FEC provided but not as a clear contribution, p.9 NECP
Germany	Y	N	Y	Estimate, see footnote 2 and p.35 NECP
Ireland	Y	N	Y	FEC provided but not as a clear contribution. Scenario 2, p.90 NECP
Sweden	Y	N	Y	FEC provided, but not as a clear contribution, p.12 NECP
Austria	Y	N	N	Target range provided and unclear methodology, p.44 NECP
Lithuania	Y	N	N	Intensity target provided but unclear methodology, p.24 NECP
Poland	Y	N	N	Only PEC contribution provided but no methodology for FEC, p.22 NECP
Romania	Y	N	N	Only PEC contribution provided but no methodology, p.57 NECP
Slovenia	Y	N	N	Only PEC contribution provided but no methodology, p.20 NECP
Cyprus	N	N	N	
France	N	N	N	
Hungary	N	N	N	
Luxembourg	N	N	N	
Malta	N	N	N	
Slovakia	N	N	N	
Spain	N	N	N	
U.K.	N	N	N	

Ambition of FEC contributions in NECPs			
	Difference w/ Coalition <u>benchmark</u>	Difference w/ PRIMES16	Comments
Latvia	-14%	-16.6%	Available contribution: 3.52 Mtoe
Italy	-2%	-10.4%	Available contribution: 103.8 Mtoe
Netherlands	4%	-3.1%	Available contribution: 1864 PJ
Czech Republic	6%	-5.1%	Available contribution: 990 PJ
Germany	7%	-15.2%	Contribution estimated to 167.3 Mtoe
Estonia	11%	-9.8%	Contribution estimated to 32 TWh
Croatia	12%	12.0%	Available contribution: 6.85 Mtoe
Portugal	17%	8.8%	Available contribution: 17.7 Mtoe
Belgium	17%	-7.6%	Available contribution: 33.1 Mtoe
Finland	17%	16.0%	Available contribution: 305 TWh
Bulgaria	18%	-5.0%	Available contribution: 9169 ktoe
Sweden	18%	-0.8%	Contribution estimated to 364 TWh
Denmark	21%	9.4%	Available contribution: 660 PJ
Greece	23%	19.6%	Available contribution: 18.7 Mtoe
Ireland	25%	11.8%	Contribution estimated to 151,652 GWh
Austria			
Lithuania			
Poland			
Romania			
Slovenia			
Cyprus			
France			
Hungary			
Luxembourg			
Malta			
Slovakia			
Spain			
U.K.			

## #2 Ambition of targets

**Contribution to EU target** – When setting their national contributions, Member States shall take into account that 2030 EU’s energy consumption must not exceed certain limits<sup>3</sup>.

■ 15 national contributions, which represent 51.3% of EU final energy consumption<sup>4</sup> were assessed. Together these 15 Member States’ contributions **would only reach 28.7% energy efficiency, a number to be compared to the 32.5% EU 2030 target<sup>5</sup>, meaning that the current contributions are not adequate.**

**National situations** – Last year, the Coalition developed a minimum national target benchmark<sup>6</sup>, based on the fact that Member States shall take into account EU and national energy efficiency measures to set their contributions (Article 6.1 GR). A comparison of contributions against the benchmark shows:

■ **LV** plans to achieve more savings than foreseen in the Coalition’s minimum benchmark (more than 10% difference).

■ **IT** plans to achieve more savings than foreseen in the Coalition’s minimum benchmark (less than 10% difference).

■ **NL, CZ and DE** plan to achieve less savings than foreseen in the Coalition’s minimum benchmark (less than 10% difference).

■ **EE, HR, PT, BE, FI, BG, SE, DK, EL and IE** plan to achieve less savings than foreseen in the Coalition’s minimum benchmark (more than 10% difference).

The table also compares the national contributions with the latest EU reference scenario PRIMES 2016. At EU level, 11.6% energy should be saved compared to this reference scenario (-11.6%).

**Important:** More work is required at national level to evaluate the contributions against a recent bottom-up estimation of energy savings potentials, sector by sector<sup>7</sup>, to assess the PEC targets, and whether policies and measures are credible and add up to the target.

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<sup>3</sup> 1273 Mtoe primary energy and 956 Mtoe final energy (Article 3.5 EED) for EU28. The Commission proposed to adjust the target to reflect the exit of the U.K. from the EU. The targets proposed are: 1128 Mtoe primary energy and 864 Mtoe final energy.

<sup>4</sup> 58.1% if the U.K. is not considered. The 15 contributions correspond to the available and estimated targets.

<sup>5</sup> The EU target of 32.5% is expressed as a comparison to PRIMES 2007 projections, and corresponds to a FEC of 956 Mtoe in 2030. Correspondingly, we calculated that the 15 contributions should remain below 956 Mtoe multiplied with their share in the EU's total FEC 2030 according to PRIMES 2016.

<sup>6</sup> The benchmark is presented in The Coalition for Energy Savings, 2018, [Energy efficiency - Getting real: from EU law to action on the ground](#). It takes PRIMES 2016 as a basis (the latest EU scenario built with the input from Member States' experts), and incorporates the effect of EU and national measures. In their NECPs, Member States may consider national circumstances (Article 6.2 GR) to create their own reference scenario (presented in Chapter 4 of the NECPs). Analysing the new Member States' scenarios and the underlying assumptions would require further work.

<sup>7</sup> For an example of a bottom-up assessment of untapped energy savings potentials, see Fraunhofer ISI, 2013, Analysis of a European Reference Target System for 2030.



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Coalition members represent:

- more than 500 associations, 200 companies, 1,500 cooperatives
- 15 million supporters and 1 million citizens as members of cooperatives
- 2,500 cities and towns in 30 countries in Europe

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