Summary of Country Reports

Submitted to the

Energy Efficiency Working Party

Period from March 2011 to September 2011

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The views expressed in this paper are those of the authors and do not necessarily reflect the views or policy of the International Energy Agency (IEA) Secretariat or of its individual member countries. This paper is a work in progress, designed to elicit comments and further debate; thus, comments are welcome, directed to the author at: Charlotte.Forbes@iea.org

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1. Introduction

This report provides a summary of the 24 country reports, including that of the European Commission, submitted by the following countries to the IEA by the end of October 2011:

- Australia
- Austria
- Belgium
- Canada
- Czech Republic
- Denmark
- European Commission[1]
- Finland
- France
- Germany
- Greece
- Italy
- Republic of Korea
- Japan
- Netherlands
- New Zealand
- Poland
- Portugal
- Spain
- Sweden
- Switzerland
- Turkey
- UK
- US

The purpose of this summary report is to highlight energy efficiency policy action and planning in IEA member countries since the last meeting of the Energy Efficiency Working Party (EEWP)[2] held in March 2011. This paper provides an overview of energy efficiency developments across all sectors, but is not meant to be a comprehensive review of every energy efficiency-related policy in IEA member countries.

In all of the country reports received, there is a range of significant energy efficiency policy action. Among the most significant observations from these country reports are three key

[1] While not officially classed as a Member Country, The European Commission also participates in the work of the IEA and gave a presentation the EEWP in September 2011.

[2] All 28 IEA member countries are members of the Energy Efficiency Working Party (EEWP). The EEWP provides advice to the IEA Standing Committee on Long-Term Cooperation (SLT) and other IEA bodies on the means to achieve 1) highly effective energy efficiency policy development, implementation and evaluation in the IEA member countries and, where appropriate, IEA non-member countries and 2) trends, policies and priorities for maximising energy efficiency uptake.

topics: while spending focus on energy efficiency remains largely unchanged, fiscal challenges remain, especially moving forward in a time of increasing financial constraints for almost all countries. Second, countries in the European Union have had to submit their second National Energy Efficiency Action Plan (NEEAP) by 30 June 2011. Third, an increasing number of countries note the importance of energy management, in accordance with ISO 50001. Several countries mentioned industrial energy management, economic energy management, and so on.

2. Changes in policy context

Energy efficiency governance: Since the previous EEWP in March 2011, several countries noted changes in government or institutions and the resulting impact on energy efficiency policy. **Finland** had parliamentary elections in April 2011, after which a six-party government was formed. The new government aims to improve energy and material efficiency in the whole society. The long term aim is a carbon neutral society. There are also plans to establish a programme to decrease dependency on oil.

A new government took office in **Portugal** on 21 June 2011, led by Pedro Passos Coelho. The ministry responsible for energy issues is now the Ministry for Economy and Employment; the new Minister is Mr. Alvaro Santos Pereira and the Secretary of State for Energy is Mr. Henrique Gomes. The new government has increased Portugal's reduction of primary energy consumption targets from 20% to 25% by 2020 and the State is leading by example, aiming to reduce its own consumption by 30% by 2020.

In **Japan**, Mr. Yoshihiko Noda succeeded Mr. Naoto Kan as Prime Minister at the end of August 2011. Legislation to promote use of renewable energy was passed just before, on 26 August 2011, with the formal approval of the upper house of parliament.

Parliamentary elections took place in **Denmark** on 15 September 2011. The centre-right Liberal-Conservative government, which had been in power for ten years, was succeeded by a centre-left coalition led by the Social Democratic Party. The Social Democrats' leader, Helle Thorning-Schmidt, took up office as Prime Minister on 3 October 2011. The new government promises a more ambitious energy strategy for the future.

Through **Italy**'s Legislative Decree of 28 March 2011, ENEA-UTEE will propose financial incentives for the refurbishment of existing buildings. The Decree also sets out regions and autonomous provinces, in collaboration with ENEA, will activate training initiatives to qualify technicians and installers of energy efficiency and renewable plants.

***Energy efficiency funding*:** Several countries described new funding for energy efficiency-related activities. Five countries have reported new funding for energy efficiency activity: **Australia**'s Clean Energy Future Package announced in July 2011 heralded a suite of measures including expanding the successful Energy Efficiency Opportunities program. A new $ 10 billion Clean Energy Finance Corporation, independent from the Australian government, will be established. The Government's Low Carbon Communities Programme will also be expanded to provide funding through competitive grants to local councils and communities to improve energy efficiency in council and community-use building and facilities. Funding for the programme will be increased from $ 80 million to $ 330 million.

In continuation of an initiative established in 2009, €100 million were released in public funds to support thermal insulation for buildings in 2011 in **Austria**.

As part of its Budget 2011, the government of **Canada** has allocated $ 78 million over two years for a new set of EcoEnergy Efficiency Initiatives, along with an additional $ 400 million in one-year investment in the popular ecoEnergy Retrofit Homes Programme.

The **German** government will provide €10 billion annually to help industry make greater use of its economic potential for energy conservation which has been verified by scientific studies. To that end, the German government will support private sector initiatives, for example via the Partnership for Climate Protection.

In the **US,** Advanced Projects Research Agency- Energy (ARPA-E) - has received an additional $ 180 million for financial year 2011. Funding is being used to support innovative research in several areas closely related to energy efficiency such as new approaches and technologies for cooling equipment used in heating ventilation and air conditioning.

Renewal or completion of funding for some energy efficiency measures was also noted- for example, the Government of **Canada**'s 2011 Budget (delivered in June 2011) states that funding is being renewed for the Clean Air Agenda with an increased focus on regulatory action as the cornerstone of Canada's approach to climate change and clean air."

It must also be noted that new funding or funding renewal is taking place in the context of an ongoing financial crisis in many countries. Practically all funding for energy efficiency made available as part of the **US** economic stimulus programme has now been allocated, transferred to state and local governments, but much of the funds remain to be expended. In the US and elsewhere, governments are likely to enter, to continue to be constrained under, a period of fiscal constraint.

To promote ESCO businesses, the **Korea**n government has substantially increased the share of ESCO activities in its Energy Efficiency Soft Loan Budget this year. As a result of this effort, the investment in ESCO business has been increased to USD 344.5 million, which is 3 times larger than that of 2010. The government expects that this will help to enlarge the energy efficiency- related market.

3. Recent data on energy consumption and intensity

Provisional estimates of energy intensity and energy consumption in 2010 are now available in most countries. Countries reported the figures and compared them to 2009 evengery consumption/intensity levels, where appropriate.

Many countries reported an increase in energy consumption in 2010, but there were also several exceptions to this. Energy consumption increased by 4.4% in **Switzerland** in 2010 compared to 2009, and was significantly higher than the previous record of 895 PJ in 2008.

The main drivers behind this growth were:

1. A colder winter: the number of heating degrees was 12.7% higher than in 2009.
2. After an economic downturn in 2009 by 1.9%, the Swiss economy grew by 2.6% in 2010.
3. A population growth by 1% and an increase of the vehicle fleet by 1.6%

Similarly, energy intensity increased from 9.5 MJ/euro in 2009 to 10.2 MJ/euro in 2010 in the Flemish region (the region with the largest share in Belgian energy consumption) in **Belgium,** due to the economic revival and the cold temperatures in 2010.

Energy consumption was 3% higher in 2010 in the **U.K.** than 2009, and **US** energy consumption has also risen, but such rises must be considered taking into account that primary energy consumption in 2009 was exceptionally low across almost all countries, mainly due to the economic downturn.

In **Portugal**, there was an increase of primary energy intensity from 185 toe/M€ in 2008 to 188 toe/M€ in 2009, but a *decrease* of the final energy intensity from 137 toe/M€ in 2008 to 136 toe/M€ in 2009. Figures are expected to show that Portugal's final energy intensity is expected to decrease even more from 2009 to 2010. Portugal's Total Final Consumption (TFC) of energy was 18 Mtoe in 2009, which represents a decrease of 3.5% from 2007 level.

Energy intensity has "improved" in **Canada** in recent years, and in **Sweden**, energy efficiency in industry is estimated to improve by 7 per cent in 2011 compared to 2010 and with a further 3 per cent and 4 per cent in 2012 and 2013 respectively. The reason for this development is that major investment in energy efficiency was made before the onset of the current financial crisis, and only recently has industrial output returned to pre-crisis levels.

4. Significant policy developments

4.1 By sector

4.1.1 Buildings

Most countries reported new or ongoing measures to improve the efficiency of the buildings sector. These measures range from training initiatives to qualify technicians and installers of energy efficiency and renewable plants in order to improve the efficiency of buildings in **Italy**, to the spread of low energy buildings (batiments basse consommation- BBC) in 2012 and positive energy buildings by 2020 for *new* buildings, and a reduction of 38% of primary energy consumption for grounds of existing buildings in **France**, as part of the ambitious goals set by the Grenelle de l'Environnement.

Amendment of secondary legislation in **Turkey** means that the "Energy Performance Certificate" will not be granted to new buildings having less than class "D" energy use and CO_2 emissions levels. Central heating system is compulsory for new buildings having an area larger than 2000m^2. Moreover, before 20 April 2011, the Construction Utlization Certificate had to be taken before construction phase but, following amendment of the regulation, it can now be taken at the phase of utilisation.

On 20 April 2011, the **Australian** Government announced that it would extend the consultation period for the Tax Breaks for Green Buildings Program, which will now begin on 1 July 2012. In **Japan**, the Program to Promote the Spread of Eco-Friendly Houses by Utilizing Eco-Points (Eco-Point System for Housing), specified that eco-points would be issued for construction of new eco-friendly houses and for environment-friendly renovation started by the end of December 2011. However, more applications than expected were received, and it was decided to shorten the application period by five months. Application for constructions which started before the end of July 2011 are accepted and the Eco-point system will be terminated.

In **Canada**, ecoENERGY Efficiency initiatives announced on 7 September 2011 include ecoENERGY Efficiency for Housing, which encourages the construction and retrofit of low-rise residential housing, making the stock more energy efficient; and ecoENERGY Efficiency for Buildings, which provides information and benchmarking tools to improve building energy performance of new and existing buildings. In July 2011, the Canadian government announced a one-year extension of $400 million to the ecoENERGY Retrofit – Homes program. Between 2007 and 2011, the program provided over 510,000 homeowners, representing 5% of homes across Canada, with an average federal grant of $1,400

In **Greece**, the "Green Roofs for Public Buildings" measure has begun development as part of Pillar I of the programme "Development Interventions for the Real Economy".

4.1.2. Transport, lighting and appliances

Transport: Fewer countries mentioned measures in the transport sector compared to preivous summary reports. However, among the key measures that were reported, was the historic agreement with thirteen major automakers announced on 29 July by President Obama to pursue the next phase in the **US** Administration's national vehicle fuel economy programme. The aim is to increase fuel economy to 54.5 miles per gallon for cars and light-duty trucks by Model Year 2025. On 9 August, the President announced establishment of fuel efficiency standards for heavy trucks - for the first time ever in the US. Such standards are projected to save truck $50 billion from 2014 until 2018 inclusive.

A new national forum for innovation and strategy development in the transport sector was established in **Sweden** in July 2011 with the participation of the Swedish Energy Agency, the Swedish Transport Administration and the Swedish Governmental Agency for Innovation Systems (VINNOVA), and a number of enterprises and universities. The aim is to bring together various actors in the transport sector in order to develop a systems approach.

For countries with a National Energy Efficiency Action Plan (NEEAP), transport recommendations are a key part of the Plan. **Spain** estimates that 50.6 % of final energy savings by 2020 to come from the transport sector. **Italy**'s NEEAP includes measures in the transport sector such as technological solutions, use of biofuels, demand-side measures, infrastructures, upgrading quality of urban mobility systems, speed control limits. **Denmark** has identified the need for greater imports of biofuels for transport as part of its flexible strategy. In **New Zealand**, improved efficiency and reliability of key freight corridors and metro passenger networks have been identified as a priority in the transport sector, as well as improving the efficiency of light vehicles entering the fleet.

Lighting: Under **Portugal**'s National Strategic Reference Framework (QREN) five tenders were published to support energy efficiency in public lighting and traffic lights through the Regional Operational Programmes for the five regions in mainland Portugal. With a total budget of EUR 26 million, these financial incentives were targeted to municipalities, associations of municipalities, metropolitan areas, and municipal, intermunicipal or metropolitan enterprises and services. Submission of proposals was possible until the end of July and results are expected by the end of 2011. On 11 August 2011, the **Australian** Government's Tenancy Lighting Rules for the Commercial Building Disclosure program were released. Under the Commercial Building Disclosure program, until 1 November 2011, only a National Australian Built Environment Rating System (NABERS) base (or whole) building rating needs to be disclosed to satisfy the conditions of Australian legislation, the *Building Energy Efficiency Disclosure Act 2010*. From 1 November 2011 onwards, a tenancy

lighting assessment will also need to be completed. Implementation of a global improvement plan for light efficiency in Brussels Capital Regional government has been reported in **Belgium**. On August 3, the **US** Department of Energy announced that Phillips Lighting North America had won the 60-watt replacement bulb category of the Bright Tomorrow Lighting Prize (L Prize) competition. This competition had been launched to challenge the lighting industry to develop high performance, energy-saving replacements for conventional light bulbs that will save consumers and businesses money.

Appliances: On July 14, the **US** DOE and Environmental Protection Agency announced the first products recognized as the most energy-efficient in their categories among those that have earned the Energy Star label. The new designation of Most Efficient aims to provide all manufacturers with an incentive for greater product energy efficiency while providing consumers new information about the products that comprise the top tier in the categories. Throughout 2011, the US has been expanding its support for the implementation of the Super-efficient Equipment and Appliance Deployment Initiative, an international initiative to accelerate the development of efficiency standards globally, while enhancing the comparability or harmonization of product test procedures. In **Switzerland**, minimal performances standards for appliances are part of the enhanced energy efficiency measures featured in the New Swiss Energy policy, approved by the Swiss Lower House in June and debated in the Upper House in September. In **Australia**, legislation is in development for Greenhouse and Energy Minimum Standards (GEMS). GEMS will further expand on the coverage of appliances and equipment by MEPS, bringing in a wider range of products including non-energy using products (eg gas products) and products that do not consume energy but that affect the energy efficiency of appliances (e.g. air conditioner ducting, building insulation or window glass). This programme will also bring in greenhouse emissions labelling requirements. Once drafted, it is expected that legislation will pass through parliament in time for programme implementation on 1 July 2012.

In **Korea**, starting from 2012, the scope of Energy Efficiency Label and Standard Program will be expanded to include 32 target products from current 24 products. This measure is expected increase energy efficiency of appliances and equipment.\

New Zealand's Energy Strategy 2011-2021 and New Zealand Energy Efficiency and Conservation Strategy 2011-2016 (NZEECS)- released on 30 August 2011 after a process of public consultation- builds on the success of existing programmes through support to the industrial and commercial sectors to improve energy sector intensity, continuation of the Warm Up New Zealand home insulation scheme to insulate 188,500 homes by 2013 , or over 15% of those eligible, and extension of the products minimum energy performance standards, labeling and EnergyStar programmes in line with major trading partners.

4.1.3 Public sector

Most countries outlined the exemplary role that the public sector can play in implementing energy efficiency. An ongoing success story is the contracting initiative in the public sector in **Austria**. Currently, there are contracts for more than 400 publicly-owned buildings. More than EUR 3.5 Million in energy costs can be saved, and 17 500 tons of CO_2 emissions can be avoided every year.

As part of Prime Minister David Cameron's commitment to make the current UK government the "greenest government ever", the **UK** announced a new five year commitment to reduce

central Government greenhouse gas emissions by 25% for 2014/15 on a 2009/10 baseline. The new commitment will cover all greenhouse gases, not only carbon dioxide, but also business -related transport emissions, including owned vehicles and business travel (but excluding staff commuting). This new commitment covers the widest scope of the Central Government estate, making it more ambitious than the previous 10% target, leading to a higher range of lifetime carbon and financial savings. In support of this, there is a new commitment to reduce domestic business travel flights. The national roundtable for energy efficiency in **France** on 17 June 2011 established three working groups**,** one of which was focused on the leadership and exemplary role of the state in energy efficiency; the group will pay particular attention to public procurement, which represents 10% of GDP, management of public assets and dynamics of local action plans.

In **Poland**, economic energy management in the public sector will be implemented by obliging the government to take an exemplary role in saving energy.

Czech Republic also mentioned the importance of the public sector's performance, and monitoring of energy consumption in government buildings.

Portugal's new government has established guidelines for the national energy policy, increasing the target for reduction in energy consumption across the country from 20% to 25% by 2020. The state will lead by example: 30% reduction in its consumption by 2020.

In **Finland**, the Ministry of Employment and the Economy published updated guidelines for energy efficiency in the public procurement in June 2011. Guidelines are directed to state and municipal organisations, but could also be used, when applicable, in the private sector. In **Belgium**, the Brussels-Capital region in particular continues to encourage the exemplary role that public authorities can play in energy efficiency improvements. Demanding energy efficiency requirements have been set for public procurement in **Germany**.
Moreover, **New Zealand**'s Efficiency and Conservation Strategy 2011-2016 (NZEECS) sets targets to get greater value for money from the public sector through increasing energy efficiency compared with a 2010 baseline.

Industry and energy management

A range of measures to promote energy efficiency in industry is underway in many IEA member countries. Energy management is mentioned with increasing frequency in the country reports, highlighting growing awareness of its importance in both public and private sectors.

Sweden has estimated that total energy consumption by industry will increase 5 % between 2010 and 2013. Nonetheless, energy efficiency in Swedish industry (kWh/added value) is estimated to improve by 7 per cent in 2011 compared to 2010 and with a further 3 per cent and 4 per cent in 2012 and 2013, respectively. The main reason for this development is the fact that major investment in energy efficiency was made before the onset of the crisis (in 2008), but only recently has industrial output returned to pre-crisis levels, i.e. full production capacity reduces energy use per unit produced.

On 10 July 2011 the **Australian** Government announced the Clean Energy Future (CEF) package. A number of measures concern industry, such as "Clean Energy Finance Corporation" which will provide investment to manufacturing businesses that provide inputs to renewable energy and energy efficiency technologies. Another CEF measure, "Clean

Technology Program" targets the food processing industry metal forging and foundry industries, while the "Clean Energy Skills Program" will help educational institutions and industry develop the materials and expertise needed to promote clean energy skills.

As part of additional decisions taken in June 2011 to expedite the restructuring of **Germany**'s energy supply, the German government will provide EUR 10 billion annually in funding support to help industry make greater use of its economic potential for energy conservation identified by scientific studies. As another incentive, from 2013 onwards, the German government will grant the tax cap in the field of energy and electricity taxation only if the respective companies make a contribution to energy savings.

Six courses oriented towards staff of ESCOs were held in **Turkey** between April and September 2011.Two were energy manager courses for industry, one was Audit and Project Training for Industry and two were Energy Manager Courses for Buildings and the last one was Audit and Project Training for Buildings. Audits have also been conducted at 100 industrial enterprises and 59 buildings.

Industrial energy management is ongoing in the **US**, where considerable support is provided to the implementation of ISO energy management standard 50001, issued in final form during June 2011. Appointment of energy managers is compulsory in large private and public companies in Italy. Other countries that noted the importance of energy management in their reports include **Belgium**, **Portugal**, **Germany**, **Canada**, **Greece**, **Czech Republic** and **Japan** (particularly in the wake of Japan's earthquake disaster).

5. Strategic planning

The **Australian** Government announced the Clean Energy Future package in July 2011. The concept comprises four different elements: a carbon price, renewable energy, energy efficiency and action on the land (such as the storing of soil carbon, revegetation and forest conservation). The Australian Government is also carrying out further work on the costs and benefits of a national scheme to replace existing State-based schemes which operate in South Australia, Victoria and New South Wales. This would reduce complexity and duplication and allow energy consumers in states without existing schemes to benefit. Depending on the results of economic modelling and regulatory impact analysis, the Australian Government will make a final decision on whether to adopt a national Energy Strategy Initiative (ESI).

Poland adopted the Energy Efficiency Act during 2011 which introduces the obligation to obtain an appropriate amount of so called white certificates and sets out rules for drawing up an audit of energy efficiency.

In May 2011, the Japanese cabinet decided the Guideline on Policy Promotion for the Revitalization of **Japan**, which outlines the basic policies for economic and fiscal management after the earthquake. The aim is to revitalize economic society which was affected by the earthquake and to make new strategy for restart. The interim report on Innovative Energy and Environmental Strategies was announced by the Energy and Environment Council at its second meeting on 29th July.

Public aids for energy efficiency investment projects are underway in **Spain**, under the framework of the cooperation programme established between IDAE and the regional governments for the Action Plan 2008-2012. Spain also has plans in place for boosting energy services market and programmes for electric mobility.

In **New Zealand**, Hekia Parata, Acting Minister of Energy and Resources released the New Zealand Energy Strategy 2011-2021 and New Zealand Energy Efficiency and Conservation

Strategy 2011-2016 (NZEECS) on 30 August 2011. The Strategy identifies four areas of focus for the Government to make the most of the country's abundant energy resources: diverse resource development, environmental responsibility, efficient use of energy, and secure and affordable energy supply. In the context of energy efficiency, NZEECS sets a target rate of economy-wide energy intensity improvement of 1.3 per percent per annum for a period of five years. NZEECS also contains targets for renewable energy uptake: by 2025 90% of electricity generation from renewable sources, providing supply security is maintained, and an additional 9.5 PJ of energy from woody biomass or direct use of geothermal energy.

Finland's new government will update the national energy and climate strategy of Finland by the end of 2012. As a part of the strategy a programme to decrease oil dependency will be established.

While there is no specific target for energy efficiency in the **Netherlands**, it is recognised as an important tool to reach Emission Reduction and Renewable Energy targets.

Greece's NEEAP succeeded a 5,1% energy saving for the intermediate period (2010), a result well above the 2,8% its initial target. It is estimated that Greece will achieve far more the 9% energy saving set as the total target for the period 2010 – 1016.

National Renewable Energy and energy efficiency strategies

EU Member countries had to a second National Energy Efficiency Action Plan (NEEAP) no later than 30 June 2011. This provided a chance for countries not just to set objectives for the future, but to gauge how much progress they have made since submission of their first NEEAPs in 2007. **France's** government emphasises that the second action plan should help to take stock of policies and measures implemented in terms of energy savings.

The **Netherlands**' total national energy saving is currently in the order of 1.4% per year. It is confident that targets will be met for 2010 and 2016.

Belgium's NEEAP, submitted at the beginning of July 2011, takes the form of an executive summary of the three regional action plans and the federal action plan (chapter by chapter). To help meet the European 2020 target, Belgium set a target of a reduction of primary energy consumption of 18% by 2020.

The **UK**'s DECC has published a report assessing progress against the policies and measures set out in the 2007 National energy Efficiency Action Plan.

The framework of **Italy**'s NEEAP 2011 is essentially the same as Italian NEEAP 2007 although the second NEEAP puts highlights further areas of intervention where significant energy saving could be achieved.

Spain's primary energy savings calculated up to 2010 represents 71,5% of the objective set by the 1st NEEAP for 2012 (Action Plan 2008-2012) , with energy savings calculated using 2004 as the base year.

6. International collaboration

Countries continue to engage in a wide range of international energy efficiency activities.

In 2010, Natural Resources **Canada** entered into a two-year funding agreement with the IEA to provide financial assistance for costs associated with hosting the Secretariat for the International Partnership for Energy Efficiency Cooperation.

International cooperation is a priority in **Switzerland**: by the end of 2011, it is aiming to have a bilateral agreement on energy with European Union. Dialogue with the neighboring countries should also be enhanced.

In **Sweden**, a common electricity certificates ("green certificates") market with Norway is under way. Former Director General of the Swedish Energy Agency, Mr. Tomas Kåberger, was recruited as new head of Japan Renewable Energy Foundation.

During 2011, the **US** has continued to expand its support for the implementation of the Super-efficient Equipment and Appliance Deployment initiative, an international initiative to accelerate the development of efficiency standards globally, while enhancing the comparability or harmonization of product test procedures.

As part of the Global Superior Energy Performance Partnership, **Finland** has launched the Combined Heat and Power (CHP) and Efficient District Heating and Cooling (DHC) Working Group. The Working Group, which aims to increase awareness about the vast potential of CHP and Efficient DHC to reduce fuel consumption and emissions and to increase the use of renewable resources for heat and power production. Current participation in the WG includes the European Commission, the USA, Russia, Sweden and Finland, as well as several companies and industry associations. The IEA secretariat has also participated in the preparation of the work.

As part of its Project on Support for the Infrastructure of Energy Efficiency Monitoring and Evaluation in **Turkey**, training about on energy concepts, monitoring and evaluation was gievnt to staff by **Dutch** experts on 25-26 May 2011.

7. Conclusions

This summary report aims to highlight energy efficiency policy action and planning since the last EEWP in March 2011, based on the 22 reports received from member countries.

Countries continue to operate in a climate of financial uncertainty, but that is not the only challenge. Various countries noted lack of information about energy efficiency as a key barrier, and federal countries noted recurring importance of harmonization, and difficulties in harmonising individual regional and federal action plans and targets can arise due to differences in regional and federal policies.

Countries outlined an impressive range of activities, although there was less mention of the transport sector compared to previous reports- however, it has be remembered that the EEWP requested that the September 2010 issue of the country report summary focused particularly

on transport. Activities in the buildings sector and industry were brought much more to the fore in September 2011 country reports.

Interest in energy management appears to be increasing. Support for combined heat and power seems to be as strong as ever. Country reports also point to ongoing efforts to incorporate energy efficiency measures into overall climate and energy strategies.

In spite of challenges or difficulties, the country reports overwhelmingly suggest a commitment to maintain or increase energy efficiency policy.