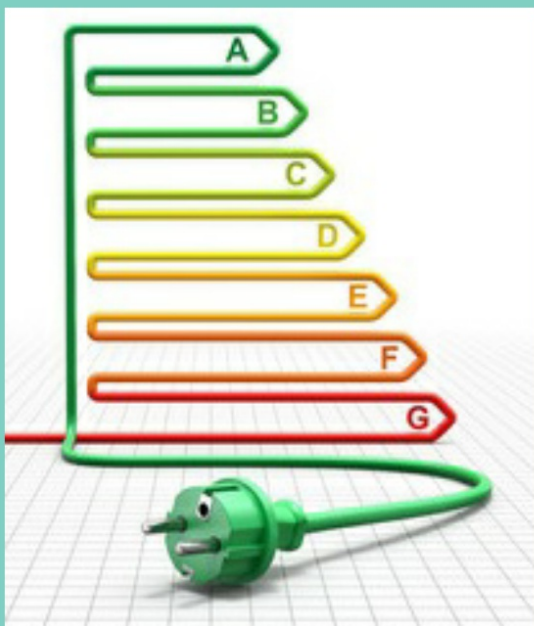




# LOW-COST ENERGY EFFICIENCY MEASURES FOR LOW-INCOME HOUSEHOLDS



**WHY** are these measures important?

**WHAT** kind of measures exist and what can they achieve?

**HOW** to roll out these measures through dedicated schemes and use EU funds to finance them?

# Background

The brochure was developed as part of the project 'Feasibility study to finance low-cost energy efficiency measures in low-income households from EU funds', funded by DG Energy of the European Commission (ENER/C3/2013-484).

The Commission has also published Specific guidelines for sub-metering of thermal energy in multi-unit buildings (implementation of Articles 9-11 of Directive 2012/27/EU on energy efficiency, discussing ways of assessing cost-effectiveness - see: [http://ec.europa.eu/energy/en/studies?field\\_associated\\_topic\\_tid=45](http://ec.europa.eu/energy/en/studies?field_associated_topic_tid=45))

The content of the brochure is based on the following sources:

- Analysis of 24 energy efficiency schemes in the EU (based on information available online)
- Study of EU funding sources that can be used to fund low-cost energy efficiency measures for vulnerable consumers
- Legal analysis of the Energy Efficiency Directive and the Energy Performance of Buildings Directive



# WHY

are low-cost energy efficiency measures for low-income households important?



## Energy poverty



In Europe, more than 1 in 10 citizens are unable to keep their home adequately warm. This can have a significant impact on their health or on their productivity levels at school or work.



People may not be able to heat their houses because of high energy prices, poor housing conditions or the inability to pay energy bills. These situations, referred to as 'energy poverty', affects a significant part of the European population.



Energy poverty can be alleviated through a variety of approaches, including low-cost energy efficiency measures for low-income households. Such measures are easy to implement and can directly target the most vulnerable consumers.

## Current context



The EU Energy Efficiency Directive recognises that energy efficiency can benefit vulnerable consumers. Several provisions provide opportunities for Member States to support the delivery of low-cost energy efficiency measures to vulnerable consumers, including through financial mechanisms.



Moreover, if certain conditions are met, improving energy efficiency in low-income households can help Member States reach energy efficiency targets, and can effectively complement more ambitious actions (e.g. more extensive building renovations), which remain necessary to reach the objectives of energy efficiency policy.



Less than one third of EU Member States have adopted targeted policies or clear definitions of energy poverty.



There is, thus, the potential to better address energy poverty through measures that also contribute to national energy efficiency targets and are in line with the broader EU energy policy. Furthermore, the uptake of energy efficiency measures and combating poverty can be supported by EU funds.

# WHY

are low-cost energy efficiency measures for low-income households important?



## Win-win solutions

A range of low-cost measures exists, which can be easily implemented to improve the energy situation of vulnerable consumers, both immediately and in the longer term. These measures provide cost savings and quality of life improvements to Europe's most vulnerable citizens and can complement more ambitious and costly improvements, which would generate even greater energy efficiency gains in the longer term.

1.

### Easy to implement

Quick installation: often a matter of hours.

Installation can be done by the occupants themselves.

No significant financial investment required from households.

2.

### Immediate effects

Cut energy bills and save energy shortly after installation:

Energy Saving Kits can save households €5-170 per year;

Advice / Information can save households €35-228 per year.

Improve temperature and comfort.

Improve health.

3.

### Wider community benefits

Job creation and a reduction in long-term unemployment (e.g. through training of unemployed people to deliver measures).

Contribution to broader energy efficiency goals and poverty alleviation through energy and financial savings.

Reduced CO<sub>2</sub> emissions and improved energy security at the national level due to reductions in overall energy consumption.



# WHAT

kinds of low-cost energy efficiency measures exist and how can they be delivered?



There are three main types of low-cost energy efficiency measures that can bring immediate energy and cost savings to vulnerable consumers as well as additional benefits to the wider community.

Even though these low-cost measures cannot replace deeper energy renovations, these measures can significantly contribute to energy efficiency improvements and bring about immediate benefits to their recipients.

## Advice and Information

These include measures providing households with advice and information about energy consumption, ways to save energy and how to reduce energy bills. This helps people understand why energy efficiency measures are necessary and beneficial and might motivate them to change their behaviour (e.g. by implementing simple changes such as optimising thermostat temperature).

Depending on the set-up of schemes, advice and information can be delivered by trained advisors, teachers or even social workers through house visits, phone calls or social media.



### Context

These measures can be implemented under all kinds of conditions, and are particularly suitable in cases where long-term effects are sought.

### Costs

The total cost of assisting a household can be between €50-790.

### Savings

These type of measures can result in €35-228 savings per household per year.

example

## Energy Ambassadors

### Location

Bulgaria, Denmark, Greece, Spain, France, Italy, Romania, Sweden, UK

### Period

2009 - 2011

### Budget

€930,972

### Beneficiaries

18,000 people

This scheme, co-funded by the EU Intelligent Energy Europe Programme, aimed to tackle energy poverty and to help vulnerable groups to better manage their water and energy consumption through the intervention of social workers.

Social workers were trained to include energy advice into their daily work and to show vulnerable households how, through simple actions, they might reduce their energy consumption significantly.

The scheme covered 300 social workers and reached out to 18,000 vulnerable consumers in total. It is estimated to have resulted in 4,500,000 kWh of total energy savings through changes in the behaviour of the served households.





# WHAT

kinds of low-cost energy efficiency measures exist and how can they be delivered?



## Energy efficiency services

Examples of energy efficiency services include draught-proofing of buildings, the optimisation of existing building technology systems, the re-commissioning of apartment blocks and installation of in-house displays and metering devices.



Photo: <https://www.flickr.com/photos/csb555/313634025>

### Context

These services are often provided by trained professionals who can install the measures. Customers can immediately benefit from improvements in the comfort and in-door temperature of their homes.

### Costs

The costs depend on the specific measure and service being provided e.g. draught-proofing can cost €63-363 per household, home energy monitors can cost €50-125.

### Savings

The savings also depend on the specific measure e.g. draught-proofing can save €31-69 per household per year, direct feedback and metering devices can deliver energy savings of 5-15% per household per year.

example

## Northern Exposure

<b>Location</b>	Northern Ireland, UK
<b>Period</b>	2010 - 2012
<b>Budget</b>	Unknown
<b>Beneficiaries</b>	60 households

This scheme aimed to reduce fuel poverty in North and West Belfast, while sustaining a community development approach to creating affordable warmth. The scheme implemented a multi-faceted programme of targeted low- and higher-cost actions and capacity building in partnership with local communities and a wide range of organisations.

Low-cost energy efficiency services delivered included draught-proofing, insulation of exposed pipes and metering. They were often combined with other measures such as wall insulation.

Following the scheme's implementation, the well-being of participants improved and fewer were classified as 'borderline depressed'. Fewer households also reported problems with the indoor environment, such as mould, condensation or bad air quality. The energy performance of the participating households also improved, in most cases by 2-20%, depending on the household and the measures installed.

Link: <http://www.nea.org.uk/northernireland/projects/northern-exposure/>

### Northern Exposure

Alleviating Fuel Poverty  
in North & West Belfast,  
Northern Ireland

# WHAT

kinds of low-cost energy efficiency measures exist and how can they be delivered?



## Devices and kits

Packages of low-cost energy efficiency equipment, devices and appliances, typically including low-energy lighting (e.g. LEDs), thermostatic valves, power saving devices, water-saving devices (e.g. water-efficient showerheads), monitoring devices, insulation of pipes, insulating film for windows and radiator foil.



Photo: <http://www.valveindustry.com/valve-news/>

<b>Context</b>	These measures are relevant when a specialised service cannot be provided, as they are easy to install by household occupants themselves, without the assistance of a technician.
<b>Costs</b>	One-off purchasing costs depend on the specific devices e.g. different kinds of low-energy light bulbs can cost €6-13 each and insulating film for windows can cost less than €85 per household.
<b>Savings</b>	The savings also depend on the specific measure e.g. low-energy lighting equipment can save €44 per household per year and insulating film for windows can reduce the heat loss by 30-50% per household per year.

example

### ACHIEVE

<b>Location</b>	Bulgaria, France, Germany, Slovenia, UK
<b>Period</b>	2011 - 2014
<b>Budget</b>	Around €44 per household
<b>Beneficiaries</b>	1,920 households

ACHIEVE identified households most vulnerable to fuel poverty and worked with them to implement suitable steps to reduce unnecessary energy costs.

Several visits were scheduled with the household: first, to diagnose water and energy consumption and habits and, again, to install the devices that were likely to generate the best energy and water savings.

The household also received a report about potential savings and costs based on information obtained during the first visit, together with some tips about energy and water saving.

On average, roughly 331 kWh of electricity and 592 kWh of heat energy were saved, translating into €91 of financial savings per household per year. In addition, the average water savings were 22 cubic metres, increasing the total financial savings to around €144 per households per year.

Link: <https://ec.europa.eu/energy/intelligent/projects/en/projects/achieve>





# HOW

to roll out low-cost energy efficiency measures through dedicated schemes?



The delivery of low-cost measures to the selected households can be supported by putting delivery schemes into place.

Schemes establish the criteria that define the low-income households targeted and the processes for granting support. They are managed by scheme owners (e.g. public authorities, NGOs or private sector organisations) who are also responsible for sourcing the funding necessary for the implementation of these schemes. Funding can come from local, national or EU funds, the scheme owners' internal funds or funds from partner organisations.

Schemes providing low-cost measures to low-income households can be implemented directly by scheme owners or through intermediaries, such as partner institutions or volunteers.

The implementation of schemes involves several steps: identification of target households (through self-referral or targeted selection), engagement of target households and delivery of the low-cost energy efficiency measures (by professionals, specially-trained volunteers or recipient households).

The following tips can help scheme owners design and implement schemes that roll out low-cost energy efficiency measures in low-income households.

## Scheme design and delivery



### 1. Involve key institutions

Partnering-up with other organisations can support scheme owners in successfully delivering low-cost energy efficiency measures and more efficiently reaching vulnerable consumers. Therefore, involve key institutions by:



#### **Establishing strong partnerships**

Work with partners that are trusted by the targeted households or that are in direct contact with them, such as social workers or medical professionals.



#### **Putting in place a well-defined framework**

This will clarify roles and responsibilities, ensure that partners stay committed, safeguard sufficient investments by the different organisations involved, and support the scheme owners with the overall coordination.



#### **Securing local community support**

Raise awareness of the benefits of the measures delivered to increase 'buy-in' among the targeted households.

# HOW to roll out low-cost energy efficiency measures through dedicated schemes?



example

## SHINE

<b>Location</b>	London, UK
<b>Period</b>	2010 - present
<b>Beneficiaries</b>	Over 9,200 referrals through 2015

SHINE is a multidisciplinary scheme, aiming to reduce excess winter deaths and hospital admissions of vulnerable people (e.g. people aged over 75 or with respiratory/cardiovascular diseases) by tackling fuel poverty as well as other physiological, social and environmental factors.



SHINE brings together a wide partnership of over 130 teams across 86 organisations. Although a number of organisations were initially reluctant to join the scheme, this was overcome by strongly emphasising the benefits for all the organisations involved. An important selling point was the possibility to simplify the referral process, resulting in more direct referrals and a reduced chance that households would get lost in the process.

Success factors for SHINE were getting the local health services on board, and the referral of individuals by medical professionals, based on their patients' health problems. Moreover, the multidisciplinary approach of the scheme helped raise awareness about energy poverty among the organisations involved, with the result that several of them now advocate for the inclusion of fuel poverty in the wider health agenda of the borough.

Link: <https://www.islington.gov.uk/environment/energy-services/shine>



## 2. Consider the wider policy context

When establishing schemes, it is important to link them to relevant energy efficiency and social policies at the national and local levels. This can mobilise additional political support and facilitate access to public sources of funding. Therefore, consider the wider policy context by:



### Ensuring and exploiting synergies

By linking the scheme to existing structures or policies, overlaps can be identified and avoided, and synergies exploited.



### Gaining political support

Linking schemes to existing policies or political priority areas may increase political buy-in, which can greatly contribute to the successful implementation of a scheme.



### Linking schemes with relevant public funding programmes

Public funding is usually linked to the achievement of key policy objectives, so linking schemes to policies can give access to public funding.

# HOW to roll out low-cost energy efficiency measures through dedicated schemes?



example

## WARM ZONES

<b>Location</b>	UK
<b>Period</b>	2002 - present
<b>Beneficiaries</b>	1 million fuel poverty assessment, 310,000 insulation measures (until 2011)

The aim of this scheme is to tackle fuel poverty and to improve the energy efficiency of the housing stock. Warm Zones adopted a coordinated street-by-street approach, working in close partnership with trusted local organisations.



The interaction with other policies has been critical for the success of Warm Zones. The scheme has built upon, and further optimised, different financing programmes as well as the delivery of energy efficiency measures from other energy efficiency and fuel poverty policies.

The success of the scheme was further enhanced by the fact that, in some of the implementation zones, it was able to secure political support by all parties. This support reduced any funding uncertainties and enabled the scheme to be promoted to prospective partners and beneficiaries confidently.

Link: <http://warmzones.co.uk/>



## 3. Seek novel financing approaches

Securing stable and long-term funding for the schemes can be challenging. Therefore, consider various funding sources when designing low-cost energy-efficiency schemes targeting vulnerable consumers, including EU funds (for details see the next part of this brochure), funds from partner organisations or funds that are available at (sub)national level.

### Search for novel funding sources



Search for novel funding sources - opportunities may exist outside local or national governments (e.g. EU funds) or within other sectors.

### Search for new approaches to reducing costs



Support by volunteers to deliver the energy efficiency measures can reduce implementation costs. However, limitations related to the availability and long-term involvement of volunteers are potential risks to consider.

example

## Compagnons Bâtisseurs

<b>Location</b>	France
<b>Period</b>	2009 - unknown
<b>Beneficiaries</b>	30 households

Compagnons Bâtisseurs, a network that has existed for over 50 years, aims to improve the living conditions of the most vulnerable people (including by addressing fuel poverty) through building improvements. The scheme helps individuals 'help' themselves, by teaching beneficiaries to carry out refurbishment and other improvement works in their households, often under the supervision of volunteer technicians formed by the scheme. The scheme, thus, delivers energy efficiency improvements, while also raising awareness about energy efficiency and offering professional training to participants. Volunteers are also trained to provide social support to beneficiaries.



As the scheme works with volunteers, costs are kept low. The volunteers, with only limited training, are able to provide energy efficiency improvements directly to the households selected. This illustrates how volunteers can easily be deployed in administrative or central co-ordinating roles with limited training, but limited longer-term commitment can also pose risks.

Link: <http://www.compagnonsbatisseurs.org/>



# HOW

to roll out low-cost energy efficiency measures through dedicated schemes?



## 4.

### Ensure there are in-house expertise and skills

Participating households need to be engaged in order for schemes to work. This requires a knowledgeable and confident scheme team. Therefore:

- **Provide training to improve staff's communication skills**  
Provide regular and targeted training opportunities, particularly for front-line staff and specially-trained energy efficiency advisors who are employed to deliver the various measures. Training should address communication issues and be supported by tailored guidance materials to help staff understand vulnerable consumers.
- **Ensure knowledge is up-to-date**  
Ensure that staff has up-to-date knowledge on installation practices and is aware of the existing levels of energy efficiency in the households participating in the scheme.
- **Follow up with the households**  
Installation by households themselves may be problematic and may require follow-up checks to ensure that measures are installed correctly.

example

### EC-LINC

<b>Location</b>	Austria, Belgium, Germany, Hungary, UK
<b>Period</b>	2011 - 2014
<b>Beneficiaries</b>	> 1,000 consultations in households

EC-LINC provided low-income households with tailored information and advice about energy and water savings. Low-cost devices such as low-energy lighting, switchable plug connectors, tap aerators and thermostatic radiator valves were provided free of charge.



One of the key lessons learned from the EC-LINC scheme is that it is beneficial to provide advisors with training in communication. This will provide them with the skills necessary to interact with vulnerable households and to encourage less motivated clients. It is particularly important to be able to communicate clearly with the households targeted, as this will facilitate their active engagement in the implementation of the measures provided.

Link: <http://www.ec-linc.info/>

## 5.

### Ensure successful delivery of the measures to the target households

The uptake of the measures delivered and the overall engagement of the households in the scheme also depend on how the measures are delivered. The following elements can support the successful delivery of measures to targeted households:

- **Use a 'no cost to the household' approach**  
Where possible, deliver the energy efficiency measures at no or very limited cost to the energy-poor households targeted.

# HOW

to roll out low-cost energy efficiency measures through dedicated schemes?



## **Communicate openly and clearly with the households**

Deliver the measures in a clear and simple way, while managing the expectations of the households. Where possible, favour face-to-face interaction. Communicate clearly any need for the occupants to share personal information or interact with official institutions.



## **Use a flexible approach for delivering the support**

Where possible, tailor the support provided to the needs of the households – for example, the regional context or local climate.



## **Involve community members**

Directly involve members of the community in the delivery of the measures. This can be particularly effective where target households are closely grouped together. Try to engage all household members.



## **Monitor and improve the scheme regularly**

Use project management tools to continually monitor the scheme, mitigate risks, and improve results. The effectiveness of the measures delivered can be enhanced by setting targets, following up and checking up on the households. This can also allow gathering data for the ongoing review of the scheme.



## **Consider if there are opportunities for wider benefits**

Where possible, ensure that the scheme can deliver wider energy and social benefits e.g. by training unemployed persons as energy advisors in the schemes.



## **Use a variety of marketing methods**

Use a variety of marketing methods and information tools and, where possible, use synergies with organisations that have direct contact with the households targeted (e.g. social services) to advertise the schemes.

example

## **FIESTA**

<b>Location</b>	Bulgaria, Croatia, Cyprus, Italy, Spain
<b>Period</b>	2014 - 2017
<b>Budget</b>	€2.9 million

This scheme aims to assist Southern European families with children to save energy at home, addressing both their energy consumption behaviour and their purchasing decisions. The scheme focuses on cooling and heating solutions.



Sharing knowledge about the benefits of energy efficiency has been key in empowering households to make energy savings and to have a positive impact on their future investment decisions. Moreover, engaging all household members increased the effectiveness and sustainability of measures.

Workshops were organised at schools, and children were encouraged to take home and implement the lessons they had learned, which in turn helped entrench knowledge and behaviour early in life, potentially resulting in more sustained behavioural change.

Link: <http://www.fiesta-audit.eu/en/>

# HOW

to roll out low-cost energy efficiency measures through dedicated schemes?



## 6.

### Consider the characteristics of the household and its occupants

Engagement in the scheme can be significantly influenced by the characteristics of the households targeted. When delivering low-cost energy efficiency measures, it helps to tailor the measures and delivery processes to the household types and to establish mechanisms for addressing emerging challenges, such as:



#### Multi-family buildings

Ensure agreement between the different households occupying the building is reached prior to implementing the measures.



#### Landlord-tenant relationships

Consider these relationships, which can have an impact on the level of engagement of the tenant or the landlord or their support for the implementation of the measures.



#### Language barriers

When targeting households for which language can be a barrier, ensure that there is in-house capacity or built-in flexibility in the scheme to deliver the measures in different languages.



#### Time constraints

Ensure the measures are delivered at times convenient for household members e.g. by arranging the visits in advance.

example

### Just Change

<b>Location</b>	Australia
<b>Period</b>	2008 - 2009
<b>Budget</b>	Around €8,000

Just Change was a pilot scheme targeted at low-income rental households in metropolitan Melbourne, with the goal of overcoming the specific barriers that prevent the adoption of energy efficiency measures in these households.



Tenants living in privately rented accommodation are often reluctant to take up energy efficiency measures due to concerns that rent charges may increase as a result of home improvements. The Just Change pilot in Australia directly addressed this issue through the implementation of a 12-month rent-freeze commitment to which landlords were asked to sign up.

Moreover, Just Change addressed the landlord-tenant relationship and ensured that both parties were on board by providing them with information showing that the scheme would benefit both.

example

### Ecoserveis

<b>Location</b>	Meridiana, Barcelona, Spain
<b>Period</b>	2007 - present
<b>Beneficiaries</b>	30 households and 100+ beneficiaries

The aim of this scheme is to inform immigrants in Meridiana about electricity and gas supply in Spain. This will help targeted beneficiaries understand energy bills, implement energy saving measures at home and overcome difficulties in paying energy bills.



This scheme in Meridiana, Barcelona, delivers a tailored service to the immigrant population. Ecoserveis is aware that the understanding of the concept of energy supply among its targeted beneficiaries is limited and has, therefore, adapted its service accordingly.

Language can be a substantial barrier to the dissemination of information and delivery of measures. The scheme, therefore, relies on staff with specific language skills in order to communicate with the target households effectively.



# HOW

can EU funds be used to finance low-cost energy efficiency measures?



Low-cost energy efficiency measures that are delivered to low-income households directly contribute to EU energy objectives, as well as to policies related to climate, welfare and health. As a result, they are, in general, eligible for support from EU funds, such as the European Structural and Investment Funds (ESIF) and the Horizon 2020 programme.

This section provides advice to policy makers, Managing Authorities and scheme owners about how EU funds can be used to finance low-cost energy efficiency measures.

## European Structural and Investment Funds (ESIF)

The ESIF represent a major share of the EU budget and support a wide range of policy objectives and activities across the EU, including in energy and social affairs. Three of the five funds are most likely to offer support for low-cost energy efficiency measures in low-income households:

### European Regional Development Fund (ERDF) & Cohesion Fund (CF)

Total budget 2014-2020: Around EUR 196.3 billion (ERDF) and EUR 63.4 billion (CF).

Types of support: Actions that support job creation, business competitiveness, economic growth, sustainable development and improve citizens' quality of life, with the bulk of the funding being concentrated on less developed Member States and regions in order to reduce the economic, social and territorial disparities that still exist in the EU.

### European Social Fund (ESF)

Total budget 2014-2020: Around EUR 86.4 billion.

Types of support: Actions that support investment in human capital, with a focus on improving employment and education opportunities across the EU, promoting social inclusion and combating poverty.

Overall, these funds focus on 11 thematic objectives that reflect the wider EU policy agenda. The two most relevant objectives for supporting low-cost energy efficiency measures in low-income households are:

- Thematic objective 4: Supporting the shift towards a low-carbon economy – targets various actions including energy efficiency improvements in the housing sector;
- Thematic objective 9: Promoting social inclusion, combating poverty and any discrimination – targets various actions for reducing poverty and the risk of poverty.

The funds are jointly managed by the European Commission and so-called 'Managing Authorities' in the Member States. The Managing Authorities develop strategic documents (Operational Programmes - OPs), which specify priorities under each of the selected thematic objectives and indicate the amounts of funding available at the national or regional level.

## Horizon 2020

Horizon 2020 is the European Union's funding programme for research in all areas of science and innovation. The programme is structured around three overarching pillars and seven 'societal challenges'. One of these challenges is 'secure, clean and efficient energy', which is very relevant to the scope of low-cost energy efficiency measures.

Horizon 2020 is managed centrally by the European Commission, which launches specific 'calls for proposals' each year. Low-cost energy efficiency measures for low-income households need to meet the requirements of the specific calls in order to be eligible for funding. Moreover, they should generally be in line with the fund's innovation focus, which may require tailoring them to the specific objectives of the calls.

# HOW

can EU funds be used to finance low-cost energy efficiency measures?



## Tips for POLICY MAKERS and MANAGING AUTHORITIES

Low-cost energy efficiency measures can contribute to many EU objectives and may address important problems faced by local communities. They can offer policy makers and Managing Authorities a great way to ensure that their EU-funded programmes tackle these issues effectively.

The following are some tips to ensure programmes have the best possible chance of supporting these schemes.



### Support funding opportunities

Facilitate, or at least do not restrict, funding for schemes supporting low-cost energy efficiency measures in low-income households when implementing the ESIF Operational Programmes (to the extent that this funding would fall under the scope of the specific OP) or the Horizon 2020 multi-annual work programmes.

Most of the ESIF Operational Programmes as well as the multi-annual Horizon 2020 work programmes have broad objectives and are likely to allow support for low-cost energy efficiency measures. So, the eligibility of such schemes depends upon how the authorities responsible for managing the programmes implement and apply the procedures for granting support. It is important, therefore, that those responsible understand the potential these schemes have to both meet broad policy objectives and solve problems at the community level.

- Ensure that the current ESIF Operational Programmes as well as the multi-annual Horizon 2020 work programmes are implemented with a view to enabling access to funds for schemes delivering low-cost energy efficiency measures to vulnerable consumers.
- Ensure, where relevant, that eligibility criteria and performance indicators for calls for proposals on energy efficiency and social topics do not unduly restrict the possibilities for delivering low-cost energy efficiency measures to low-income households or limit scheme owners' access to funding.



### Inform and train

Inform and train staff members about the opportunities and benefits of delivering low-cost energy efficiency measures to vulnerable consumers.

An important pre-condition for successfully implementing the following recommendations is ensuring that staff members, in the various Managing Authorities across the EU understand the benefits and opportunities created by schemes that provide vulnerable consumers with low-cost energy efficiency measures.

- Train staff to recognise these types of schemes among the applications for funding and their contribution to the funds' energy and social objectives, as well as other related policy objectives.
- Use these materials as a start!

# HOW

can EU funds be used to finance low-cost energy efficiency measures?



## Provide information

Communicate the possibilities for ESIF and Horizon 2020 funding to likely energy efficiency scheme owners.

In order to facilitate the receipt of relevant and eligible applications for schemes implementing energy efficiency measures in low-income households:

- Ensure that information about funding opportunities is accessible to potential scheme owners and fund beneficiaries e.g. by developing dedicated communication tools and documents.
- Maintain up-to-date information on the relevant information portals and help desks and, where possible, publicise the availability of funding opportunities in a targeted manner to likely owners of energy efficiency schemes focused on vulnerable consumers.



## Provide guidance

Provide likely scheme owners (i.e. potential fund beneficiaries) with technical assistance, guidance and support in preparing eligible applications and, when relevant, in implementing the energy efficiency schemes.

- Develop and ensure that the necessary capacity and tools for providing help, technical assistance and guidance to energy efficiency scheme owners are in place. Provide staff with specialised training where necessary.
- When possible, provide assistance throughout the period during which the scheme receives EU funding.



# HOW

can EU funds be used to finance low-cost energy efficiency measures?



## Tips for SCHEME OWNERS

Those who are looking to develop schemes to deliver low-cost energy efficiency measures should make sure to check what opportunities are available to obtain funding from EU funds. The following tips explain how to do this.



### Explore opportunities

Find out what EU funding opportunities exist in your geographical and/or thematic area.

Find out who the Managing Authorities of the ESIF are in your country (the following websites can be a good starting point to find this information: [http://ec.europa.eu/regional\\_policy/en/atlas/managing-authorities/](http://ec.europa.eu/regional_policy/en/atlas/managing-authorities/) or <http://ec.europa.eu/esf/main.jsp?catId=45&langId=en>).

Look into the ESIF's objectives and Operational Programmes by consulting the relevant Managing Authorities in your area or explore the Horizon 2020 calls for proposals available on the Horizon 2020 Participant Portal.

### example

## Identifying opportunities within the Operational Programmes of the ERDF and CF

The ERDF and CF can finance 'hard measures', including the delivery of energy efficiency measures in buildings and housing. For example:

- The Bulgarian Operational Programme, focusing on the low-carbon economy, includes the following priority: 'energy efficiency measures in public and residential buildings'. While this is fairly broadly defined, low-cost energy efficiency measures may be eligible for funding, especially where the benefits of the schemes proposed are clearly presented.
- In the Rhone-Alpes region in France, a relevant priority under which low-cost energy efficiency schemes could be funded is to 'Enhance renewable energy production, energy efficiency in housing and tertiary buildings and sustainable multimodal mobility'.

### example

## Identifying opportunities within the Operational Programmes of the ESF

Energy efficiency schemes with clear social benefits and objectives can be eligible for funding from the European Social Fund. For example:

- In Romania, the national Operational Programme on social inclusion sets out a specific objective on 'jobs for all' and focuses on skill development among the long-term unemployed. An example of a scheme that could be proposed under this objective is one that delivers energy efficiency services through specially trained advisors, who will be recruited from among long-term unemployed people.

A concrete example of how long-term unemployed people could be trained to deliver low-cost energy measures is shown on the next page.

# HOW

can EU funds be used to finance low-cost energy efficiency measures?



example

## Stromspar-Check

<b>Location</b>	Germany
<b>Period</b>	2008 - present
<b>Budget</b>	Devices: €68/household; Household check: €300
<b>Beneficiaries</b>	By end 2014: 157,244 households
<b>Funding</b>	ESF (in the period 2007-2013)

This scheme was initiated to help low-income households save energy and water costs and reduce their carbon emissions by providing free energy audits and energy saving devices. In addition, long-term unemployed people were trained as "Energy Efficiency-Checkers".



The implementation of the Stromspar-Check scheme included the training of long-term unemployed people as energy auditors or advisors to provide different energy efficiency measures to the households targeted. Until now, more than 4,000 "Energy-Efficiency Checkers" have been trained and have, subsequently, worked in the programme. The scheme has, therefore, helped many unemployed people to reintegrate into the job market.

Link: <http://www.stromspar-check.de/>



## 2. Seek support and guidance

Seek assistance during the preparation phase of a fund application.



Technical support, guidance or other types of assistance can be extremely helpful when determining whether a scheme is eligible for support or preparing the funding application. Therefore, check the available opportunities for support and assistance by consulting the relevant Managing Authorities of ESIF in your area or the National Contact Points for Horizon 2020.



Where relevant, seek to extend this support and/or assistance to the implementation of the schemes.



## 3. Prepare an application

Develop eligible funding applications and design successful energy efficiency measures.

The keys to a successful funding application are meeting the eligibility requirements and selection criteria and developing a feasible, workable project plan:



Check that the proposal meets all eligibility requirements and selection criteria in advance – and then double-check them during the preparation of the application.



Be sure to clearly explain how the scheme proposed contributes to the funding objectives (e.g. to low-carbon economy by delivering energy savings) or how the scheme can foster social inclusion by creating employment opportunities for marginalised members of society.



Be sure that the scheme is practical and feasible and likely to meet its objectives. Ensure that the underlying success factors for the scheme are in place. The application can further be enhanced, for instance, with comprehensive risk management strategies for any anticipated risks.







The brochure has been developed by Milieu Ltd and Ricardo Energy and Environment, contract holders of the study.

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