

Target Group Analysis



Source: <http://www.target-a-market.co.uk/wp-content/uploads/2014/06/target-markets.jpg>

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EXECUTIVE SUMMARY

40% of all energy consumption and 36% of CO₂ emissions in the European Union arise in private and public buildings. Thus, major advancements have to be made in this sector to reach the EU's climate and energy targets. Energy-efficient buildings will also contribute to the vision of secure, affordable and climate-friendly energy for citizens and businesses as well as generating additional societal, environmental and economic benefits.

To strengthen policies that promote retrofitting and modernizing existing buildings, the EU has adopted the **Directive 2012/27/EU on Energy Efficiency (EED)**. It requires EU Member States and candidate countries to establish a long-term strategy for mobilizing investment in the renovation of the national building stock by 30 April 2014, and every 3 years thereafter. These action plans are an integral part of a country's **National Energy Efficiency Action Plans**. As of May 2015, 27 EU Member States have adhered to the requirement of Article 4, EED, and submitted their national building renovation strategy, albeit most did not meet the deadline in April 2014 and some submitted their strategies as late as March 2015.

However, the requirements to prepare these renovation strategies appear to have overburdened most EU Member States. According to an analysis conducted by the Buildings Performance Institute Europe, in 2015 only five countries had adequately complied with the five core elements described in Article 4 of the EED. To date, no renovation strategy has been submitted that can count as a 'best practice' and provide orientation for other countries. A recent study published by JRC (March 2016) using the same methodology and scoring system as BPIE, provides a rosier picture, with 23 countries meeting the minimum requirements¹ (mainly due to the fact that the "passing mark" was lower than the one used by BPIE).

The project EmBuild (Empower public authorities to establish a long-term strategy for mobilizing investment in the energy efficient renovation of the building stock) is designed to empower public authorities at local, regional and national level, to formulate renovation strategies for the building sector that foster deep renovation and facilitate the acceleration of the renovation. Action is foreseen in selected municipalities and local government units in Germany, Serbia, Croatia, Slovenia, Bulgaria and Romania. The project however does not intend to stop here but intends to reach a much broader audience by applying a range of communication and dissemination methods. This document describes primary and secondary audiences of EmBuild, how and when they will be contacted and what kind of reaction is expected from them. It will be integrated into the project's communication strategy.

¹ JRC, 2016. "Synthesis Report on the assessment of Member States' building renovation strategies"

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1 What does EmBuild want to accomplish?

The ambitious energy and climate goals of the European Union can only be achieved when its members prepare and implement ambitious strategies, backed up by ambitious policies and programmes. One of these requirements is preparing long-term strategies for mobilizing investment in the renovation of the national building stock. EU members prepared such strategies for the first time in 2014; Energy community countries will follow in 2017. An analysis of strategies submitted in 2014/15 however showed that EU Member countries still need to acquire more experience for preparing not only strategies that comply with the basic requirements of the Energy Efficiency Directive, but more importantly, strategies that deliver on the stated objective of stimulating cost-effective deep renovations of buildings.

EmBuild is designed to highlight the good solutions and facilitate a vivid **exchange between public authorities in charge of energy efficiency measures** (in particular concerning the building sector). The aim of the project is to facilitate greater compliance with Articles 4 and 5 of the EED, namely:

- to formulate and implement sustainable and ambitious renovation strategies for the building sector; and
- to stimulate an increased rate of energy efficient renovation of central government buildings to provide a learning laboratory and kick-start the market for the whole sector.

The project will increase the capacity of public officers in selected municipalities and towns to:

- collect the necessary data and information to prepare an ambitious, sustainable and realistic renovation strategy for public buildings;
- analyze data and identify cost-effective approaches to renovations;
- analyze policies and measures to stimulate cost-effective deep renovations of buildings;
- guide (public) investment decisions and facilitate private sector involvement; and
- measure and communicate expected energy savings and wider societal benefits of retrofitting and modernizing the building sector².

It is further expected that **the knowledge collected and generated during project implementation, and the results and products of the project, are made available and disseminated to stakeholders and to the widest possible relevant audience to maximize the project scope and impact.**

The target group analysis discusses how the different target groups of EmBuild could benefit from the project's work and when and how these groups should be contacted by the project. This analysis will be integrated into EmBuild's communication strategy (D7.2).

² A separate document provide details how the project intends to reach out to the predefined policy officers at municipal and town level (D2.2 Communication Plan)

2 What are the target groups of EmBuild?

The main target groups for dissemination activities include a primary target group, namely national level ministries responsible for energy, their sub-ordinate public or (semi-)private bodies such as Energy Agencies, funds or research institutions, as well as a secondary target group, such as local and regional governments responsible for developing and implementing energy strategies within their jurisdiction.

These target audiences are on the following levels:

1. EU and international level (associations and energy efficiency fora)
2. National level authorities, associations and agencies
3. Regional actors
4. Local actors

The process of target group identification will start immediately in Month 1 of the project, using the consortium's prior contacts and the support of local partners. It will build on Task 2.1. Regular update of the target audience will take place during the project to capture the changing stakeholder landscape.

2.1 EU and international level (associations and energy efficiency fora)

Target groups at European level include the European Union, the Energy Community Secretariat (ECS) and all bodies and institutions that work at a European level and aim to support the implementation of the Energy Efficiency Directive (EED) and/or the Energy Performance of Buildings Directive (EPBD). EmBuild is directly contributing to EED, Article 4, namely the obligation of all EU Member States to prepare in 3-year intervals renovation strategies for the building sector.

What kind of insights could be generated by EmBuild for this target group?

EU-level actors and energy community countries are interested to learn to what extent EU legislation is being implemented at national level, what challenges are faced in the process and how these were overcome. In EU and EC internal networks, examples of national renovation strategy preparation and implementation will contribute to a debate on how EED shall be amended (the revision is planned in 2016) and what kind of support material is needed to ensure compliance with article 4 and 5 of the EED.

The overall (bottom-up) approach of EmBuild could be of interest to this group; conferences and other international events will be used to discuss this approach and the results it generated.

Of particular importance to this target group is how EmBuild is contributing to the general pool of knowledge regarding renovation strategies for the building sector. This implies close interaction with EU initiatives and projects with similar aims. Work package 4 may be of particular relevance to this target group as it includes country studies on the barriers of renovation. These studies follow a policy template developed by BPIE that could be inspiring to other actors; EU and ECS may want to consider promoting this template actively as a tool for methodologically assess barriers to renovation.

The study on wider benefits which will be prepared within work package 6 of EmBuild is of general interest and goes beyond the specific project needs. Wide dissemination of the findings of this WP, including a webinar, is thus foreseen.

What are the occasions in the project when communication to this target group is necessary?

EU and international actors will receive regular information about the project through the various networks that EmBuild partners manage or contribute to. Specific information will be sent to this target group if, for instance:

- Activities by EmBuild that represent a good practice that should be made known at EU-level
- If recommendations could be used when formulating new regulation or when amending existing legislation
- When tools and actions could be accommodated in the EU's guidelines and support for implementing Article 4 of EED
- When studies and analyses of more general relevance are produced by the project

Concrete examples of deliverables of potential interest to this target group may include

- D4.1 Report on barriers to deep renovation for each participating country
- D6.1 Study on energy savings and wider benefits of deep renovation measures
- D7.5 Final report on dissemination activities

2.2 National authorities, associations and agencies

Target groups at national level are those entities that are in charge of ensuring national compliance with EU legislation. With regard to article 4, EED, they include Ministries (e.g. Ministry of Energy, Environment, Economics etc.) and National Energy Agencies where they exist.

What kind of insights could be generated by EmBuild for this target group?

National level actors need to comply with EU regulations and prepare a renovation strategy as indicated in Article 4, EED. Already during the preparation of such a strategy, involvement by sub-national level actors would be required. In practice however, cooperation between the administrative levels tends to be underdeveloped in most countries. This may cause a challenge during implementation, since the expected impact of the strategy largely depends on the actions conducted at sub-national level. EmBuild follows a bottom-up approach by focusing its action at municipal and regional level. The good practices generated at these levels and the processes followed will be disseminated to other sub-national entities and at national level, where it should also influence the national renovation strategy for the building sector.

What are the occasions in the project when communication to this target group is necessary?

Actors at national level will receive regular updates from EmBuild partners on the tools prepared during the project and the results generated at local level. Of direct relevance to this group will be the country-by-country analyses of the barriers to renovation. These general country reports will be enriched by local information and will be used to prepare local renovation strategies. National actors are free to use these preliminary studies as inputs to their national strategies.

In addition to the tools generated, national actors may be interested to learn how EmBuild engaged local and regional actors in a dialogue on advancing renovation efforts of their building stock.

National level actors will receive information from EmBuild in the following cases:

- Good practices at local level (both process and outcome), which can be replicated nationwide are generated by the project
- Examples of how the national level strategy can be implemented at a sub-national level
- Examples of how action at sub-national level could contribute to an improved formulation and implementation of the national renovation strategy
- When studies and analyses prepared by the project are of general relevance to the entire country

Concrete examples of deliverables of potential interest to this target group may include:

- D2.6 Report of national consultation
- D4.1 Report on barriers to deep renovation for each participating country
- D4.3 Renovation strategies

- D5.1 Scenario report on how to improve investment climate at local level
- D5.3 Report of national roundtable on stakeholder involvement
- D6.1 Study on energy savings and wider benefits of deep renovation measures

2.3 Regional actors

This group refers to organizations and institutions, such as regional energy agencies, that provide services and support to municipalities and towns on questions related to energy efficiency, including retrofitting and renovation of buildings.

What kind of insights could be generated by EmBuild for this target group?

EmBuild will generate tools that help local level actors to prepare an ambitious but realistic renovation strategy for the building sector. Apart from a time-efficient method of prioritizing buildings for renovation and tools for conducting a deep analysis for these priority building, the foreseen process will also touch upon the wider benefits of renovations that go beyond energy saving and will promote investment through awareness raising activities. Regional actors could learn from the experience made by EmBuild and use the tools and processes to reach out to their constituency.

What are the occasions in the project when communication to this target group is necessary?

Regional actors will receive regular updates of project implementation. In general, this target group will be approached in the following instances:

- When EmBuild prepares and applies tools and methods which could be used by regional actors when interacting with their constituency
- Good practices (process and outcome) of renovation strategies that could stimulate similar action elsewhere
- Good examples of adopting a broad approach to renovation strategies that go beyond energy efficiency measures only and include wider benefits
- Good examples of how participatory approaches can be stimulated
- Good examples of promoting renovation of buildings to private investors

Concrete examples of deliverables of potential interest to this target group may include

- D3.1 Questionnaire for preliminary analysis of the building stock
- D3.2 Catalogue of low- and no-cost measures
- D3.3 Webinar for WP3
- D3.4 Standardized report for detailed analysis of buildings
- D3.5 Training package
- D4.2 Template for public sector renovation strategies
- D5.2 Guide to raising awareness
- D5.4 Recommendations for improving investment climate at local level
- D6.3 Technical guide on methodologies
- D6.4 Webinar for WP6

2.4 Local actors

The process described in work package 3 of EmBuild (Cost effective approaches to renovations) is directly applicable to local actors throughout Europe. EmBuild suggests a simple two-step approach: a preliminary analysis of the building stock based on basic and easily accessible data to identify the buildings with the highest potential for renovation activities. The second step will be a detailed analysis of these priority buildings. EmBuild will help local officers calculate the cost and benefits of deep renovation of buildings

and will complement these with low and no-cost measures that could be installed without major renovation activities. The catalogue of these measures – adapted to national contexts by EmBuild’s partners - will be of direct interest to local actors. The same holds for the 2-step process and the experience made by the focus municipalities and towns. EmBuild thus will ensure that local actors will be informed about the experience of target municipalities. In addition, a webinar will be offered to allow local authorities of non-focus municipalities to get in direct contact with the project.

WP4 on policies and measures to stimulate cost-effective renovations of buildings increases the capacity of local actors to identify (i) barriers to deep renovations; and (ii) actions to make the local market for renovation of public buildings more attractive. The template suggested by WP4 could be used by countries not covered by EmBuild and municipalities and towns throughout Europe.

Work package 5 deals with improving the investment climate at local level. This includes methods for attracting financial resources to finance the renovation strategies as well as processes for improving intra-municipality coordination among stakeholders.

Work package 6 deals with highlighting economic, environmental and social impacts that are generated along with energy efficiency results when renovating buildings. Those are often forgotten and difficult to measure. The methods applied by WP6 will be communicate widely

Concretely, information will be send when the following deliverables are ready:

- D2.6 Report of national consultation
- D2.7 Comprehensive report
- D3.1 Questionnaire for preliminary analysis of the building stock
- D3.2 Catalogue of low- and no-cost measures
- D3.3 Webinar for WP3
- D3.4 Standardized report for detailed analysis of buildings
- D3.5 Training package
- D4.1 Report on barriers to deep renovation for each participating country
- D4.2 Template for public sector renovation strategies
- D4.3 Renovation strategies
- D5.1 Scenario report on how to improve investment climate at local level
- D5.2 Guide to raising awareness
- D5.3 Report of national roundtable on stakeholder involvement
- D5.4 Recommendations for improving investment climate at local level
- D6.1 Study on energy savings and wider benefits of deep renovation measures
- D6.2 Communication piece
- D6.3 Technical guide on methodologies
- D6.4 Webinar for WP6