

## HERON: Forward-looking socio-economic research on Energy Efficiency in EU countries

### Fact sheet – March 2017

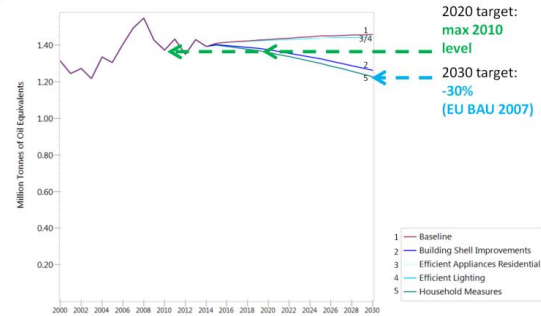


As project, HERON aims at facilitating policy makers of multi-level governance in EU, to develop and monitor energy efficiency policies in building and transport sectors, through forward-looking socio-economic research in seven EU and one candidate country.

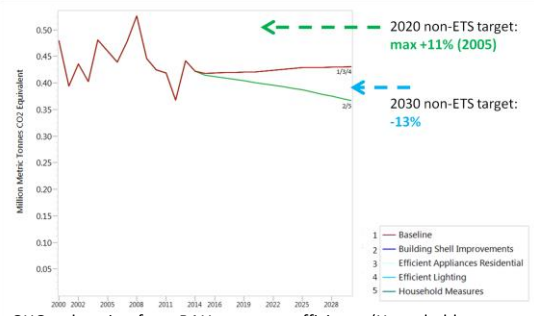
Type of barrier	Cross-cutting barriers (both in buildings and transport sector)	Main policy instruments to tackle the barrier
Social	Increasing consumer wellness	Awareness raising campaigns/ smart technologies and energy efficient cars
	Willingness to pay for more energy efficient alternatives	Financial support from the government / subsidies and tax reliefs for people with the minimum wage
Cultural	Energy usage habits	Awareness raising campaigns/ Free of charge courses and information workshops for citizens
	Energy intensity in relation to Estonian cold climate	Trainings for engineers, architects and local municipalities in order to build more energy efficient houses and technologies/ energy efficient cars
Economic	Size of the country and low population density	Financial support from the government/ Awareness raising campaigns/ Increase the capacity of educated professionals more familiar with energy efficient technologies and construction techniques
	Dependence on private investment	Financial support from the government / subsidies and tax reliefs
	Settlements structure (houses/apartments in low density areas)	Integration of spatial and transport planning, planning new developments close to efficient public transport / Improving rail service
Educational	Lack of appropriate knowledge among public and low awareness	Awareness raising campaigns/ Energy labeling of cars and buildings
	Lack of relevant national schemes	A comprehensive overview and analysis of relevant national schemes/ new analysis and schemes from teams of experts and regular updates
	Lack of highly qualified specialists	Trainings for specialist and local-municipalities / Implement relevant changes in education system
Institutional	Difficulties in finding common agreements between different administrative levels, and stakeholders (e.g. MEAC and the Ministry of the Environment)	Development of governmental think tanks and change makers teams in order to improve and push for the development of regulatory system.
	Lack of co-operation between local municipalities	Strengthen co-operation and networking/information events between different local municipalities
	Operational overlap and lack of clarity	Improve the regulatory system and strengthen communication between different organizations

# SCENARIO PROJECTIONS

ESTONIA

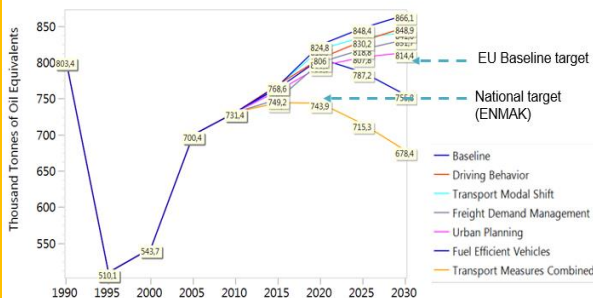


Energy usage reduction from BAU to energy efficiency (Household Measures) scenario in the Estonian buildings sector

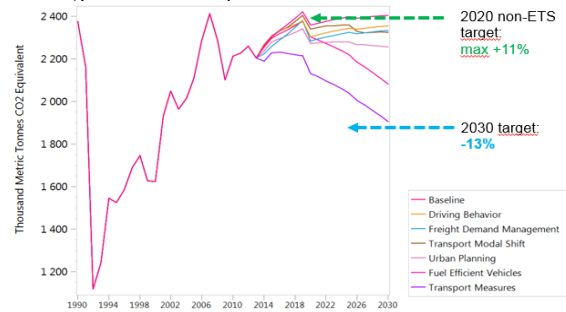


GHG reduction from BAU to energy efficiency (Household Measures) scenario in the Estonian buildings sector

The LEAP scenario building results of 2000-2030, show that without additional policy measures, the 2020 energy efficiency target (set by Estonian National Energy Development Plan 2030+) would not be achieved with the BAU scenario. Regarding the GHGs, the EU non-ETS 2020 target would be achieved under both BAU and energy efficiency scenario. That is because the EU non-ETS 2020 target accounts with rather early figures of 2005 and also because the baseline scenario drawn up hereof, considers the already adopted and effective policy legislations, such as the construction of nearly-zero energy houses from 2021 onward. However, in order to achieve the EU 2030 energy efficiency and EU 2030 non-ETS GHG target, additional policy instruments would need to be implemented. The Household Measures energy efficiency scenario composed hereof, meets those targets only if 40% of the single- and 50% of the existing multi-family houses would get renovated by 2030.



Energy usage reduction from BAU to energy efficiency (Transport Measures) scenario in the Estonian transport sector



GHG reduction from BAU to energy efficiency (Transport Measures) scenario in the Estonian transport sector

Concerning the GHG trends, Estonian transport sector is likely to reach the EU non-ETS target by 2020 with current measures (see figure above to the right), but 2030 targets are challenging and need concrete action in all transport policy areas, especially addressing the fuel efficiency of new cars and integrating spatial planning with transport to reduce the need for car use. National and EU energy efficiency targets are no as challenging as GHG reduction targets, however current energy demand trends in transport sector exceed both National and EU baseline targets for 2020 and 2030.

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