

Development of national action plans

Experience and planned actions in Bulgaria

CEECAP meeting, March 7, 2007
Warsaw

[Contents]

- Definition of status quo – data collection
- Stakeholder analysis
- Identification of barriers
- Identification of possible actions
- Stakeholder consultations
- Selection of actions

[Data collection issues]

Main target groups

- Policy makers
- State inspectorate and test facilities
- Market chain
 - Manufacturers
 - Importers/distributors
 - Retailers
 - Buyers
 - Products
- Other general info related to the energy sector in the country

[Policy Makers]

- What is the legal framework in the country regarding EU labelling and MEPS regulations?
- Barriers to the regulation implementation
- Which institutions are involved in the implementation scheme (including verification & enforcement)?
- What are the financial support policies under consideration?
- General status of compliances and forecasted milestones

[State inspectorate]

- Existing procedures for compliance checking of products and manufacturers declarations
 - Who does the verification? Human and financial resources devoted to this task
 - Legal actions against non-compliance
 - Cooperation with market players

[Test Procedures and Labs]

- What are the ISO or EN test standards for appliances already transposed in the country standards? For other kinds of appliance testing (for security, compliance to electrical code)?
- What types of appliances can be tested?
- What is the cost for a typical test?
- Nationally or regionally recognised laboratory?
- Does it have some type of accreditation?

[Market Chain]

- Understanding what is sold to whom, in which proportion
 - Who are the intermediaries between manufacturers and end-users?
 - What is their position in the market (market share)?
 - Who are the leading operators, who can introduce change?
 - Who might be our allies for energy efficiency?

[Products]

- Understanding the market
 - Number of products sold for each product group (fridges, air conditioners, etc.), differentiating:
 - Sub-groups, according to the categories identified in the EU label directives
 - Energy label classes
 - Sales per segment of the market, differentiating:
 - Brand / manufacturer
 - Outlet channel (small specialised stores, large specialised stores, super/hypermarkets, department stores, etc.)

[Products]

- Understanding sales
 - Product lifetime (real vs. manufacturer estimates)?
 - What are the national consumer trends and preferences?
 - What are the most important criteria when selecting products (for both retailers & consumers)?
 - Price levels vs label categories and efficiency?

[Manufacturers]

- Local and foreign manufacturers
 - Who are they? Integrated manufacturers or assemblers?
 - Part of large international groups or only national ownership?
 - What are their production facilities and annual output?
 - Importance on the market, advantages and weaknesses, support from national authorities, likely future plans and market trajectory
 - Attitude towards S&L programme

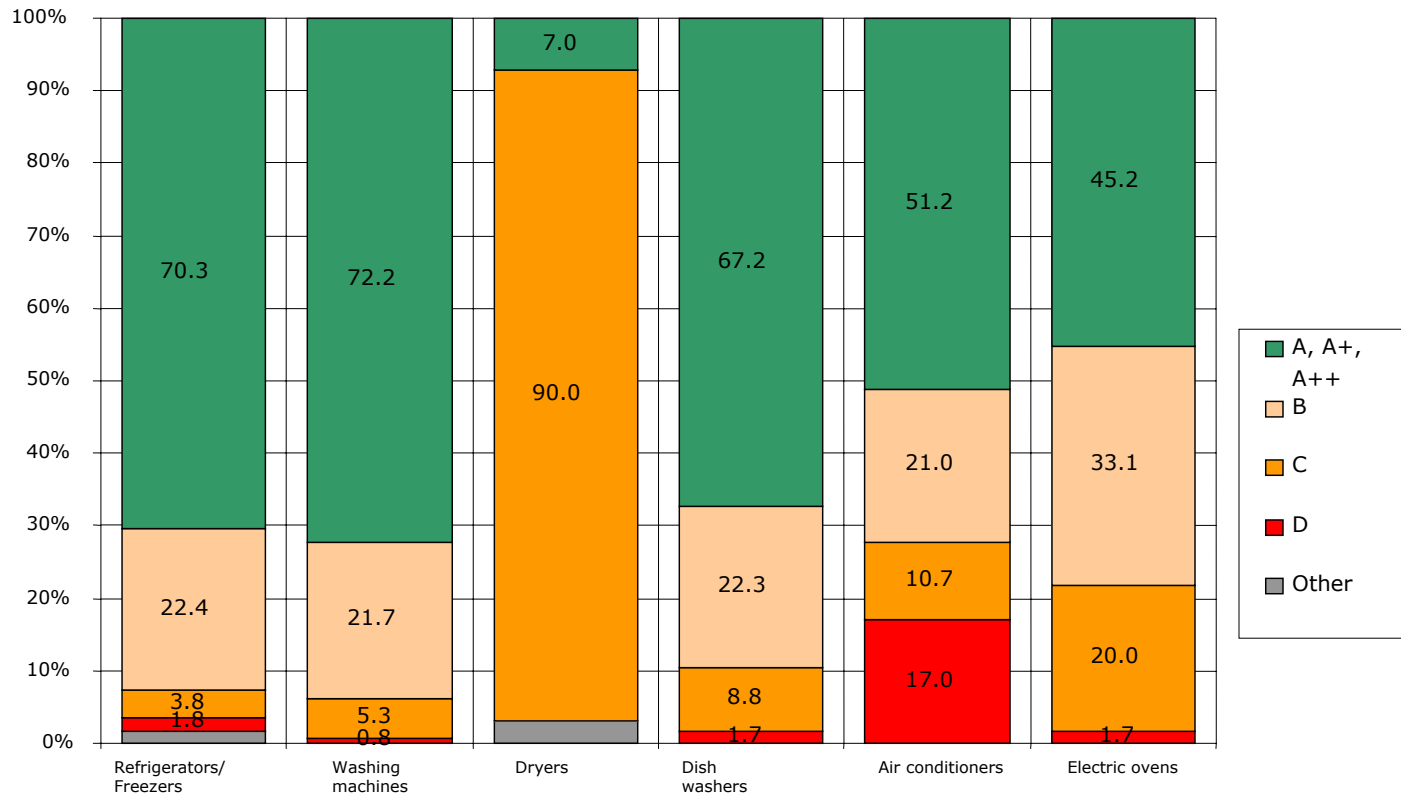
[Retailers]

- Understanding the differences between retailers
 - Types of retailers, market shares, general organisation
 - Size and number of shops, branding policy, what do they compete on?
- Understanding their knowledge regarding the energy label
 - Consultation by institutions, rate of compliance
- Understanding the business
 - How are the appliances selected and priced?
 - How is publicity organised?
- Salesmen
 - Understanding their role, status, profile, education, turnover, wages
- Attitude towards S&L programme

[Buyers]

- Understanding who are the key buyers
 - Those who are large or influential enough
 - Are they informed, what are their selection criteria, what are their motivations?
- Understanding the buying process of individual buyers
 - Why do they buy, what are the selection criteria, the general sensibility to environment protection

Results from market survey



[Baseline establishment]

- What is the current stock of appliances in the country?
 - Number of dwellings
 - Saturation rate by equipment
 - Historical trends and projection
- What is the current efficiency of the stock?
 - End usage information
 - Equipment efficiency information

[Background information]

- Understanding the context of launching a successful programme
 - Perception of energy & energy efficiency over time, electricity prices, average salary
 - Existing promotion schemes for energy efficiency
 - Position of utilities
 - Potential programme carrier

[Stakeholder analysis]

- Institutional stakeholders
 - Government institutions
 - Trade unions, industry associations
 - Test labs
 - Civil sector, consumer & environmental NGOs
- Position, role and possible involvement
- Attitude towards national S&L programme

[Stakeholder analysis]

- Market stakeholders
 - Manufacturers
 - Retailers
 - Large buyers
 - Civil sector, consumer & environmental NGOs
- Position and market share
- Attitude towards labels and national programme
- Options to respond and/or possible involvement

[Barriers identified]

- Low awareness at decision makers level on the benefits of appliance energy efficiency
- Lack of efficient procedures for compliance checking of retailers
- Lack of procedure for checking energy efficiency class
- Lack of capacity in the government unit responsible for compliance checking
- Insufficient financial resources in the unit responsible for compliance checking
- No test laboratories present in the country

[Barriers identified - 2]

- No cooperation between government and market players
- Not enough experience on informing consumers
- No cooperation with industrial associations, retailers, consumer NGOs
- Lack of financial or other incentives for purchase of high energy efficient appliances
- Not enough information about energy efficiency class available at retailers stores
- Lack of market data on appliance energy efficiency

[Planned actions - optional]

- 5 components and 30+ activities identified and presented to stakeholders
 - Policy support
 - Institutional strengthening and capacity building
 - Information and awareness raising
 - Market research
 - Market based strategies

[Stakeholder consultations]

- Ranking of potential activities
- Estimation of resources needed and available for the programme implementation
- Final compilation of a National action plan

[Expected outputs]

- Enhanced capacities of government and government agencies for appliance EE policy development
- Structural verification and enforcement of appliance S&L
- Increased consumer and retailers awareness and improved marketing of appliance EE S&L

[Output 1]

- Capacity building of decision makers on appliance EE strategies development, implementation and monitoring
- Enhanced data collection on appliance sales and stock
- Enhanced awareness of politicians and policy decision makers

[Output 2]

- State inspectors trained in compliance checking of retailers and EE declarations
- Established cooperation with industry associations on checking compliance of EE declarations
- Structural verification plan developed, approved and annually implemented for retailers compliance checking
- Verification and enforcement plan for products developed, tested and implemented

[Output 3]

- Increased consumer awareness
- Retailers and retail staff trained on appliance EE issues and sales arguments
- Established cooperation with consumer and environmental NGOs on information provision
- Large buyers informed and stimulated to purchase EE appliances
- Financial scheme for consumers developed and implemented