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# Intermediate Advisory Board Recommendations

**Deliverable D1.5**

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## Disclaimer

The content of this deliverable reflects only the author's view. The report summarizes the recommendations of the individual members of the Advisory Boards, as they shared during the streamSAVE's Advisory Board activities; and is therefore not reflecting a common advice from all members.

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## Abbreviations and acronyms

Acronym	Description
AB	Advisory Board
BACS	Building Automation and Control Systems
EEO	Energy Efficiency Obligation
EV	Electric vehicles
GHG	Greenhouse gas
MS	Member State
PA	Priority Action
RES	Renewable energy sources
WP	Work Package





## Summary

streamSAVE is driven by demand and hence as close as possible to the needs regarding energy savings calculations of its stakeholders, namely public authorities, technology experts and market actors. This diversity of stakeholders is reflected in the Advisory Board to ensure that the needs of key stakeholders are met. The role of the Advisory Board is to advise and give feedback on the project's activities and outputs to increase streamSAVE's impact on energy efficiency actions taken in Member States.

This intermediate report summarizes the recommendations from the Advisory Board on the following streamSAVE activities that ran during the first half of the project (September 2020-February 2022):

- Member States' needs in relation to energy savings estimations of the first, five Priority Actions;
- Development of streamlined calculation methodologies for Priority Actions: guidance & training module;
- Organisation of Priority Action dialogue groups;
- Next round of five Priority Actions.

These recommendations are based on the two Advisory Board Meetings that have been organized in 2021, complemented with results gathered during the online feedback survey (January 2022). In general, streamSAVE's activities and outputs were considered interesting and of big support for Member States' implementation of Article 3 and Article 7 of the EED. Points of attention were highlighted as well - such as the relevance of metered savings, greenhouse gas reductions and costs assessments, and illustration by country cases - which have mainly been taken into account in the streamSAVE Guidance on Standardized saving methodologies and the online Training Module.



## Keywords

Advisory Board; energy savings calculations; Priority Actions; standardized savings methodologies; Training Module; Dialogues





## Introduction

### About streamSAVE

Energy efficiency is one of the five key dimensions of the Energy Union, and consequently of the Member States' National Energy and Climate Plans. The Energy Efficiency Directive sets the 2020 and 2030 energy efficiency targets and defines a series of measures that contribute to their achievement within the Union. The streamSAVE project streamlines energy savings calculations and provides the support needed to increase Member States' chances of successfully and consistently meeting their energy efficiency targets. The streamSAVE project specifically focuses on Article 3 and 7 of the EED which are devoted to energy efficiency targets and national energy savings obligations, respectively.

Given the importance of deemed savings approaches in Member States' EED reporting streamSAVE focuses on streamlining bottom-up calculations methodologies of standardized technical actions. streamSAVE offers these savings methodologies in a transparent and streamlined way, not only to improve the comparability of savings and related costs between Member States (MS), but also between both EED articles. The savings actions are targeted to those measures with high energy saving potential and considered as priority issues by Member States, the so-called *Priority Actions*. Two rounds of Priority Actions (PA) are running during streamSAVE: the first round (September 2020 – February 2022) covers five actions, namely: Heat recovery; Building Automation and Control Systems (BACS); Commercial and Industrial Refrigeration Systems; Electric Vehicles; and Public Lighting Systems. From March 2022 onwards, a second set of actions will be analyzed and discussed.

In short, the project aims at fostering transnational knowledge and dialogue between public authorities, technology experts, and market actors. The key stakeholders will improve their energy savings calculation skills and ensure thus the sustainability and replicability of the streamSAVE results towards all European Union Member States.

### Role and composition of the Advisory Board

streamSAVE is driven by demand and hence as close as possible to the needs of its stakeholders, namely public authorities, technology experts and market actors. Hereto, the diversity of stakeholders is reflected in the Advisory Board, as indicated in the table below. The role of the Advisory Board (AB) is to advise and give feedback on the project's work and outputs to increase its impact on energy efficiency actions taken in Member States, and to ensure that needs of key stakeholders are met. Another objective is to share experiences and expertise with the project, and lastly, support the project outcomes towards the stakeholders (for example, input from members to the newsletter), and linking these to ongoing initiatives or projects. Concerning the working format of the Advisory Board, over the course of the project, four meetings of about 2 hours are planned, of which one in-person meeting, linked to an event.

**Table 1. Composition of the Advisory Board.**

Organization	Name	Type of stakeholder within streamSAVE
Motiva , Finland	Ulla Suomi	Assisting the responsible Ministry and Energy Authority in Monitoring & Evaluation EED





Energy institute Hrvoje Požar , Croatia	Vesna	Bukarica	Research monitoring, verification and evaluation of energy efficiency policies in Western Balkan countries
SEAI (Sustainable Energy Authority Ireland)	Joe	Durkan	Public authority, EEOS Programme Manager
SIEA (Slovak Innovation and Energy Agency)	Jan	Magyar	Public authority, Monitoring & Evaluation EED
CTI Comitato Termotecnico Italiano)	Ettore	Piantoni	Certified Energy Management; CEN CENELEC JTC 14 Chairman “Energy management and energy efficiency in the framework of energy transition” – Sector Forum Energy Management Vice chair
EDF (Electricité de France)	Dominique	Osso	Research energy efficiency evaluation & French Energy efficiency Obligation scheme
AVERE (European Electric Road Vehicle Association)	Philippe	Vangeel	Technology & market expert electric vehicles; Secretary General at AVERE
eu.bac (European Building Automation and Controls Association)	Bonnie	Brook	Technology & market expert BACS; Chair of the eu.bac EPBD BACS Compliance Verification Task Force, Chair CEN TC 247
EHP (Euroheat & Power)	Torben	Funder-Kristensen	Technology & market expert cooling & waste heat recovery

At this date, February 2022, two Advisory Board meetings have been organized (remote), namely in *March 2021*, back-to-back to the kick-off meeting of the dialogue groups, and in *October 2021*. Halfway the streamSAVE project, in January 2022, the board members were able to share their feedback on the activities organized so far and the new round of Priority Actions (online survey).

## Scope of the report

This intermediate report summarizes the recommendations from the Advisory Board on the streamSAVE activities and outcomes to increase the impact on energy efficiency actions taken in Member States, and to ensure that needs of key stakeholders are met. In this report, the feedback on the following activities, that ran during the first half of the project (September 2020-February 2022), is described:

- Member States’ needs in relation to energy savings estimations of the five Priority Actions
- Development of streamlined calculation methodologies for Priority Actions: Guidance & Training Module
- Organisation of Priority Action dialogue groups
- Second round of Priority Actions

These recommendations are based on the two Advisory Board Meetings that have been organized in 2021, complemented with results gathered during the feedback survey.





# Chapter 1 Member States' needs in relation to energy savings estimations of the five Priority Actions

## 1.1 First Advisory Board Meeting

In October and November 2020, the project carried out a survey and interviewed its stakeholders, mainly the implementing authorities in the partner Member States (MS), to assess their needs regarding energy savings calculations. A 112 stakeholders responded to the online survey and phone interviews with 22 officials were carried out. In the online survey, stakeholders were, among others, asked to indicate the importance of energy savings calculations according to the defined Priority Actions (PA). The outcome was a very high interest for electric vehicles, BACS as well as heat recovery. All survey results were presented to the Advisory Board, followed by a discussion on Member States' needs. The questions in relation to the stakeholders' needs, that were discussed during this first AB meeting, were:

- How do you see the scope of the 5 PAs? What technical aspects should be dealt with? Any preference for (sub)sectoral focus or end-use type?
- What do you consider relevant in terms of savings estimations methods and the 5 PAs, so 2030 targets can be better reached by Member States? Where are the most important methodological needs? Where can streamSAVE offer the best support to MS?
- How do you see the need to streamline Article 7 and 3 methodologies (improving comparability within MS) of the EED, nevertheless the difference in scope, i.e. savings versus consumption, but similar objectives i.e. energy efficiency improvements?

An analysis of the survey results can be consulted in the upcoming Deliverable D4.1 on MS needs related to Priority Actions.

## 1.2 Recommendations and related actions

Given their importance in European and national energy & climate planning, the following elements are recommended by the Advisory Board to be covered by the energy savings calculation methodologies:

- Energy efficiency first principle, as it is providing the framework for energy efficiency improvement assessments;
- CO<sub>2</sub> emissions reductions in addition to final and primary energy savings as, in the end, the aim is to achieve CO<sub>2</sub> emission reductions. However, in the area of Article 3 and Article 7 of the EED the focus should be on energy savings calculations in first instance;
- Private and public investments should be allocated to the most cost-effective energy performance improvement measures. Therefore, the methodologies should enable cost effectiveness assessment as well.
- When estimating energy savings, the system perspective is important, i.e. interactions with, for example, the grid, integration of renewable energy sources, or integration of charging infrastructure. Next to the system approach, the wider benefits of energy savings should not be forgotten, such as comfort and well-being.





- ✓ *Action: In the Deliverable “D2.2 Guidance on Standardized saving methodologies” these recommended areas are – where possible – covered.*

In relation to the indicative values that streamSAVE provides for the five Priority Actions, following recommendations can be made:

- The energy performance certificate is not a good indicator of energy efficiency improvements in buildings, as actual savings often deviate from expected savings, and should therefore be considered as a proxy of energy efficiency improvements for buildings (ex-ante and ex-post). However, as often no alternative data are available, they can be used, for example, to determine the baseline and to measure and verify improvements. In addition, the monitoring framework provided in the ISO 50001 on Energy Management can give inspiration here as well.
- Priority should be given to metered savings, instead of estimating savings of measures, given the increasing digitalisation nowadays and reflecting actual savings the most. However, due to technical and cost constraints, it is often not possible in practice to use metered savings from individual users.

- ✓ *Action: In the Deliverable “D2.2 Guidance on Standardized saving methodologies” these recommendations are covered by the relevant Priority Actions (e.g. BACS, EV).*

Looking closer to the Priority Actions, the members gave following feedback:

- As much as possible energy efficiency improvements should be done in areas where there is no or not much action taken today. A good example here is industrial and commercial refrigeration, as there are little to no Ecodesign measures and the energy consumption is still high. Concerning *industrialised refrigeration* plants, it is important to see how they could link to the district heating system and heat recovery in general.
- Regarding the topic of *heat recovery*, it is recommended to consider the quality of the heat, i.e. which temperature levels are sufficient and prioritizing low temperatures, where possible. Another aspect to consider is flexibility: next to estimating whether systems are efficient, it is important to look at how flexible they are, and how they can accommodate renewable energy sources.
- *Fuel switching* is an important action, as sectors will take these actions in the near future. A good example is electrification of end use sectors, such as electric vehicles.

- ✓ *Action: In the Deliverable “D2.2 Guidance on Standardized saving methodologies” these recommendations are covered by the Priority Actions, where possible.*

Streamlining Articles 3 and 7 of the EED might not serve MS’ needs, as these articles cover separate EED requirements in a totally different way, cf. the very detailed Article 7 requirements per measure in contrast to overarching, national Article 3 targets. It would be good to clarify from the start of streamSAVE that the focus is rather on understanding how the estimations or calculations are done for both articles and trying to find common ground, so the resulting savings for the articles can become more comparable.

- ✓ *Action: In the Deliverable “D2.2 Guidance on Standardized saving methodologies” these differences in articles’ approach are clarified.*





## Chapter 2 Development of streamlined calculation methodologies for Priority Actions: Guidance & Training Module

### 2.1 First Advisory Board Meeting

The structure of the template to describe the PA savings methodologies is the same for each PA, namely identification of the calculation methodology; description of the application area and possible restrictions; a calculation formula with EU-wide indicative calculation values; guidance for cost effectiveness assessment; estimation of related CO<sub>2</sub> savings and sources that were used for preparing these methodologies. Concerning stakeholder feedback on the methodologies, the technical experts and public authorities are consulted via the dialogue groups, as well via the Capacity Support Facility.

The objective is to prepare indicative values, if possible, for all terms used in the calculation formula. Those will take into account the boundary conditions relevant for each PA, such as climate conditions, modal shift, average building standards, etc. The sources that will probably be used comprise scientific literature, technical specifications, statistical data, market data and relevant legal requirements – so keeping in mind the legal framework. The results streamSAVE is aiming at comprising a set of calculation values taking into account differences between EU regions as well as a guidance on how those values were defined. It is however possible that Member States might still need to define calculation values using their national datasets.

The questions in relation to the methodologies that were discussed during the second AB meeting, were:

- streamSAVE focuses on energy, CO<sub>2</sub>, cost effectiveness and behavioural aspects in the calculation templates. Should other aspects be added as well or what is considered as most useful?
- What is relevant information streamSAVE can or should start from or align with?
- Member States having obligation schemes experience different needs in comparison to countries applying alternative measures (e.g., catalogues when an EEO is in place). What are the differences in required support?

### 2.2 Second Advisory Board Meeting

An intermediate version of the *Guidance on standardized saving methodologies* has been prepared, in which general aspects of energy savings estimations (covering Art. 3 and Art. 7, definition of a baseline, approaches for cumulating energy savings under Art. 7 and a correction factor for behavioural effects), estimation of relevant costs connected to those energy savings and greenhouse gas savings were elaborated. Eight methodologies have been developed:

1. Heat recovery for on-site use in industry - feedback of excess heat into a process
2. Heat recovery for on-site use in industry - use of excess heat for on-site applications
3. Heat recovery for feed-in to a district heating grid
4. Building Automation and Control Systems in residential and non-residential buildings
5. Energy efficient compression refrigeration units





## D1.5 Intermediate Advisory Board Recommendations

6. Fuel Switching to Electric Vehicles
7. Energy efficient road lighting systems – engineering approach
8. Energy efficient road lighting systems – simplified approach

For each methodology a calculation is included for the total final energy savings (Art. 7) and for the impact on energy consumption (Art. 3). An overview of the costs related to the action is provided, in addition to a calculation methodology for greenhouse gas savings.

On the streamSAVE platform, a *Training Module* has been developed, where for each PA, calculation forms have been provided. The user should first fill in the calculation form for the selected methodology. Each form has the following elements: practical guidance, blank excel template, brief description of the methodology, user specifications, and a calculation button. After filling out the form, the page will redirect the user to the results tab. Regardless of the selected methodology, it is possible to identify the following elements: data input, calculation results, cost data related to the action and the possibility to download the results in Excel.

Policy officers in the 10 partner countries tested and validated the Training Module during the Capacity Support Facility (October-December 2021). The input of stakeholders was collected via a simple Word questionnaire, which should take a limited amount of time to complete. The resulting feedback was then used to finalise the Module for the first round of PA, and the related Guidance by December 2021. The Advisory Board could test the platform as well.

The questions that arose regarding the Guidance and Training Module were the following:

- Which aspects of the Guidance are most relevant for policy officers/public authorities?
- Which aspects of the report are most relevant for parties implementing the actions?
- Is there any relevant information missing?
- Is the cost data detailed enough to prepare estimations?
- Training Module: Is the Training Module versatile enough to cover the necessities of MS users in order to perform the calculations?
- Training Module: What is important to make the tool quick-to-use and easy-to-use by public authorities?

The Advisory Board shared their written feedback on the draft Guidance D2.2, as well as on the Training Module.

## 2.3 Recommendations and related actions

Most of the Member States' catalogues are only available in the national languages, so the translation and sharing of these savings methodologies is very useful for other Member States, as it improves transparency.

Regarding the different needs of countries having an EEO in place versus countries implementing alternative measures, the methodology to calculate energy savings of a specific measure should not be dependent on the type of scheme. Also, from a regulatory point of view, both approaches have the same footing.

Priority should be given to metered savings or actual consumption of end-users, instead of estimating savings of efficiency measures, given the increasing digitalisation nowadays and as it reflects realistic savings. If it is not possible or desirable to use actual figures (e.g.





privacy issues), it could be useful to work with relative shares or aggregates, so the percentages of improvement in the energy consumption could be monitored. This way, it is still possible to measure the improvements achieved with the actions. Because of the energy transition, consumers will become prosumers and if they would benefit of participating in the system, they might be willing to share private data. However, due to technical and cost constraints, it is often not possible in practice to use metered savings from individual users. For large buildings and industry this can be done more easily, e.g. via obligations or other schemes.

When developing the methodologies, providing guidance (energy performance indicators) on how to measure or assess the energy efficiency improvements after implementation of the action, is a crucial element in supporting Member States.

The guidelines are based on historic climate data, however as climate is changing, future energy savings are affected. Therefore, the use of forecasted climate data might be more relevant in estimating climate affected savings. In the guidance, the relevance of forecasting factors could be raised without necessarily indicating the exact climate pathways, so the uncertainty or broad range of possibilities become clearer to the user. Nevertheless, Article 7 savings are based on ex-post calculations from the previous 10 years, so the use of historical climate data will work for EED reporting.

The difference between a baseline and reference situation could be explained more, especially how these are considered in frame of the EED. The Ecodesign Directive, for instance, defines a reference situation (i.e. minimum level of performance for new equipment), rather than a baseline (i.e. evolution of equipment).

✓ *Action: In the Deliverable “D2.2 Guidance on Standardized saving methodologies” these recommendations are covered in the introduction where generic, methodological aspects are described.*

Concerning the Training Module, its learning potential would further increase if the Module is also available for consultants, big companies, industry, etc., next to public authorities, so the Module could serve all different stakeholders that make a contribution to the national savings calculations.

✓ *Action: Involvement of all types of streamSAVE’s stakeholders (public authorities, technology experts and market actors) in the dissemination of the Training Module.*

The savings formulas are very generic and, in practice, those having to collect the data will probably face difficulties when implementing the methodologies. It is recommended to offer a set of examples to illustrate how the methods could work in practice. The DEEP platform of the Energy Efficiency Financial Institutions Group (<https://deep.eefig.eu/>) also presents use cases and can demonstrate savings examples.

💡 *Action: The 10 country cases from the Capacity Support Facility will be described in “D4.3 CSF activity report” (ongoing action for first round of PA). These cases will illustrate the D2.2 savings methodologies in practice.*

The Advisory Board shared their written feedback on the draft Guidance D2.2 (October 2021), as well as on the Training Module (November 2022).

✓ *Action: Compiling and distributing a new version of the Deliverable D2.2 Guidance on Standardized saving methodologies, taking into account AB’s written feedback. Training Module is adapted together with stakeholders’ feedback from the CSF.*





## Chapter 3 Organization of Priority Action dialogue groups

### 3.1 Second Advisory Board meeting & feedback survey

In March 2021, streamSAVE organized the kick-off meeting of the dialogue groups, with a large audience of 114 participants. In May-June 2021, the second series of meetings was held, where unfortunately, the number of participants declined. The results from the feedback survey after the meetings were overall positive. However, what should improve towards the next meetings, is the level of interaction. To attract more stakeholders, external speakers will be invited to present on good practices from Member States and from the technology sector, in the next series of dialogue groups. This third series of dialogue groups has been planned in October-November 2021. The main objectives for this series are to update participants on the final version of the methodologies, to showcase the Training Module, to have external presentations and generally to discuss issues not yet covered in the previous meeting (e.g. costs). The focus should be on the interaction with and between group members.

A last action in the upcoming months is the organisation of two back-to-back dialogue workshops, for which any suggestions and ideas are welcome. The questions that were discussed with the Advisory Board:

- Opportunities of events for the back-to-back dialogue workshops?
- Suggestions to increase interactions with the participants/group members?
- What would you be interested to get from the streamSAVE's online forum?

Next to the Advisory Board meeting, the board members were able to share their feedback on the previous dialogues via the online feedback survey (January 2022).

### 3.2 Recommendations and related actions

Specific suggestions were made by the Advisory Board on possible events for the back-to-back dialogue workshops. Also, suggestions were made on how to improve the interaction, although it was acknowledged that a low level of interaction is quite common in online meetings. It is indeed not straightforward to improve interaction, certainly in relation to Article 7 calculations, where it might be difficult for participants to share country specific information.

In the feedback survey, members of the AB indicated that the overall organization of the dialogues went very well to excellent and they learned very well on key issues related to savings calculations under Articles 3 and 7 of the EED. However, room for improvement was mentioned on getting to know other experts or policy officers active in topics they are interested in, for which the COVID circumstances are not helpful.

✓ *Action: Suggestions for improving the interaction (e.g. external experts) are taken into account in the third series of dialogues, resulting in more discussions.*



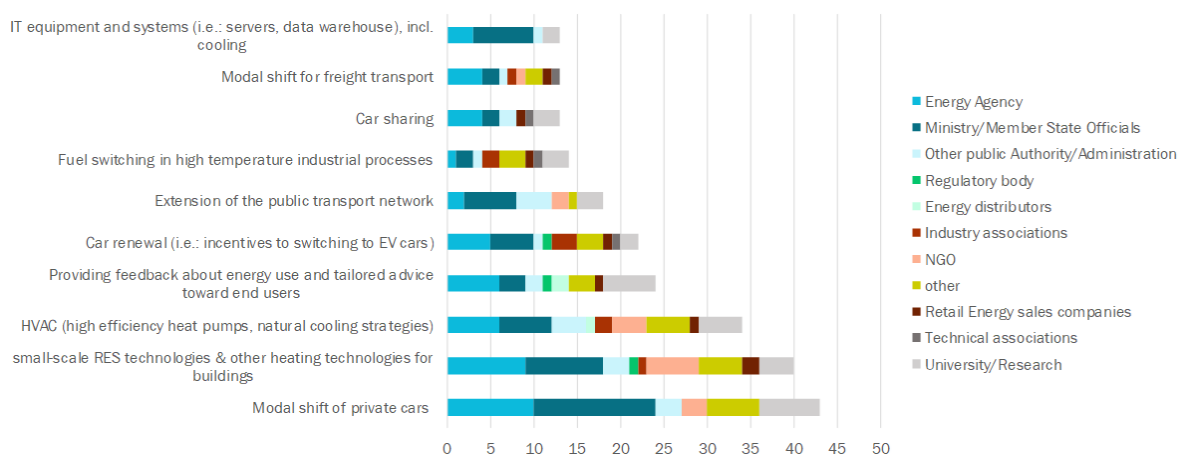


## Chapter 4 Second round of Priority Actions

### 4.1 Second Advisory Board Meeting & feedback survey

streamSAVE targets a total of 10 Priority Actions over the course of the project. Although the first 5 actions are still ongoing, the aim is to start with 5 new actions from March 2022 onwards. Hence, it is necessary to start defining the second round of Priority Actions. Principles in the decision process are possibly the link to the first round of PAs, the results from the gap analysis that streamSAVE carried out earlier, the stakeholders' needs, the identity of the project, its context (e.g. fit-for-55) and the partners' experience and expertise.

From the online survey to detect stakeholders' needs (October-November 2020), the top ten actions comprised the following topics:



The gap analysis (D2.1) on other hand, identified sectors and end-use categories that were less covered by existing methodologies from Member States' catalogues, namely:

- Agriculture
- Forestry & fishing
- Transport
- Industrial process heat & cooling
- ICT in offices and data centres
- Space cooling,
- Water heating and cooking
- Public lighting

In addition, the Green Deal fit-for-55 (incl. proposal for EED recast) also emphasises some areas of relevance, such as data centres.

The following questions were discussed during the second Advisory Board:

- Are there changes in the context compared to start of the project, which should be considered in the selection of second round of PA?
- Which other principles should be taken into account?
- Which Priority Action do you consider important? And why?

In January 2022, the board members were able to share their feedback on the new round of Priority Actions via the online feedback survey as well.





## 4.2 Recommendations and related actions

It could be interesting to focus on modal shift. For instance, in France a new white certificate is being developed for freight transport, to promote the shift from truck (lorries)-to-train. During this development, it becomes clear that defining the baseline is a difficult exercise, although it will strongly impact the size of the savings. Moreover, Member States do not cover that much modal shift in their Article 7 measures yet, despite its potential. Next to modal shift, the fuel switch from fossil trucks to electric and hydrogen trucks and the transition to hydrogen trains, can be an interesting action.

Data centres were also recommended by the Advisory Board, in spite of its possible overlap with the heat recovery action from the first round. Therefore, it was suggested to cover cold aisle and hot aisle containment systems of a data centre. Although data centres are playing a more important role in the fit-for-55 package, care should be taken as it is still a proposal for recast (so changes to the proposal are still likely).

Electrification of heat like heat pumps (RES technologies) was considered important, as a strong and fast implementation of these technologies within Member States is needed.

Next to the above actions, agriculture as well as food production were recommended, despite their low share in energy consumption. Also, the savings from promoting moving to cities - as it can strongly influence traffic jams caused by commuting - can be of added value for streamSAVE.

✓ *Action: The AB suggestions for Priority Actions, are taken into account when drafting the feedback survey to collect input from stakeholders on the second round.*

In the feedback survey, members from the Advisory Board indicated a strong interest in the actions 'Measures alleviating (also) energy poverty' and 'Small-scale RES central space heating (incl. hot water)'. Concerning energy poverty, the added value is to better understand how methodologies and indicative values differ from the calculations for non-energy-poor households.





## Conclusion

streamSAVE is driven by demand and hence as close as possible to the needs of its stakeholders, namely public authorities, technology experts and market actors. This diversity of stakeholders is reflected in the Advisory Board to ensure that the needs of key stakeholders are met. The role of the Advisory Board is to advise and give feedback on the project's work and outputs to increase streamSAVE's impact on energy efficiency actions taken in Member States. Two Advisory Board meetings have been organized in 2021, where a variety of recommendations was shared.

In general, streamSAVE's activities and outputs were considered interesting and of big support for Member States' implementation of Article 3 and Article 7 of the EED. Some points of attention were highlighted, comprising:

- Relevance of greenhouse gas reductions, cost assessments, next to the energy system perspective and offering of flexibility to this system by multiple action types.
- Recommendation to describe the role of metered savings, despite the importance of standardized, bottom-up savings calculations in Member States' EED reporting.
- Properly explaining the way and the degree of streamlining Articles 3 and 7 of the EED, given their differences in scope.
- Making sure the Training Module is distributed to all stakeholders that make a contribution to the national savings calculations.
- Offering a collection of examples to illustrate how the calculation methods could work in practice.
- Interesting actions to focus on during the second round could be modal shift for freight transport; data centres although overlap with heat recovery should be avoided; the electrification of heat like heat pumps; next to measures alleviating energy poverty.

These recommendations have mainly been taken into account in the intermediate version of Deliverable "D2.2 Guidance on Standardized saving methodologies" and the online Training Module of the streamSAVE platform.

# CONTACT THE PROJECT

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