

Heating and Cooling in the Energy Community Contracting Parties

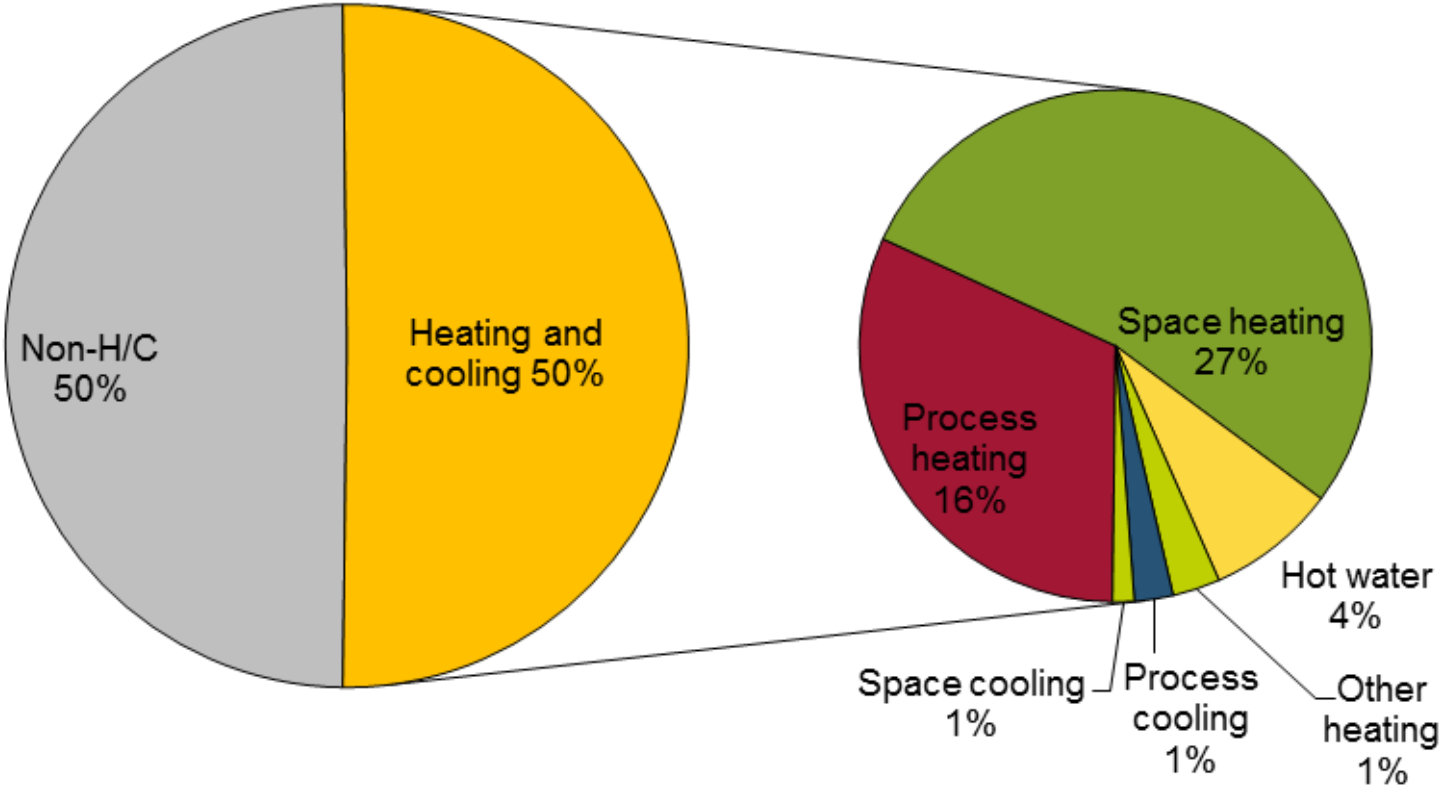
Background information to inform discussion at
Energy Efficiency Co-ordination Group, Vienna, March 2020



European Bank
for Reconstruction and Development

Context

Heating and Cooling Accounts for half of EU final energy demand...

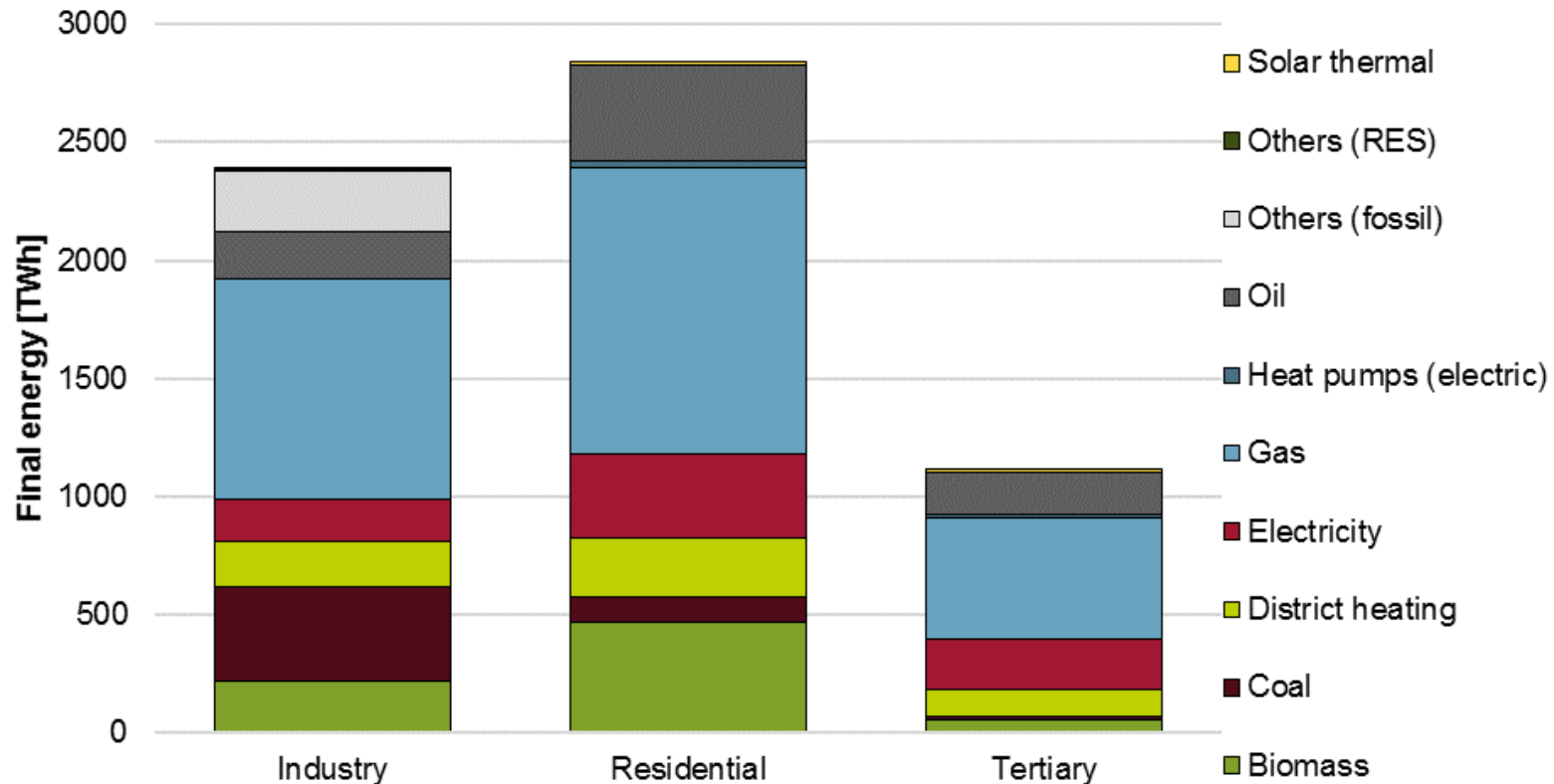


Source: <http://www.heatroadmap.eu/>

...and it will be challenging to decarbonize



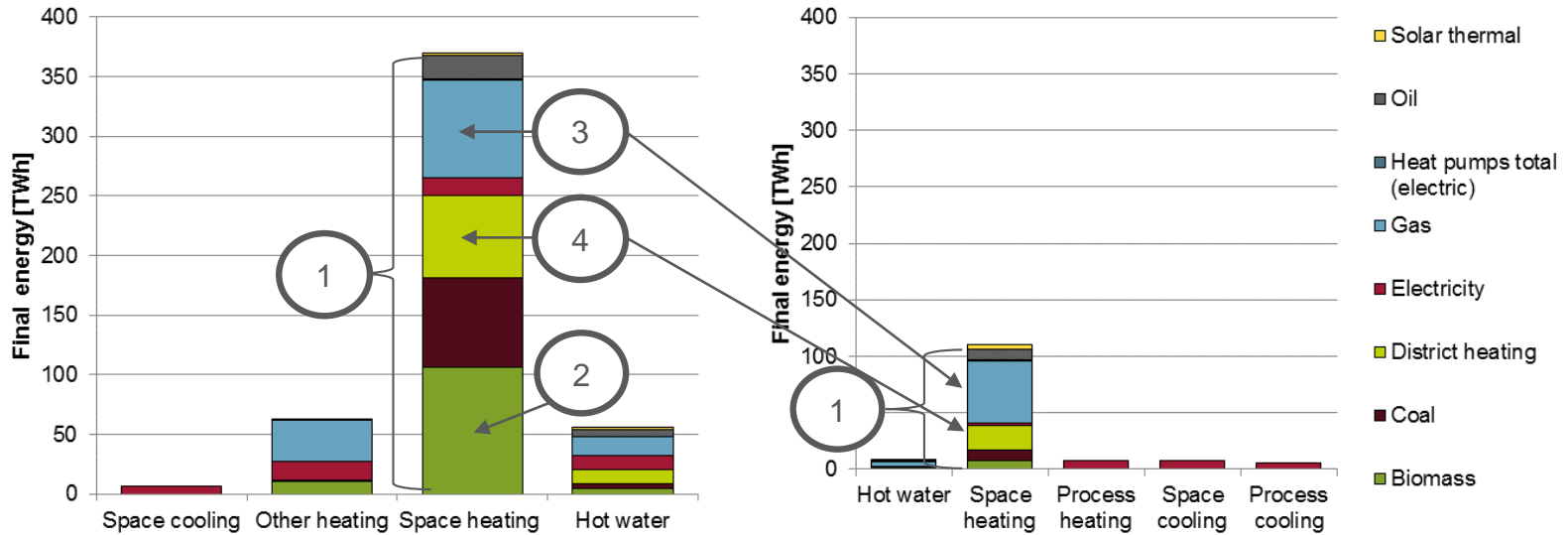
Final energy demand by fuel carrier in EU EBRD countries (Bulgaria, Cyprus, Estonia, Greece, Croatia, Hungary, Latvia, Poland, Romania Slovakia) – no readily accessible data for EECG countries, but these countries are fairly representative of EnCPs.



Source: <http://www.heatroadmap.eu/>

EBRD experience in improving energy performance & sustainability of RESIDENTIAL + TERTIARY heating and cooling demand: Selected examples

Final energy demand by type in EU EBRD countries (Bulgaria, Cyprus, Estonia, Greece, Croatia, Hungary, Latvia, Poland, Romania Slovakia), residential (left) and tertiary (right)



1. Reducing/moderating energy consumption



2. Efficient biomass boilers, shifting from fossil fuels to biomass



3. Efficient gas boilers



4. Improving EE of DH networks



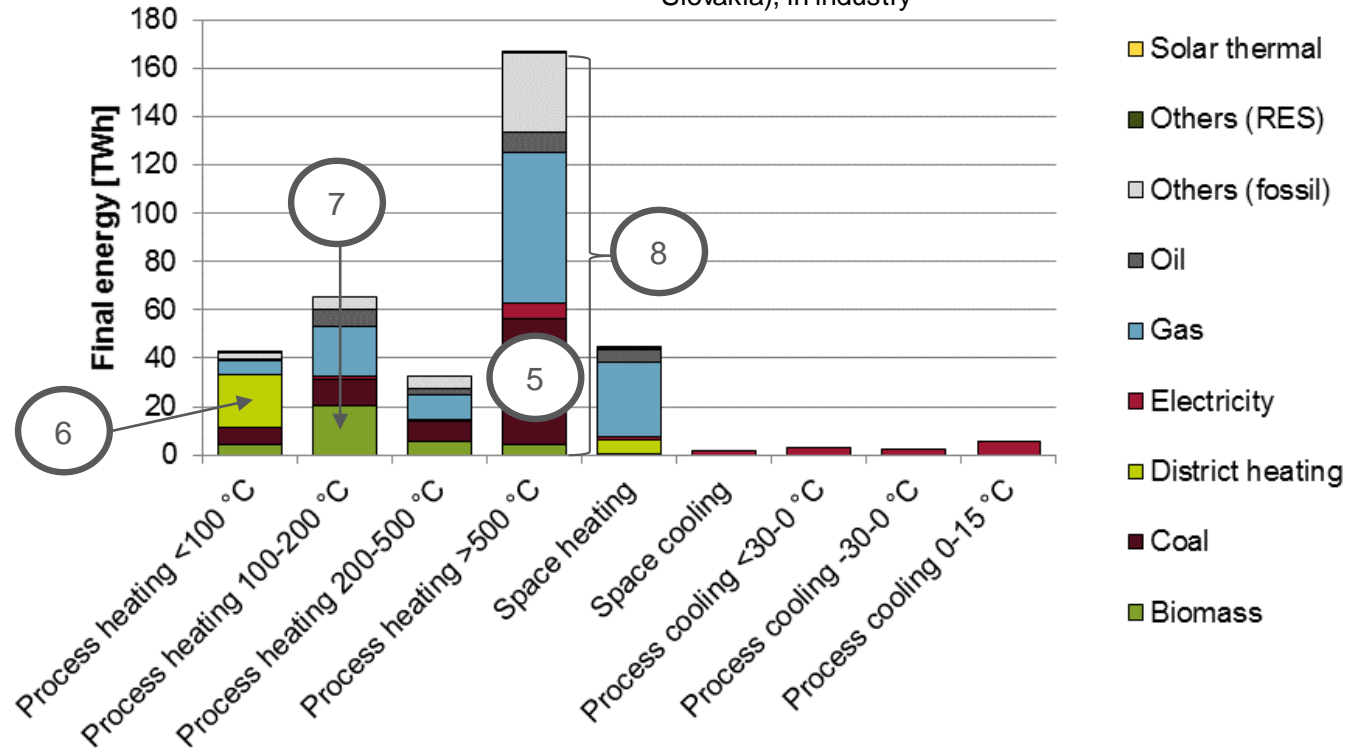
Adapted from source: <http://www.heatroadmap.eu/>

EBRD experience in improving energy performance & sustainability of INDUSTRIAL heating and cooling demand: Selected examples



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Final energy demand by type in EU EBRD countries (Bulgaria, Cyprus, Estonia, Greece, Croatia, Hungary, Latvia, Poland, Romania Slovakia), in industry



5. Fuel switching



6. Low temp district heat for industry



7. Biomass in industry



8. Heat recovery systems



Adapted from source: <http://www.heatroadmap.eu/>

Strong high-level policy framework / drivers for decarbonising heating and cooling in EU & EnCPs

- EU Climate and Energy Targets, NECPs
- EU Directives – Articles Specific to Heating and Cooling
 - Revised Renewable Energy Directive (2018/2001/EU) Article 23 - increase the share of renewable energy in heating and cooling by an indicative 1,3 percentage points
 - Energy Efficiency Directive (2012/27/EU) Article 14 Promotion of efficiency in heating and cooling
- EU Directives – EED, EPBD, Ecodesign
- Bottom-up action at city level (local air pollution)
- Energy security (e.g. gas import dependence)

Potential questions for discussion:

- Where are the biggest challenges in the heating & cooling space?
- Where are the biggest opportunities?
- Who are the main actors to engage / involve?