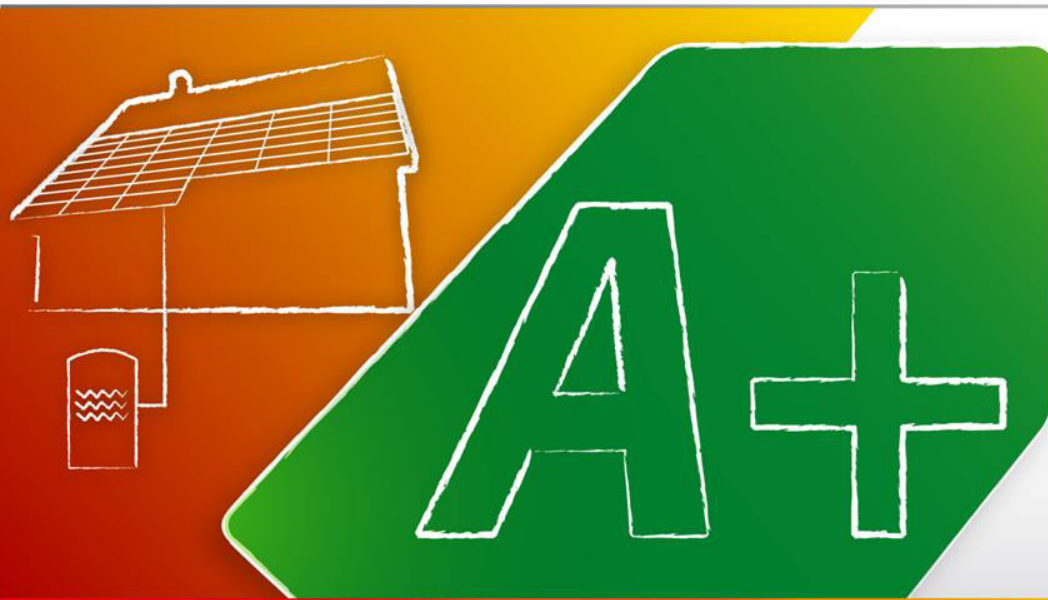




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LabelPackA+



PROJETO PILOTO PORTUGAL

19 junho 2015

www.labelpackplus.eu



ATIVIDADES A DESENVOLVER NO ÂMBITO DO LABEL PACK A+

- Dinamização de uma Plataforma de *Stakeholders* Nacional
- **Plataforma de etiquetagem energética** adaptada à realidade do mercado e às necessidades dos vários agentes:
 - Fabricantes;
 - Distribuidores e instaladores
 - Entidades fiscalizadoras;
 - Consumidor final
- Preparação dos **conteúdos formativos** para o mercado, nomeadamente para os instaladores que atuam como instaladores agregadores
- Preparação dos **conteúdos informativos** para o consumidor final
- Organização de **ações de formação e informação** por todo o país

PLATAFORMA DE STAKEHOLDERS NACIONAL

A Plataforma de *Stakeholders* Nacional (NSP) é o órgão consultivo dos parceiros Portugueses do projeto Label Pack A+.

O NSP é convidado a comentar as ferramentas e documentos desenvolvidos para o mercado Português, bem como aprovar o plano de atividades proposto, sugerir novas atividades e apoiar na monitorização da implementação da legislação da etiquetagem de aquecimento.



PLATAFORMA ONLINE



INFORMAÇÃO CONSUMIDOR

COMUNICAÇÃO E DISSEMINAÇÃO

PLATAFORMA ONLINE

- Adequação da plataforma ao mercado nacional;
- Convidar fornecedores nacionais (ainda não registados por via da base de dados da VdZ) a disponibilizar informação relativa aos seus equipamentos na plataforma;
- Testar e validar a plataforma e as funcionalidades disponíveis (NSP)
- Manutenção contínua

helpdesk

- Lista de FAQs – frequently asked questions, disponível na página web do projeto,
- Tutoriais para utilização da plataforma
- Helpdesk, disponível para profissionais e consumidores, via email (telefone a avaliar)
 - Gestão ADENE
 - Parceria do consórcio nacional
 - Parceria da NSP
 - Parceria do consórcio internacional



TÉCNICOS DE ENTIDADES PÚBLICAS

- Formação vocacionada para técnicos com responsabilidades na implementação da legislação e de apoio ao mercado e aos consumidores
 - DGEG
 - DGC
 - ASAE
 - Agências de Energia
- 8 a 10 ações de formação organizadas em parceria com a DGC nos Centros de Arbitragem de Conflitos de Consumo Nacionais.



PERITOS QUALIFICADOS

- Informação direcionada aos peritos qualificados no âmbito do SCE, veiculada via plataforma do SCE, materiais disponíveis online
- Formação orientada para peritos qualificados



PROJETISTAS

- Formação vocacionada para técnicos projetistas de sistemas de aquecimentos e produção de águas quentes sanitárias.
 - EFRIARC
 - Novos formandos, em particular projetistas de sistemas solares térmicos
 - Academia ADENE
 - Parceria com o IFP
 - Parceria com centros de formação profissional
- 2 a 3 tardes técnicas organizadas em parceria com a EFRIARC
- Formação para formadores dos centros de formação profissional para que incluam nos seus planos formativos um módulo sobre a etiquetagem energética



INSTALADORES

- Formação vocacionada para instaladores, em particular instaladores agregadores com responsabilidade de emissão da etiqueta de sistemas compostos.
 - APISOLAR
 - AIPOR
 - Centros de formação profissional
- Formação de formadores, ADENE e APISOLAR, para ministrarem a formação um pouco por todos o país, complementar às formações organizadas pelas marcas para a sua rede de instaladores
- 10 a 15 (a validar) sessões de formação organizadas em parceria com a AIPOR
- Formação para formadores dos centros de formação profissional para que incluam nos seus planos formativos um módulo sobre a etiquetagem energética.



VENDEDORES

- Formação vocacionada para vendedores de sistemas de aquecimento e produção de águas quentes sanitárias, em contacto com o consumidor.
 - Retalhistas, exemplo:
 - Box Jumbo
 - Radio Popular
 - Worten
 - Leroy Merlin
- Formação de formadores, ADENE e DECO, para ministrarem a formação em todo o país em cooperação com as cadeias de retalhistas
- Nr. de sessões de formação a avaliar de acordo com parcerias e necessidades



CONSUMIDORES

- Focus group com consumidores, pré entrada em vigor da etiquetagem, para analisar o actual perfil de compreensão da etiqueta, com vista a adequar os conteúdos dos materiais de informação destinados ao mercado Português;
- Vox Pop com consumidores, pós entrada em vigor da etiquetagem e de desenvolvidas algumas ações com o mercado, para avaliar do conhecimento da etiqueta e impacto do projeto
- Workshops, em parceria com agências de energia
- Presença em feiras e eventos focados no consumidor
- Flyers informativos nos pontos de contacto com o consumidor

COMUNICAÇÃO E DISSEMINAÇÃO

- Presença WEB
 - Plataforma Label Pack A+
 - Website ADENE
 - Website APISOLAR
 - Website DECO
- Presença em feiras e eventos de relevo para a industria
 - Concreta 2015
 - Green Business Week 2016
- Presença em feiras e eventos de relevo para a consumidores
 - Green Fest 2016
- Impressão de brochuras e publicação de artigos em jornais generalistas
- Ações de divulgação com parceiros, eg. Minuto Verde com a Quercus





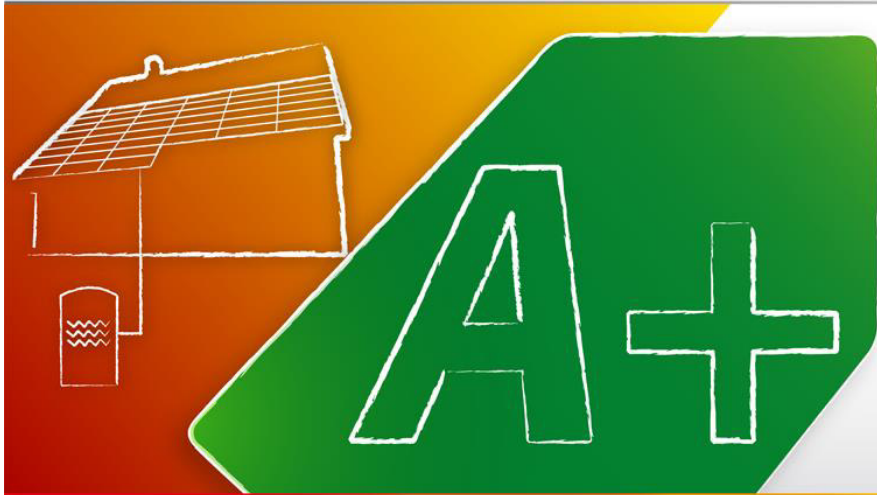
AGÊNCIA PARA A ENERGIA



ANEXO – Plano de Ação Nacional em inglês



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D3.2 Portuguese pilot project implementation strategy

25th June 2015



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1 Introduction

The Portuguese National Pilot Plan systematizes the activities to be conducted in Portugal within the Label Pack A+ project.

It presents the National Stakeholders Platform consortium and its main goal, the activities developed for the market, from the policy actors, to the installers, system designers and front-end sellers, and the communication activities, focused on the end-consumer. It also presents external activities, developed by other market agents, considered synergetic to those developed within LPA+.

The NSP is constituted by the most relevant entities in the heating market and it's constituted has a consultancy forum, who validates and evaluated the activities developed within the LPA+ auspices. The activities foreseen within this group refer to the validation and evaluation of the activities proposed, benefiting from the various stakeholders competences, as well as for the participation and cooperation with dissemination and communication activities.

The activities are distinguished as training and communication activities, training for professionals and communication for the end-consumer.

Professionals are targeted from the policy technicians, aiming at public entities technicians dealing with the implementation of public policy and with consumer responsibilities to systems designers, installers and retailers.

Consumers are addressed via the consumer associations and with dedicated actions via media, public events and communication workshops.

This is a first draft of the Portuguese National Pilot Project, to be revised upon the feedback of the relevant stakeholders and depending on the success and impact of the proposed activities.



2 National Stakeholders Platform

The Portuguese National Stakeholders Platform (NSP) is composed by the most relevant stakeholders in the Portuguese heating market. It comprehends the legal actors, DGEG, responsible for the transposition of the European Directives, namely the Eco-design and Energy Labelling directives; ASAE, the Portuguese market surveillance entity; the relevant market associations, from manufactures to installer and system designers, consumer organization and non-governmental organizations in the energy and environment domain.

The main goal of the Portuguese NSP is to engage the most relevant actors in the heating market in the successful deployment of the energy labelling directive for heating appliances. The NSP is responsible for validating the National Pilot Project (NPP) and assisting/facilitating its successful implementation throughout the project's timeframe. The NSP is to physically meet three times during the NPP implementation and, during the whole project timeline, exchange experiences in order to promote the constant revision and improvement of the programme.

2.1 Goal (MoU)

The goal of the Portuguese National Stakeholders Platform is to gather a consultancy group that critically analyses, comments and contributes to the National Pilot Project. For this consultancy group ADENE, APISOLAR and DECO invited the most relevant agents in the Portuguese heating appliances market.

The contributions requested from each participant can summarily be systematized into:

1. Participation in the NSP
2. Evaluation of the online platform and tools
3. Communication and Dissemination of the Label Pack A+

1. Participation in the NSP

The participation in the NSP requires the participation in three meetings along the project duration and the contribution to the validation of the documents presented by the Portuguese consortium. The first meeting has, as main goal, to present and validate the NPP in order to assure the complementarity between the activities proposed within the Label Pack A+ and external activities already established by other agents in the market.

The second meeting is expected to be an evaluation of the activities already developed and the identification of barriers and opportunities to revise the action plan for the forthcoming period.

The last meeting is the presentation of the final activities report and the collection of inputs and critical feedback that can be systematized and presented already in the context of WP4 and the policy recommendations to be provided as feedback for the implementation of the dispositions relating to the package label.

2. Evaluation of the online platform and tools

NSP participants are invited to contribute, comment and evaluate the online platform, given their different perspectives and roles in the market. Participants are invited to validate the platform contents, from the point of view of their responsibilities in the market chain, and test the package energy labelling tool for its usability and proficiency.



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3 Communication and Dissemination of the Label Pack A+

NSP participants are invited to disseminate the Label Pack A+ project through their media and via their network of associates, in particular the industry associations. The communication should be general, presenting the new regulations and the project goals, and specifically focusing on the training sessions, especially aimed at professionals: installers and project designers.

The communication towards the final user is also aimed namely via the display of short articles in the entity's webpage and direct link to the Label Pack A+ website.

The participating entities are also entitled to indicate and participate in the training actions, according to their technician's needs.

Finally, the NSP participants are invited to report to the Label Pack A+ Portuguese team relevant market interactions and trust the team's technical capacity feeling welcome to forward to the Portuguese Consortium any questions or doubts received by the market using the project's helpdesk.

2.2 Composition

The Portuguese National Stakeholders Platform is composed by:

DGEG – Direcção Geral de Energia e Geologia

General Direction for Energy and Geologia

ASAE – Autoridade Segurança Alimentar e Económica

Economic and Food Safety Authority

AFIQ – Associação Fabricantes e Importadores de Equipamentos de Queima

Industry Association for the manufacturers and importers of burning equipment's

AGEFE – Associação Empresarial dos Sectores Eléctrico, Electrodoméstico, Fotográfico, Electrónico

Electric, Electronic and Photographic equipment enterprise association

AIPOR – Associação dos Instaladores de Portugal

Portuguese Installers Association

EFRIARC – Associação Portuguesa dos Engenheiros do Frio Industrial e Ar Condicionado

Portuguese Cooling and Air Conditioning Engineers Association

LNEG – Laboratório Nacional de Energia e Geologia

National Energy and Geology Laboratory

DGC – Direcção Geral do Consumidor

Consumer General Direction

QUERCUS - Associação Nacional de Conservação da Natureza

National Nature Conservation Association



2.3 Specific Activities

The first activity of the NSP will be the validation and consensus on the Portuguese NPP.

Then, the NPP will be rolled out, with the support of the NSP, addressing the overall value chain, from industry to installers and consumers. Each category will be addressed with dedicated actions, as the national online platform, professional training or specific information campaigns.

Finally, the NSP should also contribute to the monitoring of the NPP implementation and suggest actions to increase its impact.

3 Online Platform

3.1 Managing the platform at the national level

Responsibilities

ADENE is the entity in charge of the Portuguese platform.

Common procedures among the consortium are still to be defined depending of the level of independence possible to manage the platform at the national level.

3.2 Helpdesk

A helpdesk service via email will be operational from September 2015 onwards. The service will be managed by ADENE, in cooperation with APISOLAR and DECO, who will be called to action whenever the questions posed are in their domains of action. Additionally the Label Pack A+ consortium will also be contacted when the national resources are unable to respond.

Tutorials and step by step manual and videos on “how to operate the platform and use the calculation tool”.

FAQs – Frequently asked questions identified in WP2, adapted to the national level and with the possibility to add more FAQs depending on the interaction with the community

Evaluate the possibility to have a phone helpdesk service

4 Training/Information Activities

4.1 Market stakeholders ongoing/planned activities

These include the activities foreseen by the manufactures and training centres, essentially aimed at installers and system designers.

4.2 Label Pack A+ specific

The Portuguese NPP has two main targets: installers, at broad, and consumers. Nevertheless, other market actors, such as policy technicians and heating equipment sellers will also be aimed at in the activities programme.



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Trainings and consumer oriented actions are free of charge.

To address **installers**, ADENE will, together with APISOLAR, be responsible for organizing trainers actions aimed at training professionals that will provide the training for installers all around the country. The training sessions will occur between the end of 2015 and 2016, focusing on geographical areas less approached by manufacturers training activities dedicated to their network of installers. A total of 150 to 200 installers are aimed.

Actions aiming at **new professionals**, namely solar thermal installers and system designers, will also be established. These actions will be organized in partnerships with existing training centres, integrated in the courses curricula. To this end ADENE and APISOLAR will work with IFP – The Portuguese Training Institute, as well as with other reference training institutes.

The training for installers will focus on a theoretical part on the Directives and Delegated Regulations, a practical part focusing on the package label and the use of the online tool and a commercial part, focusing on the contact with consumers.

ADENE will also promote awareness and competence acquisition sessions aimed at **policy technicians**, namely from DGEG, ASAE and DGC. These actions are aimed at technicians who have direct responsibility in the implementation of these regulations in the Portuguese market, and that have responsibility in the contact with the end consumer. The trainings focus on a theoretical part on the Directives and Delegated Regulations, a practical part focusing on the package label and the interaction and explanation of the new labels to consumers.

Sellers, the closest agents to the consumer at the decision acquisition stage, are also aimed in the Label Pack A+ activities plan, through training sessions to the most important market chains installed in Portugal, for example Radio Popular, Worten, Leroy Merlin, Box Jumbo, etc. A total of 12 sessions are planned and these are to be provided by dedicated trainers, with relevant experience in the contact with these market agents. ADENE and DECO will prepare and train the trainers that will be responsible for the trainings.

To addressee **consumers** DECO will organize a series of communication events throughout the project duration. These actions are also thoroughly detailed in the communication plan and encompass workshops, presence in fairs and information press releases through several media.

Aiming to perceive the Portuguese consumer understanding of the heating equipment energy label DECO will organize in October 2015 a focus group where consumers will contact with the labels and give feed-back on their understanding of the label, the difficulties in assessing and understanding the information available and the communication opportunities the consortium can implement for a successful communication. Additionally, already in 2016, DECO will also organize a VOX POP, interviews with members of the general public to perceive their reaction to the introduction of this new label in the market and the impact it has had in their system acquisition decision.

4.2.1 For the whole market value chain

A conference will be organized on the 1st semester of 2016 aimed at all the actors in the heating market.

The conference will address the European legislation, links to the national regulations, in particular to the Buildings Energy Performance Certificate, the energy label in home appliances and the communication with the end-consumer and the market surveillance of the energy labelling.



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It will also be a space for products demonstration, where invited brands will expose their products, outlining the energy performance of their equipment's.

4.2.2 Policy and market surveillance actors

The implementation of the heating appliances energy labelling scheme needs to be thoroughly understood by all the market agents, namely the institutional professionals with responsibilities in the regulations' implementation and revision, in the market surveillance process and directly interacting with the final consumer, providing assistance and clarification.

In order to assure a coherent message and the use of homogenous information materials, ADENE will organize specific training/information sessions for these stakeholders, according to their roles in the market chain and the training needs of their professionals.

Three main entities are considered in this: DGEG, ASAE and DGC. DECO will also participate in these trainings. **A maximum of 10 actions** are to be organized, depending on the number of participants and the logistics. Actions aim at training **50 professionals** in the policy sector.

Energy Agencies are also to be invited to participate in these actions.

4.2.3 Manufacturers

Large heating appliances manufacturers are not the focus of Label Pack A+ training campaign. Nevertheless, smaller manufacturers, namely working at the national solar thermal market scale, who do not have a cooperative message regarding the new legislation on the energy labelling of heating appliances can be targeted. At this level, APISOLAR will be responsible for communicating the project to its associates and identifying the manufacturers who would like to participate in the training sessions aimed at professionals and that are receptive to using the Label Pack A+ tools.

4.2.4 Distributors and Wholesalers

The contact with large wholesalers is essential, aiming at providing specific training for the sellers who are the direct contact with the consumer.

Within the Label Pack A+ project specific brochures will be developed for consumers, explaining the purpose and information available through the energy label. Considering the Portuguese market and the seller's needs, specific training materials will be prepared by ADENE, in cooperation of DECO, given the consumer message that we want to provide.

ADENE will contract external experts, to whom will provide specific training for trainers, aiming at providing them the necessary competences for training sellers with a wide geographical distribution.

The number of sessions to be developed will depend on the partnerships achieved by ADENE with large wholesalers distribution chains. Actions will be targeted at Radio Popular, Worten, Jumbo Box, Leroy Merlin, Mestre Maco, Max Mat, to name a few.

A total of **10 to 14 actions** is expected to take place, **directly targeting 150 sellers**, namely the chiefs of staff, who are given the knowledge to communicate at the store level.



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4.2.5 System Designers

System designers are essential actors in the definitions of quality heating systems, namely when concerning packages. Although system designers do not have the responsibility for issuing package labels they are responsible for proposing solutions which should be evaluated through the label simulation. This information is afterwards passed on to the installer who should meet the solution designed and assure the compliance with the expected heating energy class.

Together with EFRIARC, APISOLAR and ADENE will promote training sessions for heating system designers. Three actions are proposed, aiming at 60 system designers. The training for system designers will focus on a theoretical part on the Directives and Delegated Regulations, a practical part focusing on the package label and the use of the online simulation tool.

4.2.6 Qualified Experts within the National Energy Certification System for Buildings

ADENE will issue specific information aimed at the Qualified Experts within the National Energy Certification System for Buildings via the internal platform available for the experts.

4.2.7 Installers and Integrator Installers

APISOLAR will organize a number of training sessions according to Label Pack A+ objectives and the size and location of the target groups. A training plan will be developed which will specify the number of sessions, their locations, duration, number of participants and responsible trainer for the training sessions (also attending to the feedback from the professionals and their associations namely APISOLAR and AIPOR, and the professionals level of commitment and interest throughout the training plan implementation).

Trainings will be organized both in synergy with existing events, e.g. specific Trade Fairs like Concreta and Tectónica where it is more likely to gather with success the segment professionals, and individually geographically distributed according to installer representability and coordinated with actions developed by other players in the market so that we do not overlap existing activities, although ensuring that the information is not trade biased.

The first training session is planned to occur at Concreta 2015, in November. It is a biannual construction fair where the solar energy is always widely represented and is visited by circa 75% of installers in the heating industry.

Workshops will take place during September before the deployment of Package Labelling, addressing the main questions about the process of labelling, but are reliant on theoretical and technical information about the labelling process and tools to be available within LPA+.

Training sessions will be ministered by trainers trained by APISOLAR and ADENE and will rely on the support of AIPOR when deemed pertinent.

Actions aimed at new professionals, namely solar thermal installers and renewable energies technicians, will also be promoted in cooperation with training centres, via the introduction of specific content in their programmes curricula.



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Communication about the trainings will be deployed throughout the final quarter of 2015 and first semester of 2016. Communication actions will take place via direct-mailings and web-page and coordinated with the partners and stakeholders communication activities.

Other actions are planned throughout the triennium with the purpose of engaging professionals via media (specific publications), newsletters, social media and promotional material (e.g. brochures and flyers) will be placed locally in trade associations, construction associations and municipalities (construction and licensing departments). A press release will be coordinated with the consortium.

The training plan is dependent on the release of training material and online tool by the Consortium and although communication activities are already taking place, this will allow these activities to focus on technical parameters relating to the issuing of the energy label via online tool.

4.2.8 End-consumers

DECO is the entity responsible for the direct communication of the Label Pack A+ project at the end-consumer level.

The first action is a questionnaire to consumers, still in September/October 2015 aimed at perceiving the Portuguese consumer understanding of the heating equipment energy label. In this questionnaire consumers will contact with the energy labels and give feed-back on their understanding of the label, the difficulties in assessing and understanding the information available and the communication opportunities the consortium can implement for a successful communication. This action will be repeated at least one more time to perceive the evolution and impact of the project.

Throughout the project duration, several actions, namely via specific workshops, presence in fairs and dissemination via media channels are proposed. In 2016, DECO will participate in one energy and environment fair and one or two workshops, one of these organized in parallel with the fair. The focus will be on the opportunities in terms of energy and money saving the use of the energy label can bring, and the added value of using the simulation tool for comparing package solutions. For 2017 two generalist workshops are scheduled. In parallel media articles are to be published, not only through DECO's channels, but also straightening the cooperation with other consumer organizations. To this end, the training activities with DGC is critical, as these are consumer contact points, where information should be available.

Additionally, already in 2016, DECO will also organize a VOX POP, interviews with members of the general public to perceive their reaction to the introduction of this new label in the market and the impact it has had in their system acquisition decision.

Through ADENE, information aimed at **Regional and Local Energy Agencies**, will also be disseminated, to present the new energy label through their network of contacts as well as disseminate the actions being organized in their geographical area of intervention.

4.3 External do Label Pack A+

Cooperation with existing events.

Quercus is currently participating in a market surveillance project at the European level, supported by the Intelligent Energy Europe Programme, MarketWatch, and it will deploy a market surveillance action by the end



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of 2015, which will already consider heating appliances. The result of such an action will be made available to the Portuguese LPA+ consortium in order to have a first perception on the market uptake of these regulations

Minuto verde – tv show, 1 minuto sobre a etiqueta de aquecimento (1 ou 2 minutos verdes)

5 Monitoring activities

5.1 Targets

Activity	Nr.º Actions	Participants
Policy Professionals	8-10	50
System Designers	3	45
Installers	15	150
Sellers (at retail)	12	120
Consumers (direct)	6	120

Package Labels simulated/emitted in the LPA+ platform	2100
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5.2 KPIs

Activity	Direct KPI	Indirect KPI
Policy Professionals	<ul style="list-style-type: none"> • Presence at training session • Nr. of contacts with the Portuguese LPA+ helpdesk 	<ul style="list-style-type: none"> • Assesses to ADENE's LPA+ webpage
System Designers	<ul style="list-style-type: none"> • Presence at training session • Nr. of contacts with the Portuguese LPA+ helpdesk 	
Installers	<ul style="list-style-type: none"> • Presence at training session • Nr. of contacts with the Portuguese LPA+ helpdesk 	<ul style="list-style-type: none"> • Assesses to APISOLAR's LPA+ webpage • Assesses to AIPOR's LPA+ webpage • Nr. of subscribers of AIPOR's newsletter
Sellers (at retail)	<ul style="list-style-type: none"> • Presence at training session • Nr. of contacts with the Portuguese LPA+ helpdesk 	



Consumers (direct)	<ul style="list-style-type: none"> • Presence at training session • Contacts in fairs and consumer events • Nr. of contacts with the Portuguese LPA+ helpdesk • Nr. of contacts with the DCG offices (on this subject) 	<ul style="list-style-type: none"> • Nr. of clicks at DECO's LPA+ webpage
Consumers (indirect)	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Nr. of subscribers of DECO Proteste magazine
General	<ul style="list-style-type: none"> • Nr. of accesses to the Portuguese LPA+ webpage 	

5.3 Milestones

The proposed activities plan will be evaluated in October 2016, roughly one year after the plan as start to be implemented, and training and dissemination needs will be reassessed and redefined according to the analysis.

6 SWOT Analysis

Threats

- fee for manufacturers to access the platform

Strengths –

- addressing all the market chain

Weakness

- aiming at all the actors may imply smaller budgets for each target group and compromise the actions, namely in terms of printing of materials.
- Communications tools, namely with users are still not defined (best communication models)

Opportunities

- possibility to engage with other audience, namely via already existing projects promoted by ADENE, eg. Front and Request to Action, APISOLAR, eg. European Solar Days and DECO, eg. Clear project.

Threats

- the training materials are still not finished so the final model of the trainings and number of actions possible is still no defined;
- manufacturers are already developing a lot of trainings and that may compromise the presence/interest of installers