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## D3.9 – Portuguese pilot implementation report

30<sup>th</sup> of July 2018



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## CONTENTS

1	Introduction.....	3
2	Legal context.....	4
3	National Stakeholders Platform.....	4
3.1	Goal (MoU).....	5
3.2	Composition .....	5
3.3	Activities .....	6
4	Online Platform.....	9
4.1	Managing the platform at the national level .....	9
4.2	Helpdesk .....	9
4.3	Label Pack A+ specific .....	9
4.3.1	Public authorities.....	9
4.3.2	Manufacturers .....	10
4.3.3	Wholesalers/Retail .....	10
4.3.4	System Designers and energy experts.....	11
4.3.5	Qualified Experts within the National Energy Certification System for Buildings .....	11
4.3.6	Installers and Integrator Installers.....	12
4.3.7	End-consumers (DECO) .....	13
4.4	External Label Pack A+.....	13
5	Monitoring activities.....	14
5.1	Targets .....	14
5.2	KPIs.....	15



## 1 Introduction

The Portuguese National Pilot Plan systematizes the activities conducted in Portugal within the Label Pack A+ project framework through the whole project duration, from 2015 to 2018.

In the 1<sup>st</sup> year of the project, the focus of the Portuguese activities was the development of the common tools and the set up of the Portuguese NSP. The 1<sup>st</sup> meeting was held in June with the participation of ten entities from public authorities, to market associations and consumer organizations. The discussion evolved around the common tools, the activities foreseen and the partnerships LPA+ could entail to boost its impact.

In the beginning of 2016, upon the development of the common tools, namely the online tool and the training resources, an active training campaign was launched, ADENE focusing on public authorities and APISOLAR targeting installers. In parallel DECO organized activities towards consumers, organizing workshops in cooperation with the CLEAR project, where energy efficiency and in specific energy label and the heating energy label were discussed. By the end of the 1<sup>st</sup> 2016 semester the targets established for the installers trainings had already been surpassed with a total of 173 participations. The partnerships with some of the NSP members were also activated with specific training sessions being organized with DGEG and DGC, public authorities, and EFRIARC, system designers' association. In its activities with consumers DECO launched a survey to assess the consumer's understanding of the heating energy label and, in partnership with DECO Proteste, a market surveillance campaign was entailed focusing wholesalers and targeting the display of the heating energy label. The results evidenced a poor uptake of the heating energy label and the need for a more active information and dissemination campaign.

ADENE's endeavours with public authorities were successful with the adoption of the heating energy label, product and package, by the Energy Efficiency Fund that explicitly requested the presentation of the label and product/package fiche to account for the expected savings in the replacement of old and inefficient heating solutions. ADENE cooperated in the definition of the programme, the rating performance scale and supported the final evaluation of the proposals. Nearly 1000 submissions were presented to this co-financing programme, what gave a wider visibility to the label.

In November 2016 the 2<sup>nd</sup> NSP meeting was organized. In this second meeting eight entities participated. The results of the first year and a half of activities were presented and potential improvements to these were discussed.

2017 was dedicated to the activities with NSP partners, namely EFRIARC and APED (wholesalers association) and DECO's initiatives with consumers. The 3<sup>rd</sup> meeting of the Portuguese NSP was organized in December 2017 and it aimed at presenting the final report of all the activities deployed as well as to present the work developed and recommendations outlined from WP4, regarding the revision of the heating energy label regulations.

The partnership with APED allowed for ADENE to organized training activities with wholesalers in 2018. The cooperation with the Energy Efficiency Fund was reactivated and a 2<sup>nd</sup> co-financing programme for the replacement of heating systems was launched in June 2018 (to be in place until October 2018).

Overall 374 professionals and 775 consumers participated in Label Pack A+ initiatives and 1.569 labels were assessed in the Portuguese online tool.

In parallel with the NPP activities the Portuguese consortium endorsed several communication activities, presented in D5.4.



## 2 Legal context

Space and water heating appliances are two of the technical systems considered in the evaluation of a building energy performance within the EPBD. The replacement or upgrade of these systems is considered a potential energy efficiency improvement measure that supports the upscale of the building's energy efficiency class.

Within this sense, and in the context of the Portuguese National Energy Efficiency Plan, the **National Energy Efficiency Fund** (technically supported by ADENE) launched in 2016 ([Aviso 20 - September/November](#)), and again in 2018 ([Aviso 25 - July/October](#)), a supporting scheme that finances the substitution of water heating products/systems in the residential and offices sector. The supporting scheme has a compulsory requirement for the proponent to present the heating energy label, for individual products solutions and package solutions.

Three solutions are up to co-financing:

- **Acquisition of a solar thermal system** to integrate with an already existing conventional heater (requirement: package energy label, considering the existing water heater (efficiency to assume according to the national EPBD regulations) and the new solar thermal system, minimum class A)
- Replacement of the existing heating solution with the acquisition of a **new heating package composed of a solar thermal system and a conventional backup heater** (requirement: package energy label minimum class A+)
- Replacement of the existing heater with the **acquisition of a more efficient conventional water heater** (requirement: product energy label minimum class A)

The fund offers a **60% co-financing** of the overall solution, with funding caps of:

- **Acquisition of a solar thermal system:** 2.500€
- Replacement with **new heating package, solar thermal and backup heater:** 3.000€
- Replacement with **a more efficient conventional heater:** 1.500€

The funding editorial explicitly indicated the Label Pack A+ package tool for calculating the package label. In 2016, nearly 1.000 proposals were submitted. From these almost 400 were not eligible due to the lack of the required energy label.

Similar to this co-financing scheme are the schemes deployed by the regional operational programmes within the Portugal 2020 framework. Five regional programmes also launched in their energy efficiency for buildings funding programmes labelling requirements for the co-financing of the replacement or upgrading of the existing water heating solutions, again explicitly indicating the Label Pack A+ tool to issue the package label.

## 3 National Stakeholders Platform

The Portuguese National Stakeholders Platform (NSP) was composed by the most relevant stakeholders in the Portuguese heating market. It comprehended 11 entities, legal actors, market associations, consumer organizations and non-governmental organizations in the energy and environment domain.

The main goal of the Portuguese NSP was to engage the most relevant actors in the heating market in the successful deployment of the energy labelling directive for heating appliances. The NSP assisted the Portuguese consortium in the validation and successful prosecution of the National Pilot Project (NPP) throughout the project's timeframe.



### 3.1 Goal (MoU)

The goal of the Portuguese National Stakeholders Platform was to gather a consultancy group that critically analysed, commented and contributed 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+

### 3.2 Composition

The Portuguese National Stakeholders Platform is composed by:

**DGEG** – *Direcção Geral de Energia e Geologia*

General Direction for Energy and Geology

**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

**APED** - *Associação Portuguesa de Empresas de Distribuição*

Portuguese Association of Retail Companies

**APIRAC** - *Associação Portuguesa das Empresas dos Sectores Térmico, Energético, Electrónico e Ambiental*

Portuguese Association of companies operating in the thermal, energy, electronic and environmental sectors

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

Portuguese Cooling and Air Conditioning Engineers Association

**ENA** - *Agência de Energia e Ambiente da Arrábida*

Arrabida's Energy and Environment Agency

**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*

QUERCUS - National Association for the Nature Conservation



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ASAE, the Portuguese market surveillance entity, was called upon, and an individual meeting was held, but did not accept the invitation to be part of the NSP.

### 3.3 Activities

#### 1. Participation in the NSP

The NSP meet three times during the Label Pack A+ project. In the three meetings always more than 50% of the entities were represented, outlining the importance of the project and the good relation it was created among the NSP.

The first meeting was held on the 22<sup>nd</sup> of June 2015. The main goal was to present, gather contributions and validate the Portuguese NPP 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 was held on the 26<sup>th</sup> of September 2016, and it aimed at presenting the results of the 1<sup>st</sup> set of activities and identify barriers and opportunities to revise the action plan for the forthcoming period.

The last meeting took place on the 15<sup>th</sup> of December 2017 374



Figure 1 – 1st, 2nd and 3rd NSP meetings

The participation in the NSP was formally acknowledged by all the participating members via an email, validating the minutes from the 1<sup>st</sup> meeting and agreeing to display the organization's logo in the Portuguese website, in the NSP webpage.

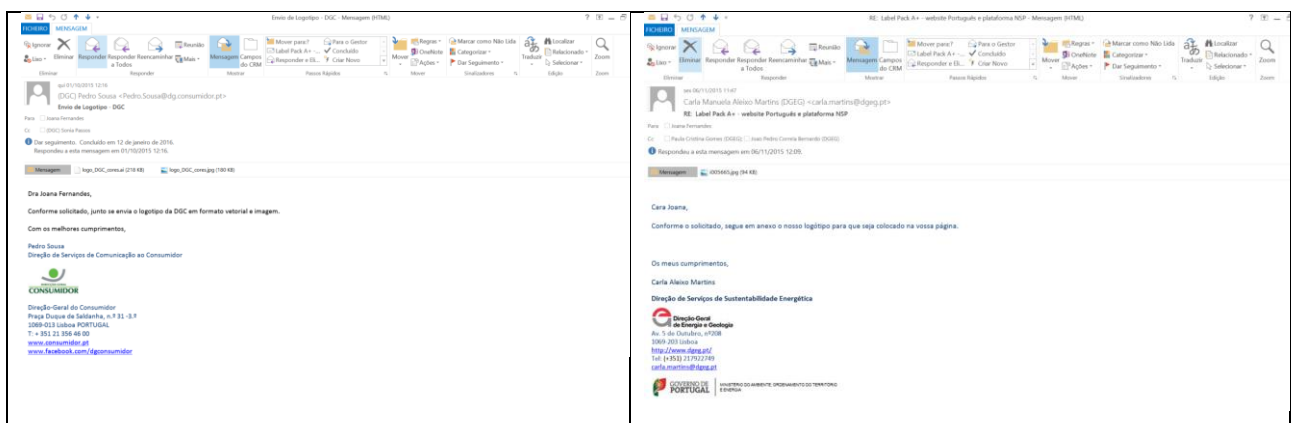


Figure 2 – Email from DGC and DGE sending their logo for the NSP webpage





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# LabelPackA+

The screenshot displays the Portuguese version of the LabelPackA+ website. The top navigation bar includes links for 'LabelPackA+ Portugal', 'Etiquetagem Energética', 'Perguntas Frequentes', 'Calcule a etiqueta', 'Recursos', 'Calendário', 'Contactos', 'Copyright', and 'Disclaimer'. Below the navigation bar is a banner featuring a map of Portugal, a large 'A+' energy label, and the word 'PORTUGAL'. To the right of the banner, under 'NATIONAL STAKEHOLDERS', are logos for ADEME, APEL, and DECO. The main content area is titled 'PLATAFORMA DE STAKEHOLDERS NACIONAL'. It explains that the NSP is a consultative body for Portuguese partners of the LabelPack A+ project, aiming to support and ensure the success of legislation implementation in Portugal. It lists the following stakeholders: AFIO (Associação de Fabricantes e Importadores de Produtos de Queima), AGEFE (Associação Empresarial dos Sectores Eléctrico, Electrodoméstico, Fotográfico, Electrónico), AIPOR (Associação dos Instaladores de Portugal), APED (Associação Portuguesa de Empresas de Distribuição), APIRAC (Associação Portuguesa das Empresas dos Sectores Térmico, Energético, Electrónico e do Ambiente), DGC (Direção-Geral do Consumidor), DGE (Direção Geral de Energia e Geologia), EFRIARC (Associação Portuguesa dos Engenheiros de Frio Industrial e Ar Condicionado), ENA (Agência de Energia e Ambiente da Arrábida), LNEG (Laboratório Nacional de Energia e Geologia), and QUERCUS (Associação Nacional de Conservação da Natureza). On the right side, it states 'This project is lead by' and shows logos for ESTIF (European Solar Thermal Industry Federation) and the European Union flag.

Figure 3 – Print screen of the area dedicated to the NSP in the Portuguese webpage.



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## 2. Evaluation of the online platform and tools

NSP participants were invited to contribute, comment and evaluate the online platform, as well as to provide feedback on the resources developed by Label Pack A+. Valuable contributions were received regarding the usability and validity of the tool. Suggestions were also made regarding the contents of the Portuguese website, and some of the proposed deliverables were also revised by some of the NSP members, namely the [Energy Label Guide](#)

## 3 Communication and Dissemination of the Label Pack A+

NSP participants were invited to disseminate the Label Pack A+ project through their media and via their network of associates, in particular the industry associations with whom dedicated training sessions were organized, for example with EFRIARC, APED and DGC (see section XX).

To this end a digital banner was developed and adequate to the specificities of some of the NSP members websites. The digital banner is a direct link to the online calculation tool.



Figure 4 – Print screen of APIRAC's and DGE's homepage with LPA+'s digital banner

The NSP members also actively participated in the communication events organized by ADENE, namely in the seminar held in November 2015 and in the final seminar that took place in February 2018.





## 4 Online Platform

### 4.1 Managing the platform at the national level

ADENE is the partner responsible for the Portuguese platform.

### 4.2 Helpdesk

The Portuguese helpdesk is operational since September 2015.

The service is managed by ADENE, in cooperation with APISOLAR and DECO, who are called whenever the questions posed are in their domains of action. Additionally, the Label Pack A+ consortium is also contacted when the national resources are unable to respond.

The helpdesk is available via:

- Web contact;
- Email;
- Phone

Between September 2015 and July 2018 nearly 100 contacts were received, via email and phone, mostly from suppliers and installers. A list with the most [frequently asked questions](#) was compiled and periodically updated in the Label Pack A+ Portuguese website.

An [online tool manual](#) was also developed and made available in the resources section.

### 4.3 Label Pack A+ specific

The Portuguese NPP had two main targets: installers, at broad, and consumers. Nevertheless, other market actors, such as public authorities, system designers, energy experts and suppliers were also targeted. The targets defined in the NPP were:

Activity	Nr.º Actions	Participants
Public authorities	8-10	50
Manufacturers	-	-
Wholesalers	12	120
System Designers	3	45
Installers	15	150
Consumers (direct)	6	120

Package Labels simulated/emitted in the LPA+ platform	<b>2100</b>
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#### 4.3.1 Public authorities

- 1 action with DGEG, 18<sup>th</sup> of February 2016– 9 participants
- 4 actions with DGC:
  - o 12<sup>th</sup> of January 2016, Lisbon – 16 participants



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- 10<sup>th</sup> of October 2016, Lisbon – 7 participants
- 17<sup>th</sup> of October 2016, Guimarães – 12 participants
- 18<sup>th</sup> of October 2016, Oporto – 4 participants

In total five sessions were organized with 48 participants. The initial target was accomplished.

#### 4.3.2 Manufacturers

Manufacturers were not the focus of the 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 were targeted, via direct contact from APISOLAR. A communication/information newsletter was sent to all APISOLAR associates, detailing the responsibilities within the regulation and the tools made available by the Commission and the LPA+ consortium.

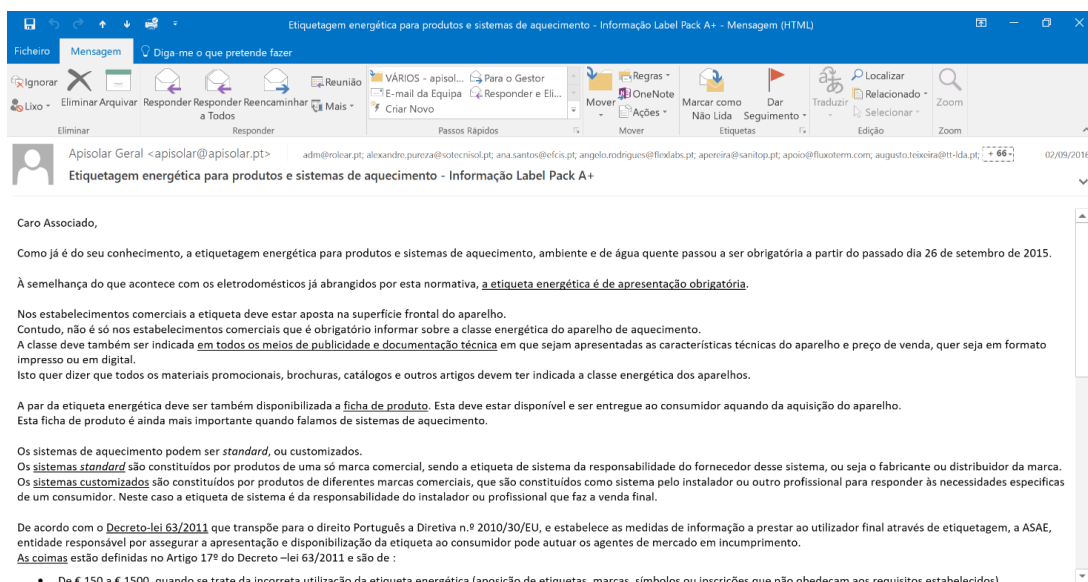


Figure 5 – APISOLAR's email to their associates

#### 4.3.3 Wholesalers/Retail

ADENE successfully engaged APED – the Portuguese Association of Retail Companies in the Portuguese NSP. That lead to the organization of one information session at APED's headquarters in Lisbon, to which all of their associates that act as suppliers and/or dealers of heating products were invited. The session took place on the 24<sup>th</sup> of May 2017 and received 15 participants, representing nine retailers.

This initial session lead to the establishment of closer partnerships with Worten and Grupo Mosqueteiros.

Two sessions were organized with Worten, on the 31<sup>st</sup> of January 2018 and on the 5<sup>th</sup> of February 2018, respectively with 13 and 12 participants.

One session was also organized with Grupo Mosqueteiros on the 28<sup>th</sup> of February 2018 for 10 participants.

In these sessions the participants were professionals from the commercial and product management departments.



All together four trainings were organized with a total of 50 participants. This result did not fully comply with the initial target. Despite this can be justified by the good information retailers already access and also by the fact that most of the retailers do not offer package solutions and only individual products, the professionals trained act as multipliers, being responsible for the organization of the shops and for the information that accompanies the products, and this information is then passed on to the vendors that directly contact with the end-consumer.

#### 4.3.4 System Designers and energy experts

ADENE organized several training sessions aimed at solar and heating system designers:

- 1 action with ADENE Academy, at the solar thermal system designers course, 14<sup>th</sup> of March 2016 – 9 participants
- 4 actions in partnership with EFRIARC (member of the NSP):
  - o 20<sup>th</sup> of April 2016 in Lisbon – 15 participants
  - o 21<sup>st</sup> of April 2016 in Oporto – 16 participants
  - o 29<sup>th</sup> March 2017 in Lisbon – 10 participants
  - o 30<sup>th</sup> March 2017 in Oporto – 9 participants



Figure 6 – Pictures from the trainings to system designers, organized with EFRIARC, in Oporto and Lisbon

Additionally, three sessions were organized by ADENE targeting energy experts, also as a support of the Energy Efficiency Fund Programme (see section 2):

- 5<sup>th</sup> September 2016, Lisbon – 13 participants
- 13<sup>th</sup> of September 2016, Lisbon – 13 participants
- 18<sup>th</sup> of October 2016, Oporto – 27 participants

Overall, 103 professionals, energy experts and system designers were trained, surpassing largely the initial targets. This can be justified, one the one side with the relevance of the theme for system designers, namely responsible for HVAC projects and also by the interest in the FEE co-financing system.

#### 4.3.5 Qualified Experts within the National Energy Certification System for Buildings

ADENE forward to the network of Portuguese Qualified Experts within the EPBD specific information regarding the link between the heating labelling framework and the buildings energy performance certificate. Approximately 2000 experts received the information, and some have also attended the trainings dedicated to energy experts and system designers.



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#### 4.3.6 Installers and Integrator Installers

APISOLAR was the Portuguese partner responsible for the trainings aimed at installers. A total of eight trainings were organized between the 2<sup>nd</sup> semester of 2015 and the 1<sup>st</sup> semester of 2016. A total of 240 professionals registered and from these 173 attended the trainings.

	LOCATION	EVENT	MONTH/YEAR	REGISTRATIONS	PARTICIPANTS
1	Porto	Concreta	20 <sup>th</sup> November 2015	40	31
2	Albufeira	-	11 <sup>th</sup> February 2016	10	8
3	Lisboa	-	3 <sup>rd</sup> March 2016	20	14
4	Leiria	-	4 <sup>th</sup> March 2016	29	25
5	Porto	-	10 <sup>th</sup> March 2016	64	42
6	Viseu	-	11 <sup>th</sup> March 2016	17	12
7	Loulé	-	14 <sup>th</sup> April 2016	37	27
8	Lisboa	Tektonica	6 <sup>th</sup> May 2016	23	14



Figure 7 – Pictures from the trainings to installers, organized by APISLAR.





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## 4.3.7 End-consumers

DECO was the partner responsible for the communication with the Portuguese consumers. To this end, DECO organized several workshops all over the country. In the 1st semester of 2016 and 2017, DECO implemented a total of 35 workshops for the general population (reaching 775 consumers) and 21 in cooperation for the scholar community (reaching 653 secondary level students). The 2016 workshops were organized in cooperation with CLEAR, another European funded project.



Figure 8 – Workshop for the general population (LabelPackA+ roll-up used)

### 4.3.7.1 Consumer Survey

DECO - with the support of Proteste (DECO's Magazine) ADENE and APISOLAR launched an online survey to consumers regarding the energy label, that ran between June and September 2016. The SurveyMonkey survey was communicated via websites, newsletters of the Portuguese Consortium and NSP members.

DECO received 210 complete answers from Consumers that contacted with the energy labels and gave 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.

Figure 9 – Screen shot of the consumer's survey (partial view)

## 4.4 External Label Pack A+

Cooperation with existing events mainly occurred at the communication level, with the participation in trade and consumer-oriented events. More details are provided in D5.4 on the communication activities.



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## 5 Monitoring activities

### 5.1 Targets

Activity	Target		Results	
	Nr.º Actions	Participants	Nr.º Actions	Participants
<b>Public authorities</b>	8-10	50	<b>5</b>	<b>48</b>
<b>Wholesalers</b>	12	120	<b>4</b>	<b>50</b>
<b>System Designers</b>	3	45	<b>8</b>	<b>103</b>
<b>Installers</b>	15	150	<b>8</b>	<b>173</b>
<b>Consumers (direct)</b>	6	120	<b>35</b>	<b>775</b>

As for the number of package labels simulated/emitted in the Portuguese LPA+ platform, from October 2015 to July 2018 a total of 1.569.

Package Labels simulated/emitted in the LPA+ platform	<b>2100</b>
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Type of label	
Water Heater	733
Comibination Heater Preferential Boiler	180
Comibination Heater Preferential Heat Pump	45
Space Heater Preferential Boiler	25
Space Heater Preferential Heat Pump	9
<b>TOTAL</b>	<b>1.569</b>

Additionally, it is relevant to identify the number of pages views received by the Portuguese online tool webpage, 6.947.





## 5.2 KPIs

Activity	Direct KPI	KPI	Indirect KPI	Indirect KPI
Public Authorities	<ul style="list-style-type: none"> <li>• Presence at training session</li> <li>• Nr. of contacts with the Portuguese LPA+ helpdesk</li> </ul>	<ul style="list-style-type: none"> <li>• 48</li> <li>• 2</li> </ul>	<ul style="list-style-type: none"> <li>• Accesses to ADENE's LPA+ webpage</li> </ul>	N/A
Wholesalers	<ul style="list-style-type: none"> <li>• Presence at training session</li> <li>• Nr. of contacts with the Portuguese LPA+ helpdesk</li> </ul>	<ul style="list-style-type: none"> <li>• 50</li> <li>• 5</li> </ul>		
System Designers	<ul style="list-style-type: none"> <li>• Presence at training session</li> <li>• Nr. of contacts with the Portuguese LPA+ helpdesk</li> </ul>	<ul style="list-style-type: none"> <li>• 103</li> <li>• 126 (mixed)</li> </ul>		
Installers	<ul style="list-style-type: none"> <li>• Presence at training session</li> <li>• Nr. of contacts with the Portuguese LPA+ helpdesk</li> </ul>	<ul style="list-style-type: none"> <li>• 173</li> <li>• 126 (mixed)</li> </ul>	<ul style="list-style-type: none"> <li>• Accesses to APISOLAR's LPA+ webpage</li> <li>• Accesses to AIPOR's LPA+ webpage</li> <li>• Nr. of subscribers of AIPOR's newsletter</li> </ul>	<ul style="list-style-type: none"> <li>• NA</li> <li>• NA</li> <li>• 2100</li> </ul>
Consumers (direct)	<ul style="list-style-type: none"> <li>• Presence at training session</li> <li>• Contacts in fairs and consumer events</li> <li>• Nr. of contacts with the Portuguese LPA+ helpdesk</li> <li>• Nr. of contacts with the DCG offices (on this subject)</li> </ul>	<ul style="list-style-type: none"> <li>• 775</li> <li>• XX</li> <li>• -</li> <li>• -</li> </ul>	<ul style="list-style-type: none"> <li>• Nr. of clicks at DECO's LPA+ webpage</li> </ul>	790
Consumers (indirect)			<ul style="list-style-type: none"> <li>• Nr. of subscribers of DECO Proteste magazine</li> </ul>	487.000
General	<ul style="list-style-type: none"> <li>• Nr. of accesses to the Portuguese LPA+ webpage</li> </ul>			18.250