



ROUNDTABLE REPORT

Stakeholders discuss
Industrial Insulation

28th November 2013

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A roundtable organised by the European Industrial Insulation Foundation



*28th November 2013
Hotel Silken Berlaymont
Brussels*

Guests



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Present

Andoni Hidalgo	Public Affairs & Communications Manager, EURIMA
Andreas Guertler	Director, Eiif
Arianna Vitali Roscini	Policy Office (Energy Efficiency), WWF Europe
Arnaud Duviolguerbigny	Head of Policy, COGEN EUROPE
Brook Riley	Campaigner, Friends of the Earth Europe
Christine Marlet	Secretary General, EUROGYPSUM
Claude Turmes	Member of the European Parliament
Davide Chiaroni	Vice director & Co-founder Politecnico of Milan Energy&Strategy Group
Edgar van de Brug	Industrial energy specialist, Ecofys
Eva Hoos	Policy Officer, European Commission DG ENER C.3 - Energy Efficiency
Gerald Strickland	Director, European Alliance to Save Energy (EU-ASE)
Hubert Mandery	Director General, European Chemical Industry Council (CEFIC)
Jonathan Lambregs	Project manager, Energy Saving Pioneers
Kathrin Watson	Policy Adviser, BDEW German Association of Energy and Water Industries
Kornelis Blok	Director of Science, Ecofys
Luigi Petito	Managing Director, Business Solutions Europa
Marion Le Roy	Economic Manager, Eurogas
Marit van Lieshout	Researcher/consultant, CE Delft
Martin Schaer	Senior Advisor to the Management Board, Building Technologies Division, Siemens AG
Michael Berger	International Market Manager Industry, Eiif
Michael Villa	Consultant, Business Solutions Europa
Michele Mannucci	Member of Steering Committee, Eiif
Neus Barres Badia	Project Coordinator, Eiif
Niels Ladefoged	Member of the Cabinet of Commissioner Hedegaard, European Commission
Paul de Koning	General Manager, NCTI
Randall Bowie	Chief Consultant, Rockwool International A/S
Rod Janssen	Editor, Energy in Demand
Sam Cortvriend	Energy, Transport & Infrastructure Group, ING Commercial Banking
Sian Hughes	Head of EU Public Affairs and Corporate Communications, Knauf Insulation

Summary of proceedings



After an introduction from **Andreas Gürtler**, Director of the European Industrial Insulation Foundation (Eiif), **Claude Turmes**, member of the European Parliament and rapporteur of the Energy Efficiency Directive, took the floor. Mr Turmes identified **3 dossiers** of particular interest for industrial insulation:

1. The EU energy and climate package for 2030
 - He welcomed the industrial insulation report drafted by Ecofys and highlighted its relevance with regard to the discussions around the EU energy and climate package for 2030: industrial insulation can ensure the competitiveness of EU industry, it should be encouraged and further developed;
 - A specific target for energy savings for 2030 is needed. A single greenhouse gas (GHG) emissions target will not develop energy efficiency per se (the International Energy Agency also confirms this paradigm).
2. The implementation of the Energy Efficiency Directive
 - An ambitious and rapid implementation of article 8 will boost industrial insulation.
3. The revision of the European Commission guidelines on State Aid in the energy field
 - Decision-makers need to understand that these regulations have a considerable potential for the development of energy efficiency.

Finally, **Mr Turmes** added:

- Europe will never lead on cheapest energy, therefore we should lead on least energy as a driver of innovation and competitiveness;
- 2/3 of power plants need to be renewed in the EU. The European Commission estimated that 200bn € are needed to replace and modernize them. Both public and private resources must be invested in this sense, but serious investments in energy efficiency can significantly reduce the amount need;
- The shale gas development in the USA is not a real revolution as it did not really affect energy prices. In addition, shale gas development in Europe presents serious environmental challenges. This technology would not impact on the competitiveness of European businesses as it could impact a wide uptake of energy efficiency products and solutions;
- Decision-makers have more contacts with reactionary companies and organizations: they need to hear the voice of the progressive business community and the concrete examples.

Professor Chiaroni briefly presented the results of a study focused on Italy and highlighted that:

- 90% of companies are just thinking about energy efficiency improvements only when the plant is obsolete;
- Very rarely thermal insulation is on the agenda of companies;
- All companies who contributed to the Italian study did not even think about industrial insulation as a BAT to deliver energy efficiency
- It is essential to increase awareness among companies (in particular about the potentials and not only the costs).



Summary of proceedings

Niels Ladefoged underlined that the revision of State Aid guidelines are strategic. They will define how Member States can make exemptions for energy/environmental taxation.

The German example (where companies that implement ISO 50001 are exempted from environmental taxation) should be taken as a model.

Eva Hoos highlighted that article 8 of the EED has a huge potential, in particular for large companies that have to make energy audits. Member States have to implement it by 5 June 2014 and in order to ensure that the transposition is done timely and with coherent support schemes, now stakeholders must get in touch with law-makers in capitals and propose solutions on how to implement it in the best way. In addition, the European Commission industrial platform, that will be launched next year, as well as the Concerted Actions, should focus their attention on energy audits in companies and spread related best practices.

Other participants underlined the following issues:



“ Both better regulation and awareness rising are needed to boost industrial insulation. Concrete examples are very helpful to support the business development. Unluckily rational decision does not happen by themselves, decision-makers must act accordingly; ”

“ Available BAT are not deployed in the best way; ”

“ There is a considerable amount of resources available on the market. It should be unlocked and addressed to develop industrial insulation; ”

“ If the EU energy and climate package for 2030 will foresee only a 40% GHG emissions target, energy efficiency will not be fostered and EU industries will loose the opportunity to invest in industrial insulation and so increase their competitiveness; ”

“ Energy intensive industries, in particular the ones in the chemical field, are already committed to industrial insulation however, are keen to explore untapped potential; ”

“ The role of maintenance is crucial. ”



Research shows that Europe is unlikely to ever be in the position to pay lower energy prices. One of the most cost effective solutions to enhance the competitiveness of the EU is therefore to reduce energy consumption. According to data presented by EiiF and Ecofys this can realistically be achieved by setting an ambitious energy reduction target for 2030.

The industrial insulation example shows that Europe is missing out on the opportunity to realise these savings in reduced energy consumption due in large part to a lack of awareness by businesses as to what can be achieved at negative cost.

A strong implementation of art. 8 of the Energy Efficiency Directive (energy audits) is crucial to realise the large economic and energy efficiency potential of the best available technology in industrial insulation. EiiF will continue to raise awareness of the benefits of industrial insulation and hopes that the relevant EU institutions will add impetus necessary to push this forward.

Background

In preparation of the present roundtable, the EiiF organized a meeting programme with 21 relevant Brussels based stakeholders. Some are among the attendees today. The meeting programme was carried out from October 22nd to October 31st. The following notes highlight some of the issues discussed at the meetings.

- Representatives from electricity, paper, non-ferrous metals industries, gas wholesale, retail and distribution sectors and manufacturers of gypsum products voiced their committed to improve the efficiency of their systems and expressed interest to further understand and possibly exploit the potential of industrial insulation.
- For representatives from glass and lime industry energy cost is a great concern however, they see no possibility to further increase their energy performance through industrial insulation. For the glass industry, for example, industrial insulation poses technical concerns due to the high temperature reached in their industrial processes.
- In countries where there is already an obligation to save energy on energy suppliers (similar to the one foreseen by art. 7 of the Energy Efficiency Directive), like in Denmark, industrial insulation is already a component of many industries business strategies.
- EU industry lobby, BusinessEurope was surprised by the lack of awareness among industries of the potential of industrial insulation. According to BusinessEurope, high energy prices and competitiveness are the main concerns of European industry which is often well aware of all solutions that can improve their energy performance.
- All representatives of the European Commission met learnt about the unexploited potential of industrial insulation and its contribution to increase competitiveness by addressing the problem of high energy prices in Europe. A correct implementation of art. 8 of the Energy Efficiency Directive could help to close this gap.
- Concerted Actions are an opportunity to present TIPCHECK to implement properly art. 8 of the Energy Efficiency Directive.
- Energy efficiency will be a priority of the forthcoming EU Greek Presidency. There could be joint initiatives to present to EU Ministers the potentials of industrial insulation.
- Brussels based industrial stakeholders are regulatory/public affairs professionals, therefore their knowledge of industrial process is limited. In many cases, they forwarded EiiF documents to their competent internal department (process automation, maintenance, etc.) or to individual companies in case of industry association. However to a certain extent, they found the information exchanged relevant also for their policy work in Brussels, for example in relation to the implementation of art. 8 of the Energy Efficiency Directive.
- The review of the Energy Efficiency Directive in 2014 could be the opportunity to make industrial insulation a binding measure.

- “[Study: Insulation could save industry €3.5 billion a year](#)”, Euractiv, 25 November 2013 (English, French and Czech)



- “[Insulation could save industry €3.5 billion a year](#)”, Financial Mirror, 26 November 2013 (English)



- “[Let's talk about industrial insulation](#)”, Energy in Demand, 29 November 2013 (English)



The European Industrial Insulation Foundation is a European non-profit foundation registered in Switzerland in 2009. The Foundation has been set up to promote and establish the use of industrial insulation as a widely understood and accepted means of achieving sustainability. Since its foundation EiiF has established itself as a resource for governments and industries that need to reduce CO2 emissions and save energy.

