

ENERGY EFFICIENCY FOR A COMPETITIVE AND DECARBONISED EU ECONOMY

THE EUROPEAN ALLIANCE TO
SAVE ENERGY'S STRATEGIC
VISION 2019 - 2024



EUROPEAN ALLIANCE TO
SAVE ENERGY
Creating an Energy-Efficient Europe



ORBITAL SYSTEMS



SIEMENS



E3G



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Foreword

Harry Verhaar, Chair of the Board of Directors

Our focus on measuring global success by GDP growth has trapped us in a linear view of society, with carbon increasingly becoming a constraint to current and future improvements in prosperity. We need to become much smarter and more resource efficient. We need to transition toward an approach in which long term quality of life becomes the most important metric.

In this context, overall energy efficiency improvements across all sectors are key to arriving at a climate neutral world by 2050.

An energy efficient Europe will foster competitiveness and growth through innovations in a range of sectors, each of these contributing to the prosperity, health and wellbeing of Europe's citizens.



Monica Frassoni, President

We must take bold actions to limit global warming. If we want to achieve net zero emissions by 2050 we need to put the energy efficiency first principle at the heart of the transition and of the future energy system. We need to act now, starting from increasing the level of ambition for 2030. People, governments and businesses must work together to fully realise the energy efficiency potential across industrial sectors, regions and cities. This will allow us to reap the tangible social, economic and environmental benefits of energy efficiency.

Time is running short, we need a shared sense of urgency that will drive better implementation, the adoption of adequate rules, investments and the use of available resources.



Businesses Ahead for an Energy Efficient and Decarbonised Europe

“Our vision is of a future where energy efficiency is central to the entire EU energy system and is a fundamental driver for citizens’ empowerment, decarbonisation, job creation, sustainable growth, competitiveness, productivity, innovation and energy security”.

The European Alliance to Save Energy (EU-ASE) is a cross-sectorial multi-stakeholder business-led alliance promoting the role of energy efficiency across the whole EU energy system, from generation and local production to end use. The membership of EU-ASE brings together businesses and thought leaders, with a cross-party group of members of the European Parliament.



Kim Fausing, CEO, Danfoss

An ambitious plan to fully decarbonise Europe is not only good for citizens but for businesses as well. We know that technology exists to meet these plans, but businesses need clear signals from governments on the future direction of Europe. We can then invest in innovation and create jobs to support the transition to a fully decarbonised economy.

EU-ASE is known to be a leading business voice in a growing, diverse and increasingly well-organised energy efficiency community in Brussels. Since our foundation in 2010, we have helped put energy efficiency high on the agen-

da of EU decision makers. Together with other Brussels-based and national stakeholders we developed and promoted the Energy Efficiency First (EE1) principle, which is now a concept used across all the EU institutions and was recently introduced in the European legislative framework.

We are convinced that through prompt implementation of EU legislation, together with suitable public and private financing, energy efficiency can play a much bigger role in the transition towards a decarbonised Europe.

Laurence Tubiana, CEO, European Climate Foundation

The recent 1.5°C IPCC report was unequivocal in warning the world has until mid-century to limit temperature rise to 1.5 and avoid the worst impacts of climate change. It is up to European companies, governments and citizens alike to ramp up ambition and make radical emissions cuts now, including through energy efficiency, to achieve these goals.



Because of the strength and number of our members we:

- Represent industry and thought leaders central to the energy efficiency campaign. Our members are all well-known and respected brands and NGOs, whose importance goes far beyond their individual sectors.
- Address policy and regulatory affairs with ambitious and well-developed positions, and intervene swiftly in the energy transition debate.
- Are able to reach out and develop partnerships with high-level politicians, policy makers and stakeholders, at EU, national and local levels, including cities.

Our mission is to:

- Serve as the leading European business organisation representing industries committed to driving an energy transition towards a more efficient, competitive and decarbonised society.

- Give visibility to, and enhance technological and market solutions for, energy efficiency, the potential of which is today not fully exploited.
- Contribute to a well-functioning EU legislative and financial framework for energy efficiency and cost-effective and socially responsible decarbonisation, in line with the Paris Agreement.
- Promote a forward looking political agenda, where energy efficiency supports emission cuts through an efficient and resilient building stock, the integration of renewable energy, and an electric mobility revolution.
- Empower people with digitalisation, efficient and smart technologies, promoting the role of citizens in the implementation of the Clean Energy Package for All and the transition to net zero emissions by 2050.
- Convince decision makers and investors that energy efficiency is affordable, realistic, and at the heart of a competitive and sustainable economy.

The EU Energy Efficiency Regulatory Framework

The last decade saw an unprecedented increase in awareness of the multiple benefits of energy efficiency. As a result of this, in November 2016 the European Commission proposed energy efficiency as one of the pillars of a package of legislation known as Clean Energy for All Europeans. EU-ASE was actively involved in talks with all the European Institutions, Member States and other interest groups, while the proposals were being developed. Despite the complexity of the discussions, policy makers showed that there is growing understanding of the full social, economic and environmental potential of energy efficiency. In 2018, the following important pieces of legislation relevant for realising the energy efficiency potential were adopted: the Energy Efficiency Directive (EED), the Governance of the Energy Union Regulation, the Energy Performance of Buildings Directive (EPBD) and the Internal Market for Electricity Directive and Regulation. Over the next few years Member States, the Commission, local governments, businesses, civil society and other stakeholders will have to work together to fully implement these pieces of legislation. All of this new legislation is an important step forward, but to realise the full potential of energy efficiency, much more has to be done.

Helman le Pas de Sécheval, General Secretary and member of the Executive Committee, Veolia

Numerous environmental service solutions with considerable GHG emission reductions, such as energy efficiency in industry and district heating, cogeneration, smart water management, and waste recycling or recovery, are technologically mature. Implementing these solutions on a large scale requires further regulatory support.



Moving forward EU-ASE will:

- Further contribute to policy makers' and consumers' understanding of the importance and benefits of energy efficiency
- Promote the need for a strong EU role in the global fight against climate change
- Put energy efficiency at the centre of EU and international long-term decarbonisation strategies
- Make energy efficiency in buildings a strategic priority for addressing energy infrastructure needs
- Support the development of relevant EU legislation and its swift implementation at national and regional level
- Improve use of public resources and help design innovative financing schemes, to unlock private investments in cost-effective energy-efficiency programmes across Europe

Emmanuel Normant, Vice President for Sustainable Development, Saint Gobain

The European Energy Efficiency framework is in place and must be promptly implemented. Simple tools like energy efficiency obligation schemes are essential to boost building renovation and meet our 2030/2050 GHG emission targets.



Energy Efficiency Directive

The directive introduces a 32.5% headline energy efficiency target for 2030 and sets a mandatory saving sub-target at 0.8% of annual final energy consumption. It also foresees an upward revision clause of the target in 2023. Such an upward revision should factor in: the falling costs of technologies, the uptake of new services, and alignment with the Paris Agreement climate objective. EU-ASE will continue to advocate a binding 40% energy efficiency target that delivers energy efficiency benefits for citizens, business and the environment.

Governance of the Energy Union and Climate Action Regulation

The regulation introduces the Energy Efficiency First principle in the EU legislative framework for the first time and obliges every Member State to follow a binding European template to prepare National Energy and Climate Plans for 2030 (NECPs) by January 2020. NECPs will support the European Commission planning and monitoring activities in view of reaching the obligations under the Paris Agreement.

Energy Performance of Buildings Directive

The directive introduces long term national renovation strategies to achieve an energy efficient and decarbonised European building stock by 2050. Such strategies must foresee mid-term goals for 2030 and 2040 and measurable progress indicators. The revised EPBD also introduces new provisions to enhance smart technologies and technical building systems.

Efficiency First for a New Energy System

Europe's energy landscape is going through profound changes, driven by digitalisation, an increasing share of renewable energy, distributed generation, citizens' engagement (the creation of "prosumers"), electrification, storage and market integration on both national and European level.

PROSUMERS

The role of end-users will be essential in the transition to net zero emissions. "Net zero" means all greenhouse-gas emissions have to be reduced or offset completely, making activities climate neutral. The transition must not only include policy-makers and industry. It requires strategic communication to engage energy users. Half of all Europeans could be producing their own electricity by 2050, meeting 45% of the EU's electricity demand. In a smart, energy-efficient energy system, energy end-users can both consume and produce electricity. By using advanced and energy efficient technologies and a highly efficient, flexible and "smart ready" building stock, energy end-users can monitor their consumption, offer flexibility to shave peak energy demand, and thus optimise and monetise their resources in the market.

ENERGY EFFICIENCY FIRST

Energy efficiency is a central pillar of the long-term EU energy transition. Assessing the potential of energy efficiency in all investment decisions means making informed choices and investing taxpayers' money in the most cost-effective way.

BUILDINGS

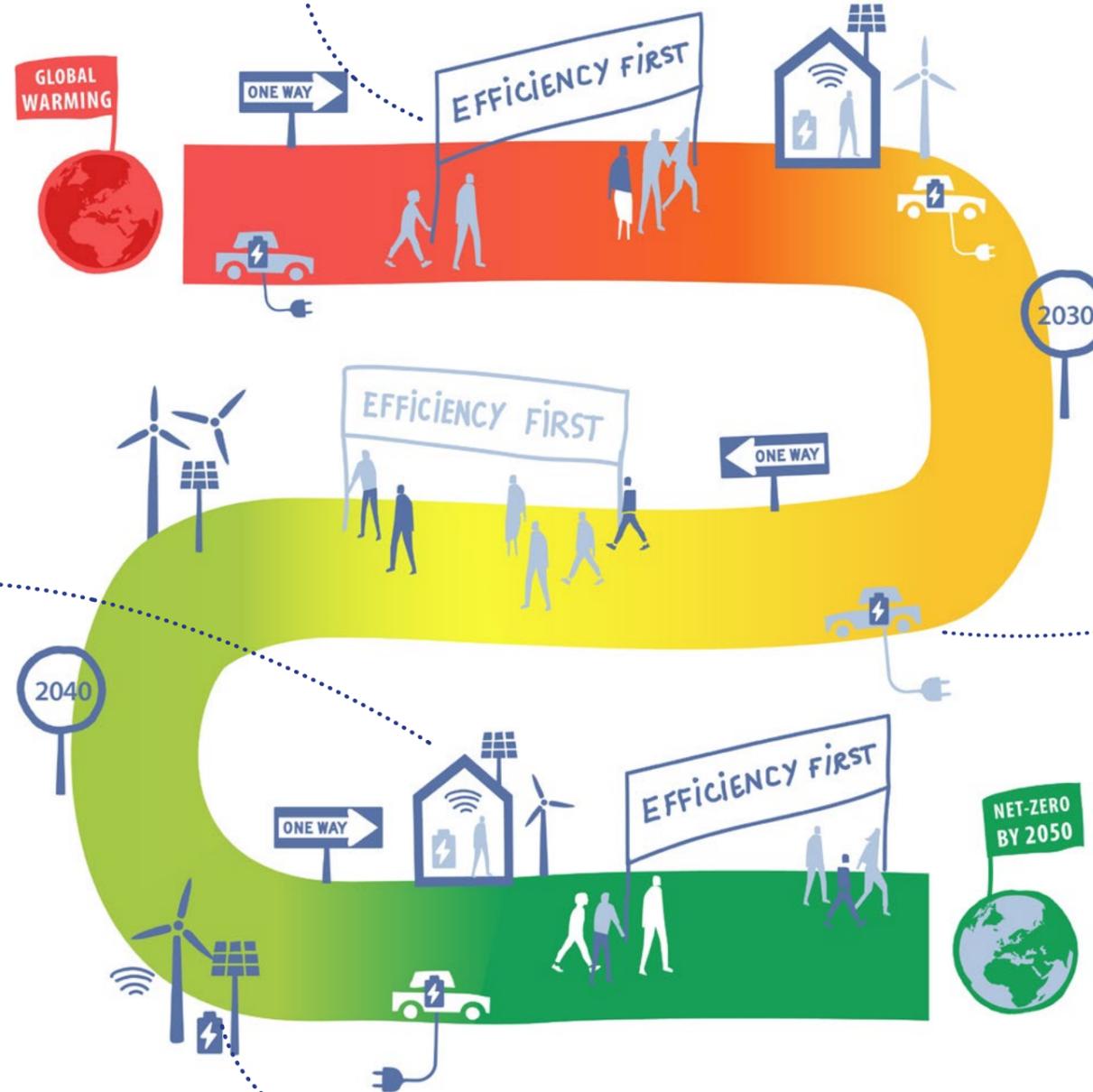
The energy-efficiency potential of the existing EU building stock, which is currently responsible for approximately 40% of energy consumption and 36% of CO2 emissions in Europe, can be fully tapped through a "system" approach to buildings renovation. In order to achieve net zero emissions by 2050, emissions from the building sector must be cut by at least 90% and ideally by 100%, below 1990 levels. This can be achieved using technologies that are safe, reliable, affordable and widely available.

ELECTRIC VEHICLES

The large scale deployment of electric vehicles (EVs) will increase electricity demand. The accelerated energy renovation of buildings can contribute to ensuring that the power grid has sufficient capacity to sustain the EV revolution. Increasing the current global retrofit rate from approximately 1% per year to between 3% (with a 50% efficiency improvement) and approximately 5% (with a 30% efficiency improvement) per year, could make it possible to power 550 million electric vehicles on the road by 2040 without the need to increase generation capacity.

RENEWABLES

With energy efficiency and renewable energy working together, the decarbonisation of our economy will go much faster and at a lower cost. Renewable energy and energy efficiency can bring about more than 90% of the energy-related CO2 emission reductions needed to meet Paris Agreement targets. Improving energy efficiency means that energy demand is reduced. This in turn means that the same amount of renewable energy can account for a larger share of final energy use. Another example of the efficiency-renewables synergy can be seen in local energy communities, where distributed local generation of renewable energy encourages end-users to efficiently manage their energy consumption.



Energy Efficiency and the 1.5°C Goal

Climate change is defining our era. If we do not take bold action we risk missing the moment where we can avoid the disastrous consequences of climate change, for people and for the natural systems that support us all. We are at a defining moment.

Energy efficiency is key to achieving the goals set out in the Paris Agreement on climate change and related greenhouse-gas emission reductions. According to the International Energy Agency (IEA), 76% of the European greenhouse gas emission reductions required to keep temperature increases below 1.5°C must come from energy efficiency. In other words, without bold energy efficiency policies, it will be impossible to reach Europe's international commitments, maintain Europe's global climate leadership, and prove the business case for climate change mitigation.

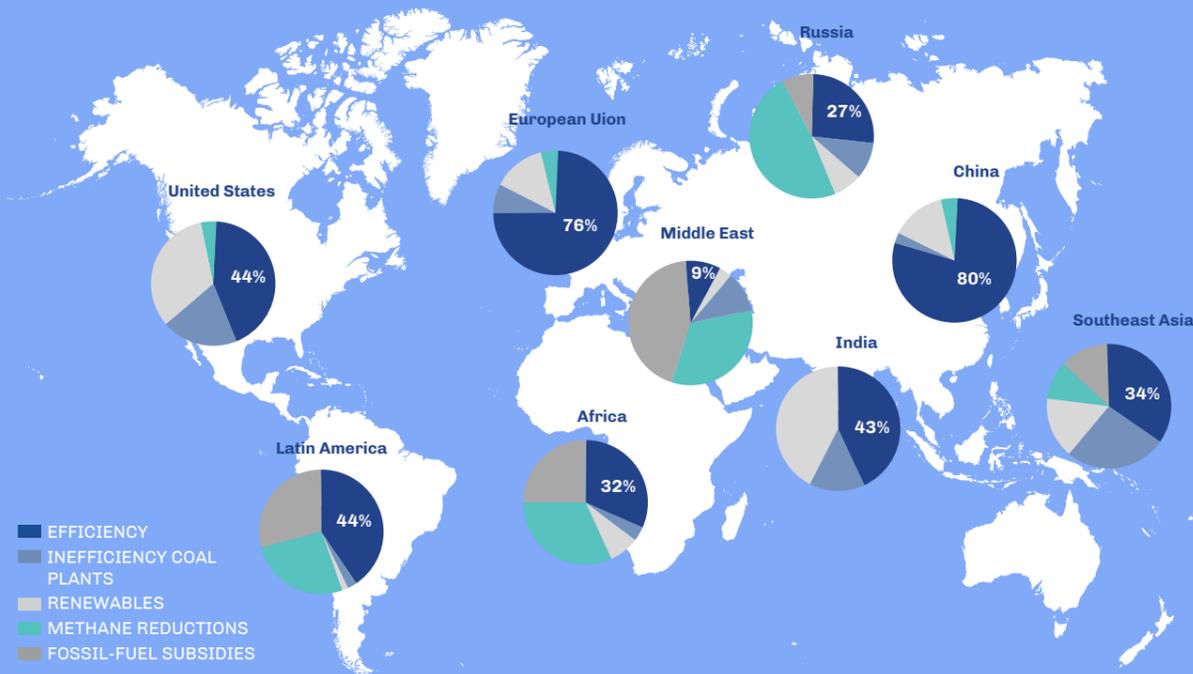
Catia Bastioli, Novamont CEO, Kyoto Club President

The EU has to maintain its leadership in research and innovation to develop zero-carbon solutions for a sustainable planet, so as to increase its leadership in climate action. Research and innovation investments are the best way to address the decarbonisation challenge while also ensuring European industrial and economic leadership.



Nick Mabey, CEO, E3G

Energy efficiency is the most critical element of delivering a rapid and affordable transition to a climate neutral EU economy. By reducing people's bills, tackling energy poverty and creating high quality jobs in Europe, energy efficiency delivers immediate benefits to all parts of society across the whole of the EU. EU-ASE is a key voice in ensuring that energy efficiency is at the heart of EU infrastructure, energy, social and industrial policy choices.



GHG Emissions reduction by measure in the Bridge Scenario relative to the INDC Scenario 2030

In its Communication "A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy", the European Commission has concluded that energy efficiency measures should play a central role in reaching net zero GHG emissions by 2050, reducing energy consumption by as much as half compared to 2005. However the principle of Energy Efficiency First as the first and best way to decarbonise our economies has not yet been fully realised.

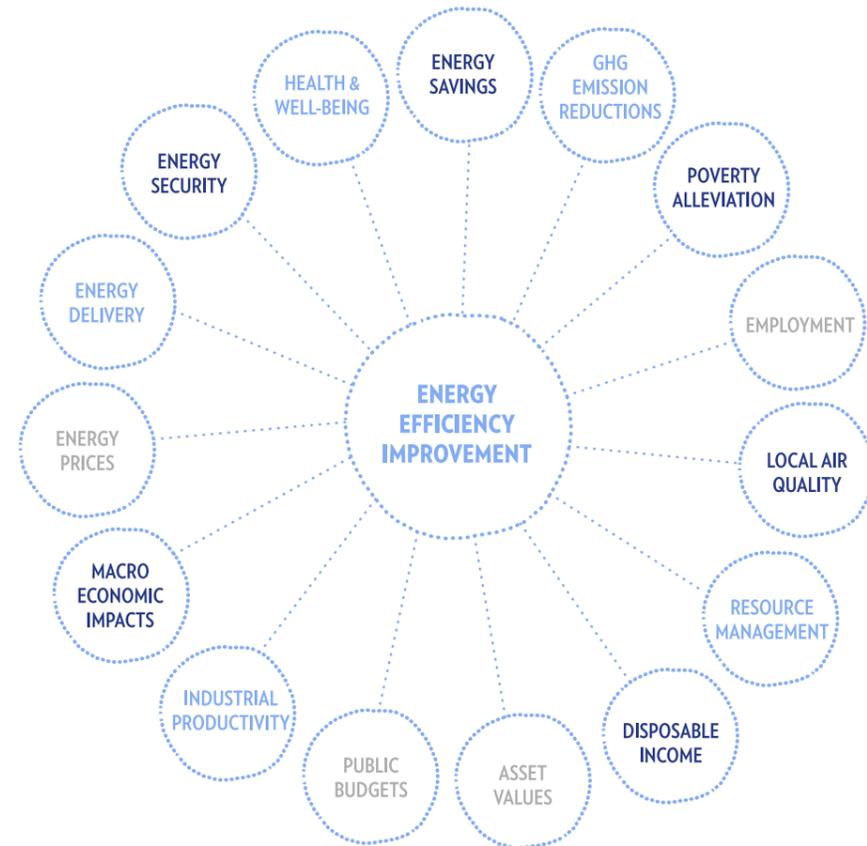
According to the EU's Governance of the Energy Union Regulation, "Energy Efficiency First" means assessing the potential of energy efficiency in all decisions related to energy use. In practice this is about systematically assessing the added value and costs of energy efficiency measures and climate neutral energy supply solutions, taking account of benefits such as job creation, economic growth, energy security, improved air quality and climate mitigation. The Energy Efficiency First principle boils down to making informed choices to invest taxpayers' money in cost-effective measures. It should be recognised as an overarching pillar of the EU's long term energy and climate strategy.

The multiple benefits of energy efficiency in a climate neutral world

Not only is energy efficiency crucial for the transition to a decarbonised economy, it also offers many long-term benefits to offset initial costs associated with efficiency improvement.

The multiple benefits of energy efficiency include economic growth, increased competitiveness, job creation, a healthier population and ecosystems, clean air and water, alleviation of energy poverty, and energy security. These benefits, combined with an increased use of renewables, simultaneously address the major societal, economic and environmental challenges facing the EU today.

In addition to all this, investing in energy efficiency simply makes economic sense. **On average, every 1€ invested in energy efficiency saves 3€, over the lifespan of a technology.** This means that energy efficiency is the most cost-effective way to tackle climate change. The European Alliance to Save Energy has a key role to play in delivering this agenda.



Energy Efficiency: Game-Changer for a Decarbonised EU

The European Commission Communication "A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy" provides a series of transition pathways as eight scenarios. A higher energy efficiency target post 2030 is a major common assumption for all of them.

LONG TERM STRATEGY OPTIONS								
Eight Scenarios	Electrification	Hydrogen	Power-to- X	Energy Efficiency	Circular Economy	Combination	1.5° Technical	1.5° Sustainable Lifestyles
Major Common Assumption	Higher energy efficiency post 2030							

Source "A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy", November 2018

Digitalising the energy system

Digitalisation is key to accelerating decarbonisation of the EU economy while ensuring business competitiveness.

Digitalisation holds the promise of breaking down traditional barriers between supply and demand. Thanks to digitalisation it is possible to deliver energy at the right time, in the right place and at the lowest cost.

The digitalisation of the energy system provides unique opportunities for smart and well insulated buildings, to improve automation and use energy more efficiently. It helps citizens to participate actively in the energy market, and fosters a better use of energy from renewable sources.



Peter Halliday, Head of Building Performance and Sustainability, Siemens Building Technologies

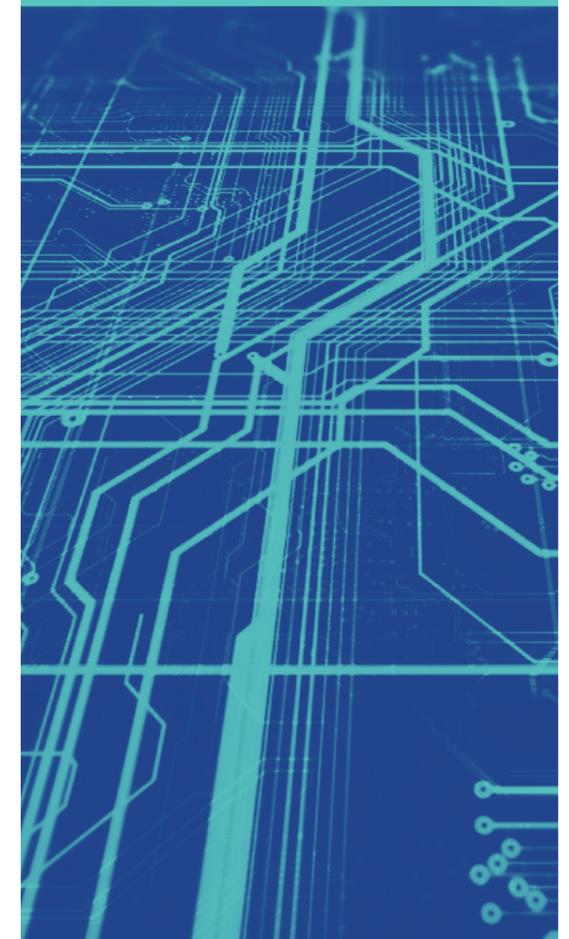
The aspirational holistic EU energy system is only feasible with the active participation of buildings. To really be part of an integral energy system, buildings must decarbonise and change the way they use energy. The basic requirement is that buildings must dynamically manage energy usage, leveraging onsite generation and storage capacity, and integrate data analytics into building operations. The necessary investments for this will create local employment, support a faster retirement of fossil-fired over-capacity, improve economic competitiveness and finally enhance quality of life.

Cities, home appliances, charging solutions for electric vehicles, smart grids and smart meters, are just a few of the areas profoundly impacted by the widespread diffusion of digital systems and data flows.

OUR ENGAGEMENT

EU-ASE embraces the digital revolution. If we manage the process thoughtfully, we could leverage digital tools to accelerate the decarbonisation path while addressing the environmental impact of ICTs.

Depending on future efficiency trends, by 2021 electricity consumption from data networks could increase by as much as 70% or fall by up to 15%.



Cutting buildings' carbon footprint

Unlocking the potential for energy savings and carbon-footprint reduction that lies in the EU buildings stock is and will remain a top priority for the European Alliance to Save Energy.



Jean-Claude Carlin, CEO, Knauf Insulation

Improving energy efficiency in buildings through measures such as better insulation is a cost-effective way of reducing energy usage, decarbonising our economies and making buildings more affordable whilst improving health and well-being.

The EU building stock is responsible for about 40% of Europe's final energy consumption and 36% of CO2 emissions in Europe. If deployed at scale, safe, reliable and readily-available technologies can tap the energy efficiency potential of Europe's inefficient building stock and limit the devastating impact of climate change on people, communities, economies and ecosystems around the world. The energy efficient retrofit of the building stock is a sine qua non for the Paris Agreement and for an EU agenda for growth, local jobs and improved living conditions for citizens across Europe.



Gene M. Murtagh, CEO, Kingspan Group

To achieve our ultimate goal of net zero emissions by 2050 we must rapidly improve the energy efficiency of both new and existing buildings, through cost effective holistic strategies that reduce greenhouse gas emissions and improve health and well-being.

OUR ENGAGEMENT

EU-ASE works closely with EU, national and local decision makers to ensure that the energy efficiency potential of buildings is fully realised, starting with the full implementation of the Clean Energy for all Europeans package.

In order to overcome financial barriers in the way of decarbonising the EU building stock, EU-ASE promotes the careful planning, use and monitoring of public funds, along with innovative financing schemes such as energy performance contracts that help to leverage private investments and increase the renovation rate across the EU bloc.



Working with renewables

Energy efficiency improvements make it easier to increase the share of renewables in the final energy mix, and vice versa. This is true across all sectors. A good example of this can be seen by combining efficient buildings with on-site or nearby renewable-energy generation. Together, efficiency and renewables offer roughly the same climate mitigation potential and can contribute significantly to energy security. Recent analysis shows that globally energy efficiency and renewables can together provide over 90% of the energy related CO2 emission reduction needed under the Paris Agreement. Energy should not be wasted, regardless of its source. In the transition towards a new decarbonised energy system, it is clear that we cannot continue to look at climate challenges in isolation. We need a system-wide approach: energy efficiency should be the first step we take, but not the only one. We need to shift to clean energy sources, creating synergies to achieve climate neutrality by 2050.

OUR ENGAGEMENT

EU-ASE recognises the role that energy efficiency and renewable energy play in reaching a net zero carbon future.

We promote a system-wide approach, developing joint initiatives and partnerships to reinforce links between renewable energy and efficiency.



Prosumers

The role of "prosumers" will be essential in bringing emissions to net zero, a transition which must not only include policymakers and industry, but requires action and communication to engage the wider public. Using new technologies and a resilient building stock, prosumers can optimise and monetise their energy resources on a peer-to-peer marketplace. This will significantly contribute to lowering energy consumption and greenhouse-gas emissions. Indeed, half of all EU citizens could be producing their own electricity by 2050, meeting 45% of the EU's total electricity demand.

Barbara Frei, President of DACH Region and EVP Europe Operations, Schneider Electric



The next ten years will be critical to mitigate climate change: the revised energy efficiency regulatory framework provides us with a unique opportunity to accelerate the energy transition, with the support of innovative and enabling technologies such as Building Automation and Controls.

OUR ENGAGEMENT

EU-ASE calls for an efficient, consumer-focused energy system and develops partnerships to empower citizens, through digitalisation and smart technologies.



Paving the way for electric mobility

Due to the increased uptake of electric vehicles, electricity consumption is set to grow globally by about 20% over the next 20 years. Unless infrastructure is properly managed, recharging electric vehicles (EVs) could increase peak power demand by as much as 50%. This would mean significant strains for local installations and the wider electricity grid.

Increasing energy efficiency of existing buildings has the potential to offset the electric vehicles' impact on the grid. In particular, by increasing the current global retrofit rate from approximately 1% per year to between 3% (with a 50% efficiency improvement) and 5% (with a 30% efficiency improvement), we can, globally, accommodate 550 million more EVs on the road before 2040 without dramatically increasing generation capacity. This would also help meet the 1.5°C temperature increase target set by the Paris Agreement.

OUR ENGAGEMENT

EU-ASE works closely with the EV industry and policymakers, to promote the renovation of the EU building stock and accelerate the switch to electric mobility.



Unleashing the energy savings potential of water efficiency in EU legislation

Water efficiency can be an important driver of energy savings. So far, European policy makers have failed to grasp this opportunity. As a consequence, EU water related legislation and policies do not integrate an energy efficiency dimension and the energy efficiency regulatory framework does not integrate a water dimension.

Christophe Beck, Executive Vice President & President, Industrial Sector Nalco Water

We can't afford to wait any longer to change the way we think about and use water. Industry is a significant user of water in the developed regions of the world and demand is growing. When you use water, you have to heat, cool, move and treat it, which is costly and requires energy. But, when you reduce, reuse and recycle water, you reduce energy costs and greenhouse gas emissions. The potential for industry to drive water and energy efficiency is significant – and it's good for business.



The energy-water nexus refers to the important interdependence of water and energy in economic life. This nexus occurs at many levels and includes water treatment, distribution and consumption.

The efficient management of water can make a significant contribution to energy savings. The water and wastewater sectors account for 3.5 % of electricity use in the EU and that share is expected to rise. At the same time, water leaks account for 24 % of total water consumed in Europe. Through the use of smart and green technologies and processes it is possible to achieve end-use energy savings related to production, use or disposal of water in its various forms along the supply chain.

In this context, sustainable water management encapsulates activity at several levels: the minimisation of water usage through technological and systemic efficiencies, the elimination of water and waste water leakages in the distribution systems to reduce water abstraction, the digitalisation and use of real-time data to measure water consumption and use for critical analysis, the optimisation of energy performance of industrial processes and wastewater treatment, storm water management through green infrastructure, and innovative solutions such as the recirculation of domestic water to reduce water and energy consumption in households.

In municipalities, water and waste water facilities account for the largest consumption of electricity, representing 30-40% of local authorities' total electricity bill. It is realistic to cut the energy use of the drinking and wastewater treatment facilities by up to 50%. Yet, despite the business case for water efficiency being well understood, investments remain sub-optimal due to a lack of EU legislative incentives. The EU has much to gain by extending the application of sustainable water management, mainstreaming the energy-water nexus across EU policy making. This will both make EU waters more resilient and support the EU in its energy efficiency ambitions.



Simon Goldschmidt, Chief Commercial Officer, Orbital Systems

We urgently need political leadership and EU water legislation for innovative technologies to help reach the water related sustainable development goals 2030, without compromising existing regulations. For the benefit of governments, businesses, and citizens, Orbital Systems innovative water saving technology is creating a paradigm shift in domestic water usage, by purifying and recycling up to 90% of domestic water usage.

Christian Blanc, Senior Vice President & President, Europe Commercial Team, Xylem Inc.



Intelligent, data-driven solutions can help water managers around the world to "solve" water by transforming how they understand and manage their assets, enabling them to realise major new water and energy efficiencies, and to lessen impact on the environment. Digital technology is the key to making water more affordable and accessible for all, and to making communities more resilient and sustainable.

OUR ENGAGEMENT

EU-ASE develops strategic partnerships and advocates more legislative incentives to unleash the energy efficiency potential of water efficiency in EU legislation. As part of its new focus on the water-energy nexus, EU-ASE enlarges its current membership and works to promote a more sustainable water management that is in line with the Sustainable Development Goals, the Paris Agreement objectives on climate change and the urgent path towards climate neutrality by 2050 at the latest.



About the European Alliance to Save Energy



Miguel Arias Cañete, Commissioner for Climate Action & Energy, European Commission

Going climate neutral is the right choice for Europe. It is the right choice for our economy. It is the right choice for our society. It is the right choice for our planet. Europe can be the world's first major economy to go for net-zero emissions by 2050. And energy efficiency will keep playing a major key role in this transition. By 2050, energy consumption should be halved. From industry but even more so by renovating buildings, both for housing and for services, energy efficiency measures must become the norm to create jobs, growth and prosperity for all Europeans. The support of businesses in the European Alliance to Save Energy (EU-ASE) is going to be crucial as Europe sets the direction of travel for our climate policy and contribution to achieving the goals of the Paris Agreement.



Dominique Rostori, Director-General, DG Energy, European Commission

With the most advanced regulatory framework resulting from the Clean Energy for All Europeans package, Europe is leading the worldwide clean energy transition. Energy Efficiency is a key part of it. Whether to fulfil our Paris Agreement commitments or move towards a long-term climate neutral economy, the 'Energy Efficiency First' principle guides all our actions: we are convinced it is good for the economy and brings numerous benefits for all European citizens. To shape this vision, we need European businesses to be on board and become strong international actors of the energy transition. I believe that, where efficiency improvements are shown to be most cost-effective or valuable, they should be prioritised. The European Alliance to Save Energy is playing a very important role in this context.

EU-ASE was established in December 2010 by some of Europe's leading multinational companies. The Alliance creates a platform from which our companies (Danfoss, Kingspan, Knauf Insulation, Nalco Water, Orbital Systems, Saint Gobain, Schneider Electric, Siemens, Signify, Veolia, Xylem Inc.) can join with politicians and thought leaders to ensure the voice of energy efficiency is heard from across the business and political community.

EU-ASE members have operations across the 28 Member States of the European Union, employ over 340.000 people in Europe and have an aggregated annual turnover of €115 billion.

For more information:
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