



 **European
Climate Foundation**
ANNUAL REPORT 2013



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CHAIR'S NOTE

I'm pleased to share with you this 2013 annual report from the European Climate Foundation. It provides an overview of the ECF's important, complex work and highlights the significant contributions made by our three sector programmes (transport, energy efficiency, and power), the impact we are having at both the European Union and Member-State level, and our increasing emphasis on initiatives that cut across traditional venues in order to address long-standing barriers to change.

2013 was an intense year for the ECF, with major decisions on the political agenda that define Europe's ambitions for climate change mitigation for many years to come. Bright spots included the adoption of ambitious fuel efficiency standards for cars and energy-saving product standards for boilers and heaters, and progress towards the effective integration of electricity markets and grids across the continent.

Equally important has been the ECF's engagement in convening stakeholders around critical issues in Brussels and in key Member States to help build a systemic understanding of and convergence around pathways towards low-carbon societies that are both competitive and sustainable. For example, the *Agora Energiewende* in Germany shows how much can be accomplished by bringing together the right mix of people and enabling fact-based debate and decision-making.

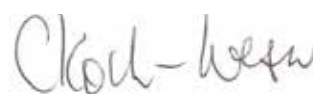
Within the ECF itself, the organisation and scope of work have been evolving quickly as we tackle increasingly complex challenges together with our

partners. In 2013, we launched two new initiatives and hired our first chief economist to help bridge the gap between mainstream and climate economics.

The ECF Supervisory Board also continued to evolve over the course of 2013. Last February I was honoured to be asked to succeed John McCall MacBain as chair of the supervisory board. We are deeply grateful to John for his steadfast commitment to our work and for his strong leadership of the board since the ECF's establishment in 2008. He will remain on the board as vice chair and as founding chair.

In September, we welcomed Laurence Tubiana of IDDRI and Sciences Po to the board. In November, Michael Jacobs resigned from the ECF board due to other commitments. We thank Michael for his dedication and insights on climate change during his more than two years of board service. Succeeding him as Children's Investment Fund Foundation (CIFF) representative is Kate Hampton, who joined the board in December. Both Laurence and Kate bring many years of experience and deep expertise in climate science and advocacy, and we look forward to their ideas and guidance.

Thank you for your interest in the ECF and for your ongoing support.



Caio Koch-Weser
Chair, Supervisory Board

SUPERVISORY BOARD



Caio Koch-Weser (Chair)

Vice Chair of the Deutsche Bank Group. Former Vice Minister in the German Federal Ministry of Finance. Previously served in senior positions at the World Bank.



John McCall MacBain (Vice-Chair)

Founding Chair of the Supervisory Board, President of the McCall MacBain Foundation and Pamoja Capital, its investment arm. Trustee of the Rhodes Trust (Oxford) and member of the Yale Advisory Board of the Center for Environmental Law and Policy.



Susan Bell

Senior Advisor at the Stanford Woods Institute for the Environment. Former Vice President of the William and Flora Hewlett Foundation. Serves on the advisory board of the Nicholas Institute for Environmental Policy Solutions at Duke University.



Kate Hampton

Executive Director for Climate Change at the Children's Investment Fund Foundation, managing a global portfolio of technical assistance and advocacy programmes.



Kristian Parker

Chair of the Oak Foundation and trustee lead on the Foundation's Environment Programme. Marine biologist and member of Oceana's founding Board of Directors.



Charlotte Pera

President and Chief Executive Officer of the ClimateWorks Foundation. Previously Senior Vice President and Director of U.S. Programs at the Energy Foundation.



Mary Robinson

United Nations Special Envoy to the Great Lakes of Central Africa and President of the Mary Robinson Foundation – Climate Justice. Former President of Ireland and former UN High Commissioner for Human Rights.



Gunhild Stordalen

Co-founder of the Stordalen Foundation. Board member of the Norwegian Zero Emission Resource Organization, Home Invest, and Nordic Choice Hospitality Group. Green advocate and spokeswoman.



Laurence Tubiana

Founder of the Institute for Sustainable Development and International Relations (IDDRI) in Paris. Professor and director of the Sustainable Development Center at Sciences Po Paris.

MESSAGE FROM THE CEO

Independent foundations, such as the European Climate Foundation (ECF), have the privilege of addressing fundamental issues facing society with a focus and long-term perspective rarely enjoyed by other institutions. This creates both an opportunity and an obligation for us to continuously question existing aspirations and strategies as we work to mitigate climate change.

In theory at least, Europe is well positioned to provide a model for the world in mastering the transition to a low-carbon economy. After all, the continent has lived through decades of peaceful integration of diverse economies; the European public is by and large aware of the risks of climate change; and we tend to view scientific evidence of global warming as a fact rather than as simply one opinion among many.

Even in Europe, however, the need to change is met with resistance. As we aim for a robust economy that can withstand occasional shocks, we tend to make choices that protect the status quo and, more often than not, result in incremental reforms.

In this mode, competitiveness is typically defined narrowly, in terms of input or factor-cost advantages. There are valid concerns that Europe is often at a global disadvantage in terms of energy or labour costs, or regulatory burdens. And against the background of an economic crisis and slow growth, rocking the boat seems risky.

At first sight, this defensive and incremental mode appears productive: Staying within the confines of “business as usual” lends confidence. Moreover, the rituals of advocacy, lobbying, and convergence around incremental changes are well established and well practised across stakeholders.

However, this business-as-usual mode is inherently neither stable nor attractive in the long run. As to stability, one only needs to consider the risk of rising fossil-fuel prices, the implications of a huge fossil-fuel import bill, and the risks to societies, communities, and business models from climate change reaching tipping points. A closer look suggests that doing business as usual is simply not sustainable.

Thus we face a transition dilemma in which practising business

as usual does not adequately address the long-term risks. And we fail to see the opportunities that lie in Europe’s leading the global shift to a low-carbon economy.

Need to think systemically...

To address this transition dilemma, the ECF is turning its attention to the challenge of balancing competitiveness, sustainability, and security of supply – a challenge articulated by the European Commission, and one that requires getting beyond a focus on one policy, one technology, or one factor cost at a time.



Johannes Meier
Chief Executive Officer
European Climate Foundation

Rather, we need to approach the challenge systematically, recognising that competitiveness must be defined in a broader, more complex way. Only by taking a systems-thinking approach can we define smart and ambitious climate policies that could reduce emissions significantly while at the same time

Systemic solutions do not come easily. Incremental, defensive thinking makes it hard to explore the potential for growth and carbon abatement.

stimulating Europe's industrial competitiveness. Our goal is to identify constellations where climate policies and economic success are not contradictory but complementary.

But systemic solutions do not come easily. Incremental, defensive thinking makes it hard to explore the potential for growth and carbon

abatement. We must go beyond pursuing further process efficiency improvements within companies. The much bigger opportunities lie largely in cross-company and cross-industry optimisation with high integration complexity. These include increased circularity (recycling and reuse), enabling emissions reductions in downstream sectors, and materials substitution.

The current policy system is designed to trigger emissions reductions by individual companies

or sectors. Reducing sector-specific emissions is obviously very important to build a sustainable industry long term, and should continue to be so. However, other areas are at least as important. The big opportunity – and the big challenge – will be to capture the potential for cross-process, cross-company, cross-sector, and cross-country abatement.

Thus, we see the need for a mind-set shift and a fundamental rethinking of the underlying drivers of success for Europe. In essence, we need a broader notion of competitiveness to reflect the dynamics and potential of Europe's profiting from the challenges of the transition. As author Nicholas Nassim Taleb has pointed out, in an uncertain environment it makes little sense trying to be robust by defending an ultimately indefensible status quo; rather, we need to develop systems, policies, and industry structures that are 'anti-fragile', that benefit from volatility and turn responses to volatility into sources of value.

...and transcend the usual boundaries

To that end, the ECF supports conversations among stakeholders that focus on the how of the transition instead of getting stuck in unproductive comparisons of the long-term benefits and necessities of decarbonisation with the short-term costs. We recognise that technical and business-model innovation also calls for governance innovation, as such discussions can be orchestrated meaningfully only if we transcend national, sectoral, and institutional

Thinking small and not big, being satisfied with only incremental innovation, and not striving for radical, cross-sectoral, and cross-silo innovation may well be the biggest threats to European competitiveness and the 2°C target.

boundaries and overcome business-as-usual thinking in Europe. Within the ECF organisation, this calls for close integration of country political perspectives with sectoral perspectives.

Moreover, we are increasingly working on cross-cutting initiatives that focus on the transition to the low-carbon economy and on the challenges of an effective 2030 policy framework for Europe. This framework must not only include climate and energy perspectives, but also start integrating concerns about competitiveness, innovation, and resource efficiency. As a result, we are extending

our network to include new partners with expertise in areas complementary or contextual to climate change mitigation.

Thinking small and not big, being satisfied with only incremental innovation, and not striving for radical, cross-sectoral, and cross-silo innovation may well be the biggest threats to European competitiveness and the 2°C target.

At the ECF, we are committed to supporting and working with others to counter these threats and move Europe well beyond business as usual.

Keeping Climate Change Top of Mind

2013 speaking engagements by ECF CEO Johannes Meier

Munich, 20 January: Panel member for “Pattern Shift – Warming World, Rising Risks” at Digital Life Design 13

Lech, 11-12 April: Participated in Lech Energy Forum hosted by DG ENER

Erfstadt, 11 May: Spoke to RWE managers about the risks of maintaining a “business-as-usual” stance on climate change

Paris, 5 June: Attended OECD Roundtable on Sustainable Development, focused on development of renewable energy sources

Brussels, 25 June: Referenced Cambridge/AEA report, Fuelling Europe’s Future, during electric vehicles panel at European Sustainable Energy Week conference

Baden-Baden, 26 September: Spoke at Baden-Badener Unternehmer Gespräche on risks of climate change, asset risks, and transition management challenges

Vienna, 13 November: Addressed Austrian Society for Foreign Policy and the United Nations (ÖGAVN) on transition to a low-carbon economy

Warsaw, 20 November: Moderated Climate Action/UNEP panel on “Innovative Technologies to Accelerate Green Growth”

Boston, 13 December: Gave lecture at Tufts University on “The End of Business-as-Usual”

See pp. 22-23 for a full listing of the ECF’s outreach activities and milestones.

LEADERSHIP TEAM & FELLOWS



Johannes Meier
Chief Executive Officer



Keith Allott
Senior Associate
UK Programme



Stephen Boucher
Programme Director
EU Climate Policies



Tom Brookes
Managing Director
Energy Strategy Center



Rebecca Collyer
Deputy Director
Power Programme



Patty Fong
Programme Director
Energy Efficiency



Thomas Fricke
Chief Economist



Pete Harrison
Deputy Director
Transport Programme



Robin Millington
Director of External
Relations



Arne Mogren
Programme Director
Power Programme



Martin Rocholl
Programme Director
Transport Office, Head of
Germany Office



Tomasz Terlecki
Head of Central Europe
& Eastern Europe
Programme



Mayta Villafane
Chief Operating
Officer



John Ashton
Fellow



Bert Metz
Fellow



**Princess
Laurentien van
Oranje-Nassau**
Fellow

OUR ROLE & STRATEGY

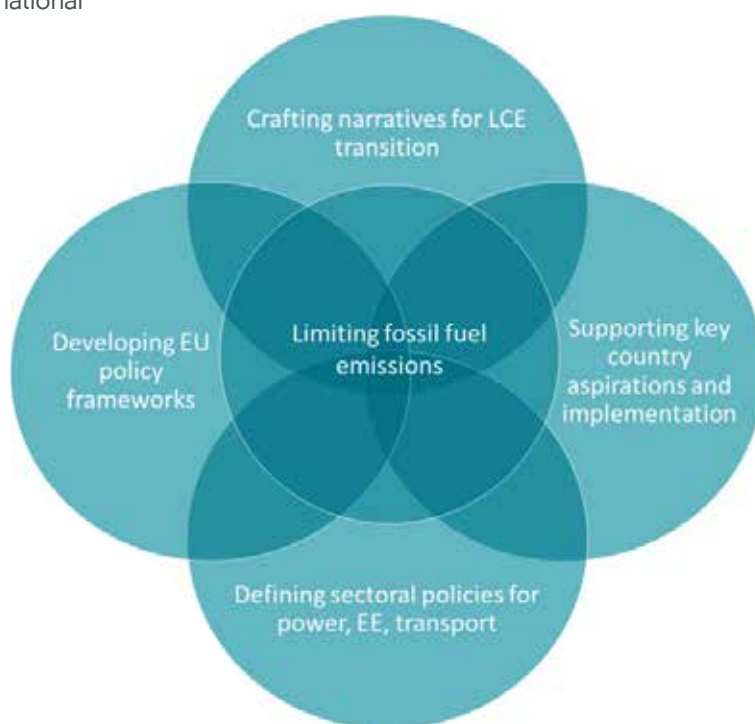
The European Climate Foundation was established in 2008 as a ‘foundation of foundations’ to collaborate in ensuring Europe’s transformation to a low-carbon economy. We aim to be the smartest place in Europe for funding climate change mitigation strategies, by identifying the opportunities for intervention – the ‘sweet spots’ where philanthropic investment can make a real difference.

STRATEGIC PRIORITIES

Set against a challenging backdrop of Europe’s stalled economic recovery and concerns over the need to create jobs while sustaining industrial competitiveness, we have five strategic priorities:

1. Crafting robust narratives, anchored in science and systems thinking, to guide the transition to a low-carbon economy
2. Developing ambitious cross-sector European policy frameworks for driving this transition in the EU and for encouraging appropriate international aspirations
3. Defining pragmatic sectoral policies for an integrated, efficient European approach to power, energy efficiency, and transport
4. Supporting high aspirations and effective implementation in key European countries, namely Germany, France, the United Kingdom, and Poland
5. Limiting fossil-fuel emissions in the EU and neighbouring countries.

The challenge across all of our work is linking abstract narratives with concrete implementation. Likewise, we must link our work at the global, EU, and national levels, and we must link policy innovation with politics and polity.



On the following pages, we describe major activities and successes initiatives, and then highlight our work and recent wins in Germany,

THREE TYPES OF INITIATIVES

Recognising the need for these linkages, our strategic portfolio of initiatives is highly intertwined, and we organise our programme staff and grant-making along three dimensions:

Sector Programmes: The biggest potential for reducing greenhouse gas emissions in Europe lies in shifting the power and transport sectors from fossil fuel to renewable energy sources and increasing the energy efficiency of buildings, cars, trucks, and a wide range of industrial products and consumer appliances.

Cross-Cutting Initiatives: In addition to driving climate policies within specific sectors and geographies, there is important work to be done across venues. Through our cross-cutting initiatives, we seek to create a robust case for green growth, strengthen ambitions in international and regional forums, and counter climate change deniers.

Geographic Initiatives: Our primary geographic focus is on Brussels (the hub of EU policymaking), Germany, the United Kingdom, France, and Poland – five venues that play a critical role determining Europe's political leadership on climate and energy policy. Beyond these core venues, we undertake short-term projects to build coalitions of stakeholders, create regional policymaker networks, and test new model initiatives that have the potential to be replicable and scalable across the EU and business-as-usual proponents.

HOW WE ADD VALUE

Across all of our work, our emphasis is on:

Providing thought leadership that leads to new narratives. We seek to bring a 'systems thinking' approach to the climate debate, rising above partisan positions and illuminating the best data and best practices from around the world.

Creating a robust evidence base to underpin the case for change. This includes commissioning economic and technical research, monitoring progress towards policy implementation, and polling to understand current attitudes and compliance levels.

Convening the right players. Often, the first step towards building consensus about the way forward is to assemble the right mix of people around the

table. Where necessary, we address governance gaps by facilitating the process and helping to align stakeholders working in the same space. Where there is not sufficient capacity in the field, we try to build that capacity over the medium term and fill the short-term gap through consultancies and at times through our own project leadership.

Creating awareness of the facts and the need for action. This includes shining a spotlight on roadblocks and countering the flood of misinformation put out by climate change deniers and business-as-usual proponents.

in 2013 for our three sector programmes and four cross-cutting Poland, and the United Kingdom.

POWER PROGRAMME

The Power Programme aims to decarbonise European electricity generation by 2050 by replacing unabated coal with flexible low-carbon power sources.

The Power Programme works at both the EU and Member-State levels to promote effective policies and cross-border cooperation on decarbonisation. In 2013, we focused primarily on four platforms:

- Completing the EU-wide “Roadmaps to Reality” project – the latest phase in our Roadmap 2050 effort;
- Commissioning research to assess the economic impact of different decarbonisation policies across five Northern European economies;
- Accelerating cooperation and interconnection of power grids among the countries bordering the North Sea; and
- Supporting Germany’s transition to an energy mix dominated by renewables through the *Agora Energiewende* initiative, co-funded by the ECF and the Mercator Foundation (see pp. 32-33).

In addition, we supported NGOs and think tanks on issues of renewables, market design, state aid, coal-based power generation, and the internal energy market – all consistent with 2050 decarbonisation goals.

Towards a robust policy framework

We wrapped up the third and final phase of the ECF’s flagship Roadmap 2050 project with a multi-stakeholder process culminating in our latest report, *From Roadmaps to Reality: A Framework for Power Sector Decarbonisation in Europe*. This report, published in December 2013 in collaboration with ECF grantees RAP, E3G, and ClientEarth, focuses on governance and market design issues in order to inform policymaking debates on the EU’s internal energy market and the 2030 climate and energy package. Like our earlier work, it reflects nearly two

years of rigorous analyses and intense consultation with regulators, industry representatives, NGOs, and academics. The willingness of these organisations to consult and be consulted has been of critical importance and ensures the report reflects a broader perspective on the topics at stake.

Decarbonisation, growth, and competitiveness

Recognising a critical need among Member States for a fact-based understanding of how decarbonisation policies affect growth and competitiveness, the ECF commissioned PwC to analyse the long-term economic impact of energy policies in five European countries (Denmark, Germany, the Netherlands, Sweden, and the United Kingdom) between 1970 and 2010. The conclusion: countries can decarbonise at faster-than-average rates without reducing economic growth or sacrificing competitiveness.

The PwC report, titled *Decarbonisation and the Economy*, contains detailed case studies on each of the five countries and serves as a useful reference point for policy debates on decarbonisation, growth, and competitiveness amid the EU’s 2030 climate and energy discussions.

The analysis shows that structural changes in the economy driven in part by specific energy policies have led these countries to outpace the OECD-average in decarbonising their economies. As a consequence, consumer power prices are now above the EU average, but these economies have found ways to remain competitive. Even more importantly, those countries with the most far-reaching decarbonisation policies have managed to generate new sources of economic growth and create low-carbon jobs.

Cooperation in the North Seas

The Power Programme and key partners E3G, Stichting Natuur and Milieu, Ecologic, Concito, and the Institute for Public Policy Research engaged in a regional advocacy and analytical effort to support the integration of renewable energy in the North Seas. Specifically, we funded research on the pipeline of feasible North Seas Grid projects from consultants Redpoint-Baringa and encouraged deeper regulatory cooperation in ministerial forums such as the North Seas Countries' Offshore Grid Initiative (NSCOGI). We also commissioned a case study of regional integration in the Nordic region as a resource for future planning.

Looking ahead

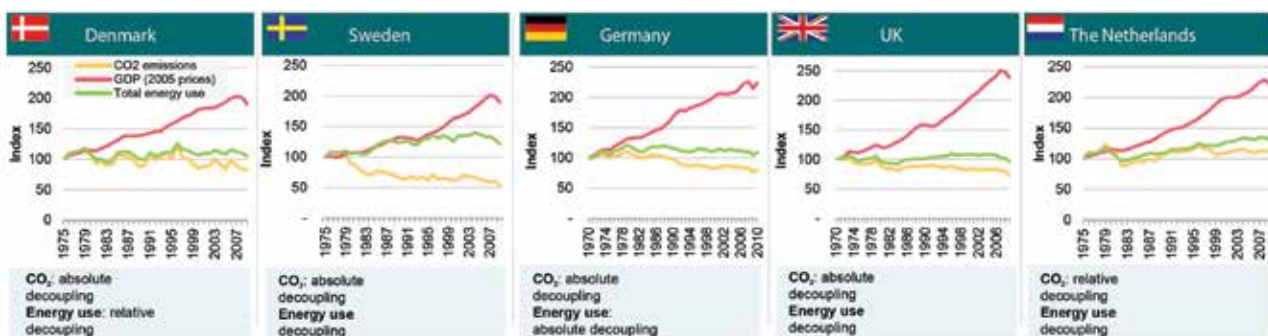
The ECF power team expects 2014 to be dominated by discussion of the 2030 climate and energy package and by the engagement and interplay among Member States, the new Commission, and Parliament. This year's elections and leadership changes mean the ECF and the field will see many new faces in key EU policymaking positions.

At the Member-State level, we will continue to engage in Germany through the Agora; pursue power sector modernisation in Poland; and describe pathways for decarbonisation in the UK.

2014 Priorities

- Provide thought leadership and convene stakeholders regarding the 2030 climate and energy package – including new EU governance rules and the framework for renewables
- Provide thought leadership on competitiveness and power price interlinkage
- Assess pathways towards completion of the internal energy market and interactions with state aid rules
- Support new arrangements for regional systems and grid cooperation

CO₂ Emissions, Energy Use, and GDP in 1970 - 2010



This analysis from the ECF-commissioned PwC report, *Decarbonisation and the Economy*, shows that all five countries have experienced economic growth decoupled from CO₂ emissions and energy use. Source: The World Bank; PwC analysis.

FROM ROADMAPS TO REALITY

From Roadmaps to Reality, launched in December 2013, represents the latest milestone in the ECF's Roadmap 2050 project. This multi-year effort has engaged a broad spectrum of stakeholders along a journey from long-term projections to concrete policy recommendations—all centred on the common objective of achieving an affordable, secure transition to a decarbonised power sector.

The first report, *Roadmap 2050*, provided a practical, independent, and objective analysis of pathways to achieve a low-carbon economy in Europe, in line with the energy security, environmental, and economic goals of the EU. The second report, *Power Perspectives 2030*, described the challenges of transitioning to a fully decarbonised power sector from a technical point of view and offered potential solutions.

Unlike the previous studies, *From Roadmaps to Reality* is not a quantitative technical analysis but a qualitative analysis of the current EU legal, policy, and governance framework. Specifically, it examines whether the current EU framework is adequate to

drive a secure and affordable transition to a decarbonised power sector, and describes policy options where the current framework is lacking.

Key conclusions

The report argues that completion of an integrated European energy market is a critical building block for an affordable and secure transition. The challenge for EU policy, therefore, is to capture the benefits of increased systems and market integration while allowing the prudent and, where possible, coordinated use of market interventions on a national level.

However, given the limitations in the current EU governance structures on energy (both in terms of competences and responsibilities), there is a risk that national-level interventions could create a patchwork of energy policies and therefore undermine the benefits of an integrated internal energy market.

From Roadmaps to Reality proposes a suite of measures to address these challenges, and concludes that EU governments should work towards a stronger regional energy framework that aligns market integration and decarbonisation objectives, backed up with robust and truly independent governance structures.

Specifically, we need measures to drive the market enablers (e.g., physical integration, building the



Dries Acke (ECF), presenting at the December 2013 launch of the *Roadmaps to Reality* report.

demand side, or system operation) and measures to manage the interventions (e.g., support for low-carbon technologies, energy efficiency, and resource adequacy mechanisms).

The live debate on a 2030 climate and energy package offers an attractive window of opportunity for Member States to establish a stronger policy framework.

Launching the report

From Roadmaps to Reality was launched on December 5th in Brussels at an event attended by more than 100 high-level participants from the EU institutions, industry, NGOs, and academic institutes.

Together with the consortium of lead authors from RAP, E3G, and ClientEarth, we are now pursuing a targeted outreach strategy in Member States and with relevant EU entities like Agency for the Cooperation of Energy Regulators (ACER) and the European Network of Transmission System Operators for Electricity (ENTSO-E).

Measuring the impact of Roadmap 2050

The Roadmap 2050 project, including this latest phase, demonstrates the value of harnessing a diverse group of stakeholders – utilities, transmission system operators, technology manufacturers, NGOs, and leading academics – and working ahead of the policy development curve.



Pictured here, from left to right, are lead authors Simon Skillings (E3G), Sharon Turner (Client Earth), Mike Hogan (RAP), and Karla Hill (Client Earth).

Over the course of the project, our reports have inspired and supported the European Commission's own strategy, which developed from the 2020 climate and energy package to the low-carbon economy and energy roadmaps for 2050 to the recent communication on a 2030 energy and climate framework, published on January 22, 2014. This communication identified European governance structures and the completion of the internal energy market as of critical importance in the next step of EU climate and energy policy—completely in line with our latest recommendations.

SUPPORTING CLIMATE-FRIENDLY INVESTMENTS

The ECF is working to encourage public financial institutions to invest in the transition to a low-carbon economy.

Government funding can be essential in getting large-scale energy projects off the ground, by mitigating perceived risk, increasing private-sector confidence, and raising money at a cheaper rate. But governments must also balance public interests with fair returns for private investors. Public financial institutions are arguably the best equipped players to oversee this process, enabling institutional investors to access low-risk opportunities and stable income streams, while allowing governments to leverage limited public funds to close financing gaps.

In light of these dynamics, over the past few years the ECF has been working to turn the ashes of the economic crisis into the phoenix of a low-carbon recovery, by encouraging the flow of public and private funds towards climate-friendly activities. For example, we have supported organisations such as E3G, which advocated for founding the UK's Green Investment Bank, and, in partnership with CEE Bankwatch Network, began an effort in 2010 to green Europe's largest public bank, the European Investment Bank (EIB).

Though the EU's policy on the low-carbon transition was clear, the EIB's role in mobilising funding

for that transition was not. Through advocacy efforts and technical assistance, the ECF's NGO partners have helped to position the EIB as an accelerator of public and private financing for renewables and energy efficiency programmes.

The bank now takes minority stakes in projects, leverages institutional investor funds by issuing climate-related bonds, and acts as an information broker providing services to support low-carbon deals. Today, the EIB is the biggest financier of renewables in Europe, and almost 26% (€13 billion) of its total 2012 lending went to climate action activities.

Until last year, however, the EIB continued to provide concessionary financing for new coal plant construction in the EU, including a new

lignite plant in Slovenia that the government says is destined to lose €50 million a year. Pressure from ECF partners Bankwatch and Focus Association for Sustainable Development helped to convince the EIB to stop funding new coal plants – a major policy victory, though too late for Slovenia. Going forward, we will continue to support the EIB in developing rational economic arguments in favour of low-carbon investments.



The European Investment Bank is a major funder of the London Array, the world's largest offshore wind farm.

ENERGY EFFICIENCY PROGRAMME

The Energy Efficiency Programme aims to ensure that policymakers see energy efficiency investments as a highly effective pathway to increase European competitiveness and energy security while affordably reducing greenhouse gas emissions and protecting human and environmental health.

In line with this strategy, 2013 saw progress on adopting stricter standards and effective labels for appliances and equipment, designing and implementing national energy efficiency policies and support schemes, and ensuring that energy efficiency is a political priority.

Standards and labelling wins

2013 brought some big wins on the standards and labelling front. The most significant victory came in March, when after a seven-year process, the EU finally approved minimum energy efficiency regulations on boilers and water heaters. Projected savings for these two appliances alone will total 136 million tonnes of CO₂ emissions annually in 2020.

In addition, new standards and/or labels were adopted for networked standby, vacuum cleaners, computers and servers, printers and copiers, kitchen appliances, and coffee machines. Altogether, the measures adopted in 2013 will save 172 MtCO₂ per year in 2020, the equivalent of closing 50-55 coal power plants in Europe. And, starting in July 2014, energy-using products sold online must display an energy label, and dealers must present this information to customers.

These policy achievements bring Europe closer to reaching its energy-savings potential of 400 MtCO₂ through the adoption of ambitious standards and labels for energy-consuming products. ECF grantees played a major role in providing technical assistance to support EU policy deliberations, as highlighted on page 17.

Supporting strong EED implementation

In May 2013, the ECF-funded Coalition for Energy Savings published a detailed guide to strong implementation of the Energy Efficiency Directive

(EED). Written by expert members of the Coalition, including ECF staff members, the guide is designed to help NGOs and business advocates of energy efficiency navigate EED legal requirements.

National policymakers have found this publication, which includes a “top 20” checklist for effective implementation, a useful addition to the formal guidance documents issued by the European Commission.

Making energy efficiency a political priority

Through concerted efforts in the second half of 2013, our partners successfully ensured that energy efficiency remained a high political priority within the European Commission and European Parliament. In January 2014, the EC published an important communication on a policy framework for climate and energy in 2030, which included a placeholder for energy efficiency in a 2030 package. This was followed by an EP resolution supporting a 40% energy savings target in 2030 based on analysis commissioned by the Coalition for Energy Savings.

External programme evaluation yields good marks

In 2013, the ECF commissioned an independent third-party review of the Energy Efficiency Programme, with the goal of answering two main questions. First, did our strategies and activities influence our ultimate goals for EU and national policymaking? Second, did we employ the most effective strategies and actions?

The review was conducted by Triple E Consulting, international climate and energy consultants. Triple E reviewed strategic documents, grantee proposals, and reports, and conducted 60+ interviews with

external stakeholders, current and former grantees, and staff members representing a broad range of EU and country perspectives.

The key finding was that the ECF has improved the collective quality and depth of the policy debate on energy efficiency. Specifically, Triple E noted improved professionalism among ECF-funded NGOs, and said that our outcomes-driven approach and deep staff expertise allows grantees to adapt to changing contexts while staying focused

on delivery. It also observed a good match between actions funded and intended outcomes.

While the need to shape EU policies was recognised, there was strong support for retaining or even increasing Member-State activities, reflecting a need to shift from policy formulation to implementation. So our 2014 budget prioritises the UK, Poland, Germany, and France, and we are developing a strategy for supporting implementation and capacity building in Central and Eastern Europe.

“The work that ECF have done in facilitating coalitions is highly regarded and has brought an important and new diversity to the energy efficiency debate.”

– Evaluation of ECF’s Energy Efficiency Programme Strategy by Triple E Consulting

2014 Priorities

Ensure that energy efficiency is a political priority in the 2030 package on climate and energy, through EU and national advocacy work and stakeholder coalitions. The EC is expected to complete a review of progress towards the EU’s 2020 energy savings target and to propose a target for 2030.

Support the design and implementation of national energy efficiency policies, especially for buildings in the UK, France, Germany, Poland, and Spain. These countries are required to submit plans and begin implementing policies and programmes that comply with the EED. National concerns – whether over rising energy costs, high unemployment, delivering on a political commitment to a low-carbon energy transition, or reducing fossil-fuel import dependency – provide additional opportunities to push the energy efficiency agenda.

Support an ambitious revised legislative framework for the Ecodesign and Energy Labelling directives. This is an opportunity to ensure a more streamlined, transparent regulatory-setting process, enable countries and the EU to take action against sellers of non-compliant products, promote better monitoring of product development so that standards stay ahead of the curve, and improve the energy label so consumers better understand total energy consumption and lifecycle costs.

AT LONG LAST, EFFICIENCY STANDARDS FOR BOILERS AND WATER HEATERS

Given that boilers and water heaters account for 25% of all CO₂ emissions in the EU, it's no wonder that they have long been a top priority for supporters of stringent energy efficiency rules.

When the EU established the implementation process for the Ecodesign Directive for Energy-Using Products in 2007, it identified boilers and water heaters as having the highest energy savings potential of the 40 product groups it sought to regulate.

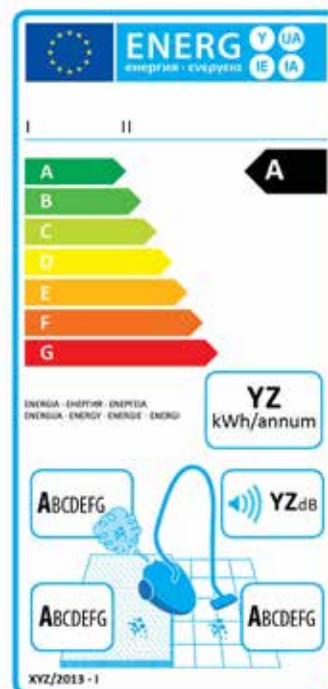
The ECF and our grantees were involved from the early stages in promoting EU adoption of new standards and labels for boilers and water heaters. With our financial support, the European Environmental Citizens' Organisation for Standardisation (ECOS) was able to increase its staff to engage in both highly technical and time-intensive consulting and build a coordinated NGO advocacy campaign. To counter intense industry lobbying, ECOS targeted the actors involved in regulation approval, namely the EC and Member States.

Despite these advocacy efforts, weaknesses in the legislative process for setting standards and labelling requirements stalled the approval of minimum efficiency regulations for boilers and water heaters for years. Specifically, a complicated regulatory adoption process and insufficient surveillance of the energy-efficient technologies developing on the market led to controversies on technical details relating to the phase-out of the most inefficient models – such as non-condensing boilers – and an energy label that would allow comparison across fuels and heating technologies.

To kick-start the stalled process, the ECF supported the launch of the Coolproducts campaign of EU and national NGOs in 2009. Coordinated by the European Environmental Bureau (EEB), the campaign aimed to raise the political profile and build media awareness of the Ecodesign Directive and the energy-savings potential of all the products regulated by it. At the same time, Coolproducts members, such as ECOS and INFORSE-Europe, provided technical input in the consultation process to resolve

controversies while ensuring a decent level of ambition in the final proposed regulation on boilers and water heaters.

Due to a last-minute lobbying attempt by the conventional boiler industry to weaken the energy label, ECOS and the EEB pressured Energy Commissioner Günther Oettinger to hold a consultation where 21 other stakeholders supported the Coolproducts campaign position. This safeguarded the integrity of the energy label in the final vote on the regulation – a single energy label based on primary energy, thus ensuring comparability across energy sources and promoting the best heating solutions.



New EU energy label for vacuum cleaners becomes mandatory for suppliers as of 1 September, 2014.

TRANSPORT PROGRAMME

Europe should become the global leader in highly fuel-efficient vehicles and zero-carbon cars by 2050. With that goal in mind, the Transport Programme is pursuing the step-by-step establishment of stringent fuel efficiency legislation that will put Europe on a clear path to decarbonisation.

Efforts by the ECF and our NGO partners and grantees helped lead to an agreement on CO₂ targets for light-duty vehicles in 2013, and progress was made on truck fuel efficiency, biofuel sustainability criteria, and aviation and shipping emissions cuts. These successes validate the ECF strategy of underpinning decarbonisation arguments with hard data and engaging stakeholders from all parts of society.

As we enter 2014, the ECF is well positioned to continue pushing for environmentally sustainable transport policies. To this end, we will build on progress made in 2013 on CO₂ emission standards and fuel quality and prepare a multi-stakeholder project to address more fundamental transition challenges on the road to a zero-carbon transport system.

CO₂ targets agreed for cars and vans

In 2013, EU legislators agreed on CO₂ emissions reduction targets for passenger cars and vans by 2020. This achievement came after four years of research by the ECF and our partner, the International Council on Clean Transportation (ICCT), to demonstrate that reducing fuel consumption would also benefit car owners, strengthen economies, and drive technological innovation in the auto industry.

The EU decision to cut CO₂ emissions from cars by nearly one-third to 95 g/km, and from vans by approximately one-sixth to 147 g/km, was a major victory in times when passing progressive climate legislation has become increasingly difficult. Key elements of the campaign included highly detailed technology analysis, exemplary NGO advocacy in European capitals, active support from consumer groups, and the establishment of a positive economic narrative.

To build upon this success, we are preparing the debate on the 2025 CO₂ emission standard; initiating talks on a size-based standard and raising awareness on the potential of light-weighting; assuring a progressive revision of the test cycle; and facilitating debate on future technologies such as electrification.

Stage set for efficiency improvements in trucks

EU legislation proposed in 2013 could improve the fuel efficiency of trucks by up to 15%. An ECF-funded study and effective advocacy activities by our grantees helped inform a progressive European Commission (EC) proposal to revise EU truck dimensions. This legislation, which we hope will pass in 2014, will ensure that new trucks have better aerodynamics and additional engine space to improve heat recovery and cooling.

Advocacy efforts on trucks in 2014 will focus on fuel efficiency labelling and preparing proposals to introduce and/or improve charging systems in several Member States.

Tighter sustainability criteria coming for biofuels

This year, the ECF and our NGO partners have helped move the biofuel debate forward in the European Parliament. The EP has sent a proposal to the Council of Ministers to cap food-based biofuels at 6% and improve reporting of the indirect CO₂ emissions that result from changing land use.

However, breaking a political stand-off over this issue in the Council of Ministers will likely rely on a compromise that weakens the EP's proposal. Opponents of sustainability improvements are seeking to protect the status quo in the farming and

biofuels sectors, while several other countries are concerned that the switch to advanced biofuels will increase fuel costs. In response, the ECF – with research support from the ICCT – has built an industry-NGO partnership. This group is advocating for waste and residue-based cellulosic biofuels, aimed at resolving the impasse and promoting biofuels with a better environmental performance.

A compromise might also be struck in 2014 on the Commission's proposal to account for elevated carbon intensities of fuel from tar sands, kerogen, gas, and coal. The EC called for an impact assessment after the issue became blocked in the Council of Ministers, and ECF allies have played a central

research and advocacy role throughout the assessment process. ECF grantees also organised scientists and Nobel Peace Prize laureates to highlight the environmental problems of tar sands and other high-carbon fuels.

Our 2014 priorities will be to coordinate and enable advocacy to support the Commission's proposal for a shift to better biofuels; support advocacy to ensure that the Fuel Quality Directive (FQD) sustainability criteria are a central part of this policy transition; continue industry-NGO cooperation on second-generation biofuels; and continue to support NGOs in their campaigns to keep tar sands from entering the EU.



Pete Harrison of the ECF, speaking at an April 2013 event organised by the European People's Party, the European Consumers' Organisation (BEUC), and the Fédération Internationale de l'Automobile. The panel included representatives from DG Clima, the Federation of German Consumer Organisations, the European Association of Automotive Suppliers, Transport & Environment, the Royal Dutch Touring Club, the European Automobile Manufacturer's Association, and the International Council on Clean Transportation.

Progress towards carbon pricing for aviation

Several of our 2013 initiatives sought to address rapidly growing aviation emissions through technical analysis, targeted stakeholder advocacy, media outreach, and policymaker engagement.

ECF grantees played an important role building support within the EU for an aviation CO₂ standard and convincing it to resist tremendous international pressure to remove aviation from its Emissions Trading System (ETS). Rather than abandon the aviation component of the ETS, the EU has now proposed amending it to cover only emissions that occur within European regional airspace. While this proposal represents a reduction in coverage, the EU's decision reflects its commitment to passing a regional initiative and creating leverage for a global market-based measure (MBM).

Much work is now required to prepare for the 2016 vote on a global MBM, but we see the ICAO Assembly's decision to create a formalised MBM work process as a step forward.

We will continue to address the rapid growth in aviation emissions in 2014 by maintaining strong

support for existing regional initiatives, specifically the inclusion of aviation in the EU ETS; ensuring adequate account is taken of environmental effectiveness and integrity during the development and design of a global MBM; and supporting progress towards a stringent CO₂ standard.

One step closer to curbing shipping emissions

Decisions made in 2013 in both the International Maritime Organization (IMO) and the EC suggest that we are moving towards emissions cuts from maritime vessels. With the involvement of ECF grantees, the IMO reached an agreement on

technical cooperation in May 2013, removing a major hurdle to reducing emissions from the existing fleet. Also, the EC proposed in June to monitor, report, and verify (MRV) shipping emissions.

Over the next year, we will focus on strengthening the EU's MRV

proposal and bolstering the Energy Efficiency Design Index for new ships and ensure transparency in its application; building support for measures that increase efficiency and reduce emissions from the existing fleet; and countering industry opposition and communicating a positive economic narrative for fuel and emissions reductions.



PROGRESSIVE NEW VEHICLE STANDARDS

Despite a challenging political context in 2013, the EU passed mandatory emissions reduction targets for cars and vans by 2020. The progressive climate legislation will cut CO₂ from new passenger cars by nearly one third to 95g/km and from vans by approximately one sixth to 147g/km.

This development marks a major policy achievement for ECF and other NGOs that waged a four-year campaign comprising targeted outreach, strategic partnerships, and rigorous research to make the economic case for reform.

Passing the 2020 CO₂ targets

Political agreement on the 2020 CO₂ emission standards came after a long effort by the ECF and our partners to prove that reducing fuel consumption is technically feasible and good for consumers, the economy, and the environment. This achievement was not an easy or straightforward task: European carmakers viewed these policy goals as a direct threat to their bottom line.

To tackle this challenge, we reached out to our broad network of environmental NGOs and commissioned reports assessing the economic impact of decarbonising light-duty vehicles. Thanks to detailed technical research carried out by the ICCT, we were able to demonstrate that the targets would be cost-effective and beneficial for consumers and the European economy.

For example, this research showed that the cost per vehicle to move from 130g/km to 95g/km was considerably lower than the car industry's original claims. Our research demonstrated that the pay-back period for consumers would take just three years, as fuel savings would quickly surpass initial technology costs.




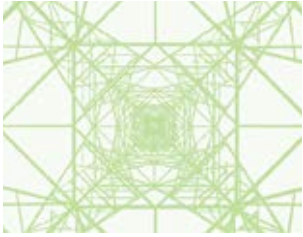
These efforts, along with public and behind-the-scenes NGO campaigning and advocacy, laid the foundation for targeted engagement of key stakeholders, consumer groups, unions, and industry. Ultimately, consumer groups supported 95g/km as good for household budgets; an industry coalition placed focus on the economic benefits of 95g/kg; and unions publicised that fuel efficiency creates auto sector jobs.

What 95g/km means for Europe

The 95g/km standard for new passenger cars alone will help substantially in the EU's efforts to reduce overall greenhouse gas emissions and sets an important precedent for future CO₂ target debates:

- Cars are responsible for approximately 17% of EU CO₂ emissions, and road transport in general is the second biggest source of GHG emissions.
- Assuming full market penetration in 2030, the 2015 standard of 130g/km, combined with the 2020 standard of 95g/km, will enable the EU to reduce transport emissions by 25% and total GHG emissions by 5%.
- The 2020 CO₂ target for cars represents a 4% improvement each year, up from only 1% before fuel efficiency legislation started to show effect. This will likely serve as the baseline for debates on the 2025 CO₂ emission standards.

European Climate Foundation: 2013 at a Glance

FEBRUARY	Poland 2050 briefing for Brussels NGOs and think tanks attracts 40+ attendees	Caio Koch-Weser succeeds John McCall MacBain as chair of ECF board	ECF and grantees in EC's consultation on generation adequacy, capacity mechanisms, and the internal energy market	MARCH	Study tour of journalists and energy experts on Germany's <i>Energiewende</i>
		APRIL CE Delft publishes ECF-commissioned report, <i>Carbon leakage and the future of the EU ETS market</i>	Erica Hope co-authors EurActive.com article challenging EC's depiction of energy savings as having a negative economic impact		
AUGUST	ECF-funded ICCT reveals widening gap between claimed and real fuel efficiency of European cars, generating hundreds of news stories	ECF, Oak Foundation, and Velux Foundation co-host Copenhagen seminar on the low-carbon economy with experts and foundations	JUNE Friends of Europe discussion paper on EU internal energy market includes article by Johannes Meier and Arne Mogren	OCTOBER	Two ECF-funded surveys reveal strong public and corporate support for the energy transition in France
	ECF grantee DENEFF launches the Halve Energy Waste campaign ahead of German federal elections	EU approves new efficiency regulations for boilers after years of ECF investment in research, technical support, and advocacy	ECF's Julian Popov draws attention to Southeast Europe's huge renewables potential in the <i>European Voice</i>		
NOVEMBER	Dinner hosted by Stordalen Foundation and ECF brings together Swedish leaders on need to engage on climate change	Laurence Tubiana of IDDRI and Sciences Po joins ECF board	Rebecca Collyer kicks off North Seas Grid project with partners from UK, Denmark, Netherlands, and Germany	DECEMBER	ECF-commissioned research by PwC shows low-carbon transition need not compromise economic growth or competitiveness
	ECF sponsors Berlin and Brussels launch events for UNEP's fourth Emissions Gap Report in advance of COP 19		ECF orchestrates joint statement from 27 scientists, challenging false industry claims about "high-efficiency coal" as a climate solution		Renée Bruel appears on Dutch TV explaining how ECF's work on standards and labels drives lower CO ₂ emissions
		Launch of ECF report, <i>From Roadmaps to Reality</i> , focusing on Europe's policy framework to drive power sector transition	EU adopts 2014-20 budget with binding share of Cohesion Policy funding to support low-carbon shift, a victory for ECF-funded NGOs		EC delays auction of pollution permits ("backloading") to address carbon-market oversupply – a first step towards fixing ETS

	JANUARY	ECF CEO Johannes Meier speaks on “Gas and Renewables: Friends or Foes?” at European Energy Forum	Patty Fong and Johannes Meier kick off stakeholder process on urban-scale deep retrofits in Spain	ECF-commissioned report by CE Delft shows airlines would reap huge financial gains from participating in EU ETS; findings make global headlines	
		Health and Environment Alliance publishes first-ever economic assessment of the health costs associated with coal pollution in Europe	ECF’s Carel Mohn explains the carbon-bubble risk in major German newspaper <i>Die Welt</i>	Early results from ECF-commissioned research show that a cost-effective transition to fuel efficient cars is feasible	CPSL publishes <i>Clean Energy Finance Solutions: Poland</i> , part of a series on Central/Eastern Europe
		42 companies and associations run full-page ad in <i>Financial Times</i> calling for European Parliament to support “backloading” of emission allowances		Carbon Tracker Initiative launches second study on <i>Unburnable Carbon</i> and makes the carbon bubble issue a mainstream concern	MAY ECF-led Coalition for Energy Savings publishes <i>Guidebook for Strong Implementation of the EU Energy Efficiency Directive</i>
		Roundtable with Institute of International and European Affairs comparing insights on decarbonisation strategies in Ireland and continental Europe	Cambridge Econometrics and AEA-Ricardo publish ECF-commissioned report, <i>Fuelling Europe’s Future</i>	JULY Johannes Meier and Arne Mogren lay out three prerequisites for European decarbonisation in article on www.energypost.eu	European Investment Bank renounces coal funding
		French journalists discover Germany’s <i>Energiewende</i> on a two-day info tour	SEPTEMBER Launch of New Climate Economy project to showcase climate change economics – will link to ECF work on competitiveness		Stockholm roundtable with Global Challenge, leading to Agora and think tank collaboration
		ICAO Assembly decides to develop global market-based measure to address aviation emissions, stemming from ECF-funded analysis	Tom Brookes serves on Eco Advisory Board for South by Southwest (SXSW)	ECF hosts launch of the European Energy Agency’s progress report on Europe’s 2020 climate and energy targets	
		Adoption of Poland’s first ban on indoor coal burning, the result of a campaign involving ECF grantees		EU confirms 95g/km 2020 CO ₂ emission standard for cars, culmination of ECF multi-year campaign supported by ICCT analysis	In <i>European Energy Review</i> , Johannes Meier describes EU transition to a decarbonised economy as an opportunity to set a global example
		London roundtable with Chatham House on challenges of low-carbon transition	Kate Hampton joins ECF board, succeeding Michael Jacobs as CIFF representative	New ECF website launched in English and German	

EU CLIMATE POLICIES

The EU Climate Policies Programme aims to provide the direction and ambition needed for Europe through clear targets in line with science and an adequate price on carbon.

Strengthening the EU Emissions Trading System (ETS) is a priority for the ECF. In 2013, we supported a range of activities by Sandbag and other grantees that led to a first step towards fixing the ETS, the so-called “backloading” measure, which helps mitigate the impact on carbon market prices of the surplus in emission quotas due to the economic downturn. This small but symbolic victory came in mid-December when the European Parliament and the Council finally approved the measure.

Funding the low-carbon transition

ECF-supported efforts in 2013 contributed to the greenest-ever EU budget, despite the current context of economic constraint and spending restrictions. EU leaders are now committed to spending at least 20% of the entire Multiannual Financial Framework for 2014-2020 on climate-related policies and priorities. This commitment triples the previous budget share and could yield as much as €180 billion in funding for climate-related investments.

Some credit for this success goes to the ECF-funded “Well Spent” campaign, led by CEE Bankwatch, Friends of the Earth Europe, and WWF European Policy Office. This campaign showcases positive examples of EU cohesion policy investments in energy efficiency, renewable energy, and other projects underpinning the shift to a low-carbon economy.

Showcasing public support in France

The ECF also supported effective advocacy in France for carbon taxation, energy fiscal reform, and, more broadly, the government’s thinking on the energy transition. To that end, we commissioned two novel surveys – one a representative sample of French CEOs from French industry and another of

French citizens – both of which highlighted support for the low-carbon transition.

These surveys, the first major opinion polls conducted in France on this subject, showed that 83% of citizens and 91% of business leaders believe the energy transition will have a positive long-term impact on the French economy. More specifically, CEOs said they expect the transition will deliver technological innovation (88%), provide access to new markets (78%), and increase the attractiveness of French companies overall (69%).

Laying the groundwork for a new cross-cutting initiative

Much of 2013 was devoted to identifying the key issues and defining the initial work plan for ECF’s brand-new Low-Carbon Economy initiative. We also recruited the ECF’s first-ever Chief Economist, Thomas Fricke, who will play a key role in guiding our work. (*Learn more about Thomas and his new role on pp. 28-29.*)

What’s prompted this new initiative is the need to reframe the economic debate around the low-carbon transition and to connect currently fragmented efforts. Our ultimate goal is to accelerate a tipping point: once enough of the mainstream economic, business, and financial community concludes that a low-carbon economy is on balance necessary, feasible, and beneficial, pursuing a low-carbon agenda will get clear political priority.

In turn, this will convince investors that a low-carbon economy represents a robust and likely outcome, and that growth and productivity gains will come from supporting change in this direction. Given such certainty, they will adjust their risk evaluation and investments accordingly.

Economies obviously need to become more shock-resilient. The transition to a low-carbon economy will open up new opportunities to do just that.

Shaping a bold 2030 climate and energy package

Another big focus area for the ECF as a whole and for the EU Climate Policies team in particular is the EU 2030 framework for climate and energy. This must start with a clear agreement on the limits of the business-as-usual mode and a shared sense of urgency and ambition in the face of Europe's high dependence on fossil-fuel imports.

Our work in this area includes the following activities:

- Crafting a compelling high-level EU political vision for Europe's low-carbon industrial future;
- Reframing the economic debate to overcome misconceptions that climate action would endanger Europe's fragile economic recovery, competitiveness, and security of supply;
- Clarifying effective policy and market options and pathways based on fact-based analysis;

- Addressing the social costs of the transition by reaching out to a wider set of stakeholders, coordinating across the field, and supporting civil society in applying pressure on Europe's leaders;
- Demonstrating the EU is not acting in isolation from the rest of the world; and
- Engaging the financial community to address the long-term financial risks of inaction and to develop cost-effective solutions.



The 2030 framework for climate and energy is a big focus area for the ECF as a whole and for the EU Climate Policies team in particular.

INTERNATIONAL POLICIES & POLITICS

This new platform for philanthropic cooperation aims to catalyse greater ambition on climate change by working at the intersection of national and international decision-making.



As in past years, the ECF funded the launch of the UNEP Emissions Gap Report in 2013. This photo was taken at the UNEP technical panel presentation in Warsaw, in conjunction with COP 19. From left to right: Joe Alcamo, UNEP; Dr. Niklas Höhne, ECOFYS; Jennifer Morgan, WRI and IPPI; and Bert Metz, ECF and IPPI.

The International Policies & Politics Initiative (IPPI) was launched in April 2013 by the ECF and four partners – the ClimateWorks Foundation, the Oak Foundation, the Children’s Investment Fund Foundation, and the Mercator Foundation – to highlight opportunities for philanthropic collaboration, joint strategy development, resource pooling, and grant-making alignment in the arena of international policies and politics of climate change.

The IPPI team is focused on two key outcomes in the run-up to COP 21, slated for Paris in December 2015:

- Encouraging governments to put forward and agree to more ambitious national targets, actions, and policies in the global arena, which are captured in the UNFCCC framework.
- Ensuring that the COP 21 agreement, and the architecture for implementing it, promote an upward spiralling of ambition.

Key Year 1 accomplishments

Our first project was to commission a study of national and political economies in Brazil, China, France, Germany, India, Poland, the United Kingdom, and the United States. These assessments are helping us to identify the best international levers for boosting country climate targets. We will continue to build funder alliances with the aim of aligning investment strategies and resources in 2014.

Part of our mission is to challenge the conventional wisdom that ambitious climate action is bad for the economy and to encourage sound green growth planning. Since its formal launch in 2012, the ECF-supported Green Growth Best Practice Initiative has created tools to guide policymakers, practitioners, and others in their green growth planning and delivery – all based on high-quality analysis and best-practice assessments.

Nivela, a new Southern think tank funded by IPPI, is positioning itself as an umbrella network bringing together committed thought leaders grounded in local organisations through which they will advocate for ambitious climate targets. We also worked last year to advance the participation of progressive Southern voices in national and international climate debates.

The IPPI-supported partnership between the Open Climate Network and the Climate Action Tracker has contributed significantly to international understanding that current national GHG emission reduction pledges are inadequate to limit the global temperature increase to 2°C. IPPI supported the monitoring of pledges and policies with regard to the 2°C goal, in particular through the UNEP Emissions Gap Report. We also supported the launch of the UNEP report in Berlin and Brussels.

We funded multiple activities linked to the UNFCCC framework and COP 19, including a trilateral dialogue among the U.S., China, and Europe. We also underwrote a successful project to raise awareness of the importance of climate change through the national Polish media and the strong community of Catholic intellectuals.

To further promote climate action, IPPI is supporting the creation of transformational climate initiatives or 'clubs', such as the Renewables Club of Germany. We are also involved with preparations for UN Secretary-General Ban Ki-moon's Climate Summit in September 2014, where such clubs are set to be catalysed.

Lessons learned from COP 19

We took away three important lessons from COP 19 in Warsaw and our first year of work:

First, we must support the voices outside official events with activities inside. For example, during COP 19 we orchestrated a joint statement from 27 leading scientists arguing for no new unabated coal and hosted a press conference with the authors at the same time activists were protesting the International Coal and Climate Summit.

Second, engaging a wider range of Southern voices is crucial. We must help link developing-countries voices calling for a new development model with the international negotiations.

Third, planning for COP 20 – to be held in Lima, Peru, in December 2014 – must start now. We organized interviews with Latin American think tanks, governments, civil society, and business to gather recommendations on what the

philanthropic community could do to support a positive outcome. We also sought their perspectives on how to leave a 'heritage' from the negotiations that will influence Latin American countries to support stronger climate ambitions.

Supporting civil society efforts

In 2013, we engaged in several small-scale partnerships aimed at mobilising public support for climate action, and built trust, relationships, and support with local groups. For instance, we played an important role in funding the Asian energy conference organised by the Global Campaign to Demand Climate Justice, which enabled mobilisation of grassroots movements throughout Asia. And we engaged in complementary activities to support NGOs' efforts during COP 19, and through Fossil Free UK, a project involving the British chapter of 350.org.

2014 Priorities

- Build political and communication capacity at the international and national levels to ensure that climate change is at the top of domestic agendas in 2014
- Develop and communicate scientific analysis, decarbonisation modelling, and country scenarios for use in policymaking
- Contribute to a successful Climate Summit in September 2014 through support of transformational partnerships and mobilisation of the public

LOW-CARBON ECONOMY

Thomas Fricke joined the ECF in December 2013 as Chief Economist, a newly created position supporting the Low-Carbon Economy initiative. We spoke with Thomas about his aspirations and the ECF's efforts to develop a better understanding of the economics of climate change and climate policies.



Thomas Fricke
ECF Chief Economist

Tell us about your new role and what you hope to achieve.

My ambition is to pull climate economics out of the corner and into the general debate about economic policy and modelling. I would like to build a bridge to conventional economics and help introduce climate as a normal part of economic models. The good thing in this sense is that I myself am an economist and a journalist, not a big climate expert.

How can this bridge-building be helpful?

We need to learn. While we have a strong sense of what needs to happen in the power or transport sectors, we don't have a clear understanding of the economics. For example, Germany's *Energiewende* led to rising coal production and

higher carbon emissions. That's a serious problem, also in terms of credibility. Nobody really saw it coming. The same is true for the collapse of ETS carbon prices.

The truth is that we don't fully comprehend the interconnections among energy prices, climate policy instruments, and the economy as a whole. Without a better understanding, smart policies might at any point turn counterproductive. We need to do a better job of anticipating side effects and designing better policies in order to maintain public support for ambitious climate policies.

What attracted you to this job?

I see a huge need to bring climate economists and conventional economists together. The sad fact is that conventional economists and leading policymakers don't listen to climate economists. The economic models being used in finance, treasury, and economics ministries don't take climate-related factors into account, and climate economists would never be asked for their thoughts on the euro crisis. We need to close this gap and make it harder for conventional economists and politicians to reserve climate issues for special moments.

That's a big challenge. Where do you start?

To be sure, this is going to be a long-term effort. You cannot just knock on the door of the finance ministry and expect it to change right away. We should not pretend to have all the answers but rather explore new ways of working.

My perception is that people are a little bored by the big policy summits and abstract percentage goals for emissions reductions. While government leaders try to find answers in summits and targets, rising energy prices are sparking debate about Europe's competitiveness.

The good news is that many conventional economists are interested in exploring climate issues for their own purposes. They are starting to be aware of the missing links and how climate influences their daily work. In particular, they need to better understand energy prices, because these prices enter their business cycle forecasts.

What concrete things would you like to accomplish in your first year or two?

First, we are looking hard at how climate policies affect companies. People argue that high energy prices destroy competitiveness, but the reality is much more complicated. Together with McKinsey & Company we examined the competitiveness of the chemical sector in the low-carbon transition. Our study shows that Europe's chemical industry, up to now, has managed to live quite well with rising energy prices, while at the same time reducing emissions. The lesson is that there need not be a contradiction between climate policies and the strength of the economy. This offers huge potential.

Second, we are developing an energy price monitor – probably monthly – that could become a credible reference point in the debate on climate policies. There's so much emotion about energy prices, and this tool could be useful for practitioners and journalists.

Third, I would like to convene climate and macro-economic experts to develop a plan for bringing Europe out of the crisis through a green new deal and investments in a lower-carbon economy. I would like to see us offer solid policy ideas that address unemployment and slow growth in a way that's good for the climate. For example, we might consider offering tax rebates as a stimulus, linking these to spending on consumer products that are CO₂ friendly. Offering subsidies for investment in energy-efficient building renovations is another tactic, and would give the housing sector a lift.

How is your work at the ECF different from your chief economist role at *Financial Times Deutschland*?

It's been interesting to make the transition from a daily newspaper, where people are always rushing and deadlines define the whole day. When meetings go beyond 30 minutes, people get nervous – but at the end of the day, you have that paper in hand. The downside, of course, is that journalists, after all the staff cuts, are so busy multitasking that they have less and less time to do deep thinking. Journalism has become so conventional, so much of a herd mentality, so superficial.

I'm happy to be in a place where we get deeper into these issues. There are moments where I think some of our ECF meetings could be shorter, but it's good to be out of the trap of having to solve the world's big problems in less than 30 minutes!

STRATEGIC COMMUNICATIONS

The Energy Strategy Centre (ESC), the strategic communications unit of the ECF, works to shift the public narrative around the low-carbon transition from costs and barriers to challenges and opportunities.

In 2013, the ESC continued efforts to rebut the many sources of misinformation in the climate change debate through sector-specific research, advocacy support, participation in expert panels, and media outreach.

Boosting the impact of IPCC AR5

The Fifth Assessment Report (AR5) of the Intergovernmental Panel on Climate Change (IPCC) represents the most comprehensive review of climate science since the panel released its Nobel Peace Prize-winning AR4 in 2007. But the full AR5, which is being released over 13 months, is thousands of pages long and written in scientific and technical language – a potential deterrent to lay readers.

For that reason, the ECF teamed up the University of Cambridge Programme for Sustainability Leadership (CPSL), the Cambridge Judge Business School, and a variety of partners from the business community to distil the key AR5 findings into a series of easily digestible summaries. The ESC managed the writing and editing process for the series, called “Climate: Everyone’s Business” (see Spotlight at right for more details).

The ESC also supported the IPCC Secretariat in developing and executing the communications strategy for the Working Group 1 report. We coordinated more than 250 interviews in Stockholm following the official IPCC press conference and disseminated briefing notes and rebuttal lines. This work led to more than 12,400 stories worldwide in the first three days following the launch.

Supporting ECF programmes and initiatives

Another priority for the ESC team was to facilitate progress on the EU 2030 framework for climate

and energy. Our work helped to strengthen the ECF network of institutional contacts and put it in a better position to provide input into the 2030 framework proposal and help prepare the ground for Council and Parliamentary negotiations that lie ahead.

Other ESC activities in 2013 included involvement in sector-specific advocacy campaigns, notably supporting the Transport Programme’s win on tougher CO₂ emission standards for cars, and organising meetings and launch events around major ECF publications such as *Poland 2050* and *From Roadmaps to Reality*. We also contributed to expert panels hosted by the International Energy Agency in Paris and the Foundation for European Progressive Studies in Brussels, and moderated a European Consumers’ Organisation (BEUC) event in the European Parliament.

Our media outreach covered over 90 initiatives across all ECF programmes, resulting in 1,200 stories. As part of this effort, we coordinated and placed 23 op-eds, many of which appeared in multiple publications.

2014 Priorities

- Strengthening operational capability and supporting capacity-building in the NGO field
- Strengthening global climate communications
- Aiming for a 2030 framework that explicitly balances competitiveness and sustainability concerns and highlights the role of European integration

DISTILLING THE BUSINESS IMPLICATIONS OF CLIMATE CHANGE

The IPCC's Fifth Assessment Report contains a wealth of information on the projected impact of climate change on business operations. To increase awareness of the key findings, the ECF is leading an effort to distil AR5 into a series of clear, concise, reader-friendly summaries.

These summaries, published by the University of Cambridge Programme for Sustainability Leadership under the header "Climate: Everyone's Business," cover the broad implications of climate change as well as the particular implications for industry, employment, energy, finance, transport, tourism, cities, buildings, agriculture, fisheries, and the military.

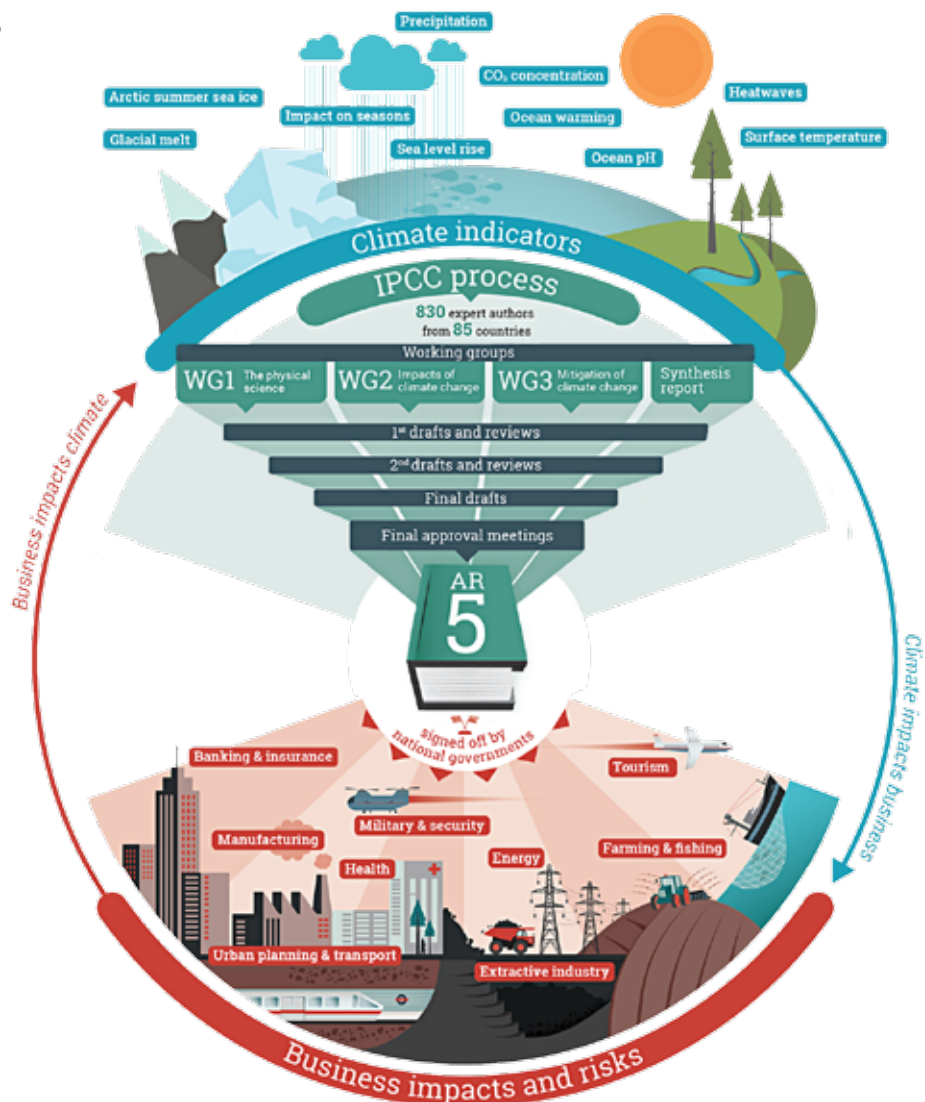
The first set of ECF-supported summary documents, infographics, and PowerPoint presentations, released in September 2013, explains the process of compiling AR5 and its significance for business. The second set, published in October, focuses on the physical science as the foundation of understanding climate change. All of these materials can be downloaded from <http://www.cpsl.cam.ac.uk/IPCC>.

Most of the sector-specific content will be in the IPCC reports scheduled to come out in March and April 2014. Summary documents based on these reports will be produced and released soon thereafter.

Infographic is a modified version of the original by the *Information is Beautiful Studio*

Our hope is that as readers gain a stronger understanding of climate science, they will recognise the risks to their business models and potential opportunities and consider options for adapting to climate change, as well as for mitigating their contributions to the problem.

CLIMATE EVERYONE'S BUSINESS



2013 was the year when Germany's *Energiewende* – the transition from reliance on fossil fuel and nuclear power to a renewable energy system – hit adolescence, with almost 25% of the country's power supply coming from renewables. Like most teenagers, this one exhibits some unpredictable behaviours that get on its parents' nerves. Yet it also is a source of joy and learning – if one is prepared to listen. Through the *Agora Energiewende* initiative, co-funded by ECF and the Mercator Foundation, we are doing our best to help rear this promising youth. And 2013 brought significant learnings on both sides.

Bringing systemic thinking to the field

One of Agora's key messages from the start – it's all about wind and solar power – became common wisdom in the German debate in 2013. Building on this fundamental assumption, the debate increasingly focused on the key challenge: how to make the system most flexible. Different stakeholders offered different (often self-serving) solutions, calling for more storage, or demand-side integration, or grid expansion, or financial incentives for flexible gas turbines. All of these are important options; what was missing was a systemic view.

That's where Agora came in with several ground-breaking studies. One of our key projects was an analysis of demand response potential in southern Germany, where we proved that 2 GW could be shifted to diminish peak load. Another important insight emerged from an in-depth modelling of the optimal allocation of renewable energy sources. For the first time, this question was addressed from a systemic point of view: we developed several scenarios

taking into account different flexibility options, European interconnections, and deployment speeds. The conclusion: it doesn't matter if most new renewable installations are close to industrial centres (where the load is) or in the best sites (wind along the coast, solar in the south). The overall costs for the society will be more or less the same under all scenarios.

Addressing the European dimension

Partly due to misunderstandings, partly for good reasons, many neighbouring countries blame Germany's *Energiewende* – the pubescent teenager – for unscheduled electricity flows, bearish wholesale market prices, or grid instabilities affecting their own systems. This is unfortunate, as many studies show that cooperation across European energy markets would enable a less costly and more secure transition pathway.

Thanks to additional funding, we were able to broaden the Agora mandate in late 2013 and begin reaching out to neighbouring countries. We hired a new team of four senior associates from Poland, France, Austria, and Germany and charged them with extending the Agora approach of stakeholder dialogues and policy-oriented research to the bilateral and regional levels.

With this new leadership, the new European team, and a new political and strategic position, expectations for 2014 are high, as is the level of excitement about our ongoing impact.

Shaping policy perspectives amid a change in government

Throughout the 2013 German election campaign and the slow formation of the new government, the Agora team worked closely with key individuals in all major political parties, focusing on the big energy policy question: How much does the *Energiewende* cost? To support this discussion, we made recommendations to

reform the Renewable Energy Act in a cost-efficient manner and participated in numerous discussions, leading to a political consensus on many elements.

The new coalition government agreed upon a mixed set of energy reforms in its coalition treaty. While energy efficiency and reforming the emissions trading scheme were mentioned only half-heartedly, the main pillars of the *Energiewende* got clear support. The emissions targets, the nuclear phase-out, and further growth of renewable energy were not called into question by the new government, nor by any other party represented in the new Parliament.

Changing of the Agora guard

The new government started with important personnel decisions: Agora director Rainer Baake was named deputy minister of the new Ministry for Economy and

Energy – in charge of the two departments for Energy and Europe – and was quickly dubbed “Mister Energiewende” by the media. Thus, Agora lost its director but gained a very close government ally. But this was not the only news: Two Agora Council members were appointed deputy ministers in other ministries: Jochen Flasbarth in the Ministry for Environment, and Ulrich Kelber in the Ministry for Consumer Protection.

In the wake of these changes, Klaus Töpfer, former head of the UN’s environment programme and German Minister for Environment in the 1990s, agreed to chair the Agora Council, while former deputy director Patrick Graichen succeeded Rainer Baake as director of the team. With this new leadership, the new European team, and a new political and strategic position, expectations for 2014 are high, as is the level of excitement about our ongoing impact.



1. Rainer Baake left Agora and became a close government ally. 2. Patrick Graichen succeeded Baake as director of the Agora team. 3. Klaus Töpfer is the new chair of the Agora Council.



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Polska 2050

POLAND: BUILDING THE ECONOMIC CASE FOR A LOW-CARBON TRANSFORMATION

Demonstrating the economic feasibility of a low-carbon transition is particularly important in Poland given the country's historical reliance on a coal-fired power sector, limited access to environmental data, and strong energy industry lobbying. Not surprisingly, advocates of a low-carbon Poland face staunch resistance from hardliners opposed to environmental policy reform, even amidst strong economic growth.

To help bridge this divide and initiate policy dialogue, the ECF has been working in Poland since 2008. Through our ongoing support of the "Low-Emission Poland 2050" initiative, our local partners – the Institute for Sustainable Development and the Warsaw Institute for Economic Studies – have helped build the economic case for progressive national climate policy reform, raise awareness, and build alliances among disparate groups.

In 2013, ECF funding helped Low-Emission Poland 2050 publish a comprehensive, economy-wide analysis of Poland's carbon footprint and emissions reduction potential under the direction of lead authors/editors Dr. Andrzej Kassenberg and Dr. Maciej Bukowski. Titled *2050.PL - The Journey to the Low-Emission Future*, the report identifies pathways for building a low-carbon economy and the potential impact on economic development.

The authors of the study helped raise awareness and engage key policy stakeholders by taking part in

bilateral meetings with the Ministry of Economy, the Ministry of Finance, and the Chancellery of the President of Poland, among others. The team also presented the report at the COP 19 in Warsaw and conducted briefings with Brussels-based NGOs and think tanks, relevant EC units and EP members, and policy and business decision-makers. These efforts have made the future of coal in Poland an important topic on the economic agenda.

In the run-up to this key study, Low-Emission Poland 2050 published four other reports highlighting the economic benefits of a low-carbon transformation, available at <http://np2050.pl/en>.

Looking forward

Building on the momentum gained in 2013, we are now focused on

- Facilitating the public debate on the low-carbon economy;
- Bringing together experts and public figures interested in promoting a progressive agenda; and
- Preparing new discussion papers covering the most important issues related to low-carbon development (i.e., the EU 2030 goals, creating green jobs).

Our success in 2014 will hinge on making our findings part of the political agenda for the most important parties in the forthcoming elections.

Poland 2050 Outreach

Brussels, 7 February: Briefing for NGOs and think tanks attracts 40+ attendees

Brussels, 4-5 June: Briefings with European Commission units and about 15 Members of the European Parliament

Warsaw, 25 June: Poland 2050 launch draws 120+ policy and business decision-makers

Berlin, 29 October: Presentation at Humboldt Viadrina School of Governance on Polish climate and energy policy

Warsaw, 20 November: Poland 2050 report discussed at COP 19 session

UNITED KINGDOM: STRENGTHENING CONFIDENCE IN THE LOW-CARBON TRANSITION

The United Kingdom has long shown leadership on the climate policy front, through the 2008 Climate Change Act, which provides a legally binding framework to guide the transition to a low-carbon economy, and through innovations such as the Green Investment Bank.

Much of this progress has been enabled by a broad national political consensus on climate change. However, this consensus is now under stress as the UK heads towards a general election in 2015.

Household energy bills have shot to the top of the political agenda, and progress on decarbonisation is tangled in competing visions of the country's energy future – from renewable energy to nuclear power and shale gas. A growing number of media and political voices are casting doubt on the climate science and the economic case for action.

The ECF's UK programme is working with grantees to rebuild consensus and confidence in the low-carbon

transition. In 2013, we had two main areas of focus: improving legislation reforming the electricity market and supporting the Energy Bill Revolution campaign.

While the final Energy Act is not ideal, ECF grantees such as Green Alliance, E3G, and Greenpeace

helped secure important milestones such as an emissions performance standard for new power stations, and a framework to incentivise electricity demand reduction alongside low-carbon generation.



The Energy Bill Revolution campaign calls for a major energy efficiency programme to eradicate fuel poverty and reduce energy use and carbon emissions. The campaign is supported by a broad coalition of children's and older people's charities, health and disability groups, environmental and consumer groups, trade unions, businesses, politicians, and public figures.

2014 Priorities

Improving the media and political discourse. We will continue to work with grantees such as Carbon Brief on fact-checking the UK media's coverage of climate and energy issues. We are also working with other funders to establish a new unit that will promote evidence-based discussions in the media and mobilise authoritative voices on the low-carbon economy.

Decarbonising the power sector. We are developing a project to explore technical and governance options in line with the goal of making the UK power sector nearly carbon-free by 2030, focusing on the neglected role of interconnection, EU market integration, and demand-side management.

Opposing coal station upgrades. Together with a range of grantees we aim to minimize the threat that existing coal stations could be upgraded to allow operation throughout the 2020s.

Building the case for European ambition. The ECF and core grantees are working with civil society and progressive businesses to encourage the UK to play a positive role in international climate negotiations.

COORDINATING A GLOBAL RESPONSE TO CLIMATE CHANGE

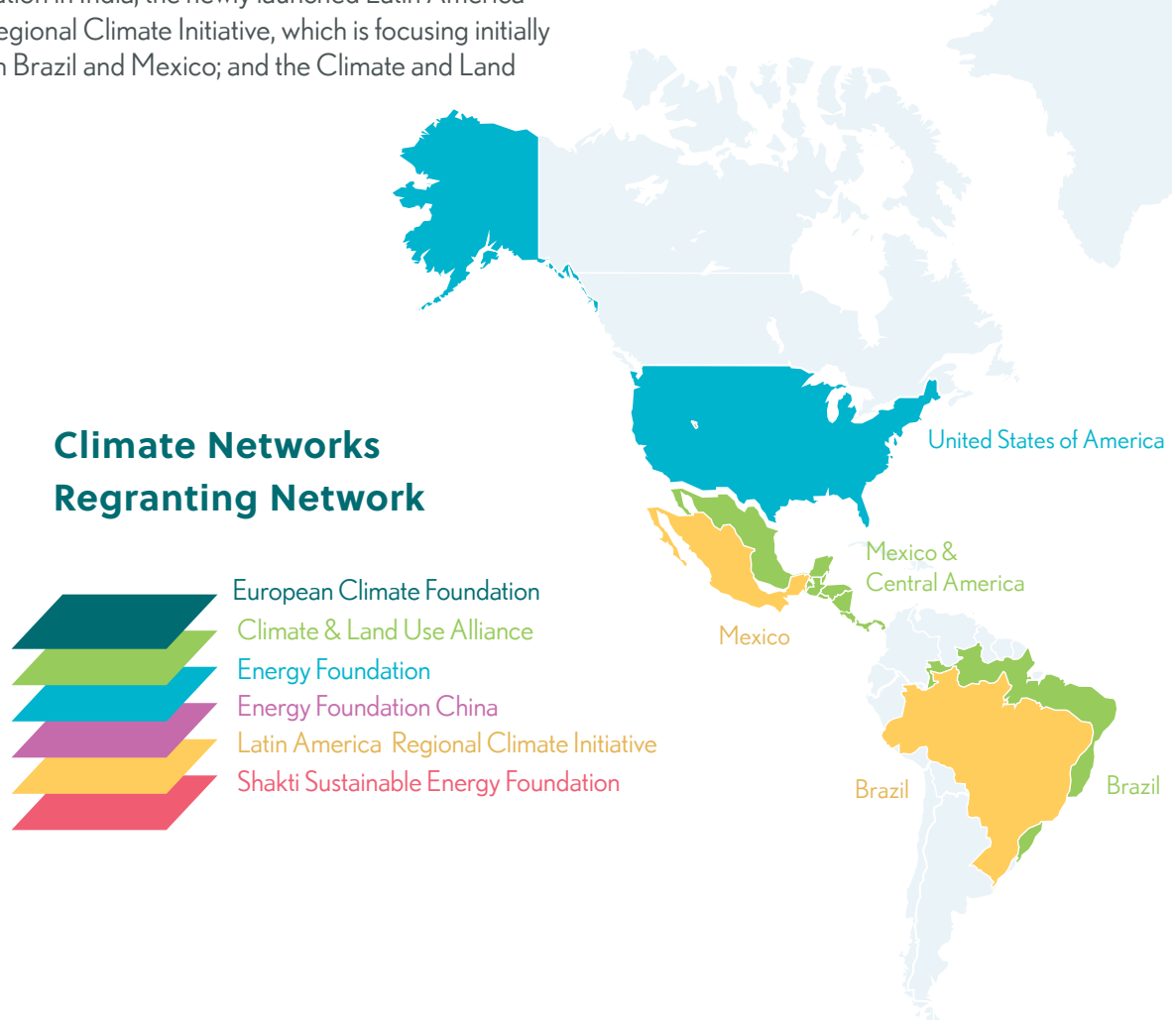
Climate change is a global challenge that calls for global answers. Recognising the need for a coordinated response to this challenge, the European Climate Foundation – along with six other grant-making organisations – is part of the ClimateWorks Regranting Network. Members of this network collaborate to marshal the talent and capacity required to support philanthropic donors in the climate change arena.

As shown in the map below, the ClimateWorks Regranting Network operates in China, Europe, India, Indonesia, Latin America, and the United States. Besides the ECF, other members include the Energy Foundation, which is active in China and the U.S.; the Shakti Sustainable Energy Foundation in India; the newly launched Latin America Regional Climate Initiative, which is focusing initially on Brazil and Mexico; and the Climate and Land

Use Alliance, which operates in Indonesia, Brazil, Mexico and Central America, and the U.S.

Funding high-impact opportunities

Member organisations align their goals, coordinate strategies, facilitate larger networks, and help direct philanthropic resources to a portfolio of the highest-impact opportunities to reduce the pollutants that drive climate change. This portfolio includes projects on clean power generation, energy efficiency, oil use, forests and land use, and non-CO₂ climate pollution. It also includes strategies and activities that cut across sectors, such as strengthening strategic communications, improving air quality, and building public and political support for climate action and the transition to a low-carbon economy.



Different network members are taking the lead on particular themes on behalf of the network. For example, the ECF is driving efforts to create a global communication hub charged with defending climate science and exposing the risks of a continued reliance on and investment in fossil fuels. We are also leading a new initiative aimed at increasing the political will and ambition in the international

policy making environment and increasing the political will to change (see pp. 26-27).

As a result of this coordination, we expect to see more efficient knowledge sharing and learning, as well as more effective deployment of resources dedicated to addressing climate change around the world.



Latin America Regional Climate Initiative



SOME OF OUR GRANTEES & PARTNERS

Climate Bonds



Polska Zielona Sieć



réseau
action
climat
france

CEE

bankwatch
network



Climate Bonds



The
Carbon
Brief



Friends of
the Earth
Europe



E3G

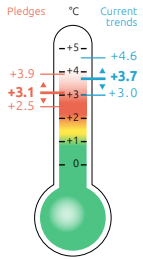


JONGEREN
MILIEU
ACTIEF

CARBON DISCLOSURE PROJECT

NATUUR
& MILIEU





KNOWLEDGE MANAGEMENT: A UNIFIED PLATFORM FOR PLANNING AND MONITORING

In 2013, the ECF continued to make big strides towards becoming a learning organisation, by deploying new tools that allow for mapping our strategies, planning campaigns, and tracking progress and outcomes in a more consistent, transparent way.

The biggest change came with our year-end rollout of a single planning and monitoring platform across all of our programmes and initiatives. Before, each ECF programme had its own way of presenting its strategy and its own tools for monitoring progress.

Now, everyone is using the same logic model to depict their theory of change, to state their long-term objectives, and to list the bottlenecks that prevent them from reaching each objective. If an objective is to defend climate science and shift public opinion through the media, one bottleneck might be the lack of recognised climate spokespeople in a particular Member State. In some cases, there may be specific bottlenecks to overcome as well as drivers or opportunities that can help us achieve our programme objectives.

Defining outcomes

Once the objectives and the bottlenecks/drivers to reach the objectives are known, the next step is to define the outcomes that will help us reduce or eliminate the bottlenecks or capitalise on the drivers. It's up to each programme team, together with their strategic partners, to articulate programme strategy by working from objectives, to bottlenecks/drivers, to desired outcomes – the right side of the chart on p. 41. Then they need to map out the activities

(and grants, and grantees) that can best deliver those outcomes – the left side of the chart.

At a glance, this new framework allows us to see the logic flow within each programme workplan and how each grantee contributes to collective network outcomes. It also should make it easier to coordinate action and monitor progress at all levels. By showing how change will occur, it helps make the implicit explicit.

What's next?

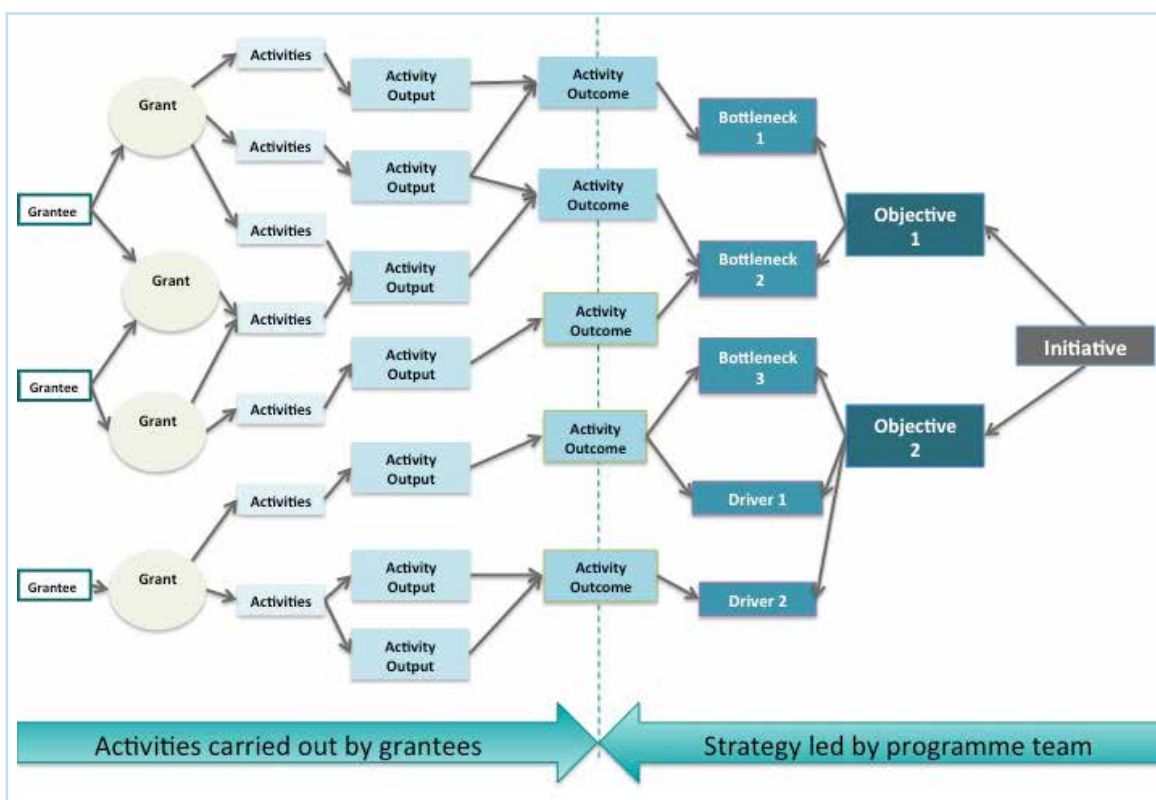
The new planning and monitoring platform is online, and we are rolling it out across the ECF programme teams. We expect to use the system internally in first-half 2014, to plan new campaigns and monitor progress against those already under way. We also plan to share it with funders who would like a closer understanding of our strategies and how we monitor our activities, measure impact, and adapt accordingly. Eventually, we will provide access to grantees so they can input progress updates and see their contributions to the overall strategy.

Ultimately, what we learn through this platform will feed into our resource allocation process, helping us to define our biggest priorities and allocate funding and staffing most effectively.

"We see the ECF as a hub for philanthropic innovation."

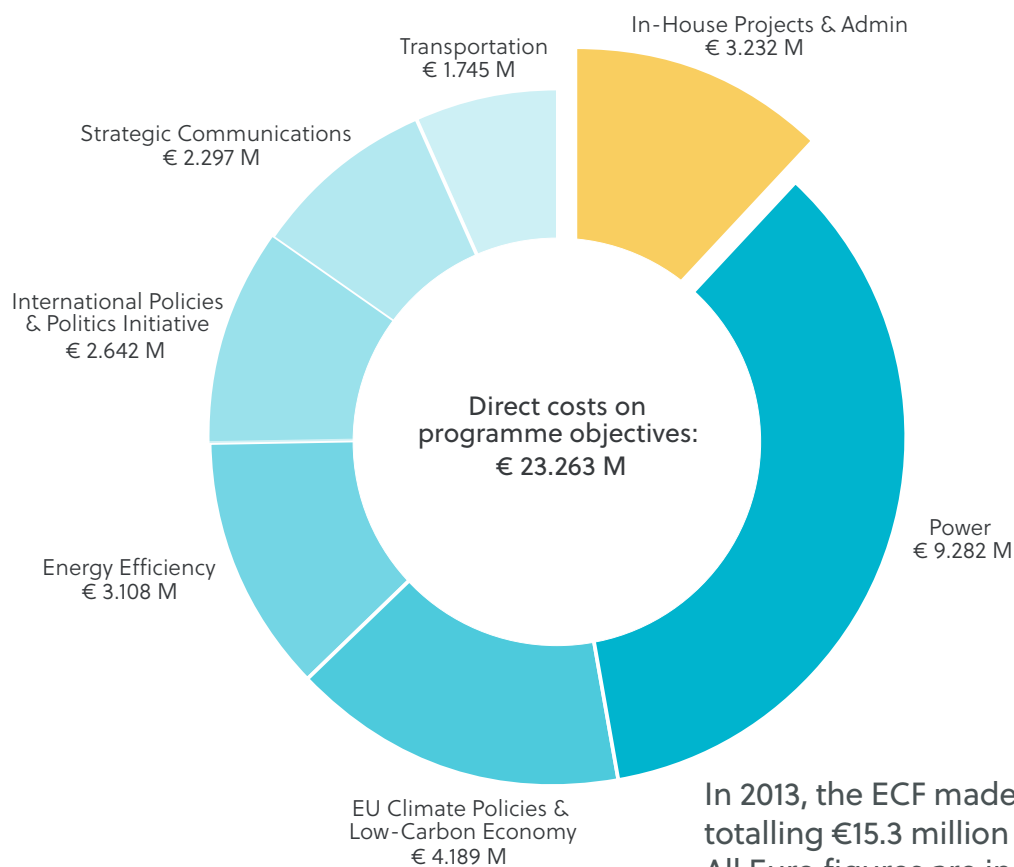
Matt Baker, Environment Program Officer, Hewlett Foundation

A New Framework for Planning and Monitoring



Each programme team, together with their strategic partners, takes an initiative and articulates programme strategy by working from objectives, to bottlenecks/drivers, to desired outcomes – the right side of the chart. Then they map out the activities (and grants, and grantees) that can best deliver those outcomes – the left side of the chart.

FINANCIAL OVERVIEW



Core Funders

In 2013, the ECF had six core funders providing unrestricted general operating support. We are grateful for the enormous engagement of these organisations in guiding and shaping our mission and strategies.



Carbon Offsets

As in previous years, the ECF will compensate for the carbon emissions linked to its activities in 2013. In 2012, it compensated for a total of 203 tons of CO₂ equivalent.

FURTHER READING

The following publications were commissioned by the ECF or produced independently by our grantees and partners with ECF support in 2013. For links to these publications, please visit our website at <http://europeanclimate.org/category/news/publications/>

POWER PROGRAMME

RAP Reply to the Commission Consultation on Generation Adequacy, Capacity Mechanisms, and the Internal Market in Electricity

WWF European Policy Centre Re-energising Europe: The Case for Post-2050 Renewable Energy Targets and Support

Health and Environment Alliance The Unpaid Health Bill: How Coal Power Plants Make Us Sick

E3G Creating New Electricity Markets in Europe to Meet Energy Policy Challenges

Institute for Environmental Economics ESCO Market in Poland: Current State and Development Perspectives

ENERGIACLUB Renewable Energy Potential in Residential Buildings

E3G Risk Managing European Power Sector Decarbonisation: Poland Case Study

RAP Demand Response as a Power System Resource

McLaren Environmental Climate Implications of Underground Coal Gasification

E3G Moving CSS Forward in Europe

E3G Briefing on the European Investment Bank's New Screening and Assessment Criteria for Energy Projects

RAP A Review of Challenges in Implementing UK's New Feed-in-Tariff

RAP, E3G Nachfragesteuerung im deutschen Stromsystem

E3G Infrastructure Networks and the 2030 Climate and Energy Framework

PwC Decarbonisation and the Economy: An empirical analysis of the economic impact of energy and climate change policies in Denmark, Sweden, Germany, UK and The Netherlands

RAP Capacity Mechanisms for Power System Reliability

E3G North Seas Grid Project Pipeline Analysis

RAP, E3G, ClientEarth From Roadmaps to Reality

EU CLIMATE POLICIES PROGRAMME

Center for Clean Air Policy The New Deal: Reforming the EU ETS to Enhance Low-Carbon Industrial Competitiveness

WWF European Policy Office Re-energising Europe: Putting the EU on Track for 100% Renewable Energy

RAP Capacity Markets and European Market Coupling—Can They Co-Exist?

CE Delft Carbon Leakage and the Future of the EU ETS Market

WWF European Policy Office Response to the European Commission Public Consultation on a 2030 Climate and Energy Package

CDP CDP S&P 500 Climate Change Report 2013

ENERGY STRATEGY CENTRE

Carbon Tracker, Grantham Research Institute Unburnable Carbon 2013: Wasted Capital and Stranded Assets

University of Cambridge Programme for Sustainability Leadership, Cambridge Judge Business School IPCC AR5 Overview: Implications for Business

University of Cambridge Programme for Sustainability Leadership, Cambridge Judge Business School IPCC Science Report: Action, Trends & Implications for Business

ENERGY EFFICIENCY PROGRAMME

Buildings Performance Institute Europe A Guide to Developing Strategies for Building Energy Renovation

ECOFYS, Friends of the Earth Europe, Climate Action Network Europe Saving Energy: Bringing Down Europe's Energy Prices for 2020 and Beyond

Economist Intelligence Unit, Global Buildings Performance Network, Buildings Performance Institute Europe Investing in Energy Efficiency in Europe's Buildings

ENERGIACLUB Renewable Energy Potential in Residential Buildings

Coalition for Energy Savings Guidebook for Strong Implementation of the EU EED

E3G Driving Efficient Ecological Transformation in Europe

E3G Why Energy Efficiency Needs to Have Priority as Part of the Energiewende

Topten International Services Energy Efficiency Before and During the Implementation of the Ecodesign and Energy Labelling Regulations

Coolproducts for a Coolplanet Coalition, European Environmental Bureau, European Environmental Citizens' Organisation for Standardisation, Topten International Services Contribution from European Environmental NGOs to the Evaluation Study on the EU Energy Labelling Directive and Certain Aspects of the Ecodesign Directive

Buildings Performance Institute Europe Boosting Building Renovation: An Overview of Good Practices

European Environmental Bureau Resource Efficiency Indicators for EU Product Policy: Embedded Energy in Washing Machines

TRANSPORT PROGRAMME

E3G Emissions Performance Standard: Energy Bill Amendments

CE Delft, Transport & Environment The Billion Euro Aviation Bonanza

Transport & Environment Sustainable Alternatives for Land-based Biofuels in the European Union

Transport & Environment The Urgency of Concerted Global Action to Tackle Emissions from International Aviation

Cambridge Econometrics, Ricardo-AEA An Economic Assessment of Low Carbon Vehicles

Transport & Environment Poland at a Crossroads: The Impact of CO₂ and Fuel Economy Regulation for Poland

Transport & Environment Mind the Gap: Why Official Car Fuel Economy Numbers Don't Match up to Reality

CE Delft, Transport & Environment Monitoring of Bunker Fuel Consumption

RAP Policy Brief: EU Power Policies for PEVs

Cambridge Econometrics, Ricardo-AEA Fuelling Europe's Future – How Auto Innovation Leads to EU Jobs

Transport & Environment Aviation ETS: A Meaningful Future?

Transport and Environment Global Deal or No Deal?: Your Free Guide to ICAO's 38th Triennial Assembly

Transport & Environment How Clean Are Europe's Cars?

ONLINE RESOURCES

Agora Energiewende

www.agora-energiewende.org/

Forum for planning Germany's transition to a high share of renewable energy resources

BPIE Data Hub for the Energy Performance of Buildings

www.buildingsdata.eu

Facts and figures on Europe's building stock, key legislation, financial schemes, and building code requirements

CarbonBrief

www.carbonbrief.org

Latest developments in climate science and fact-checking on climate

Coalition France pour l'Efficacité Énergétique (CFEE)

<http://www.coalition-energie.org>

French perspective on energy efficiency policies

Climate Action Tracker

www.climateactiontracker.org

Independent science-based assessment tracking the emission commitments and actions of countries

Coalition for Energy Savings

www.energycoalition.eu

Brings together business, professional, and civil society associations to make the case for a European energy policy that places a greater emphasis on energy efficiency

Cool Products

www.coolproducts.eu

Campaign to set ambitious minimum requirements for energy efficiency and other environmental aspects of products sold in the European Union

Energy Bill Revolution

www.energybillrevolution.org

Campaign to improve energy efficiency in the United Kingdom, aimed at eradicating fuel poverty and reducing energy use and carbon emissions

EU Climate Policy Tracker

www.climatepolicytracker.eu

Up-to-date developments in climate and energy policies across the 27 EU Member States

European Council for an Energy Efficient Economy

<http://ecee.org>

Captures the latest developments in energy efficient product policy

Green Growth Best Practice

<http://ggbp.org/>

Global network of practitioners and policymakers sharing best practices for green growth planning and implementation

KlimaFakten

www.klimafakten.de

Offers clear and easily understandable information about the facts of climate change to a German-speaking target audience

Low-Emission Poland 2050

<http://np2050.pl/en>

Examination of the costs and benefits of an ambitious climate policy in Poland

Roadmap 2050

www.roadmap2050.eu

Hub for the Roadmap 2050 project and contributing studies

Sandbag

www.sandbag.org.uk

Shines a light on what is really going on in emissions trading

Understanding the UN Climate Science Reports

www.cpsl.cam.ac.uk/IPCC

Clear, concise summaries of the Fifth Assessment Report (AR5) of the Intergovernmental Panel on Climate Change (IPCC)

Views of Environmental NGOs on the EU Ecodesign and Energy Labelling Policies

env-ngo.eup-network.de

Provides links to official documents and NGO position papers on the European Ecodesign and Energy Labelling directives and implementing measures





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