



DEESME

National schemes for energy efficiency in SMEs

Deliverable 2.6 - Public

Monitoring concept

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About

Improving energy efficiency is the most cost-effective way to reduce energy-related emissions, improve economic competitiveness and increase energy security. In the European Union, several pieces of legislation aimed at guiding states and companies, regardless of their size, on ways to improve their energy efficiency: one of them is the Energy Efficiency Directive, establishing a common framework of measures and requirements with the goal to remove market barriers and promote a more efficient use of energy in supply and demand. Article 8 of the Directive offers ways to achieve this, requiring Member States to promote and facilitate the implementation of energy audits and energy management systems. The audits are compulsory for large companies and recommended for small and medium enterprises (SMEs). National authorities should encourage both to implement the resulting recommendations.

Member States have all chosen different approaches to transpose the requirements into national laws and to support companies (trainings, websites, helplines and funding support schemes). SMEs have less workforce, technical and financial capacity to perform energy audits, and therefore rarely do so: making them aware of the multiple benefits that can derive from improving their energy efficiency and accompany them in the energy transition, with knowledge and funding from both the public and private sectors, is key. That is what DEESME, a Horizon 2020-funded project (September 2020 – September 2023), aims at.

DEESME enables companies, especially SMEs to manage the energy transition by taking profit of multiple benefits from energy management and audit approaches and provides national authorities with guidelines and recommendations to empower their schemes under article 8, using the multiple benefits' approach.

The project identifies and shares good practices from national schemes, EU projects, and other initiatives with national authorities and support them in developing more effective schemes dealing with energy audits and energy management systems. It assists SMEs to develop and test the technical DEESME solutions by organizing information and training initiatives, realising energy audits, and implementing energy management systems starting from international standard and adding the multiple benefits energy efficiency approach.

The project is built on a consortium of academics, research organisations, consultancies and government offices from Belgium, Bulgaria, Germany, Italy, the Netherlands and Poland, namely: IEECP (NL, coordinator), FIRE (IT), SOGESCA (IT), Fraunhofer ISI (DE), CLEOPA (DE), SEDA (BG), ECQ (BG), KAPE (PL), EEIP (BE).

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Executive Summary

One of the aims of DEESME project (**Developing National Schemes for Energy Efficiency in SMEs**) is the support EU (and non) National Authorities enhancing the impact of energy audits and energy management systems.

Work Package 2 is fully dedicated to activities for National Authorities. Starting from an inventory of needs and requirements of NAs about transposition of Article 8 EED and activities for small and medium enterprises (T2.1), a report on best practice for policies on energy audits, energy management and multiple benefits was drafted (T2.2). Based on these outcomes, support material was developed for NAs, in the form of a generic guidance on best-practice and a country specific one (T2.3). For each challenge identified in the assessment, a set of possible solutions (strategies) was proposed basing on best practices identified across EU MS. In the specific guidance, challenges and related strategies have been tailored and customized for each of the 10 MS involved in the project. Furthermore, the guidance provides an overview of the DEESME approach on energy audits and EMSs including the evaluation of non-energy benefits.

Task 2.4 is about “Monitoring of WP2 quantitative and qualitative results”. Thus, it aims to monitor the results and impact of this work package. In particular, the number of National Authorities informed and involved in the project, and the policy recommendations implemented will be monitored.

Information will be collected that allows to verify:

- a) **the quality of the products;**
- b) **the interest in the products and the possibility that they will be used;**
- c) **suggestions for improving the products.**

The policy-related process in DEESME will be followed-up in WP5, where a direct support will be offered to National Authorities, and the forthcoming evaluation results from WP2 will also feed to the WP5 process.

This deliverable (D2.6) describes a monitoring concept established during the project. It consists in two rounds of monitoring that will be provided in September 2022 and at the end of the project. It covers the following aspects (Figure 1):

- I. **Indicators and data requirements: A description of key performance indicators, their operationalization and data requirements to determine them.¹**
- II. **Data collection overview: An overview of the data collection process.**
- III. **Data collection templates: A presentation of the templates used for data collection.**
- IV. **Roles and responsibilities: A bundle of information on the practical implementation of data collection for each project partner.**
- V. **Data assessment: A description on how the collected data will be processed.**

¹ see more details in sections 3 and 4.



VI. Summary: An overview of the schedule and responsibilities.

In addition, screenshots of the draft data collection templates are shown in the annex (VII).

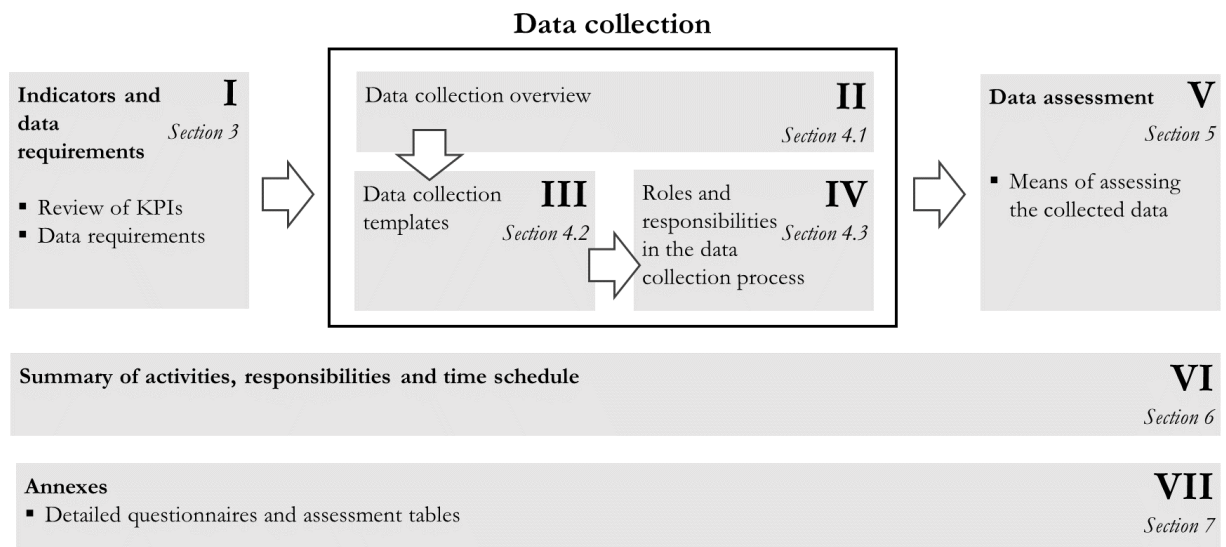


Figure 1: Overview of the monitoring concept



1. Introduction to the monitoring concept

According to the DEESME proposal, each work package (WP) includes its dedicated monitoring activities. Work package 2 (WP2) of the project is aimed to National Authorities, customizing policies to enhance the impact of energy audits and energy management systems, with the main objectives to:

- **Involve National Authorities (NAs) and/or their implementing agencies of 10 European Member States;**
- **Identify and share best practices from national schemes, EU projects and other initiatives with NA;**
- **Support NA in developing more effective schemes dealing with energy audits and energy management systems.**

The monitoring activities in WP2 aim to keep track and verify the results created under this work package and to identify opportunities for improvement in the further implementation of the project, especially within WP5 (Figure 2).

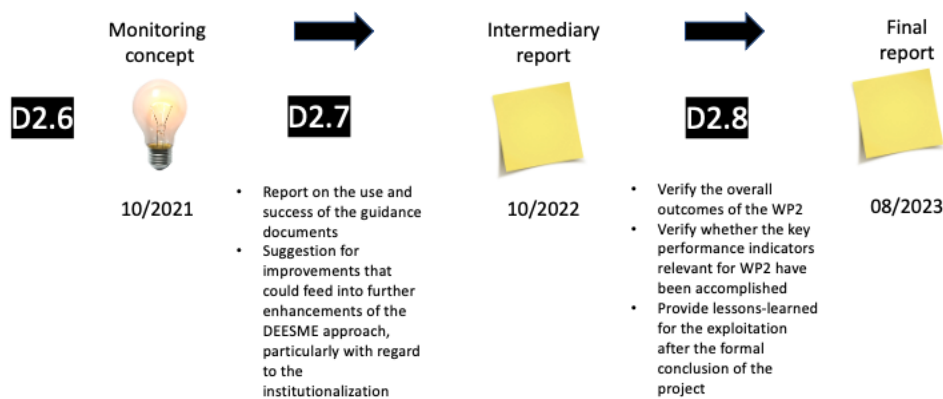


Figure 2: Overview of the deliverables in T2.4

This monitoring concept specifies how the successful use and application of the tools created under the DEESME approach will be monitored (D2.6). Based on this concept, two monitoring rounds will be carried out:

- **An intermediary monitoring (D2.7) will mainly report on the use and success of the guidance documents and workshops and it will make suggestions for improvements that could feed into further enhancements of the DEESME approach, particularly with regard to the institutionalization in WP5.**
- **A second monitoring (D2.8) towards the end of the project will verify the overall outcomes of WP2 (NAs involved, recommendation implemented). In that way, it will verify whether the key performance indicators relevant for WP2 have been**



accomplished and it will seek to provide lessons-learned for the exploitation of DEESME approach after the formal conclusion of the project.

The monitoring activities in WP2 are closely related to the forthcoming activities in WP5 which, building upon the challenges and recommendations emerged in this work package, will provide direct and tailored support to NAs including the preparation of specific policy proposals.



2. The monitoring concept

The monitoring concept covers various items (Figure 3):

- **Indicators and data requirements:** First, the monitoring concept reviews the key performance indicators established in the proposal phase of the project for WP2 and describes what data and information are required for monitoring them (section 3);
- **Data collection overview:** After the data requirements have been formulated, an overview of the different data collection steps is provided (section 4.1)
- **Data collection templates:** Thereafter, the structure and content of the data collection questionnaires are presented (section 4.2).
- **Roles and responsibilities in the data collection process:** Finally, the practical organization of the data collection is described (section 4.3).
- **Data assessment:** This section describes how the actual assessment of the collected data will take place (section 5).
- **Summary of activities, responsibilities, and time schedules:** The last section of the concept contains an overview of all responsibilities including the schedule (section 6).
- **Annexes:** The annexes of this document contain an overview of the detailed questionnaires and assessment tables used for carrying out the monitoring activities in WP3 (section 7).

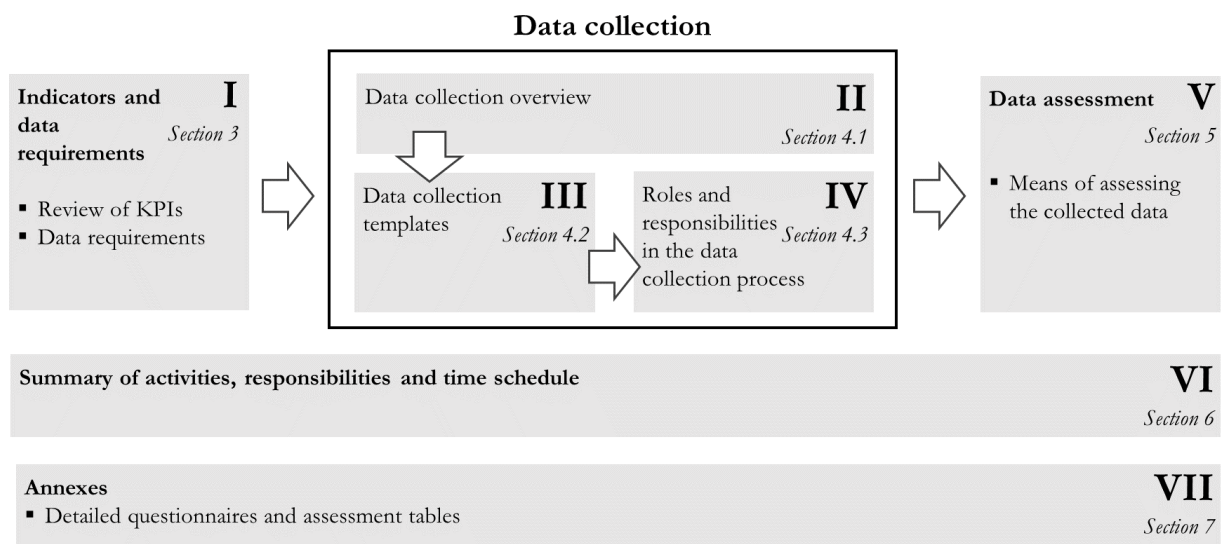


Figure 3: Overview of the monitoring concept

More information on the indicators is provided in the next section (see section 3).



3. Key performance indicators and data requirements

According to the project proposal, the DEESME project shall attain a set of different key performance indicators within and beyond its duration. The overall set of indicators addresses different parts of the project. Several of them relate to the activities in WP2 (Table 1). Many of them measure both expected impacts during project duration and 5 years after the project ends (i.e. until August 2028).

Project Performance Indicator		Quantification		Measurement unit
		within project duration	5 years after project ends	
Indicators related to National Authorities and policies				
#1	Proposals for National schemes under art.8 of EED customised and adopted by NA	5	20	number
#2	National Authorities directly involved	10	-	number
#3	Auditing scheme including multiple benefits and management/organisational approach	1	20	number
#4	Energy management approach including multiple benefits management	1	20	number
#5	EU National Authorities informed	28	28	number
#6	Other National Authorities/energy agencies informed coming from associated countries	5	16	number

Table 1: Project Performance Indicators for WP2

Next to verifying whether these quantitative indicators have been reached, one aim of the monitoring work package is also to report on the perception of the materials developed in the project including the aim of making suggestions for improvements. This aim cannot be achieved by merely analysing these quantitative indicators alone. An additional analysis of qualitative indicators relating to the developed materials is therefore required.

3.1. Operationalization of the quantitative KPIs

The project will directly involve 10 National Authorities and it is assumed that at least five will adopt solutions provided from the project. Considering that project partners are in touch with all the EU national authorities thanks to the common participation in several EU projects, the cooperation among the projects and in EED Concerted action in particular, and to specific formal agreements already in force, it is assumed that additional 10 (20 in total) will adopt DEESME solutions by the five years period after the project conclusion.

According to consolidated relationships with energy agencies and authorities from associated countries, it is assumed that 5 associated countries will be directly informed during the project and all of them (16) will be informed by the five years period beyond the project. For that, DEESME consortium will strengthen cooperation with the Energy Community during WP5 implementation.



3.1.1. Summary of data requirements to determine the quantitative KPIs

This section provides a generalized overview of the data required to determine the KPI shown in the previous section. Details on the specific information that needs to be collected are given in the next section and in the later referred-to data collection templates in the annex. Various items of information need to be collected to determine the values of the quantitative KPIs. The necessary information from the participating companies include:

- **The number of National Authorities that are following the project's activities and are interested to be updated .**
- **The number of National Authorities that have gone through the guidelines.**
- **The number of National Authorities that have attended the workshops.**
- **The number of National Authorities that have implemented, or planned to implement, policy recommendations based on guidelines for the Art.8.**

As stated, there is a strong link between WP2 and WP5 activities. In WP2 NAs are activated, providing them generic and tailored guidance documents in terms of policies for Art.8 and SMEs, and informing them about the DEESME approach. Then in WP5 NAs will receive specific support in implementing new policies dealing with energy audits and the promotion of energy efficiency measures or in improving the existing ones.

This conjunction also impacts on the determination of the indicators, many of which are in common between the two WPs. The information of NAs and their involvement in the project (indicators # 2, #5 and #6 in Table 1) can be fully verified within the current work package, otherwise the adoption of national schemes or the implementation of DEESME approach can be preliminarily evaluated in WP2 but has to be ensured in the forthcoming WP5.

3.2. Operationalization on the qualitative targets

Next to the previously mentioned quantitative indicators, a set of qualitative indicators shall serve in the evaluation of the developed materials in WP2. This evaluation shall in particular cover the perception of the developed materials.

Differently from the previous quantitative indicators, no specific indicators have been suggested in the proposal. Therefore, a new set and methodology is introduced here. In the first monitoring round, this methodology for the qualitative evaluation covers two areas: a general evaluation on the overall approach and an in-depth part dedicated to the produced material (generic and specific guidelines).

The aim of the **general part** is to verify the interest in the DEESME approach about Art.8 and SMEs. It covers the following areas:

- **Interest in Art.8 policy activities: topics where NAs are most interested regarding mandatory energy audits?**



- **Interest in SMEs policy activities: topics where NAs are most interested regarding policy addressed to SMEs?**

The aim of the **specific part** is to obtain a generalized overview of the performance of the entire set of material produced within the WP, namely the *Generic guidance for national authorities on overcoming challenges in the implementation of Art.8 EED* and the *Country specific guidance document for the implementation of Article 8 EED*. Feedback is requested on the following aspects:

- **Ease-of-understanding: are the contents clear?**
- **Ease-of-application: are the outputs easy to implement?**
- **Perspectives: is the developed material likely to be re-used in the future by the NA?**
- **Recommendations: what part was especially beneficial/not beneficial? Are there further topics that could be addressed?**

To ensure a harmonized setup, all questions covering these areas should be based on a qualitative 5 -point Likert scale, ranging from “totally disagree” to “total agree”. Recommendations, on the contrary, should be in free text format.



4. Data collection

This section describes the design of the data collection process. More specifically, it starts by outlining the data collection process and describes at which points of time what data needs to be collected using data collection templates.

4.1. Overview of data collection

Regarding the quantitative impacts of the project, data about the involvement and information of NAs will be gathered during first monitoring round. Data regarding the implementation of policy recommendations and DEESME approach will be collected during the second monitoring round, feeding to the WP5 process.

The assessment of the perception of the developed materials will be mainly realised during the first monitoring round, starting from the distribution of the country specific guidance, and updated during the second round. Finally, data about the usefulness of the workshops will be gathered with a dedicated questionnaire to send afterwards and then integrated into the monitoring reports. In total, the data collection activities encompass two assessment activities:

Intermediate monitoring round (November 2021 – September 2022): The intermediate monitoring is split in two main parts. A first general part investigates the interest of national authorities in DEESME activities addressed to them, both about the energy audit according to Art.8 EED and the policies for small and medium enterprises. The second specific part is focused on the evaluation of information and support material, in terms of clarity of content and opportunities for improvement.

Evaluation of quantitative indicators will be carried out in the **general** part: question about following project activities will highlight whether the national authorities are informed about the project (indicators #5 and #6 in Table 1), while the awareness about guidance documents as well as any feedback received about them is a proof of the involvement of the NA in the project, at least for WP2 purposes (indicator #2 in Table 1).

In addition to this, in the **specific** part, qualitative indicators are evaluated by asking feedback on the material produced within the WP. Specifically, a precise evaluation of the contents is requested, asking for an evaluation of the clarity of the contents and opportunities for improvement for each of the five sections of the guideline (*Introductory overview of the national transposition, Summary of the country specific challenges identified, Country specific solution strategies, Suggestion for the promotion of energy audits, EMS, and NEBs and Generic guideline* in the Appendix). Finally, feedback about the customised challenges and strategies identified within the guideline are requested in terms of relevance of the challenge and applicability of the strategy.

The evaluation of the workshops carried out in D2.2 will be integrated within the intermediate monitoring report to verify the involvement and interest of participants, especially National Authorities and implementing bodies in the events carried out under WP2.



Second monitoring round (October 2022-August 2023): This second measurement aims to verify the overall outcomes of WP2 updating the evaluation of the information and training material in form of lessons learnt and follow-up and gathering feedbacks about the accomplishment of relevant indicators in terms of policy recommendations and DEESME audit and EMS approach. Questions about the implementation of changes based on guidelines and of proposed policy recommendations allow to monitor the adoption of national scheme under Art.8 (indicator #1 in Table 1) and will feed into WP5 evaluation where a tailored support will be offered to NAs for the implementation and institutionalisation of these policies. With the same purpose, questions about DEESME audit and EMS approach are aimed to check the interest about it and the possibility to take account of the results of the approach with companies when creating new policies or revising existing ones (indicators #3 and #4 in Table 1) and will feed into WP5 themselves. At this stage, NAs are informed about DEESME approach through a dedicated section of the country guidelines. At a later stage, WP3 activities dedicated information campaign will be defined in WP4 to highlight results and best practices emerged.

4.2. Data collection templates

To simplify and harmonize the data collection activities, a set of questionnaires are provided in a spreadsheet. These are included in the Annex of this document. This section provides an overview of these documents.

4.2.1. Sheet “General information”

The sheet general information serves to track information on the DEESME partner following up on the NA and contains information on the NA (e.g. location, category) as well as information on its contact person (screenshot see Annex 7.2).

4.2.2. Sheet “Intermediate monitoring”

This sheet specifies the information that needs to be collected in the first monitoring round, i.e. after the submission of the guidance documents to involved stakeholders and the starting of the information campaign. Information and involvement of the NA can be gathered through dedicated questions, as well as feedbacks about the guidance documents. The questionnaire consists of open and closed ended questions (screenshot see Annex 7.3).

4.2.3. Sheet “Second monitoring”

This sheet seeks to highlight the lessons learnt about the support material, updating what emerged in the intermediate round, and the policy recommendations provided in the guidance. Feedbacks about



the DEESME approach regarding audit and energy management system are also collected through the questionnaire. The questionnaire itself consists of open and closed ended questions, which can be found in Annex 7.4.

4.3. Roles and responsibilities in the data collection process

Crucial for the success of a monitoring and evaluation plan is a clear determination of roles and responsibilities for the data collection (for detailed information, see section 6). In this chapter, the major roles and responsible institutions for this process will therefore be defined.

The overview of the process for the three measurements is shown in Figure 4.

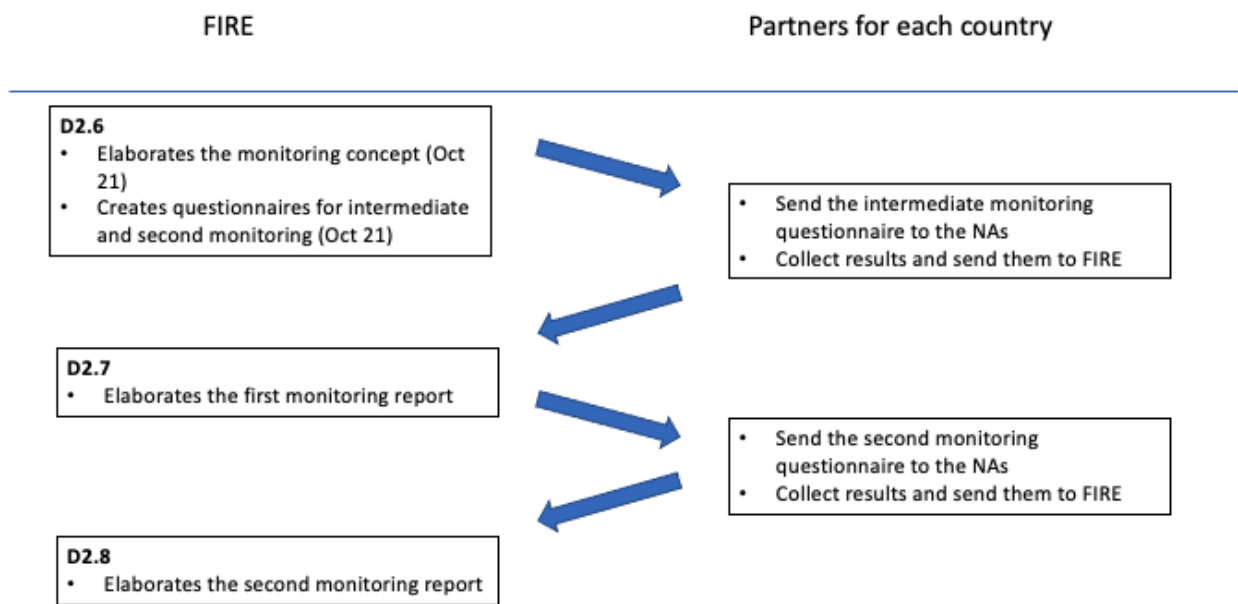


Figure 4: Overview of the data collection process

Detailed instructions on the process can be found in Section 6.



5. Data assessment

One major task within the evaluation of the project is the determination of the overall impact of the project along the KPIs.

5.1. Quantitative and qualitative KPIs

WP2 indicators don't require numerical elaboration as it is for example in WP3, where indicators about energy savings (GWh/year) and investment in sustainable energy (million EUR) must be collected. According to this, the assessment of the quantitative KPIs can be made in the same way of the qualitative ones: for each question, the closed answers belonging to the same category will be counted and all of them will be illustrated in distribution graphs. For questions with open answers, a set of common categories will successively be developed when reviewing the answers. The answers will be then attributed to one or several of these categories and the resulting count per category will be visualized along with representative answers to underline their meaning, where helpful.

A limitation of the approach is that it does not allow a quantification of the impact 5 years after project ends, since no data will be gathered after the end of the project. However, based on the achieved levels of the KPIs, it will be pointed out how many additional NAs will on average be needed to be informed and/or adopt the DEESME policy approach to achieve the targets for the 5 years after project end.



6. Summary of activities, responsibilities and time schedule

The details of the monitoring plan, including activities, responsibilities, and time schedule are presented in Table 2.

Monitoring /Deliverable	Responsible	What	By when
1	FIRE	Provides the questionnaire XLS template in English	October 2021
1	Partners for NAs involved	If necessary, provide the translation in national language of the Excel-questionnaire	November 2021
1	Partners for NAs involved	Send the intermediate monitoring questionnaire to the NAs	May 2022
1	Partners for NAs involved	Remind to participating companies to send back the survey	June 2022
1	Partners for NAs involved	Check data validity to ensure that questions were answered correctly	latest by July 2022
1	Partners for NAs involved	Translate completely filled template back into English and send it to FIRE	latest by July 2022
1	FIRE	Analyses the data	Aug 2022
1	FIRE	Provides the intermediate monitoring report	Oct 2022
2	FIRE	Provides the second monitoring XLS questionnaire in English	October 2021
2	Partners for NAs involved	If necessary, provide the translation in national language of the Excel-questionnaire	November 2021
2	Partners for NAs involved	Send the second monitoring questionnaire to the NAs	April 2023
2	Partners for NAs involved	Remind to participating companies to send back the survey	May 2023
2	Partners for NAs involved	Check data validity to ensure that questions were answered correctly	latest by June 2023
2	Partners for NAs involved	Translate completely filled template back into English and send it to Fraunhofer ISI	latest by June 2023
2	FIRE	Analyses the data	July 2023
2	FIRE	Provide the final monitoring report	Aug 2023

Table 2: Detailed overview of the monitoring plan



7. Annexes

7.1. Overview of the tasks in Work Package 2

Task	Short description	Focus	Start	End	Report
2.1	Mobilizing National Authorities	Needs assessment Workshops	9.2020	8.2022	12.2020 8.2022
2.2	Identification and sharing of best practices for enabling national authorities	Best practices	11.2020	06.2021	04.2021
2.3	Development of support material for national authorities	Support material	02.2021	10.2021	06.2021 10.2021
2.4	Monitoring of WP2 quantitative and qualitative results		03.2021	08.2023	10.2021 10.2022 08.2023

Table 3: Overview of Work Package 2



7.2. General Information

General information

Color coding

	To be filled in by the participant/NA
	Pre-filled by the DEESME project partner
	Example

DEESME partner

		Example
Institution		
Name: Contact for questions		
Email: Contact for questions		

NA information

NA name		Sample Agency
Address		Via Aldo Moro, 18, Rome
Country		Italy
Category (Ministry, Agency,...)		National Agency
Homepage		www.sample.de

Contact person at the NA

First name		Marco
Surname		Bianchi
Email address		marco.bianchi@sample.it
Phone number		394565234
Role		Head of efficiency unit



7.3. Template: Intermediate monitoring questionnaire

General part: about the DEESME project		Yes	No
	Are you following the project's activities?	x	
	Are you interested in being updated about the DEESME activities on mandatory energy audits (Art.8)?	x	
	In particular, what topics are you most interested in regarding mandatory energy audits (Art.8)?	x	
	Are you interested in being updated about the DEESME activities that deal with SMEs?	x	
	In particular, what topics are you most interested in regarding SME's?	Enter text here	
		Yes	No
	Have you been in touch with guidance documents?	x	

Specific part: About the guidance							Comment about the score
Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree			
						Enter text here	
						Enter text here	
						Enter text here	
						Enter text here	



DEESME

National schemes for energy efficiency in SMEs

Please give us your opinion for each section of the guideline:					
<i>Introductory overview of the national transposition</i>					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
Contents of the section are clear		x			
Was there any part of the section that needs to be updated? If yes, what needs to be changed?					
Enter text here					
<i>Summary of country specific challenges identified</i>					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
Contents of the section are clear		x			
Is there some topic (challenge) that might still need exploration?					
Enter text here					
<i>Country specific solution strategies</i>					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
Contents of the section are clear		x			
Are there some issues in the proposed strategies, that are still difficult to grasp?					
Enter text here					
<i>Suggestion for the promotion of energy audits, EMS, and NEBs</i>					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
Contents of the section are clear		x			
Are there some issues in the suggestions, that are still difficult to grasp?					
Enter text here					
<i>Generic guideline (Appendix)</i>					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
Contents of the section are clear		x			
Are there further challenges (and/or strategies) within the generic guideline that you would take into account in your country?					
Enter text here					



7.4. Template: Second monitoring questionnaire

Lesson learnt: DEESME information and training material					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
The guidance material will likely be re-used in the future		x			
In sum, the DEESME material brought us new insights in specify policy issues		x			
Was there any part of the material that you found especially beneficial?	Enter text here				
Was there any part of the material that needs to be revised? If yes, what needs to be changed?	Enter text here				
What suggestion do you have for the European Commission in order to support your activity in the field of energy audits with further legislation, actions, and tools?	Enter text here				
Lesson learnt: policy recommendations					
Have you implemented changes based on guidelines for the art8?	Yes x	No			
If yes: which one(s)?	Enter text here				
Have you implemented any of the proposed recommendations for national schemes under Art.8 (in he country specific guideline)?	Yes x	No			
If yes: which one(s)?	Enter text here				
Have you planned to implement any of the proposed recommendations for national schemes under Art.8 (in he country specific guideline)?	Yes x	No			
If yes: which one(s)?	Enter text here				
If no: why?	Enter text here				
About DEESME audit and EMS approach					
	Totally disagree	Tend to disagree	Neutral	Tend to agree	Totally agree
Are you aware of DEESME approach regarding energy audit and energy management system?					
Are you aware of non-energy benefits evaluation?		x			
We are interested in the DEESME energy audit approach		x			
The DEESME audit approach can be translated at a policy level in our country (e.g. considering the outputs of the project when creating new policies or revising the existing ones?)		x			
We are interested in the DEESME EMS approach		x			
The DEESME EMS approach can be translated at a policy level in our country (e.g. considering the outputs of the project when creating new policies or revising the existing ones?)		x			