

Carrots, sticks and tambourines

Christiane Egger

ÖÖ Energiesparverband/Cleantech-Cluster Energy

christiane.egger@esv.or.at





CANADA

39.5 million

9,984,670 km²

10+3

49 %

60+ %

Population

Surface area

Number of provinces

Forested area

Electricity production from hydro

AUSTRIA

8.9 million

83,879 km²

9

47 %

68 %



The province of Upper Austria



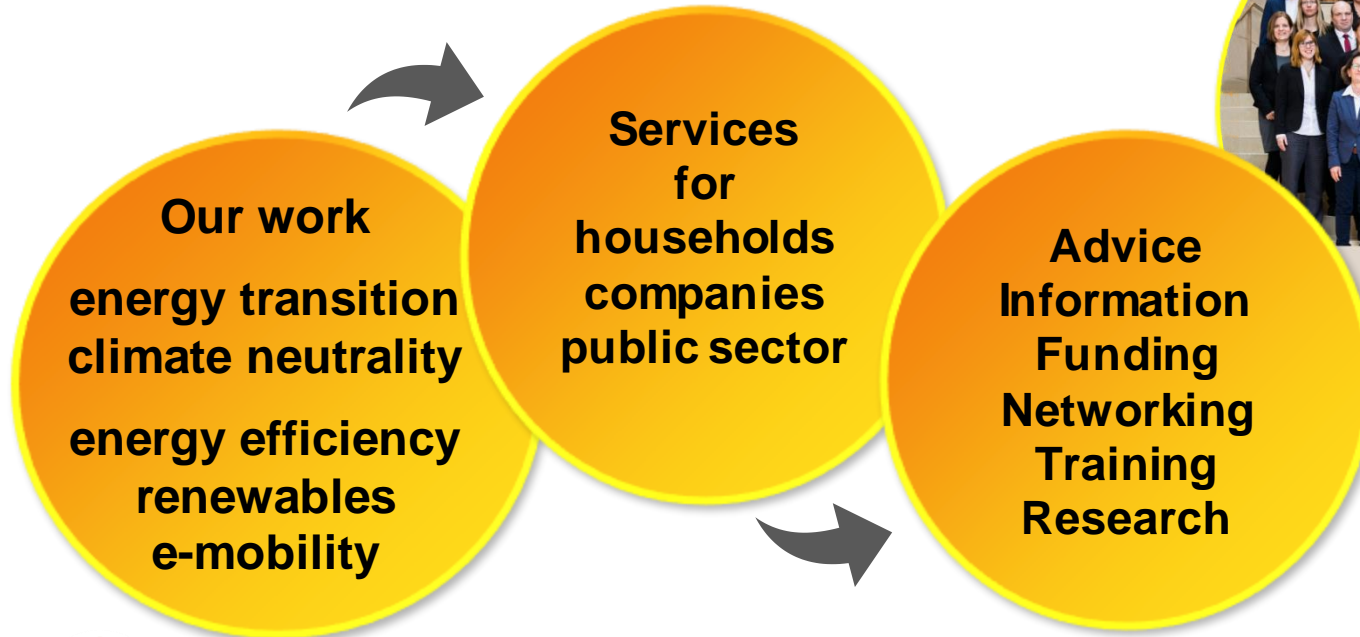
Capital: Linz
Population: 1.5 million



Industrial & rural:
25% of Austrian industrial exports
50% live in small municipalities

OÖ Energiesparverband

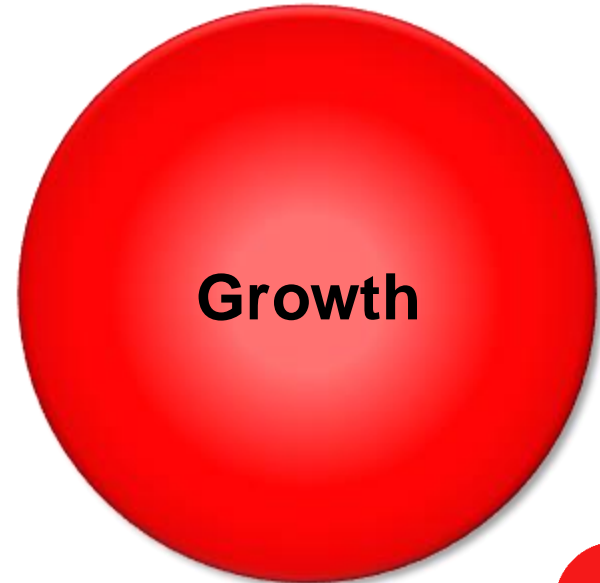
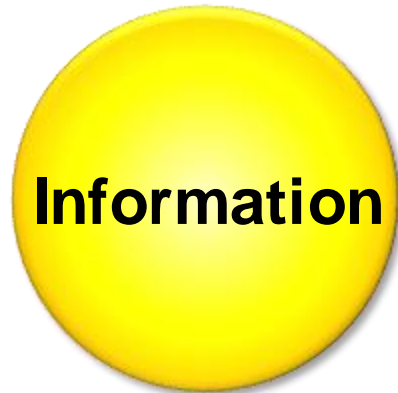
The Energy Agency of Upper Austria



The Cleantech-Cluster (CTC)



The network of energy & environmental technology
companies in Upper Austria
250 partner companies





solar + storage



bioenergy



**small hydro &
wind**



**heat pumps/
geothermal**



**energy manage-
ment/building
technologies**



**architects/
construction
businesses**



**building
materials**



**energy consul-
tants/building
certificates**



**training &
research**



lighting



**contractors/
plant operators**



**suppliers/
wholesalers/
other**

Bioenergy boiler and equipment manufacturers in Upper Austria



25 % of all modern small-scale bioenergy boilers installed in the EU are manufactured by Upper Austrian companies



More info: www.ctc-energy.at



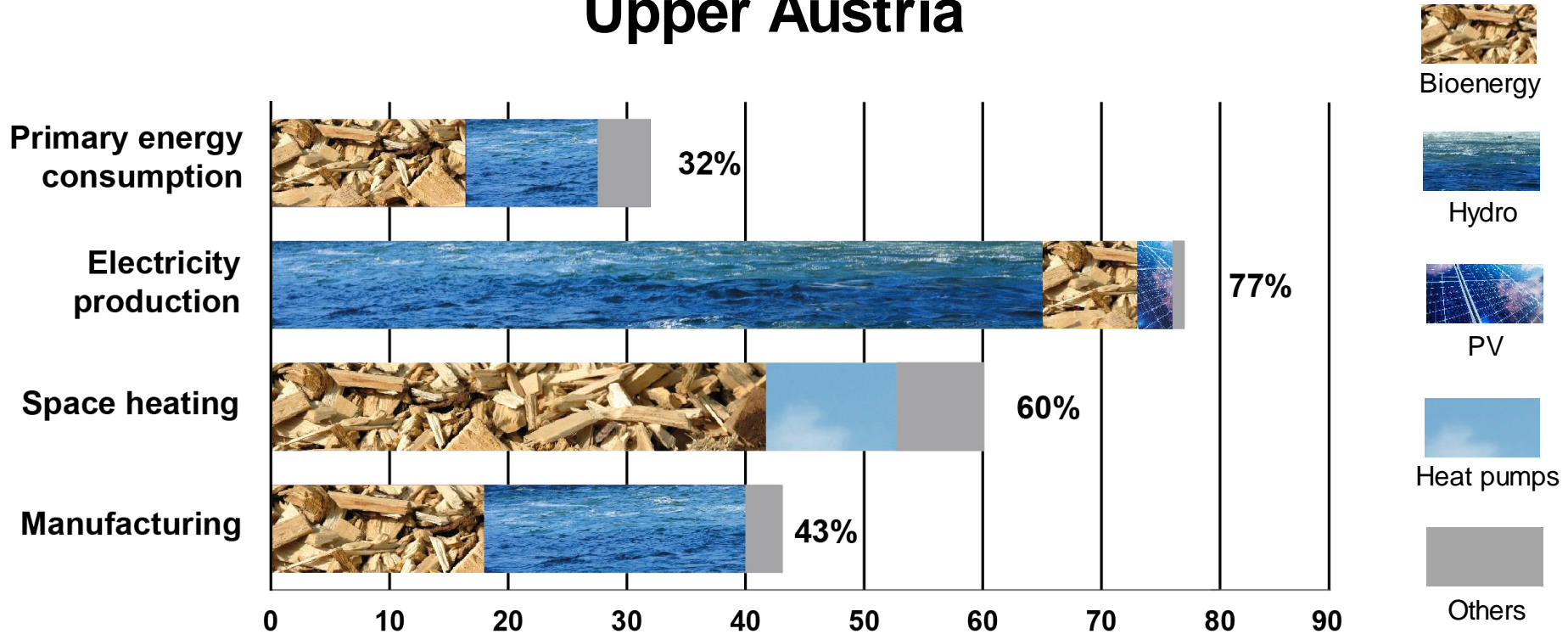
Climate Neutrality?

Climate Neutrality =

NO FOSSIL FUELS

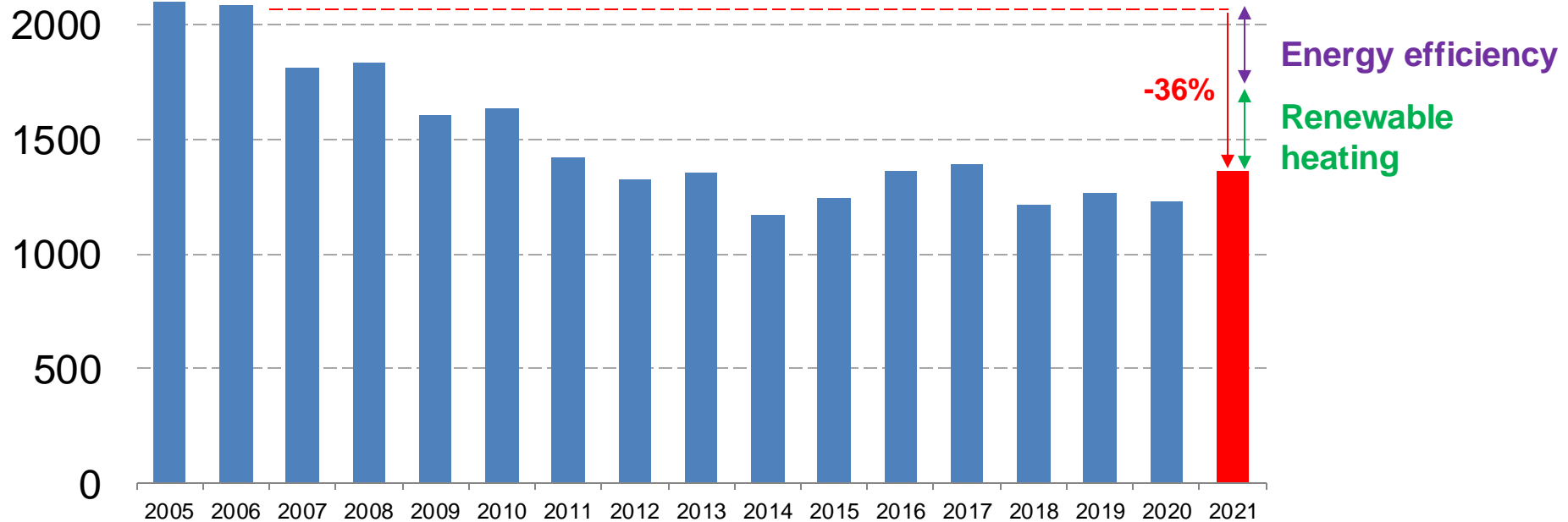
ANYMORE!

Share of renewable energy in different sectors Upper Austria



Greenhouse gas emissions from buildings Upper Austria

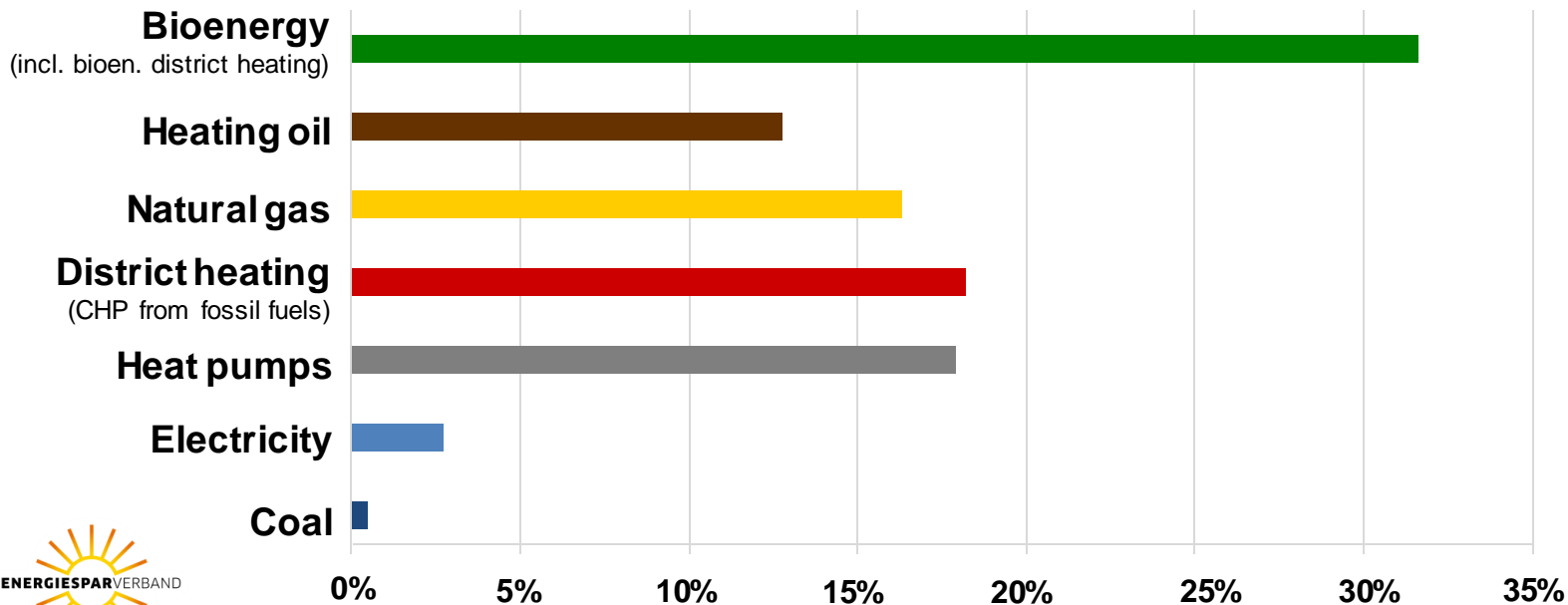
1000 t CO₂



Heating in Upper Austria

% of all dwellings

72,000 automatic bioenergy systems installed:
41,000 pellets, 31,000 wood chips,
360 bioenergy district heating plants



Different fuels - more options and more economic opportunities for different players



pellets

mostly home heating



wood chips mostly larger
buildings (public,
commercial), district
heating



Firewood

rural areas
often people who own
forests

Most important ways to use biomass in Upper Austria

automatic **wood pellet heating systems**, mostly in single-family homes with bulk delivery



automatic **wood chip heating systems** for commercial and public buildings



district heating systems supplied by biomass thermal plants



large-scale combined heat and power plants supplied by biomass (**CHP**)



modern **biomass stoves**, mostly in low-energy homes and as auxiliary heating in homes heated by oil/gas

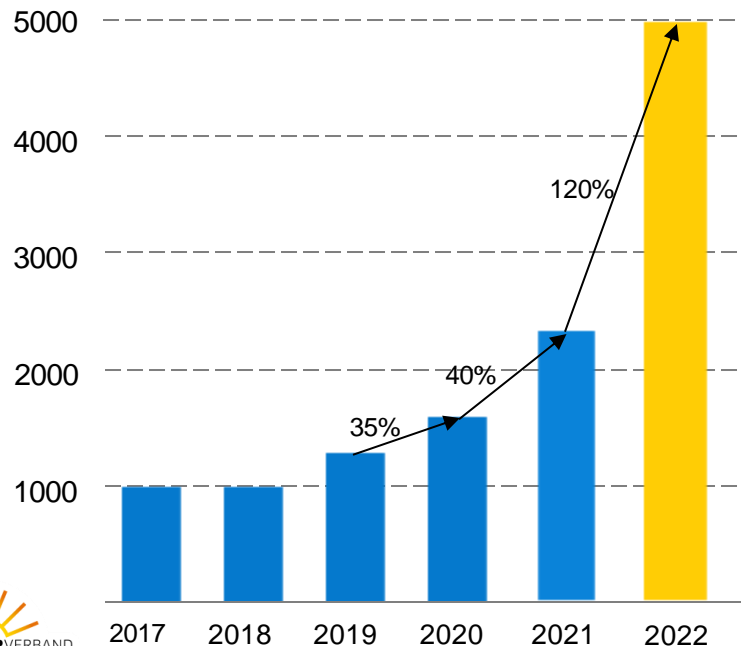


low-emissions firewood boilers, mainly in rural areas

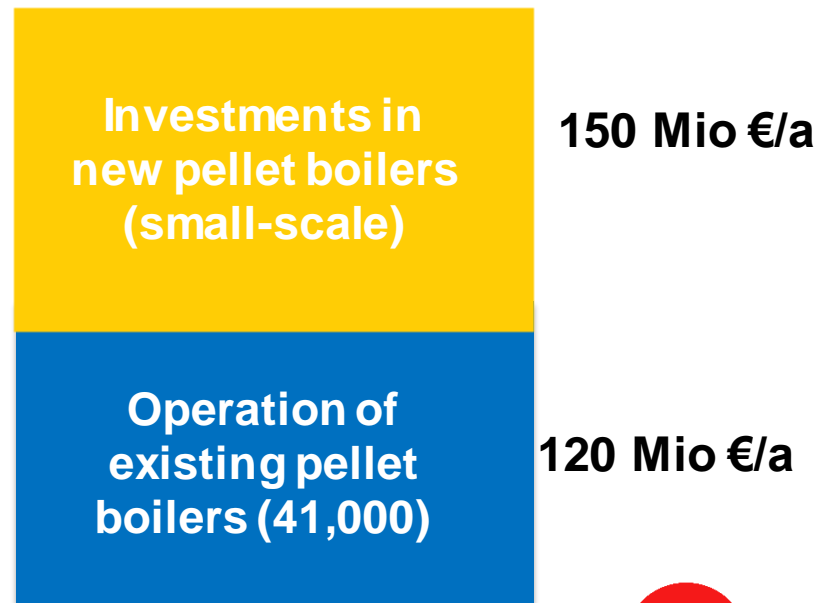


Investment engine: Pellet heating in Upper Austria

Installed pellet systems per year (mostly home-heating)

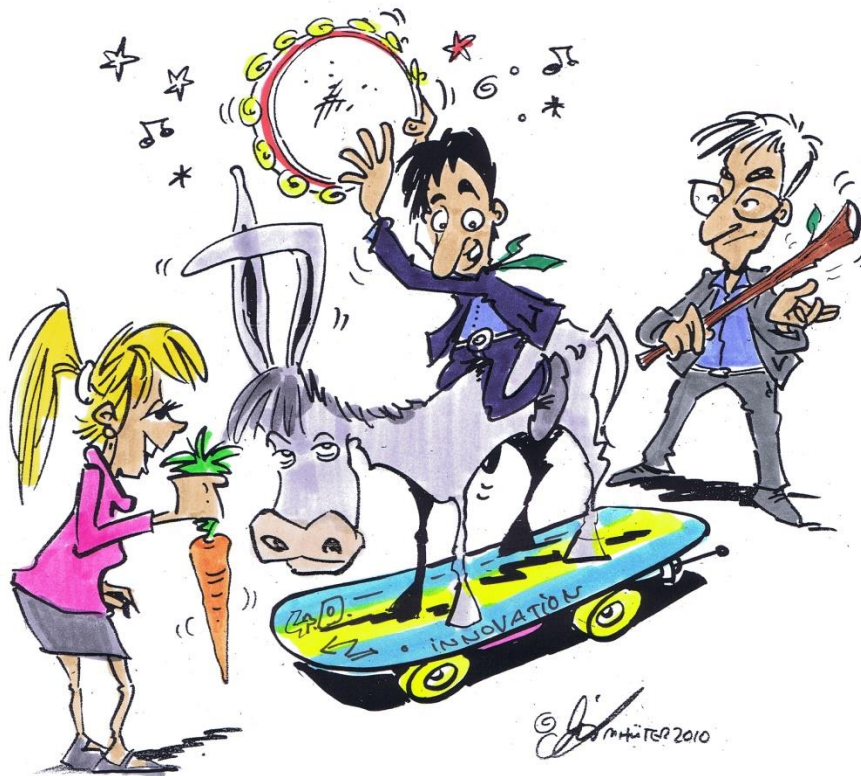


Investments in 2022: **270 Mio Euro**



Upper Austria's strategy **for market transformation**

Carrots, sticks and tambourines, and a skateboard



Goodbye fossil fuels, hello pellets

Subsidies for replacement of fossil systems: 50 %, for low income household up to 100 %

Energy advice 10,000 face-to-face sessions/a

Information & campaigns awareness raising (e.g. AdieuÖl)

Training programmes for actors along the value chain



Banning oil and gas heating stepwise market phaseout (new construction, no replacement of broken equipment, functioning old systems must be replaced)

Stringent emissions and efficiency standards for heating systems and buildings (quality is king)

Innovation and market development support for businesses (e.g. product development, joint export actions etc.)

Our tambourine:

Awareness and information for citizens

- 2022: **10,000 face-to-face energy advice sessions** (onsite), **10,000 telephone or digital advice sessions** plus hotline with 50,000+ calls
- 20+ information **campaigns** (e.g. AdieuÖl, Upper Austria Saves Energy)
- Regular information stands at **tradeshows and fairs**
- **Information materials** on a wide range of sustainable energy topics
- **50-100 information talks/year** at events
- Also extensive information activities for **municipalities and businesses**





GANZ **OBERÖSTERREICH** SAGT

Adieuöi

Jetzt raus
mit den
Ölheizungen

In the last 2 years...



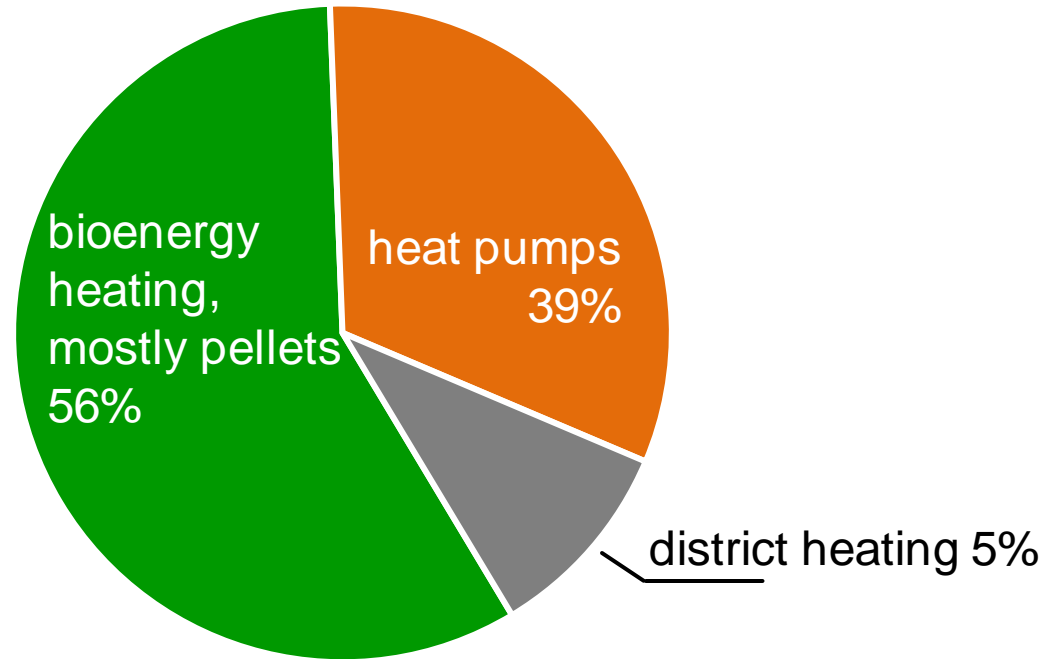
- energy **price hikes** (fossil and renewables), fear of **gas supply interruptions**
- **many new EU policies** for the energy transition (regulatory and funding instruments, "taxonomy") <-> **EU policy debate on sustainability of bioenergy**, high visibility of heat pumps
- very strong increase in **new installations** <-> market shortages (equipment, staff)
- currently, very high inflation and fears of a recessions (very low investments in pellet heating) <-> wider **societal consensus**: energy transition is here to stay

What is next?

- **decarbonising space heating** will continue
- **new target groups** with high interest in renewable heat
 - residential: oil heaters (late adopters), gas heaters (all groups)
 - companies: not only early adopters
 - mayors of gas-supplied municipalities
- **which role for bioenergy, which for heat pumps?**
 - new buildings (very high efficiency standards) -> heat pumps
 - ample opportunities in building renovation where bioenergy is more suitable (high flow temperatures, less good insulation standards) in many parts of Europe
 - trust in sustainability of bioenergy needs to be re-established!



30,000 homeowners said goodbye to fossil fuels and hello to...



Austrian Investment subsidy "Raus aus Öl und Gas"

Some lessons learnt



- understand, quantify and **communicate all the benefits** (beyond climate protection and cost savings)
- **market segmentation:**
 - which consumer group is most likely to be activated?
 - how can you reach them?
 - where do pellets and where do wood chips work best?
- **value chain approach:** identify and aim overcome gaps in the supply chain
- **policy advocacy:** "package approaches" work best (carrots, sticks, tambourines and ... megaphones!)

European Pellet Conference: March 5, 2024

- The world's largest annual pellet-related conference
- **Trade show: 100+ bioenergy-related exhibitors**
- **Policies - Markets - Technologies**
- Young Biomasse Researchers Conference
- held in Wels/Austria
- Call for Papers: 10 October



www.wsed.at



Goodbye fossil fuels hello bioenergy!



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