



Marketing Is Power: Marketing Energy Efficiency in the MENA Region

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National Energy Conservation Day – Tunisia 2003

Marketing Is Power

Introduction – Importance of Marketing



An energy efficiency (EE) program was designed in Pakistan to help farmers reduce their energy operational cost by installing energy-efficient, electric-powered pumps to their tube wells.

The program was well designed and included a technical assistance component to help farmers select the most efficient system based on their needs and to further assist with installation of the new pumps to ensure quality and achieve savings. The program also had a financial assistance component providing attractive financing to the farmers and offering a hotline to answer customer questions and address complaints.

It became clear that while the program had been well structured, it was missing a significant piece of the puzzle. The program needed to be promoted to make the farmers aware that it existed.

Team members created a marketing plan that included:

- An attractive color brochure to be distributed to the farmers by mail.
- An aggressive TV advertising campaign.

Additionally, the donor organization financing the project wanted their name included on all brochures and TV ads, stating that the financing was made possible through their organization.

At this point, some of the other team members involved in the project insisted upon hiring a professional marketing consultant. The marketing consultant conducted a field survey. Findings from the survey contrasted from the initial thoughts on the issue. The original marketing plan set by the group did not address the actual issues.

The marketing consultant reported the following findings:

1. A significant portion of the farmers are illiterate, so brochures would be completely ineffective.
2. Most farmers do not watch TV; they listen to the radio.

3. The public has a negative perception of all Western organizations, so adding statements about the donor funding would actually discourage participation in the program.

What we learn from this experience is that a program that appears perfect might fail without professional marketing assistance.

- Simply creating a brochure is not marketing. This lack of understanding is common among individuals that come from technical backgrounds, and this mindset will waste money and will not produce results. Marketing is a special set of skills that requires a professional and a plan with a timeline, as well as, clearly defined deliverables and milestones. Marketing without a professional is like trying to fill your own cavity rather than go to a dentist. Trying to create an effective marketing plan in a piecemeal fashion, as the story above illustrates, will fail. Without an overall strategy, it may obtain some results, but these may not be the results that were desired.

The marketing professional understands the preparation and research required prior to launching, as well as, the steps needed to implement that strategy.

- An active campaign marketing energy efficiency will involve the government, the commercial sector, NGOs and the general population. Energy efficiency is still a relatively new and unknown concept and marketing and outreach activities are the way that each of these groups will become aware of its importance and what the actions are they being requested to take.

Each group will need to be told about how EE benefits them using a type of media that will reach them effectively.

This marketing is a “low hanging fruit” in terms of sustainable economic development; creating jobs, helping to alleviate poverty and ensuring adherence to international treaties. On a high level, the overall goal is to create a “green attitude” among the citizens of the MENA region and create a sense of pride in being a “green part of society”, ensuring a better future for all through sustainable economic development.

MED-ENEC is focusing on the EE subject. This brochure will provide a guideline on awareness building, which is based on the assumption that EE needs to be actively promoted – to be prepared and conducted with strong and appropriate professional marketing measures – to ensure a quick and comprehensive success.



Head of EU Delegation to Egypt's Speech at the Ministerial Opening Session - the Euro-Egyptian Energy Day, Cairo, 2014

Marketing and Behavioral Change

Seeing Is Believing and Personalized Demonstrations

Changing perceptions is possible but requires the right marketing mix and an understanding of barriers, beliefs and how trust is developed within communities.

Lifebuoy soap is well known for influencing hand washing behaviors worldwide. In order to achieve the desired change, the company worked backwards, starting with the desired behavior and figuring out the steps necessary to create that change. Unilever, the manufacturer of Lifebuoy, uses a “seeing is believing” example. Glow-germ powder, a powder that shows germs when held under ultra-violet light, is put on the hands of target market participants. These participants are shown the germs left on their hands when washed only with water. This is then compared with the results when hands are washed with soap. The benefits of washing with soap are clearly illustrated by showing the glowing hands with water washing versus the less glowing hands with the use of soap. This very visual and personalized example makes it clear what the behavior desired is, as well as, what the benefit of this behavior is. The reason the soap company has been successful is its ability to very clearly demonstrate benefits of regular hand washing relevant to the target audience.

Box 1: Energy Star Label

The US Energy Star program shared this behavioral marketing approach, looking at what behavioral change is desired and working backward. The objective was to make the general public aware of what actions they could take to be more energy efficient. Through advertising, visits to schools, and public events, over a period of time, this instant association with the energy star symbol and saving money while “going green” was created. The energy star symbol became a reminder of the benefits of choosing an energy conscience appliance. The most successful campaigns sustained promotions and publicity from non-federal sources such as environmental groups, business, and utility companies. Households that recognized the ENERGY STAR label indicate strong association between the label and the desired behavior- being more energy efficient. According to the environmental protection agency, 80% of Americans now recognize the Energy Star sticker.

Nudging people towards energy efficiency

Nudging is a concept proposed by Thaler and Sunstein (2008) which is based on findings in psychology and behavioral economics. The concept explains why people deviate from rationality within their behavior and provides ideas on how to

steer citizens in targeted directions (e.g. using energy efficiency to save money in the long term). Some Governments established specific “nudge units” - behavioral insight units (UK in 2010, Denmark in 2010 and Germany in 2015).

For example, rearranging the dessert buffet in a student’s canteen with fruits in the front and unhealthy desserts in the back increases significantly the fruit consumption. Nudging can be seen as a low cost instrument for decision makers to design the context of certain decisions for or of “wanted behavior” of citizens. It is basically enticing a favorable voluntary decision.

Box 2: Nudging

Three major reasons why “nudging” is successful.

1. “Default effect”
People tend to stick with the default option. This has been verified in several psychological experiments.
2. Positive peer pressure.
Peer pressure in a group steers individuals to change their own behavior, attitudes or values.
3. Following an example.
Citizens accept new attitudes or behavior easily if they can follow a strong example.



MED-ENEC & LAS Experts During a Training Session on Energy Efficiency in Buildings, Granada, Spain, 2015

Stages of Behavior Change

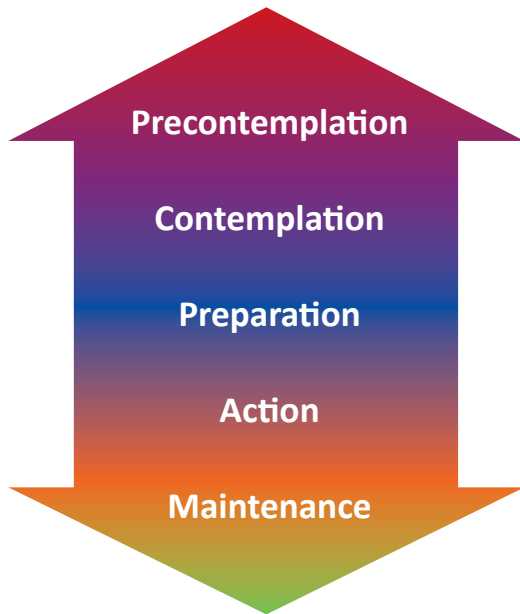


CHART
Behavior change stages and their characteristics

Stages	Characteristics
Precontemplation	Individual does not intend to change behavior in the next six months
Contemplation	Individual is strongly inclined to change behavior in the next six months
Preparation	Individual intends to act in a near future (generally next month)
Action	Behavior has already been incorporated for at least six months
Maintenance	Action already happens for over than six months and the chances to return to old behavior are few

The chart describes the stages of behavior change on an individual level.

Behavior change does not happen instantaneously. There are generally five stages that an individual has to go through in order to not only make the change but continue to repeat the behavior that is desired for a period longer than six months.

The arrow on the left hand side shows the stages of behavior change. The box on the right hand side shows the actions that need to be taken by an organization in order to create behavior change.

Behavioral Barriers

The main behavioral barrier in the MENA region is a lack of consumer awareness. Overall, there is still a fairly low level of awareness by consumers and, to some extent, retailers concerning e.g.: the benefits of energy efficient lighting. Additionally, there is a lack of experience, and in some cases trust, of the targeted consumers regarding the performance

and quality of new lighting products. There are usually higher upfront costs of energy efficient lighting compared to the alternatives with lower efficiency.

The UNDP project Namibia Energy Efficiency Program (NEEP) identified the following barriers to implementation of energy efficiency programs* (Box 3).

Box 3: Awareness, Information, and Cultural Barriers to the Implementation of EE Programs

Consumer awareness is the main issue when it comes to making decisions to acquire EE or RE products. For example National Housing Enterprise offers SWHs and other EE/RE products as options to their new homeowners. Many customers make choices based on upfront cost as opposed to long-term cost savings (e.g., solar water heaters where the cost difference will be paid back through energy savings). Awareness in choosing products based on a full life cycle cost analysis rather than initial cost plays a major role in making such decisions.

Negative past experience with EE/RE projects is also an issue. (e.g.: the project in Okahandja, Namibia, where solar street lights were utilized and did not perform well. This created a negative perception about the reliability of solar street lighting.)

The perceived quality of EE products and the way customers look at technologies, especially what is manufactured locally, has an effect.

Aesthetics have been an issue with green products such as solar water heaters, EE roofs, and solar cookers. These green products have typically not appealed to customers

due to choice of color and shape. Comments like “this thing looks like a coffin” have been commonly overheard.

EE product marketing for a long time has focused on marketing of technologies for “limited income” families, creating a customer perception that these products are for the poor. Using such products can be looked at as a loss of social status, which is very important, especially in Africa.

Air conditioning is viewed as a symbol of building status even with government buyers. We were given the example of a local library where the buyers insisted on having compressor-based central air conditioning, and options like evaporative cooling and free cooling were not a possibility.

Awareness of using the power of information has been underutilized. Case studies clearly demonstrating savings and benefit data can be very powerful catalysts towards a market-driven adoption process versus a government-driven EE market.

* MED-ENEC has published several brochures on energy efficiency, see page 24

The Right Message and Understanding Your Target Audience

General Public

Communicating energy efficiency in the MENA region, addressing the relevance of greenhouse emissions, and energy savings will be seen as a credible message if promoted through the correct channels. TV talk shows and TV documentaries have shown strong results in disseminating these messages to the general public.

Corporations/Industry

Messaging about switching-off computers, lights and air-conditioning at the end of the working day may save energy but may not be enough of a savings to influence behavior. However, messaging that if these behaviors are added to measures like installing energy efficient lighting, lowering thermostats and using energy efficient cooling systems, the energy savings really do become significant – potentially cutting the building’s energy consumption by half. This is much more effective messaging.

Industrial Plants

Industrial plants, depending on the processes used, have the flexibility to reschedule their periods of highest demand to cut peak loads and to even out their demand over a longer or different time period. Messaging to this audience should let them know that this will help the utility to run at higher efficiency in addition to environmental benefits.

Box 5: Communicating the message effectively to target audience entails

- Clear – simple to understand and unambiguous;
- One clear and distinct message
- Consistency – with the goals of the project or campaign;
- Targeted to who is receiving the message
- Appealing, Unique and Distinctive enough to stand out from other competing messages being heard

Box 4: MENA region examples of visionary messages

- Energy efficiency. An investment for today and tomorrow (Arab EE Day Slogan) *
- Make Renewables Real
- Greening the Arab Countries
- Saving 30 Percent energy enlightens our world
- Combat climate change anywhere
- Conserving energy consumption: investing in the present & future
- Smart consumption – better future
- Minimizing CO₂ – maximizing jobs (Cairo Climate Talks no. 17) **
- Green investments – investments into your future



Promotion of Solar Water Heaters within Palestine.

*MED-ENEC is closely working together with the League of Arab States (LAS); starting with the first Arab EE Day (AEED) which was launched in 2012 until the present MED-ENEC supported and co-sponsored the AEED each year **This event was coordinated with MED-ENEC (2013)

أحسن ما تحمل همّ الفاتورة.

صار فيك تنزّل عن كتافك جزء كبير من فاتورة الكهرباء. لأنّ اللمبة الموقّرة للطاقة، بتوفّر ٨٠٪ من فاتورة الإنارة، وبتعيش ١٠ مرّات أكثر من اللمبة العادية وبتعطيك نفس كمية الضوء. اللمبة الموقّرة للطاقة، يعني كيف ما بزمتها، راكبة.



وفر بالكهرباء
مش بالضوء

Defining Real Market

Behavioral Barriers

Psychographic and Demographic attributes affect attitudes and preferences



It is often difficult to discover the true motivation behind behavior. Cultural norms, beliefs, baggage, and previous experience can all play a role in behavior, both at the conscious and subconscious level. The marketing professional needs to dig deeper into these behaviors to truly understand their motives. Informal conversations, focus groups, or survey tools are required to learn more about the motivators and how to present the message to reflect them.

Take store owners in Egypt for example. These store owners can often be seen spraying water with a hose in front of their stores. If one were to take the behavior at face value, it would look like the water was just being used to clean dust and dirt. This might seem wasteful, but by digging deeper, it can be found that historically this is how these store owners cool their stores which is the real reason for the behavior. Like energy efficiency behaviors, there is often a deeper underlying reason why people do what they do.

A study by the Canadian Center of Science and Education on perceptions and behaviors towards energy efficient lighting found that socio-demographic characteristics of consumers affect their choices and preferences for their environmental lighting behaviors at home. The study yielded strong support that the socio-demographic characteristics of consumers are related to perceptions of energy efficient lighting and environmental lighting.

House Size

Findings related to consumers' general perception of energy-efficient lighting showed significant differences in house size. Respondents who owned a larger house (more than 3,000 sq. ft.) were more willing and likely to accept energy-efficient lighting for their homes. Addressing the five variables of visual comfort, aesthetics, impression, cost, and technological attributes is important.

Gender

The effect of gender in this study was found to be significant. Male respondents perceived the attributes of compact fluorescent light bulbs (CFL) more positively than female respondents. As far as lighting issues with visual comfort, aesthetics, and impression at home, females may think CFLs not suitable for their homes; studies have shown that women's negative mood decreased with warmer light sources). Although the cost of new CFL technology is significantly lower now than it was in the past, female consumers' perception on the cost of CFL technologies was more negative than that of male consumers.

Age

In this study, the oldest respondents (65 years and over) were more positive about the CFL's visual comfort than younger respondents were. Due to elderly people's sensitivity to glare and the yellowing of the lens, a lighting environment for elderly people should fall within the bluish-white color temperature range

As anticipated, energy-efficient lighting usage behaviors were found to be positively related to a general perception of energy-efficient lighting.

Directly Observing Behavior- Not using Theory

If incorrect marketing barriers are identified, then the wrong set of issues will be addressed. The best way to anticipate market barriers is by directly observing behavior; specifically, observing the behavior of those that are currently engaging in the target actions and those that are not.

Box 6: Nigeria

In Nigeria, Energetech studied energy consumption by monitoring 20 households in Abuja for a year and 35 households in six geopolitical zones for a period of a month at a time. A total of 249 appliances, 101 AC units and 702 lighting circuits were studied. The process entailed an exploratory monitoring campaign followed by a detailed monitoring campaign. Measurements included: daily load, annual consumption of cold devices, and seasonal variations. MEPS were created based on actual data. Likewise, real issues/obstacles like low quality power access were learned of through this direct observation. This project approach was innovative in that it used real data versus theoretical data to determine barriers and create standards.

Trust Barriers

If energy efficiency is known to be a desirable characteristic but also one that is difficult for a consumer to verify, manufacturers and sellers have an incentive to suggest that all of their products are very efficient, creating trust barriers. The way to solve this problem is through the use of independent testing agencies who are provided thorough guidelines for how to evaluate and approve product, enforcement of guidelines, and penalties/destruction of those appliances that are falsely labeled.

The Design Principal of Observation to Determine True Barriers

Likewise, to develop a behavior-relevant energy efficiency portfolio, program designers and implementers would determine the barriers that are preventing customers from engaging in the target behavior. Because people generally have little idea of why they make decisions, determining barriers is more difficult than asking customers why they do or do not engage in a particular activity. Program managers can use the design principle of observation instead, determining what is different between those that invest in a particular efficiency improvement and those that choose not to, or: by comparing the results of programs that attack different sets of barriers.



“Don’t Burn your Money to Heat Water. Solar Energy is Free”.

Solar Water Heaters Awareness Campaign Flyer - Lebanon

EURO-EGYPTIAN ENERGY DAY

Leaders of Energy Efficiency
21 November 2014



Ministry of Petroleum



Ministry of Electricity & Renewable Energy



The Egyptian Cabinet
Information and Decision Support Center
(IDSC)



Technical Assistance to Support
the Reform of the Energy
Sector, Arab Republic of Egypt



EGAS



EGPC



EgyptEra



THE EGYPTIAN CENTRAL ENERGY EFFICIENCY UNIT
الوحدة المركزية لكفاءة الطاقة في مصر

Understanding Market Forces Against the Message

The marketing research must address what effect that energy efficiency activity will have on other competing interests in the space. Taking a look at the competitive environment or those that will feel threatened by the energy efficiency marketing campaign will help to mitigate rumors and exaggeration that can potentially affect the success of the campaign. Having a plan for rebuttal of criticism or negative public relations should be a part of the strategy. The concepts of green marketing and cost savings are not the only items of importance, and this should be kept in mind during the planning and implementation stages. Marketing needs to create a very visible value proposition to communicate clearly with all stakeholders.

Manufacturers and Labor Unions

An example of competing interests are the manufacturers and labor unions involved in producing incandescent lightbulbs. Phasing out incandescent lightbulbs by legislation or outlawing the production of new bulbs although an important step but if done suddenly or without proper preparation can be met by extensive resistance contributing to non-compliance.

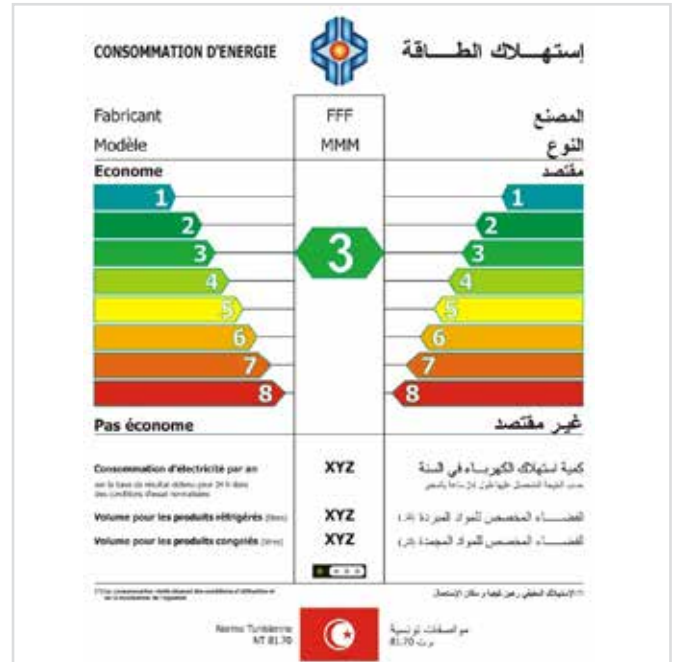
Engaging these manufacturers and labor unions in discussion and creating a dialogue with existing manufacturers not complying with energy efficiency standards is the first step. This dialogue from a marketing perspective must show the clear value proposition and benefits for all involved. Helping these groups retool their manufacturing facilities is one potential solution as well as offering attractive financing options and skills training. Such steps convert a force of resistance to a helping force for compliance.

Utility Companies

Utility companies may not appreciate the energy savings that their consumers are getting and the government is pushing for because they will perceive this as lower revenue generation. However utilities will not have to build additional infrastructure to support the peak energy loads. They will save money because they can support the load on the resources that they already have in use.

The utility company also has the opportunity to generate revenue by providing energy efficiency consulting services. Electricity and gas utilities are now in a privileged position to advise their clients on energy efficiency in their homes through demand side management.

Barriers inhibiting energy efficient behaviors include: missing regulatory framework, generally low economic attractiveness for renewable energy projects due to high financial barriers



Energy Label - Tunisia

(high upfront costs), and low fossil fuel prices (fossil energy subsidies)*. Further obstacles are limited institutional capacity and a low number of specialized firms and human resources in MENA to carry out energy efficiency projects.

Perceived Adverse Impact on Low Income Citizens

Measures to mitigate the impact of energy price increases on the low income citizens are critical for building public support for subsidy reforms. Targeted cash transfers or vouchers are the preferred approach to compensation. When cash transfers are not feasible, because of limited administrative capacity, other initiatives, such as public works programs, can be expanded while capacity is developed.

Box 7: Oil exporting countries to implement EE

The UAE's oil and gas sector is recognizing the importance of the energy efficiency agenda. The issue is that, despite the size of their reserves, they are not infinite and that oil for export produces greater revenue generation than oil for the domestic market. It is, therefore, in the oil and gas sector's interest to work with those trying to drive down domestic consumption, as it will maximize the sector's longer term sustainability and maximize revenue.

*MED-ENEC has published several brochures on this issue – "Energy Subsidies" at <http://www.med-enec.eu/downloads/publications>

Types of EE Activities that Can Benefit from Marketing

Switch to Energy Efficient Lighting at the Consumer Level

Offering helpful energy efficiency tips to reduce cost and usage, as well as, considering either giving away energy efficient lightbulbs or offering payment plans and manufacturer's rebates to help with the financial burden of purchasing new lightbulbs which are some ways of smoothing out the rollout of the program. The audience should feel in control and in a position where they can plan a short-, medium-, and long-term strategy to manage their lives. In countries where energy is subsidized, giving away EE lightbulbs would make a lot of sense; the energy savings would reduce subsidy amounts and relieve significant burden on the public purse.



Energy Saving Campaign Flyer - Lebanon

Purchase Energy Efficient Appliances

When the consumer knows how much they can save with a more energy efficient appliance in cash for the year, it tends to be more appealing. Most manufacturers of energy efficient appliances, will include a tag or sticker to promote the annual savings either voluntary or through legislation. Seeing the savings through visual communication tends to work better than simply hearing about it. Rebate programs and government credits don't hurt either. When consumers have an opportunity to save money instantly and over longer periods of time, they will work towards "going green" and purchasing an energy efficient appliance.

Enhancing Building Code Standards, Codes, and Labels

Since buildings* are the largest users of energy, they offer one of the largest opportunities in terms of EE. The best ways to take advantage of these opportunities is to create new government policies that provide businesses incentives for following standards and codes that obtain the optimal amounts of energy conservation. Training may also be needed within companies to ensure that building equipment suppliers know how to make their equipment more energy efficient. Or: offering some resources that they can use effectively and easily to reduce energy costs.

When Energy Efficiency Building Codes cannot be implemented, standards that establish minimum, mandatory energy-efficiency requirements for building components and equipment have been used as a first step towards transforming the efficiency of new or existing buildings. Such standards have the advantage of being easier to enforce than building codes in countries with less experience in energy efficiency. They also are easier to use for renovations of existing buildings in which upgrades of components and equipment present significant opportunities.

Box 8: Promotion of Solar Water Heaters in Lebanon

- Attractive financing packages for consumers
- Annual solar water heaters trade seminar
- Website
- Law incorporated into building code to the Government of Lebanon
- Awareness Campaigns - A nationwide awareness campaign on the "A solar heater for each household"
- Establishing legal framework, financial framework, and marketing/ awareness campaigns

Box 9: Green Roofs in Lebanon

Green roofs are roof space covered by vegetation that enhance both aesthetics and energy performance of the building, hence increasing the share of green spaces. In addition, green roofs are considered as insulating components reducing energy consumption by 10% due to their layers (soil, plants and water). They absorb the heat and hence reduce the need for air conditioning the space right beneath it. On the environmental aspect, green roofs help reduce CO₂ emissions through the lowering of air conditioning demand and increasing the green areas. This project is one of the first of its kind in Lebanon and the region, and serves as a model project that will, hopefully, be adopted by the public and private sectors, and encouraged.

* MED-ENEC has published several brochures on this issue – "EE Urban Planning" and "EE building Guidelines" at <http://www.med-enec.eu/downloads/publications>

Factors required in order to make energy efficiency programs succeed

- Have a statutory basis.
- Be economical for producers and consumers.
- Focus on larger consuming subsectors.
- Be established in cooperation with industry and manufacturers.
- Be enforceable, with penalties applied in the case of violation.
- Include coordinated voluntary measures (standards and labels) and regulations with performance floors and ceilings.
- Be phased in over time to accommodate technology improvements.
- Be strengthened (to be more stringent) at regular intervals (every 3–5 years) in consultation with improvements.
- A comprehensive communications plan in advance of rollout is critical to success. Lack of clear communication and planning can lead to anger, confusion, and potential political instability.

Minimum Energy Performance Standards (MEPS)

Box 10: Launching a MEPS program

Steps:

- Determine what the objective is now and what it will look like in the short term and long term.
- What standards must be adhered to in order to gain an energy efficient rating? Which products will be identified in the short, medium and long-term to receive energy efficiency ratings?
- Who will be in charge of testing to ensure adequate standards – which labs independent of the Government will test and how uniform results are obtained.
- Create branding; logo, standard colors, fonts, guidelines for using branding to keep it consistent. A place where manufacturers and those interested can go to see what the standards are, how to affix labels correctly, and answer any other branding questions to ensure consistency.
- Create consistent message that goes with the brand. Guidelines should contain standard messaging for press releases social media and other media. Within branding guide standard messaging should be clearly stated to create uniform brands.
- Communicate the meaning of the brand through advertising, public relations, television, radio, word of mouth, public events, schools, and all stakeholders.
- Find people who have a high level of influence to support and promote the brand and concept. Nurture relationships with these people.
- Create a business award to give public recognition to those companies who are doing an exceptional job using energy efficiently.
- Develop partner programs to increase the reach of the program and allow other organizations and businesses to feel like they are playing an active role.
- Determine how to evaluate success. Evaluation of success can be measured through interviews, observation, and quantitative data correlated to the program.
- The Energy Star program has succeed largely in part because it clearly lays out branding rules for all involved in the program including social media and press release guidelines.



Box 11: SEEC – Air-conditioning Program

The Saudi Energy Efficiency Center (SEEC), the entity responsible for the development of energy efficiency and conservation policies targeting all sectors, formulated energy efficiency labels for air conditioners both imported and locally manufactured. The minimum energy performance standards were strictly enforced and no less than 50,000 air-conditioners have been confiscated from stores that didn't meet the country's energy saving requirements.



Various Energy Labels

Marketing should be closely coordinated with local government to create minimum energy performance standards, as well as labels for products that communicate clearly and attractively on these products that they meet those standards.

A comprehensive review by the International Energy Agency (IEA, 2010) indicates that the success of energy efficiency programs depends on the clarity of rules and regulations.

Price Reform

There is a need to correctly re-calculate the real costs of electricity generation and distribution, and ensure that the real cost is communicated transparently to the public. Revision of tariffs should be done in a way that ensures that those who can afford it pay full cost, while mechanisms to support those who cannot afford it should be developed, as a first step to rationalize consumption.

Energy Subsidy Reform

The majority of countries in the MENA region provide some level of subsidy for primary energy, some countries took active steps for subsidy reform.

Issues

- Lack of information regarding the size and shortcomings of subsidies.
- Opposition from special interest groups benefiting from the status quo who can block reforms.
- Lack of government credibility and administrative capacity. Even where the disadvantages of energy subsidies are recognized, the general public often has little confidence that the government will use savings from subsidy reform in a way that is beneficial to them.
- Concerns regarding the negative impact on inflation, international competitiveness, and instability of domestic energy prices.
- Weak macroeconomic conditions.



Things that Must Happen for Price Reform to be successful

- Price increases occurring in well-timed phases – increases that happen too quickly without proper warning will likely result in significant backlash.
- Clear communication prior to starting reforms of when and how price increases will occur so that the public can plan accordingly for the increases.
- Those who are hardest hit by the removal of subsidies be compensated from the beginning through more targeted social protection.
- Successful and long-lasting reforms require a depoliticized and rules-based means for setting energy prices.

sees red, they know they are going to cut someone’s power off. If you let everyone know that electricity is running low and they can see that, some people will not turn on appliances if they can avoid doing so.



The Egyptian Regulator provides this tool to communicate to the consumers real time load. During peak loads the green circle turns red – consumers are encouraged to curtail non-essential loads like washing machines.

Box 12: Mauritania’s Diesel Price Reform

When the government of Mauritania introduced a new diesel price formula in May 2012, it included mitigating measures as an explicit component of the energy subsidy reform program, which helped contain opposition despite a price increase of more than 20 percent over a five-month period.

Implementation of an automatic fuel pricing mechanism is not in itself a solution for achieving sustained energy subsidy reform, but should be part of a broader reform strategy. Subsidies hurt growth. Although they can be used to provide short-term support, in the long run subsidies hinder growth potential.

Mitigation of Power Interruption

Energy efficiency activities offer the opportunity for a collaborative solution where the whole community can work together to solve a problem. Messaging should center on the idea of shedding unnecessary loads at peak times so that everyone can have better service, thus achieving a common good.

An example of this is the color system, where a community works together to save power. If a member of the community

Box 13: Load Management- The Egypt Example

Loss Reduction and Load Management in the Unified Power System

- Calibration of all measuring devices (200 devices).
- Reducing the % losses value from 7% to 3.71%.
- Conducting dynamic response tests for all generating units beyond 125 MWe, total of 37 units.
- Implementing load shifting pilot projects at two cement factories and one iron & steel company.
- Sensitivity analysis study has been carried out to select the most appropriate scenarios for peak and off peak Time -of- Use (TOU) tariff. Energy Efficiency Market Support.
- Conducting 193 audits, and recommendations of 20 additional audits.

Demand Side Management Programs

On the demand side, there are at least five activities that can be considered low-hanging fruit (the easiest to implement). These are:

- Energy efficiency building codes
- Appliance standards
- Energy audits
- Housekeeping measures that would ensure usefulness and implementation of the recommendations of these audits, and
- A program of demand-side management (DSM) for public buildings. Building codes and appliance standards have already been prepared in most MENA countries.

These codes and standards should be reviewed to ensure that they are up to date. Compliance with these codes and standards need to be made mandatory. A decision should be made to appoint and equip a responsible entity. Energy audits for industrial and commercial firms should be launched.

A building insulation program in Dubai has resulted in claims that all buildings have become twice as energy efficient since completion of the program. Further steps are also underway in other ecological areas such as water efficiency and waste management, with the intention of ensuring the green credentials of every building to meet international environmental standards and expectations.

Successful DSM programs require the following:

- Planning ahead
- Get up-front buy-in
- Program specifics. Explain how the program works and discuss the potential benefits to their constituents. Then ask for candid feedback such as: Are we missing anything? Do you feel this program will be well received? If yes, why? If not, what needs to be changed?
- A call for support. Once the program has been reviewed, discussed, negotiated, and shaped into a form that's acceptable to all parties, ask for the influencers' support for the DSM program
- A request for endorsement. Be sure to invite these influencers to formally endorse the program. Ask if they will help spread the word through their networks and whether they are willing to share their positive perspective with the media.
- Implement a pilot program – Even a small sample
- Involve strategic project partners
- Give consumers options. For example, utilities could offer customers a choice between receiving a one-time rebate or a low-interest loan to make energy efficiency improvements.

Box 14: Possible DSM Program Strategy

“One of the more interesting private sector DSM program strategies I’ve seen is to partner with a retailer that wants to boost store traffic and sales,” says Lynn Stein, a senior advisor at E Source. “I’ve seen some utilities develop programs to retire old, inefficient air conditioners by offering a ‘Cash for Clunkers.’ Consumers got a rebate on an efficient new air conditioner when they brought their old one to the store. It was a government funded program. If the consumer purchased an appliance that was more energy efficient, they would get a government rebate. The local retailers would get increased traffic for pushing the energy program and the customers would save money. The retailer would give the consumer proof that they decommissioned the old unit. The consumer would turn in a short application, proof of purchase, and proof that the unit was decommissioned and they would receive their rebate in the mail.



From the Arab Energy Efficiency Day Website (supported by EU-MED-ENEC) www.arabeeday.net

Market Players

Government

Governments will need to develop an overall national energy strategy, this includes which government agencies will be involved and what each will be tasked with. The function of government should be to play a leading role in setting the national energy efficiency agenda, which would include the following:

- Developing a national energy efficiency strategy that specifies measurable efficiency goals.
- Developing the institutional, legal, and regulatory frameworks that provide for incentives, enforcement, and compliance monitoring.
- Setting up a body with the adequate means and authority to monitor the achieved results and adjust the national strategy accordingly.
- Developing a means to collect and analyze energy consumption data. In particular, governments will need to be able to monitor and track a set of measurable energy efficiency key performance indicators (KPIs).
- Government led internship programs to install values, understanding and skills.
- Online training programs for professionals.
- Moving towards local manufacturing of EE components to increase skills and employment and lower costs.

Middle Eastern governments will need to review their existing energy subsidy regimes and determine how and to what degree these could be replaced with incentives that promote greater energy efficiency.

The level of government involvement in demand side management programs does not need to be publicly announced. General mistrust in government is often one reason that has been credited to the failure of previous energy reforms.

Box 15: APSEY

The Arab Program for Sustainable Energy Youth™ (APSEY) is a regional sustainable energy internship program which targets young professionals and post graduate students of engineering, economics, and law fields from the Arab region. The program aims to boost technical and operational capacities of the region's young talents interested in renewable energy and energy efficiency fields. The program recruits 12 interns every year in two rounds for a hands-on experience in the center's research and analysis, policy briefs, technical assistance, and other related activities. The opportunity covers full travel and accommodation expenses in Cairo in addition to a monthly salary.

Civil Society

Civil society actors have become significant players in the global development backdrop for the delivery of social services and implementation of development programs as a complement to government action, especially in regions where government presence is weak. Today, civil actors are seen as change agents in their respective societies, trying to improve living conditions while striving for a more equitable and just world. They are mediators in the transformation to a post-fossil society, able to influence the policy-making process while reshaping the general public interests and specific constituencies, such as consumers, workers, and farmers. However, to date, civil society organizations and the broad public in the MENA region have little engagement and involvement in the development of the transformation process towards a sustainable development pathway. Actions recommended for civil society to take include:

- Organization of conferences and workshops at the regional, national, and local levels for improved communication and dialogue among members and grassroots.
- Building the capacities of the civil society organizations to communicate the needed measures in regards to the energy transition in the MENA region by reinforcing existing regional partnerships.
- Implementation of regional programs in the thematic fields of the network.
- Knowledge exchange through collaboration with research institutes and universities.
- Development and implementation of awareness raising measures and campaigns to distribute information and increase public acceptance, in particular with regards to large-scale renewable energy projects.
- Engage in national, regional, and international policy processes.
- Prepare policy papers and recommendations for policy and other relevant processes and bring civil society's voice to the table.
- Engage with associations at the local and grassroots level to understand their needs and opinions.
- Contribute to development of socio-economic opportunities.
- Create opportunities for young generations in the green sector and in relation to low carbon development and climate protection.
- Promote the narrative of a green economy and low carbon development.

Local NGOs are much more powerful than they are often given credit for. These organizations are generally entrenched with the public and have a more solid understanding of real barriers. Development organizations play an essential role in assisting governments with their campaigns. These organizations need to work closely with the local professionals, who better understand the culture and climate. NGOs should play a large role in training the public on why it is important to be a “green citizen”. This includes developing content, promoting this message in local schools, and being available as a resource to answer questions.

The private sector must be included as a market player, and the “what’s in it for me?” questions need to be answered clearly using the correct medium to deliver this message. Another key component of DSM program success is to get upfront buy-in from local groups with a lot of clout, typically, there are state and regional groups that are key players at the regulatory level. To make sure a new DSM program has a chance of succeeding, target those ‘heavy hitters’ in the area—brief them on the new program, get their feedback, and ultimately obtain their endorsement before rolling out a program.

Box 16: Relevant DSM Stakeholders

Examples of groups that should be contacted before a DSM program goes live include environmental organizations, business and industrial trade associations. Valuable feedback from these groups can help refine the DSM program before it’s rolled out. Conversations with these influencers should include program specifics. Explain how the program works, and discuss the potential benefits to their constituents. Then ask for candid feedback, such as: “Are we missing anything? Do you feel this program will be well received? If yes, why? If not, what needs to be changed?”

The energy transition process can be proactively driven by stakeholders from industry or society. They can create “bottom-up” pressure on the incumbent energy regimes by introducing technological innovations, applying new collaboration schemes, or advocating for the cause of renewable energies. Additionally, the private sector must be included in task forces relevant to promoting energy efficiency. Being a part of the discussion is important to gain buy-in from all of the stakeholders involved.

Local industry needs to clearly announce support. Manufacturers in the MENA region need to assess the size of the future market and to understand the decision making process and available incentives.



Promoting outdoor solar cooking in Namibia

Steps to a Successful Marketing Campaign

A successful marketing campaign involves planning a strategy, setting goals, and key performance indicators that will be used to determine success. Choosing the right marketing consultant is one of the first steps. Specific questions should be asked of potential marketing consulting candidates.

Questions to Ask the Marketing Consultant Candidate

1. What is your company's experience and expertise? Some consultants have experience in only one area but try to pass themselves off as experts in all areas.
2. What is your consultant's background and qualifications?
3. How recent and practical is that experience? Those that can, do; those that can't, teach—and some even become consultants. The best theoretical advice is not a replacement for the practical.
4. How much do your services cost? How can you judge value for money? What would be the expected results of your activities?
5. What clients have you worked for?
6. Do you have experience in social awareness building?

The Marketing Process – How It Works

Marketing and planning start well in advance of a campaign launch. The time prior to launch is used to:

- Conduct primary and secondary market research
- Define the target market and create customer personas
- Understand the overall goals and how to implement those goals
- Create a brand
- Design programs
- Determine key performance indicators
- Decide which stakeholders will be involved and to what capacity
- Define success indicators

Defining the Market

First, define the target market, their demographic, and the psychographic components. Demographic information consists of factual information that can be categorized, such as age, race, gender, income, religion, etc. Psychographic factors consist of interests, activities, and opinions (IAO). To sell energy efficiency programs to target audiences, the message has to be converted into a product or service of value to the consumer. The aim of the study phase is to

examine social and marketing barriers, attitudes, opinions, and perceptions and determine the value proposition as it relates to the target audience. This may include different value propositions depending on the audience.

Secondary and Primary Research

Secondary research (also known as desk research) involves the summary, collection, and evaluation of existing research. This might entail looking at factors that have affected the success or failure of EE programs in other countries as well as in the MENA region. Primary research consists of the conducting of one's own research using surveys, observation, experiments, and focus groups.

Both types of research must be used in advance of creating the marketing strategy or marketing will be ineffective (think of the Pakistani example at the beginning of this report).

How to Brand Energy Efficiency

- Well-designed logo.
- Color scheme that is identified as related to EE activities.
- Consistent font that is identified with EE activities.
- Communications standards binding rules to users, especially institutional staff, the so called "Communication Guidelines". These will guide further media productions such as rollups, posters, publications, websites and other media products. Branded items such as; brochures, pens, stationary, business cards.
- Consider collaborating with well-known celebrities close to the cause to help delivering the message.

Presentation of Findings to Stakeholders

The consultant will present the research findings and ideas to the customer in both a visual and verbal manner and receive feedback. Based on this feedback, the consultant will go back and continue to modify the strategy until all parties are in alignment. The consultant has the ability to represent and defend interests to the group based on data and analysis. The concept is verified, and an advertising strategy is determined. While the creation and placement of ads are done by an outside agency, the consultant, in conjunction with the stakeholder group, should determine the budget, objective, messaging, and what success looks like.

Meetings with prospective advertising agencies are set up. The agency is hired by the marketing consultant to design a concept and campaign. When this is approved, the concept is storyboarded.

Storyboarding for television advertisements consists of presenting drawing panels or rough sketches illustrating the sequence of pictures or actions in an advertisement, as well as camera angles, in the sequence that they will occur. Once the story board has been approved, it is taken to production.

A media agency is hired to handle placement and design of advertising in newspapers, magazines, etc., according to budget, and the level of reach will be clearly communicated by the agency to all parties. The media agency will be responsible for executing the plan. This plan may consist of onsite marketing demonstrations and visuals to promote awareness.

The Digital Strategy- Cross Platform Communications are Key to Maximizing Reach



Website

The look of the website should be clean and professional, and the information should be easy to find. The required functionality of the website should be decided upon before the project is started. The best way to do this is to gather major stakeholders in the project and whiteboard the “must haves” and “nice to have” capabilities. A search bar within the site will help to understand what content people are looking for, what the most common searches are, and where there may be holes in content that people are searching for but cannot locate. The website should help to create a brand, and this brand should be consistent across all online platforms.

Energy Efficiency website Lebanon



Website of the Lebanese Center for Energy Conservation (LCEC)

Analyzing Performance of Website and seeing who it is reaching

Google Analytics and/or other analytics program should be set up while building the website for tracking and an understanding of user behavior, how users are finding the website, demographics of users, and how users interact with the site.

Social Media

Social media offers several benefits. In addition to offering a means of communication and dissemination of information in a relatively inexpensive manner, social media offers the potential to form relationships with “influencers.” Influencer strategy is defined as marketing to a select group of individuals, such as journalists, bloggers, consultants, or industry analysts who influence your buyers’ decisions.

Hashtags

Encourage users to utilize special hashtags created for the campaign, and make sure that all content is enabled with share buttons to make it easy to share to sites such as LinkedIn, Facebook, and Twitter. The use of a brand sentiment tool will help to consistently monitor the user sentiment towards products and to better engage with the community. This will also allow visibility into negative sentiment, and the marketing messaging can be modified if necessary to address this.

Videos

Videos are indexed by search engines more quickly than images, which means that they will often show up before other types of content when consumers are searching for EE content. Videos are a great way to offer a visual understanding of energy efficiency in a way that is engaging to the viewer. Maximum success using social media requires consistent use,

clear and entertaining messaging, fantastic images, and the creation of a media calendar. A media calendar plans out ideas, concepts, and posts as they relate to dates for offline activities, specific marketing messages, holidays, etc. The media calendar can be planned out a year in advance and edited if necessary based on events and changes in marketing messaging.

Email Marketing

The communication of information to audiences of different demographics and psychographics can be done through the use of segmented email newsletters, creating either unique or modified content and messaging to different groups based on what is most relevant to them.

Online Advertising – Quick, Clear, Concise Messaging to a targeted audience

Online advertising, also known as search engine marketing activities, is another tool to drive leads. Google AdWords is a great way to drive traffic but must be monitored on a consistent basis to ensure correct keywords and to modify bidding strategies. While AdWords is a very good way to generate leads, it is imperative to monitor costs and to have AdWords run by a professional with experience. There are digital advertising agencies that specialize in paid digital media and employ staff that are Google AdWords Certified (trained directly by Google). Without this, it is very easy to run up a hefty bill that does not necessarily hit the target audience or get high-volume, low-quality leads.

Outreach and Public Relations

The marketing consultant should assist the program management in hiring a media agency that would create a proposal with a media mix that represents the target audience and where they go for information, news, and entertainment. This media mix would include radio spots, television advertisements slotted at best times for the target audience, and magazine and newspaper ads with clear messaging and visuals.

A press release should be written and sent out to relevant media. Tools for sending out press “blasts” (blanket emails to editors) proven unsuccessful. And if possible, it is better to take the time to do more personalized targeting and introductions. If an accurate list of editors does not exist, it should be created or purchased. Post relevant press releases onto the website.

Mass media should be thought of more as a branding and awareness strategy than something that will independently change behaviors. A mass media strategy on its own does not provide legitimacy or build trust, but it is a good tool for generating large-scale awareness.

How to create an energy efficiency public event

- Opening ceremony with representatives like well-known celebrities close to the heart of target audience
- Press briefing or conference
- Information, discussion and assistance provided by experts
- Social media and information screens
- Films, multimedia presentations, exhibitions
- Printed materials: Books, brochures, leaflets, posters
- Kid related activities
- Entertainment, talk shows, special guests, things happening
- Food and beverages
- An understanding of website, hotlines other materials available for follow-up questions

Offline Public Outreach



The Ecotruck is the first of its kind in Lebanon offering educational material and learning tools about renewable energy systems and applications. It is equipped with renewable energy technologies including solar water heating, micro wind, photovoltaic, and biomass systems

Box 17: Celebrating Arab Energy Efficiency Day (AEED)

The day's activities included celebrating Arab countries success stories in the energy efficiency field and discussing the industry's latest technologies and global initiatives. Government officials, public sector, and international organization representatives were invited to the event, as well as Arab energy and power students and professors. The event also included the screening of a documentary and a television spot that the organizing committee, consisting of the Secretariat of the Arab Ministerial Council for Electricity (AMCE), MED-ENEC and RCREEE, had arranged to produce in order to be used as awareness raising tools.

The AEED is celebrated on May 21 each year since 2013 adopting different awareness campaigns in the League of Arab States member countries.

Developing Marketing Strategies

How to implement a marketing campaign

Create an online presence (digital marketing)

- Program Website
- Search engine optimization
- Ads on local websites
- Twitter ads
- Keyword targeted text ads (Google AdWords)
- Email Newsletters
- Google analytics tracking

Reaching out through mass media












- Radio advertising and news or talk radio spots
- Newspaper/local magazine ads
- Television advertisements
- Feature story opportunities
- Press releases and proactive media relations
- Press conferences with key social and political figures

Marketing directly to primary target audiences

- Direct mail
- Door hanegrs
- Bill Suffers
- Stories or ads in trade publications
- In store/point of purchase displays
- Promotional items (stickers, pens, magnets, tote bags, etc.)
- Community outreach events

Look at results based on performance objectives modify campaign based on findings and continue

MED-ENEC publications on energy efficiency issues

 <p>الخطط الرئاسية لرفع كفاءة الطاقة للتخطيط العمراني في منطقة الشرق الأوسط وشمال إفريقيا</p> <p>الطبعة الأولى</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>Energy Efficient Urban Planning Guidelines</p> <p>أكتوبر 2013</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>دليل إرشادي لكيفية استخدام الطاقة في البناء لمنطقة الشرق الأوسط وشمال إفريقيا</p> <p>نوفمبر 2013</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>Energy Efficient Building Guideline for MENA Region</p> <p>نوفمبر 2013</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>
 <p>Energy Efficiency Codes Industry, Construction and Utilities in the Southern Mediterranean</p> <p>فبراير 2014</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>Financing Energy Efficiency in the Building Sector in MENA Region</p> <p>فبراير 2015</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>ESCOs - Energy Service Companies: A market tool to foster energy efficiency in the Southern Mediterranean</p> <p>مايو 2014</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>ENERGY SUBSIDIES A ROAD MAP FOR REFORMS In the Southern Mediterranean</p> <p>أغسطس 2013</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>
 <p>ENERGY EFFICIENCY AND EMPLOYMENT: A WIN-WIN OPPORTUNITY In the Southern Mediterranean</p> <p>أغسطس 2013</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>Energy Efficiency Building Code A Roadmap for implementation in the MENA Region</p> <p>سبتمبر 2013</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	 <p>Energy Efficient Lighting Guidelines and Recommendations for the MENA Region</p> <p>يناير 2015</p> <p>MED-ENEC Energy Efficiency in the Construction Sector in the Mediterranean</p>	

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List of Abbreviations

AEED – Arab Energy Efficiency Day
 APSEY- Arab Program for Sustainable Energy Youth
 CFL- Compact Fluorescent Lamp
 EE- Energy Efficiency
 KPI- Key Performance Indicators
 MENA- Middle East and North Africa
 MED-ENEC- Energy Efficiency in the Construction Sector in the Mediterranean
 MEPS- Minimum Energy Efficiency Standards
 MSP- Mediterranean Solar Plan
 NGO- Non Governmental Organization
 RE- Renewable Energy
 RCREEE- Regional Center for Renewable Energy and Energy Efficiency
 DSM- Demand Side Management
 LED- Light Emitting Diode energy efficient light bulbs
 NEEP- Namibia Energy Efficiency Program
 SEEC- Saudi Energy Efficiency Center
 IEA- International Energy Agency

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Picture 7	Photo by Palestinian Energy Authority
Picture 8	Photo by LCEC
Picture 9	Photo by LCEC & UNDP Lebanon
Picture 10	Photo by Sam Gouda
Picture 11	Photo by ANME
Picture 12	Photo by LCEC
Picture 13	Photo by MED-ENEC
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Picture 15	Photo by Egypt ERA
Picture 16	Photo by AEED website
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