



THE ENERGY EFFICIENCY WATCH SURVEY REPORT 2020

Insights from 1,270 energy efficiency experts

Progress in energy efficiency policies in
the EU Member States

Towards new narratives:
The missing WHY for energy efficiency



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Summary and main conclusions

Key conclusions

- **Energy efficiency policies: ups and downs continue**
Overall, disappointing levels of improvement in energy efficiency across policy fields: The Member States remain too slow, way too slow – new dynamics lacking! Levels of ambition in policy development and implementation keep fluctuating in many Member States
- **The WHY is often missing: lack of strong narratives**
Policy ambition is maintained in a specific country or region despite political changes where a consensus has been reached on "WHY" it should be done (and not "We must because Brussels tells us so")
- **"It's the economy, stupid!" (quote Bill Clinton)**
More attention needed for the positive economic impacts of energy efficiency on **jobs, industry and competitiveness**
- **Buy-in from important stakeholder groups**
Lack of Member State ambition is often due to **opposition of key stakeholder groups**
- **Need for better data on benefits beyond climate protection and cost savings**
EU data, indicators and quantification of **job and competitiveness impacts** of energy efficiency and the energy transition are needed to help shape the debate
- **Are we talking about the right things? And to the right people?**
New messages and new stakeholder interactions are needed to **speed up acceptance and participation**
- **Never waste a good crisis!**
Unique opportunity to reposition energy efficiency as a key recovery strategy ("the fastest recovery is the green recovery") – but this requires much better **NARRATIVES!**

The EEW4 survey objectives and approach

Over the last 15 years, the importance of energy efficiency in European policy has steadily increased. The adoption of the "Energy Efficiency First" principle and the Green Deal brought a new policy era, also for energy efficiency. Since 2006, **Energy Efficiency Watch (EEW) projects** have accompanied this policy development and implementation process. The EEW creates feedback loops on the implementation of European and national energy efficiency policies and thus enables mutual learning on effective policy making across the EU. Additionally, the Energy Efficiency Watch 4 project (EEW4) introduced a new element – a focus on narrative development and implementation. The

EEW4 is funded by the H2020 programme and coordinated by Eufores. It runs from June 2019 to May 2022. Further information at www.energy-efficiency-watch.org.

One key activity of the EEW4 project was an **extensive survey in which 1,270 energy efficiency experts from all 27 Member States were consulted**. The aim of the survey was twofold: firstly, to learn how they see the "real-life" progress of energy efficiency policies in their own countries (similar to the previous EEW surveys carried out in 2012 and 2015). Secondly, it aimed to contribute to a deeper understanding of what constitutes a successful narrative and of which stakeholder groups are key in different countries. It also enquired about the current positioning of energy efficiency in the public debate and the perception of key stakeholders' opinions on it.

Following extensive pre-testing, the survey was carried out between February and June 2020, mostly using an online questionnaire. Participants were mostly from the business and the public sectors, universities and research, and energy agencies. The very high-level of response was due to intensive roll-out activities.

Energy efficiency progress remains much too slow

The first part of the survey was dedicated to gathering views on energy efficiency policy progress in the last 3 years. In order to compare the progress across countries and policy fields, a "progress indicator" was calculated. The results are shown in the table below (details see page 14). Generally, a lack of progress can be observed despite the much-increased ambition levels. No new dynamics emerged and the levels of improvement in different fields remained very similar to those reported in 2015.

More established instruments, such as energy efficiency requirements for buildings, product labelling and energy certification of buildings are reported to have the highest positive impact whereas energy taxation and the inspection of heating and air-conditioning systems are perceived as least effective. A key outcome of the 2015 survey was confirmed: significant "up-and-down" movements for many Member States are observed. This was often triggered by changes in national governments which resulted in either more or less priority on energy efficiency.

Progress indicators 2020 Ranking - Comparison 2015

		2020	2015			2020	2015		
	Austria	13	5	↓		Italy	7	13	↗
	Belgium	22	13	↓		Latvia	13	15	
	Bulgaria	13	23	↑		Lithuania	6	9	↗
	Croatia	11	10			Lux	3	10	↑
	Cyprus	22	5	↓		Malta	26	25	
	Czech Rep.	17	15			NL	13	19	↗
	Denmark	2	1			Poland	24	22	
	Estonia	5	3			Portugal	7	21	↑
	Finland	1	2			Romania	24	20	↘
	France	19	12	↓		Slovak Rep.	10	15	↗
	Germany	17	5	↓		Slovenia	9	5	↘
	Greece	11	24	↑		Spain	21	28	↑
	Hungary	27	26			Sweden	4	4	
	Ireland	19	15	↘					

The missing "WHY": towards new energy efficiency narratives

A key finding of the EEW3 was that the levels of policy ambition strongly depend on the existence of underlying national or regional narratives about the multiple benefits of energy efficiency. Where these are accepted and shared by policy makers, key stakeholders and parts of the population, energy efficiency has become an integral part of economic and social policy – instead of "just" a climate policy. If such narratives do not exist, energy efficiency is neglected or controversially debated, leading to a lack of ambition or frequent policy changes ("ups-and-downs"). Effective and strong narratives are therefore needed to further drive the energy transition on Europe's pathway to climate neutrality.

The EEW4 puts the analysis and development of narratives for energy efficiency at the core of its activities. The results of the survey provide inputs for this process on EU level and in each country. In order to be strong and widely adopted, new or strengthened narratives need to resonate with topics of general importance in society and have the support of key stakeholder groups. The data help to focus on topics and actor groups of importance in a country context and identify possible weaknesses in the current debate.

As a first step, the survey looked at **topics of high importance** in society, since these are most likely to catch people's attention and get them interested in related benefits. In the EU27, **jobs, industrial competitiveness and investments** are of highest importance in the public debate. In comparison, housing/living costs, air quality, independence from other countries and rural development spur much less interest.

To which **topics is energy efficiency currently being linked** in the public debate?

Across the EU, it is by far most often discussed in regard to **investments**, followed by its impact on competitiveness, housing/living costs and air quality. The most important topic – jobs – is strongly underrepresented in the public debate. Jobs and competitiveness are mostly discussed with positive connotations, investments mostly in a negative manner.

Similarly, understanding which **actor groups** are most influential on politics in a specific country context is an essential element, since effective narratives need wider stakeholder support. Across the EU, **associations of large industry** have by far the strongest political influence, followed by Trade Unions and Chambers of Commerce. The views of the tabloid press, farmers organisations, NGOs and churches are seen as having a much lower impact. The three most influential groups are slightly more supportive of the energy transition than opposed, however, with strong variations across countries.

EU27: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	72 %	28 %
Industrial competitiveness	2	2	63 %	37 %
Modernisation / investments	3	1	44 %	56 %
Housing / living costs	4	3		
Air quality	5	4		
Independence from other countries	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	47 %	13 %	40 %
Trade Unions	2	37 %	40 %	23 %
Chambers of Commerce	3	52 %	28 %	20 %
Tabloid press	4			
Farmers organisations	5			
NGOs	6			
Churches	7			

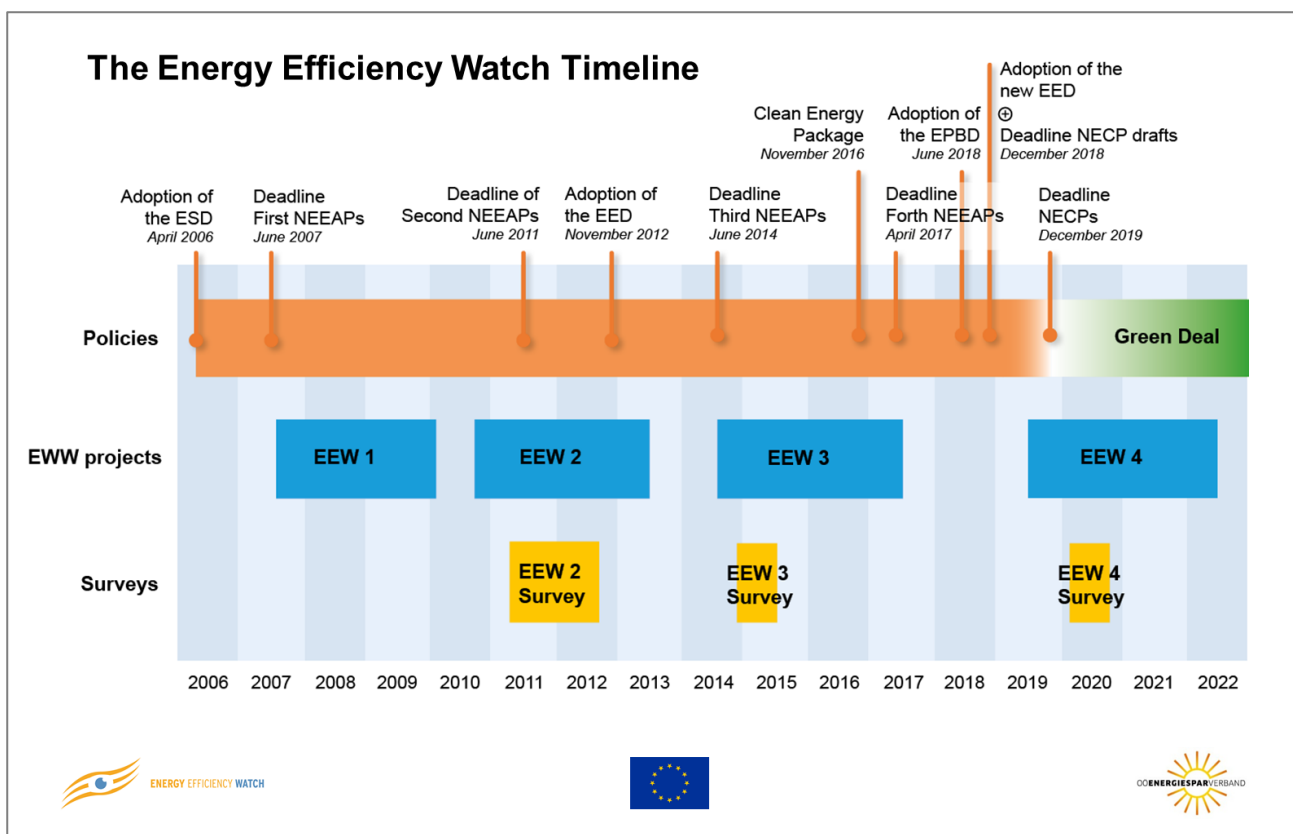
Objectives and methodology of the EEW4 survey

The Energy Efficiency Watch Project

Over the last 15 years, the importance of energy efficiency in European policy has steadily increased. This is reflected in several directives, including the Energy Efficiency Directive (2018/2002, amending 2012/27/EU, EED), Energy Performance of Buildings Directive (2018/844 amending 2010/31/EU, EPBD), the Energy Labelling Regulation (2017/1369) and the Ecodesign Directive (2009/125/EC).

With the adoption of the "Energy Efficiency First" principle and the introduction of the Green Deal, a new policy era for energy efficiency has started. The objective of achieving climate neutrality by 2050 has made the need for increased energy efficiency efforts evident. The current energy efficiency target (improvements of energy efficiency by 2030 by at least 32.5 %) is presently under revision (March 2021).

Since 2006, Energy Efficiency Watch (EEW) projects have accompanied the policy development and implementation process. The EEW facilitates the implementation of EU energy efficiency policies by collecting information on this process and providing it to a variety of stakeholders, including European, national, regional, local policy makers and experts. It creates a feedback loop on the implementation of European and national energy efficiency policies and thus enables mutual learning on effective policy making across the EU. A key objective is therefore to support engagement of the public sector at all governance levels.



Additionally, the Energy Efficiency Watch 4 project (EEW4) introduced a new element - a focus on narrative development and implementation based on the key findings of the EEW3 project. A narrative is a set of accepted societal benefits – in this case of energy efficiency – in a country or a region. In addition to climate benefits, these can be economic benefits (e.g. job creation, industrial competitiveness), political benefits (e.g. decreased import dependence) or social benefits (e.g. decreased housing costs, healthier buildings).

The ambition in policy development and implementation over longer periods significantly depends on the existence of such underlying national or regional narratives based on key benefits of energy efficiency. Ideally, these narratives are shared by policy makers across the political spectrum and are also accepted by important stakeholder groups and significant parts of the population. If such narratives do not exist, energy efficiency is neglected or controversially debated, leading to frequent policy changes and lack of ambition.

The EEW4 therefore puts the analysis, development and implementation of narratives for energy efficiency at the core of its activities. It aims to create a better understanding on national debates and bring these to the policy development processes.

The EEW4 project is funded by the H2020 programme and coordinated by Eufores. It runs from June 2019 to May 2022. Further information: www.energy-efficiency-watch.org.

The EEW4 survey objectives and approach

One key activity of the EEW4 project was an extensive survey of energy efficiency experts and stakeholders in all 27 Member States. The aim of the survey was twofold:

Firstly, to learn from them how they see the "real-life" progress of energy efficiency policies and their implementation in different sectors in the last 3 years in their respective countries. The objective and content were similar to that of the two previous surveys: the first was carried out in 2011/2012 (EEW2) and second in 2015 (EEW3). This approach allows for a comparison of progress over time as some parts of the survey were retained in all 3 surveys.

The second part was new in the EEW4: it aimed to contribute to a deeper understanding of what constitutes a successful narrative and which stakeholder groups are key in different countries. The survey also enquired about the current positioning of energy efficiency in the public debate and the perception of key stakeholders' opinions on it. The survey empirically gathered broad stakeholder inputs on existing and potential new narratives. It constitutes a key pillar of the narrative analysis carried out within the EEW4 (so-called "input phase"). Other core elements were business stakeholder workshops, inputs from the 3 partner networks (FEDARENE, Energy Cities and ECEEE) and narrative sessions in national parliaments.

In order to get a comprehensive picture, the survey gathered opinions and experiences from a range of different key energy efficiency actors and stakeholders. The aim was to learn how far the implementation of energy efficiency policies has progressed in the opinion of persons with day-to-day work in the energy efficiency field and what their views are on elements of successful narratives.

Background & objective of the survey




Objective of the survey:

- views of experts and stakeholders
- on progress "on the ground" in energy efficiency policies in their respective country
- gather insights for narrative development in Member States

More than 1,270 experts from all Member States participated

- 16 % more than in the 2015 survey with one Member State (UK) less

- questions partly retained for comparison, extensive pre-testing of new questions relating to the narratives
- survey carried out by the OÖ Energiesparverband, supported by project partners
- mostly online (April to June 2020) with extensive roll-out efforts



The survey was carried out using a questionnaire. 1,270 questionnaires were completed and used to draw conclusions. The high-level of response was due to very strong efforts made by ESV and the support of the EEW project partners.

Methodology of the survey

The approach chosen for the stakeholder survey aimed at reflecting the variety of experiences of a broad range of actors spanning 27 countries with vast differences both in energy efficiency policy tradition, in specific progress in the past years and possibly also in narrative elements.

Stakeholders addressed and consulted came from the business field, the public sector, the research and consultancy community, energy agencies, and from NGOs and relevant associations.

After refining the survey objectives as a first step, a questionnaire was developed and tested in collaboration with the EEW4 project partners. Several meetings were held throughout the questionnaire development process.

A twofold approach was used reflecting the dual objectives of the survey:

For the first part of the survey, which focused on the progress in energy efficiency policies, the 2015 questionnaire was analysed to decide which questions should be retained, adapted, deleted or added to reflect the policy changes since then.

For the second part of the survey, which focused on elements of future narratives, extensive research, discussions among project partners and pre-testing took place. As successful narratives consist of an increased understanding of related benefits and the wider support of key stakeholder groups, these two issues were put at the centre of the questionnaire development process.

For the analysis of benefits other than climate protection and energy cost savings (these were considered as already being relatively widely understood), a range of relevant documents and publications on the "multiple benefits of energy efficiency" were analysed. These included, among others, IEA publications (<https://www.iea.org/reports/multiple-benefits-of-energy-efficiency>), relevant EU projects (such as Odysee-Mure, <https://www.odyssee-mure.eu/data-tools/multiple-benefits-energy-efficiency.html>), the Combi project, <https://combi-project.eu/>, the mbenefits project, <https://www.mbenefits.eu/>) as well as other literature. The benefits listed were compared and a list of relevant key benefits deduced. In order to be usable in a survey, the number of identified benefits was reduced and the wording simplified. As a part of the same analysis process, a list of potentially important stakeholders (other than policy makers in national or regional contexts) was collected, also reduced in number and simplified in wording.

Based on these hypotheses, a pre-testing process was implemented: as a first step, the list of benefits and stakeholders was pre-tested within the consortium, and by the ESV with about 10 external experts. Based on these findings, a second round of pre-testing was done by the 3 partner networks (FEDARENE, Energy Cities and ECEEE/Borg & Co). This test phase used the methodology of open answers. It gathered an understanding of benefits and stakeholder groups that are perceived as most important in order to allow for a further reduction in number and wording, and to provide quality assurance of the pre-selection done in the first steps. In total, 25 in-depth interviews were carried by phone/online meetings with experts from 16 countries in autumn 2019. The results were synthesised by ESV and used to develop the final questionnaire.

The questionnaire was grouped around the following main topics (a copy of the questionnaire can be found in the annex):

- overall ambition of the energy policy in each Member State and its progress in the last 3 years
- the improvements in actual implementation and effectiveness of specific policy fields and measures
- subjects of importance in the general public debate in each country and whether energy efficiency is already linked to these subjects in the debate
- the influence of different stakeholder groups on politics in each country and whether these groups are supportive or opposed to the energy transition

- the ambition of European energy efficiency policies and energy efficiency policy measures to be introduced at European level

Due to the significant policy changes between the 2015 and the 2020 surveys, only a few questions were exactly retained from the 2015 survey (and these were largely the same that had already been asked in the 2012 survey). This included the questions on the overall ambition and progress of energy efficiency policies as well as the progress in some specific policy fields.

The questionnaire consisted of 10 questions (excluding those on the country and work field of the interviewees). Most questions included a number of sub-questions, resulting in a total of 71 sub-questions with a total of over 90,000 individual answers (more than double of the number in the 2015 survey).

The survey was carried out between February and June 2020. In the two previous surveys, collecting answers at important European conferences had played an important role. As the timing of the survey fell largely into the first Covid lockdown period, only one major event could be included (the Energy Efficiency Watch conference held in the context of the World Sustainable Energy Days 2020 in Wels/Austria at the beginning of March 2020).

The rest of the inputs were collected through an online questionnaire (hosted in an EEW4 look on ESV's website). In order to reach out to a large number of stakeholders and collect a high number of responses, very intensive roll-out activities were carried out:

- Targeted mailings using the extensive databases of ESV, FEDARENE, ECEEE and Energy Cities. A timetable was developed for a staged mailing approach and reminders over the input phase.
- ESV partnered with relevant energy efficiency networks (such a REHVA) as well as identified and contacted relevant national energy efficiency organisations. Many of them showed an interest in the approach and were willing to distribute the information to their members (which can be considered as a recognition of the approach taken, seeing the large number of survey requests that reach many networks and stakeholders).
- Newsletters of the project partners and other energy efficiency organisations were used to promote the survey and motivate the recipients to participate.
- EEW4 online meetings held in the survey period (e.g., business stakeholder workshops) were also used to collect inputs.
- For countries with a low initial response rate, follow-up communication was done by ESV by e-mail and phone.

These intense efforts resulted in the collection of a **total 1,270 completed questionnaires**. This is considered as a real success. It is 16 % more than the 2015 survey (which had already exceeded expectations) which had included the UK with a very high number of responses.

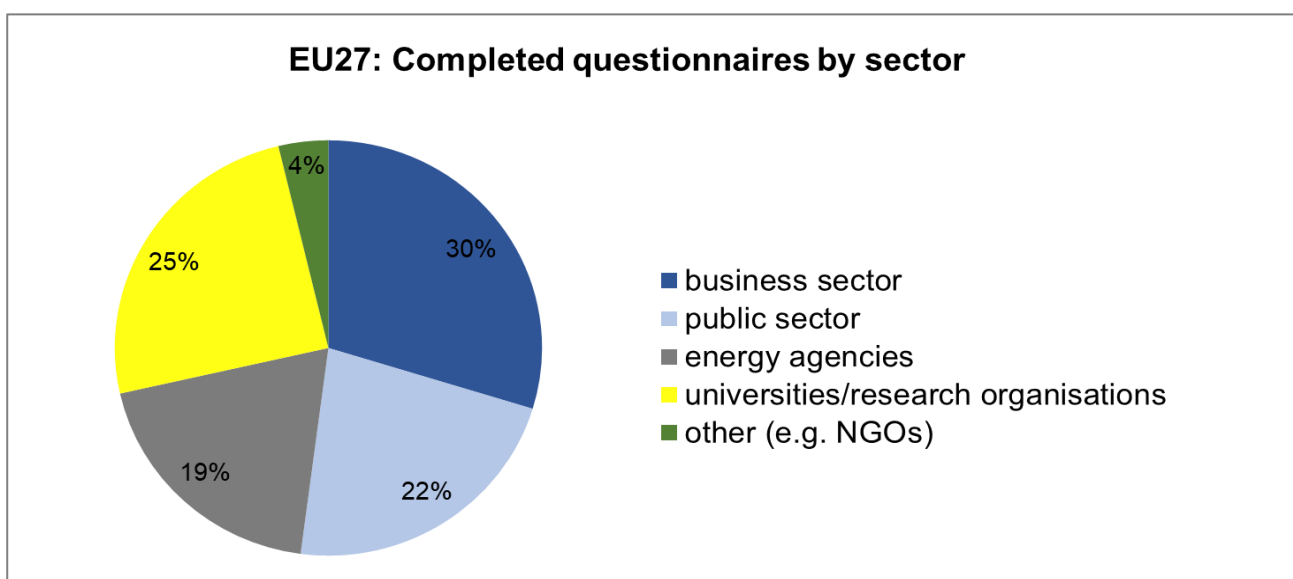
The following table shows the number of completed questionnaires in each Member State. The varying number of participants across Member States had to do with the presence of experts in the partner networks, language issues (the questionnaire was in English) and the size of the country. Due to the intense efforts, the response level from small and very small countries (where the overall number of energy efficiency experts is limited) was significantly increased compared to 2015.

Completed questionnaires by Member State

	Austria	61		Italy	85
	Belgium	46		Latvia	31
	Bulgaria	30		Lithuania	27
	Croatia	49		Lux	25
	Cyprus	31		Malta	23
	Czech Rep.	52		NL	36
	Denmark	34		Poland	34
	Estonia	22		Portugal	47
	Finland	48		Romania	43
	France	64		Slovak Rep.	24
	Germany	138		Slovenia	40
	Greece	49		Spain	65
	Hungary	27		Sweden	65
	Ireland	74		Total	1270

The varying number of participants across Member States had to do with the presence of experts in partner networks and mailing lists, language issues (the questionnaire was in English) as well as the size of the country.

Participants in the survey came from the business sector (30 %), universities and research bodies (25 %), the public sector (19 %), energy agencies (22 %) and others (4 %, mostly NGOs). This can be considered as a good reflection of the energy efficiency landscape.



Survey results across Member States

Progress indicator

In order to compare the progress across countries and policy fields, a "progress indicator" was calculated from four relevant questions of the survey (see annex for the questionnaire), namely question 1 (ambition of energy efficiency policies), question 2 (progress in the last 3 years), question 3 (improvements in key energy policy areas) and question 4 (effectiveness of selected policy instruments). The answers were weighted (the most positive answer by 100 %, the least positive by 0 %).

The ranking resulting from this calculation shows Finland, Denmark and Luxembourg as the three countries where energy efficiency policies progressed most in the last 3 years and Hungary, Malta, Romania and Poland as the four countries where the least progress was made.

 Austria	13	 Italy	7
 Belgium	22	 Latvia	13
 Bulgaria	13	 Lithuania	6
 Croatia	11	 Lux	3
 Cyprus	22	 Malta	26
 Czech Rep.	17	 NL	13
 Denmark	2	 Poland	24
 Estonia	5	 Portugal	7
 Finland	1	 Romania	24
 France	19	 Slovak Rep.	10
 Germany	17	 Slovenia	9
 Greece	11	 Spain	21
 Hungary	27	 Sweden	4
 Ireland	19		

In the 2012 and 2015 surveys, progress indicators were also calculated using the same methodology. They were partly based on the same questions as in 2020 (relating to the ambition and the overall progress) and partly on other questions (in 2012 relating to the then different energy policy context set by the ESD, in 2015 relating to the annual savings and NZEB targets). Despite these differences, it seems justified to compare these results as an indicator for overall policy progress.

Finland and Denmark have maintained their position in the "top group" throughout all three surveys. Luxembourg has regained position 3 (as in 2012) after having dropped to rank 10 in the 2015 survey. Estonia, which held position 3 from 2012 to 2015 has moved down

slightly to rank 5. Hungary, Malta and Poland have remained in the lower rankings from 2012 to 2015. Portugal, Greece and Bulgaria saw the biggest relative upward development since 2015, whereas the largest downward development in ranking can be observed for Cyprus and Germany.

Looking back to the 2012 survey, Cyprus and Austria fell back to their 2012 ranking, whereas Portugal and Luxembourg bounced back to their 2012 ranking. France, Ireland and Hungary have steadily decreased their ranking, whereas Italy, the Slovak Republic, Lithuania and the Netherlands have improved it step-by-step.

A key outcome of the 2015 survey was confirmed: significant "up-and-down" movements for many Member States are observed. This was often triggered by changes in national governments which resulted in either more or less interest and priority for energy efficiency or trends in EU policy.

A main conclusion of the EEW3 project was that these ups-and-downs in energy efficiency policy will continue as long as the multiple benefits of energy efficiency are not sufficiently understood by national policy makers and stakeholders and have not become an integral part of economic, security and social policy - instead of "just" a climate policy.

This conclusion was also based on the observation that in some Member States the understanding of the positive economic, environmental and social impacts of energy efficiency has already allowed it to become independent of political fluctuation and an inherent part of energy and economic policies. That is why a key focus of the EEW4 is contributing to the analysis and the development positive narratives for energy efficiency and the energy transition.

Progress indicators 2020 Ranking - Comparison 2015

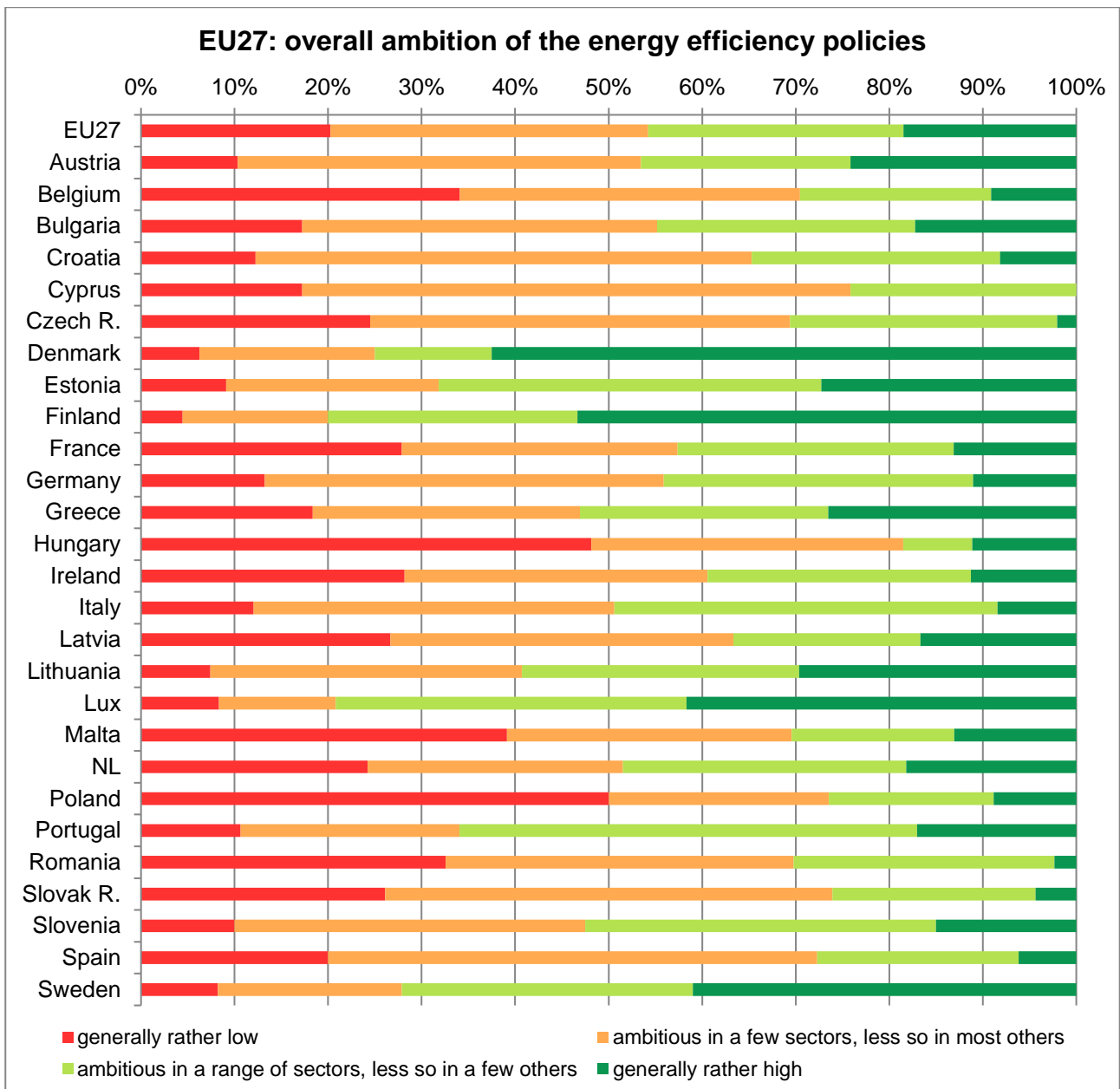
		2020	2015			2020	2015		
	Austria	13	5	↓		Italy	7	13	↗
	Belgium	22	13	↓		Latvia	13	15	
	Bulgaria	13	23	↑		Lithuania	6	9	↗
	Croatia	11	10			Lux	3	10	↑
	Cyprus	22	5	↓		Malta	26	25	
	Czech Rep.	17	15			NL	13	19	↗
	Denmark	2	1			Poland	24	22	
	Estonia	5	3			Portugal	7	21	↑
	Finland	1	2			Romania	24	20	↘
	France	19	12	↓		Slovak Rep.	10	15	↗
	Germany	17	5	↓		Slovenia	9	5	↘
	Greece	11	24	↑		Spain	21	28	↑
	Hungary	27	26			Sweden	4	4	
	Ireland	19	15	↘					

Overall ambition

The first question of the survey aimed to get an impression of the "energy efficiency policy climate" in each country and a feeling for how the experts perceive the general aspirations of their country regarding energy efficiency policies.

Strong variation can be seen between countries. By weighing the answers within each country ("generally rather low" with 0 %, "ambitious in a few sectors, less so in most others" with 37 %, "ambitious in a range of sectors" with 75 % and "generally, rather high" with 100 %), the following picture presents itself: Hungary and Poland are perceived as the least ambitious by the experts from the respective countries. At the other end of the spectrum, Finland, Denmark, Luxembourg and Sweden are rated as most ambitious by their country experts.

Compared to the 2015 survey, there has been only a slight improvement in the overall level of ambition of EU Member States. Larger fluctuations can be observed for individual countries. According to the respective country experts, the level of ambition has increased the most in Spain, Greece, Luxembourg and Portugal. The most significant decreases in ambition are seen for Germany and Estonia.

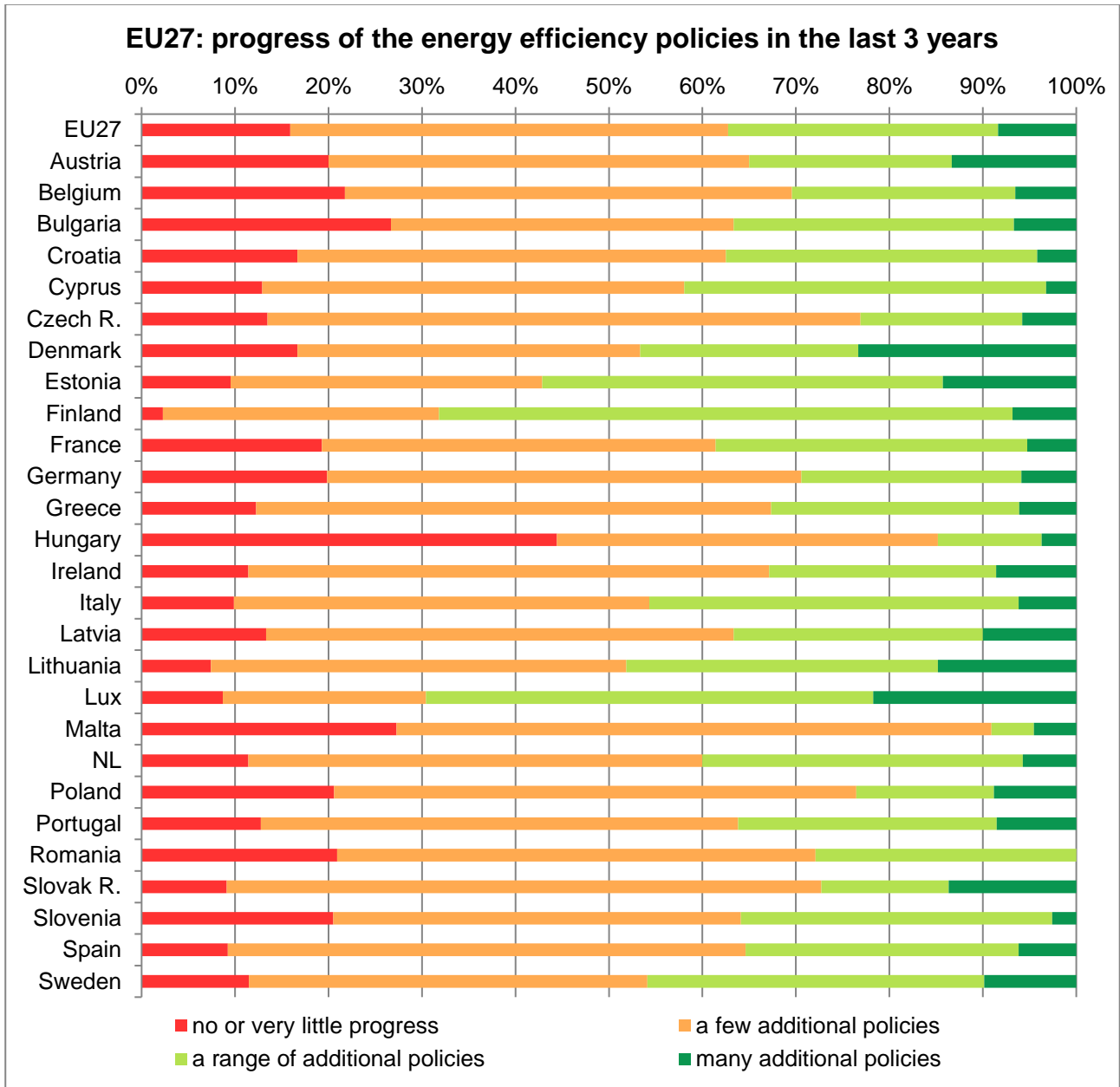


Progress in the last 3 years

The second question focused on the specific progress in energy efficiency policies in the last 3 years in each country.

Compared to the 2015 survey, the EU27 average remains quite unchanged. The countries where experts reported the highest recent progress in additional policies are Luxembourg, Finland and Estonia. Experts saw the least progress in new policies over the past 3 years in Hungary and Malta, followed by Romania and Poland.

When Member States are compared to each other, the most significant positive changes since 2015 took place in Spain, Luxembourg and the Netherlands. The most negative changes are reported for Romania, Germany, Slovenia and Croatia. These four countries are among the 7 that fell below EU average since the previous survey.

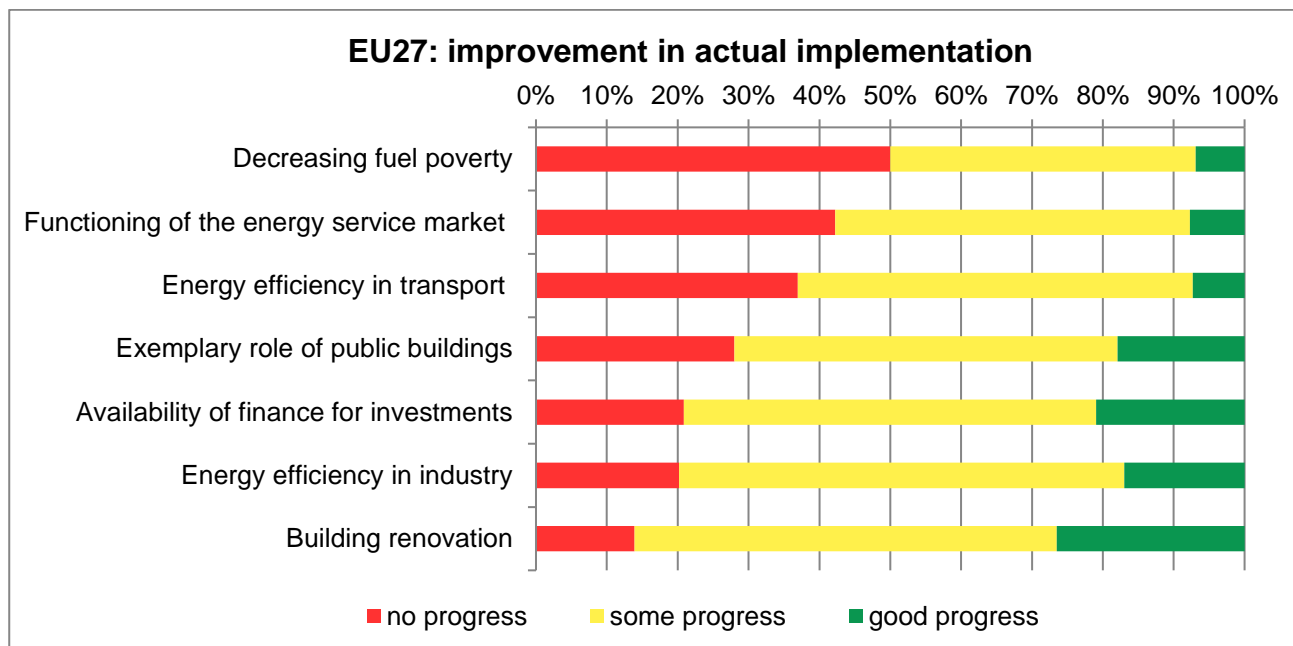


Specific policies and energy efficiency policy instruments

The next two questions focused on important policy areas and on a range of specific energy efficiency policy instruments.

The first question asked about the progress made in the last three years in actual implementation in a range of energy efficiency fields. Across instruments and Member States, the least progress is observed in decreasing fuel poverty, the functioning of the energy service market and energy efficiency in transport. The fields where the most progress is being seen are building renovation, energy efficiency in industry and availability of finance for energy efficiency investments.

Comparing the EU27 results to those of the 2015 survey, a lack of progress can be observed, especially considering the much-increased ambition levels. In overall terms, the levels of improvement in different fields remained very similar and no new dynamics emerged: fields in which low levels of progress had already been observed, remained at a similar slow pace of change (decreasing fuel poverty, functioning of the energy service market and energy efficiency in transport). Sectors that had seen somewhat better improvements (building renovation, energy efficiency in industry and the exemplary role of public buildings) kept up their levels of progress.



Some changes can be seen by looking at the progress in implementation in the different energy efficiency fields in the last 3 years in the context of each country.

























In **building renovation**, most progress was reported for Estonia, Croatia and the Slovak Republic, the lowest progress for Malta, Germany and Hungary.

In the **availability of finance for EE investments** the country with highest progress is Luxembourg, followed by Estonia and Germany. The countries with the least progress are Belgium, Ireland and Romania.

The greatest progress in the **functioning of the energy service market** is observed by the experts from Slovenia, Finland the Czech Republic whereas the lowest rate of progress is observed by the experts from Hungary, Bulgaria and Luxembourg.

In addressing **fuel poverty**, the best rates of progress are reported from Sweden, Denmark and Finland. The least progress is seen by the experts in Hungary, Belgium and Latvia.

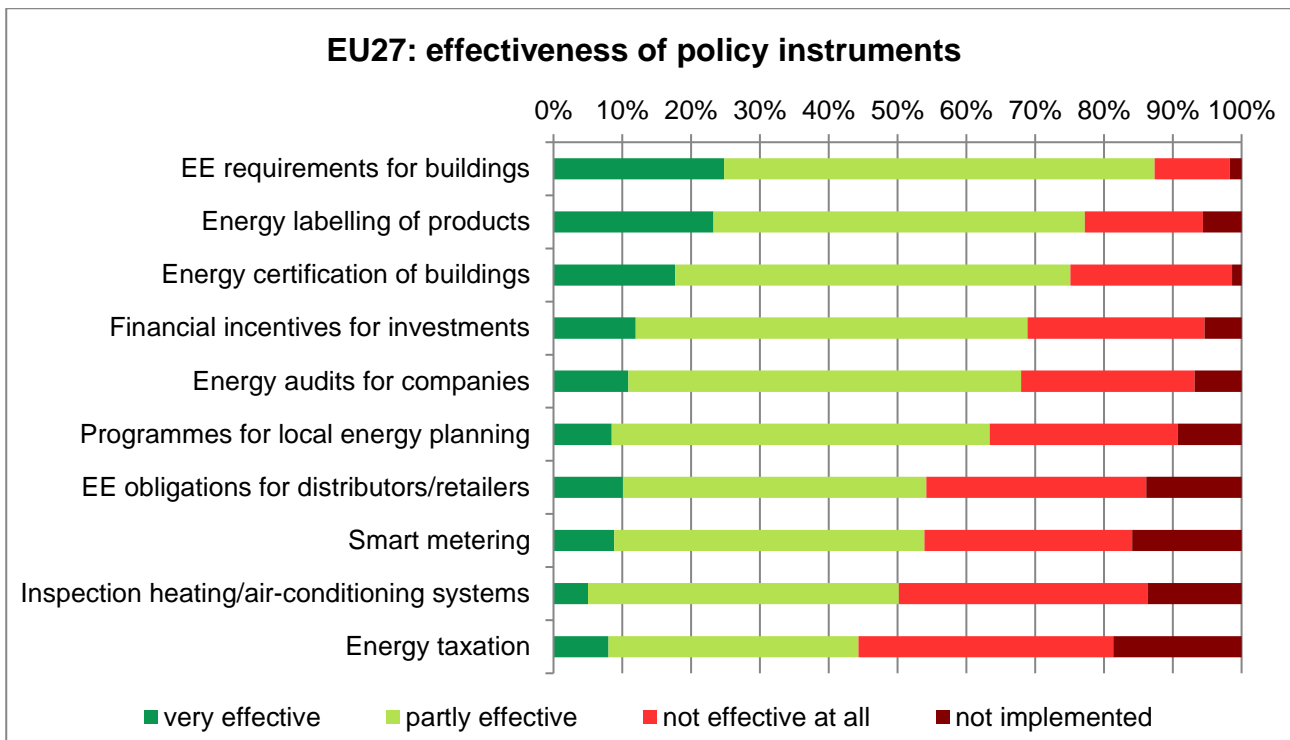
**How do you see the improvements in actual implementation
in the last 3 years in the following fields?**

	most progress		least progress	
Building renovation	1. Estonia		25. Hungary	
	2. Croatia		26. Germany	
	3. Slovak R.		27. Malta	
Availability of finance for EE investments	1. Lux		25. Romania	
	2. Estonia		26. Ireland	
	3. Germany		27. Belgium	
Functioning of the energy service market (e.g. EPC)	1. Slovenia		25. Lux	
	2. Finland		26. Bulgaria	
	3. Czech Republic		27. Hungary	
Decreasing fuel poverty	1. Sweden		25. Latvia	
	2. Denmark		26. Belgium	
	3. Finland		27. Hungary	

The second question in this section relates to a range of specific energy efficiency policy instruments mentioned in the EED or the EPBD. It looked at the perception of the effectiveness of these instruments in the Member States.

In regard to overall EU averages, again, more established instruments, such as energy efficiency requirements for buildings, labelling of products and energy certification of buildings are the instruments with the highest positive impact – respectively 87 %, 77 % and 75 % of the experts agree that they are at least partly effective. On the other end of the spectrum, more than a third of the experts consider energy taxation and the inspection of heating and air-conditioning systems as not effective.

Compared to the 2015 results, only a slight overall improvement can be observed. In view of the increased level of ambition, this seems by far insufficient. Some improvements in effectiveness can be observed for policies and programmes for local energy planning, followed by smart metering. A decrease of effectiveness was reported for labelling of products (which might be attributed to wider application of the A+/A++/A+++ ratings). The other instruments remained more or less stable in their effectiveness rating.



More significant changes can be seen by looking at the different instruments and their developments in the last 5 years in the context of each country.

The effectiveness of **energy certification of buildings** increased the most in the Czech Republic, Lithuania and Luxembourg, and decreased most strongly in Malta, Romania, Croatia and Austria.

For the **inspection of heating and air-conditioning systems**, experts report the strongest improvement in impact in the Slovak Republic, and the biggest decrease in impact for Malta.

According to the experts, the most positive development in **energy audits for companies** took place in the Slovak Republic, Lithuania and Hungary.

In the field of **smart metering**, experts in Estonia, Lithuania and Luxembourg saw the strongest improvements in their countries, whereas experts in Malta and Cyprus saw a reduction of the impact in their context.

Regarding the **energy labelling of products**, few countries reported a significant increase in effectiveness. Experts consider the impact of this instrument to be significantly lower in 2020 than 5 years ago in Luxembourg, Malta and Cyprus.



The following image shows the number of Member States where at least 70 % of experts see a specific instrument as "partly or very effective", as well as the number of countries where 30 % or more of experts rate this same instrument as "not effective as all".

Compared to the same analysis in the 2015 survey, the most significant positive changes are seen for energy audits for companies (6 more countries rate them very positively than

in 2015) and for smart metering (4 fewer countries rate them negatively). At the other end of the spectrum, the most significant negative changes are seen for energy labelling of products (5 fewer countries rate them very positively than in 2015) and for the inspection of heating/air-conditioning systems (4 more countries rate them quite negatively).

How effective are the following policy instruments in your country?

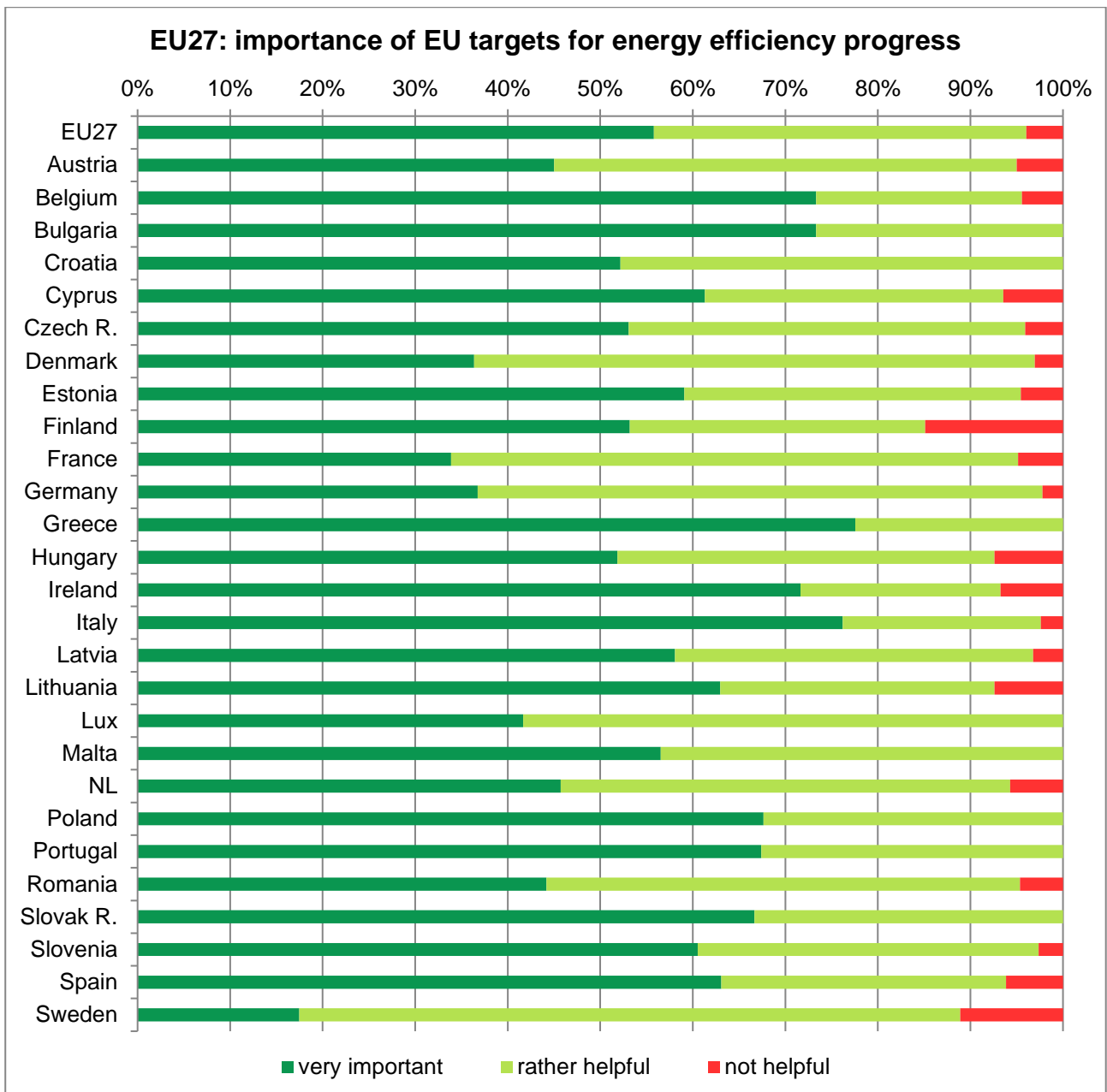
Number of countries

	 Over 70 % see them as partly/very effective	 Over 30 % see them as not effective
EE requirements for buildings	25	2
Energy labelling of products	20	2
Energy certification of buildings	18	9
Financial incentives for investments	14	10
Energy audits for companies	12	9
Programmes for local energy planning	9	9
Smart metering	5	13
EE obligations for distributors/retailers	3	17
Energy taxation	2	18
Inspection heating/air-conditioning systems	0	21

European targets and ambitions

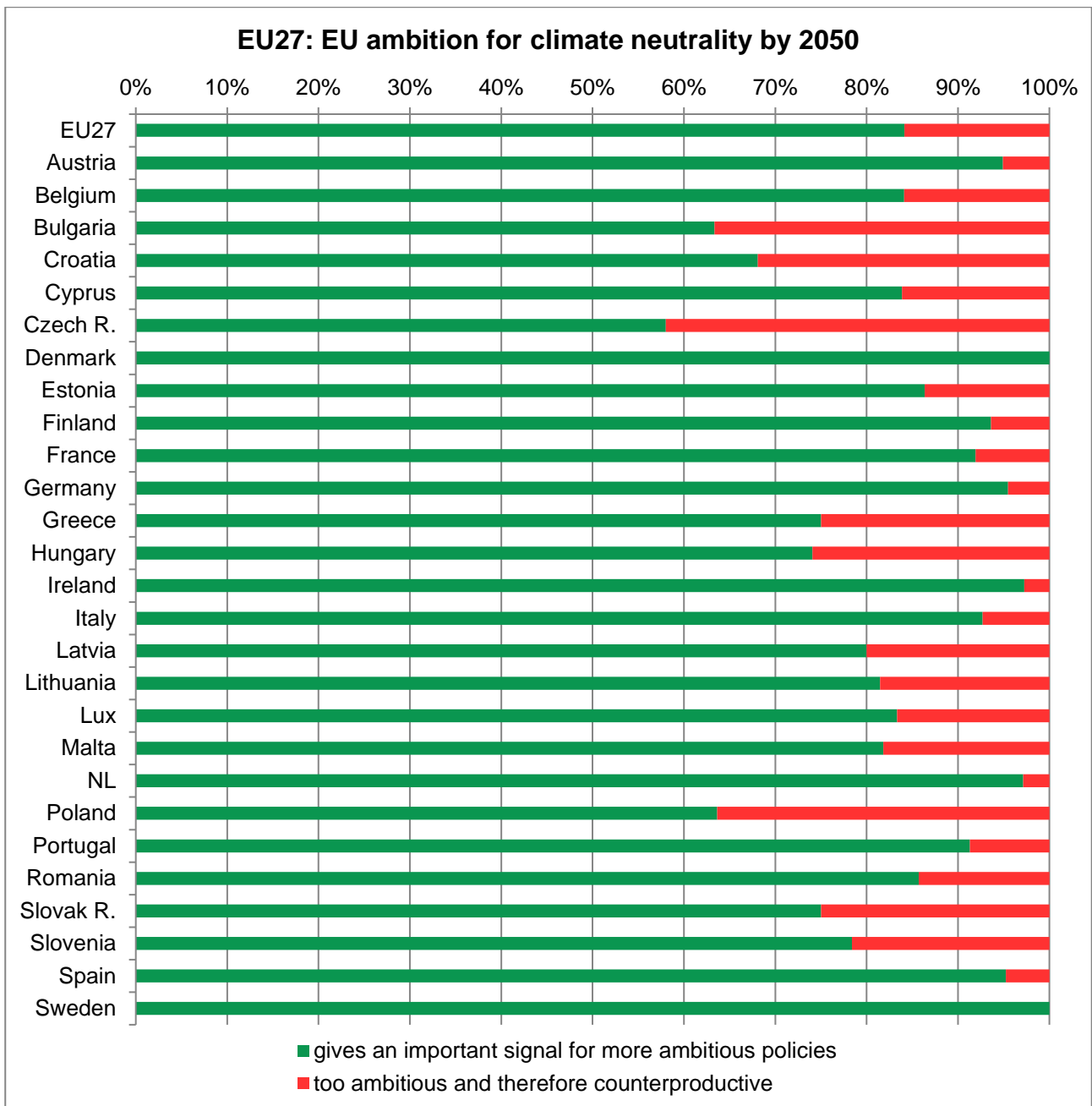
The survey also polled experts on how EU targets, directives and ambitions influence the progress in energy efficiency in their country.

The first question asked about the importance of EU targets and directives for energy efficiency progress in Member States. The results are very positive: Across all countries, 96 % of survey participants agree that EU targets and directives help drive energy efficiency progress in Member States. In eight countries, 100 % of experts consider them to be positive for progress in energy efficiency. Highest ratings for "very helpful" were given in Greece (78 %) and Italy (76 %), followed by Bulgaria (73 %), Belgium (73 %) and Ireland (72 %). The highest ratings for "not helpful" came from Finland (15 %) and Sweden (11 %).



The second question assessed how experts perceive the EU's ambition for climate neutrality by 2050 (which had been announced only a few months before the survey). In EU average, 84 % find that it gives an important signal for more ambitious policies in their country, only 16 % report that this is too ambitious and, therefore, counterproductive in their context.

Some variability is observed between Member States. In some countries, the EU's ambition is very welcome and seen positively by experts. In Denmark and Sweden, all surveyed experts welcome the EU's ambition. It is seen positively by 97 % of experts in Ireland and the Netherlands, 95 % in Austria and Germany, 94 % in Finland, and 93% in Italy. However, in Czech Republic, Bulgaria, Poland, Croatia, Hungary, Greece and the Slovak Republic, at least a quarter of experts consider this to be too ambitious and counterproductive in the context of their country.



The following question aimed at assessing where the experts see the highest need to act on European level.

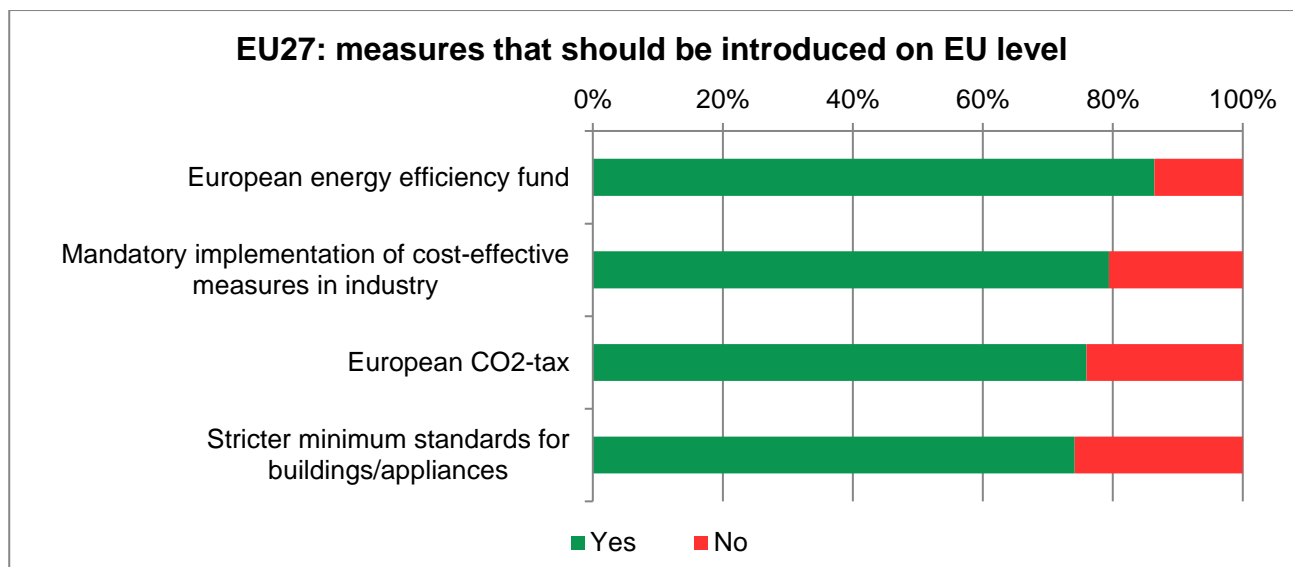
The measure that received the most support among the energy efficiency experts is "a large European energy efficiency fund (giving both grants and loans)". 86 % are in favour of its implementation on EU level – a similar result as in 2015 (84 %). In Hungary and Romania 100 % of experts support this idea, followed by Austria (97 %) and Ireland (96 %). In comparison, 37 % of the Czech experts are against it, followed by the Netherlands (32 %), and Denmark and Finland (both 31 %). Compared to the 2015 survey, the largest increase in support is seen in Austria, Sweden, Estonia and Germany, whereas the strongest decrease in support is in Czech Republic, Poland and Latvia.

The measure that found the second highest level of support among the experts is the potentially far-reaching instrument of "mandatory implementation of cost-effective

measures identified in energy audits in industry". 79 % are in favour of this – also a similar result as in 2015 (76 %). The highest levels of agreement come from Hungary (92 %), Malta (90 %) and Spain (88 %). The highest levels of disagreement are from Finland (50 % of experts are against such a measure), followed by Croatia (37 %) and Lithuania (36 %). Compared to the 2015 survey, the largest increase in support is seen in Estonia and Germany, whereas the strongest decrease in support is in Croatia and Romania.

Three quarters (76 %) of the experts would like to see the introduction of a European CO₂-tax. This is more than at the time of the 2015 survey when 67 % of experts were in favour. This measure has the highest support in Lithuania and Luxembourg (both 92 % in favour), followed by Austria and France (both 91 %), and Sweden (89 %). By contrast, 44 % of the experts from Poland are against such a measure, followed by Malta (41 %), Latvia and Finland (both 40 %). Compared to the 2015 survey, the largest increase in support is seen in Lithuania, the Slovak Republic, Luxembourg and Estonia; the strongest decrease in support is in Ireland.

Nearly as popular among the experts were "stricter minimum standards for buildings and appliances" – 74 % support this. This is the only measure that saw a slight decrease in support since the 2015 survey (78 %). In Bulgaria, 97 % are in favour of it, followed by Malta (91 %), Portugal (91 %) and Sweden (90 %). At the other end of the spectrum, 47 % of the Austrian experts are against it, followed by Luxembourg (46 %) and the Czech Republic (43 %). Compared to the 2015 survey, the largest increase in support is seen in Lithuania and Cyprus, the strongest decrease in support is in Latvia, Austria and Hungary.



Towards an improved energy transition narrative

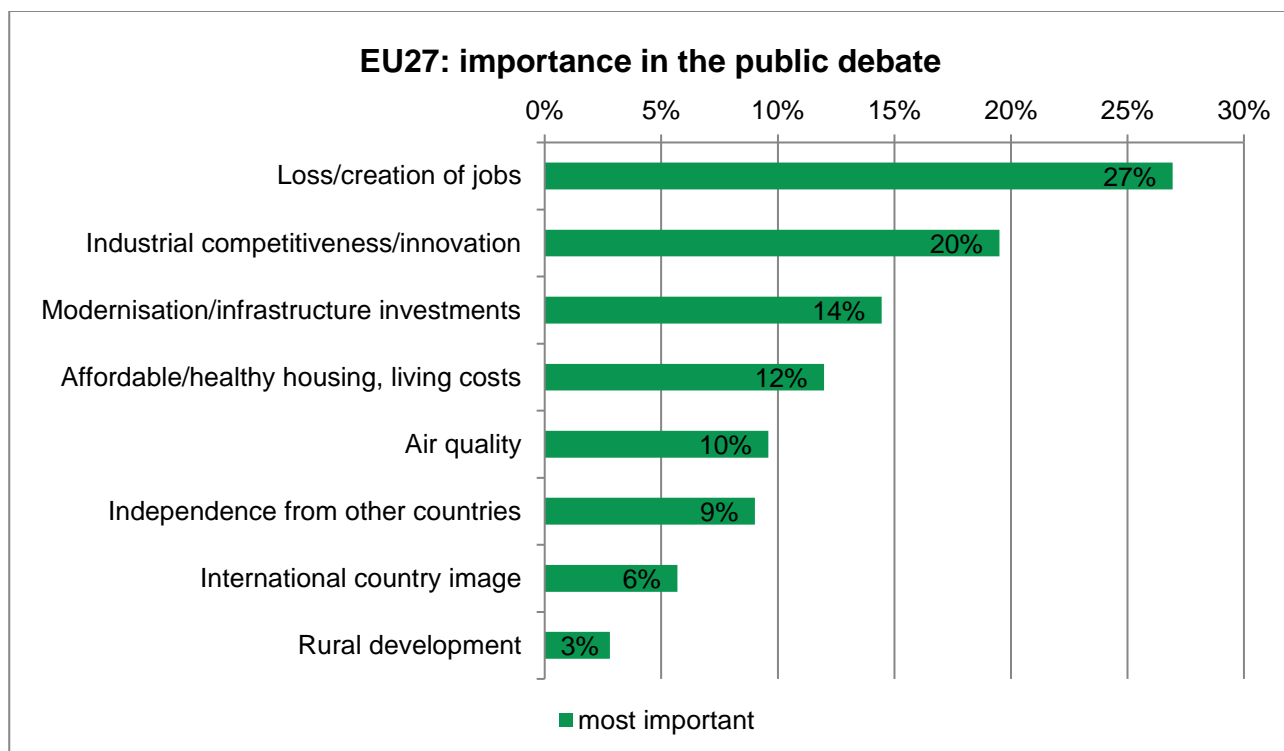
A key aspect of the EEW4 project is better understanding which topics are most likely to constitute effective and strong narratives for energy efficiency and the energy transition in general. To achieve this, the survey first aimed to pinpoint subjects which are important in the general debate in each country, and thus most likely to resonate with decision makers and citizens and trigger reactions. The second step was to see whether energy efficiency

is already linked to these topics of high interest. Finally, the survey looked at which actor groups are influential in each country and their current position regarding the energy transition, since effective narratives need a wider support among stakeholders. On pages 10-11, a description of the questionnaire development process is outlined.

A narrative is a set of accepted societal benefits - in this case of energy efficiency - in a country or a region. In addition to climate benefits, these can be economic benefits (e.g. job creation), political benefits (e.g. decreased import dependence) or social benefits (e.g. healthier buildings).

Topics of importance in the general public debate

In terms of which subjects are of key interest in the general debate (independent of energy and climate), across EU27, the most important topic is loss or creation of jobs, followed by industrial competitiveness, and modernisation and infrastructure investments. Least important in the public debate and media are the subjects of international country image and rural development.



However, there are differences across countries: Jobs are the most important subject in 14 countries, modernisation and infrastructure investments in 5 (Slovak Republic, Latvia, Bulgaria, Romania and Czech Republic), industrial competitiveness in 4 (Sweden, Finland, NL and Denmark), independence from other countries in 2 (Lithuania and Estonia), housing and living costs in 1 (Luxembourg) and air quality in 1 (Poland).

	Loss/ creation of jobs	Industrial competi- tiveness	Moderni- sation/ invest- ments	Housing and living costs	Air quality	Indepen- dence from other countries	Interna- tional country image	Rural develop- ment
EU27	1	2	3	4	5	6	7	8
Austria	1	2	3	4	6	5	7	8
Belgium	1	2	5	3	4	6	7	8
Bulgaria	2	3	1	6	4	5	7	8
Croatia	1	5	2	4	7	8	3	6
Cyprus	1	4	5	3	6	2	7	8
Czech R.	6	2	1	3	4	5	8	7
Denmark	2	1	5	6	8	4	3	7
Estonia	3	4	2	6	7	1	5	8
Finland	2	1	5	4	3	7	6	8
France	1	2	5	3	4	7	6	8
Germany	1	2	5	3	4	7	6	8
Greece	1	7	3	2	6	4	5	8
Hungary	1	4	5	8	6	2	3	7
Ireland	1	4	5	2	6	8	7	3
Italy	1	2	4	6	3	5	7	8
Latvia	4	3	1	5	6	2	8	7
Lithuania	4	2	3	5	7	1	6	8
Lux	6	2	3	1	7	5	4	8
Malta	1	6	2	4	3	8	7	5
NL	2	1	5	3	4	7	6	8
Poland	2	6	4	5	1	3	8	7
Portugal	1	2	3	4	5	7	6	8
Romania	2	5	1	7	3	6	8	4
Slovak R.	2	2	1	5	4	8	6	7
Slovenia	1	2	3	5	4	6	7	8
Spain	1	3	7	2	4	5	8	6
Sweden	2	1	3	4	7	8	5	6

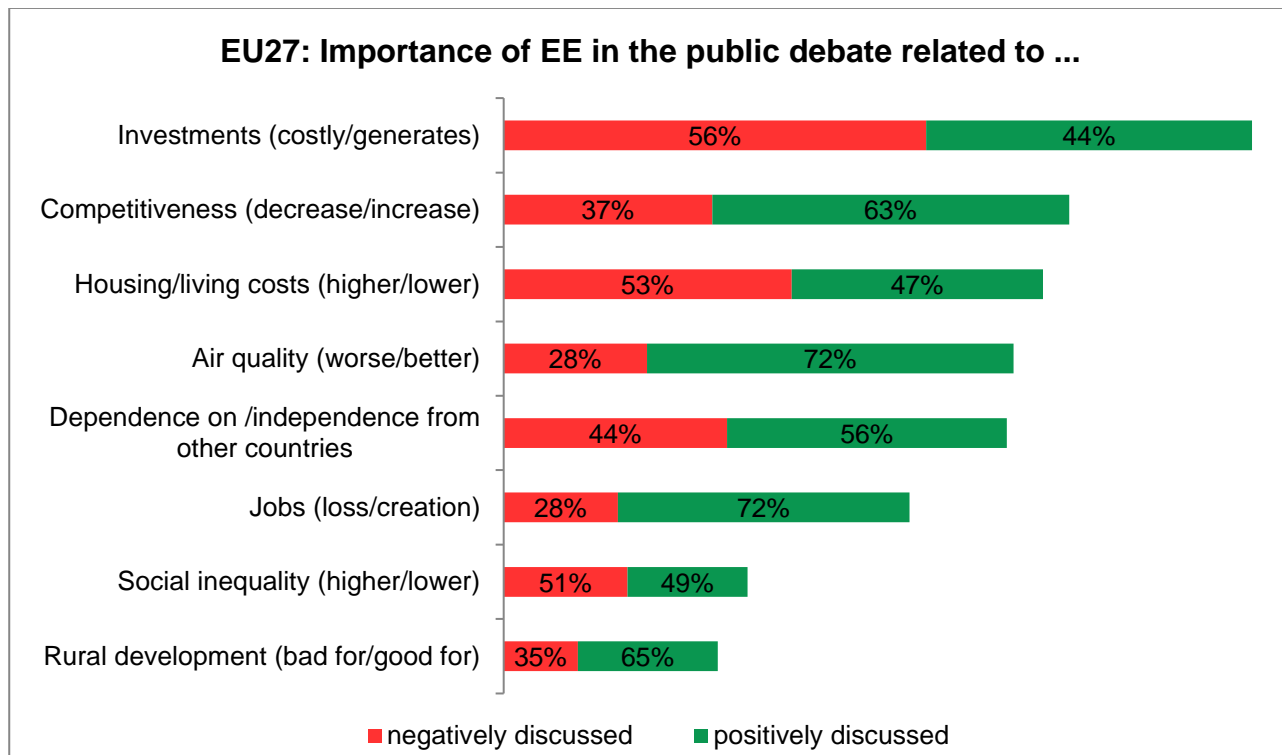
Link of these topics to energy efficiency

When looking at which subjects are linked to energy efficiency in the public debate, a rather divided picture arises. In overall terms, it is most frequently related to the issue of investments – and about equally in a negative context ("needs costly investments") as in a positive context ("generates local investments").

It is also linked similarly often to the following four subjects: competitiveness (around two thirds in a positive manner as "increasing competitiveness"), housing and living costs (about equally positively and negatively), air quality (72 % in a positive context as "improving air quality") and the dependence or independence from other countries (seen slightly more positively than negatively).

In overall terms, positive connotations are more frequently encountered than negative ones (60 % to 40 %). Nevertheless, strong narratives will also have to address these "counter-narratives" in order to be successful.

Looking at the alignment of the importance of a topic in public debate with its link to energy efficiency, a varied picture across Member States emerges: A stronger alignment between societally important subjects and the energy efficiency debate can be found in Austria, Greece, Estonia, Latvia, Lithuania and Sweden, whereas this link is not yet so well developed in Bulgaria, Cyprus, Finland, Ireland and Spain.



When looking at the perception of the link of energy efficiency on the most important issues in the public debate (jobs, competitiveness, investments, housing – see page 28) a varied picture emerges between Member States: The impact on **jobs** is seen positively in Denmark (100 %), followed by France and Greece. It is discussed most negatively in Estonia, Germany and Poland. The link to **competitiveness** is most positively debated in Denmark, Portugal and Finland; most negatively in Germany, the Netherlands and the Czech Republic. The positive generation of **investments** is most frequently linked in Greece, Denmark and France, whereas the aspect of costs ("needs costly investments") is most present in Estonia, Ireland and the Netherlands. The positive effect of energy efficiency on **housing and living costs** is most widely recognised in Croatia, Hungary and Lithuania, the negative effect most discussed in Germany, Belgium and the Netherlands.

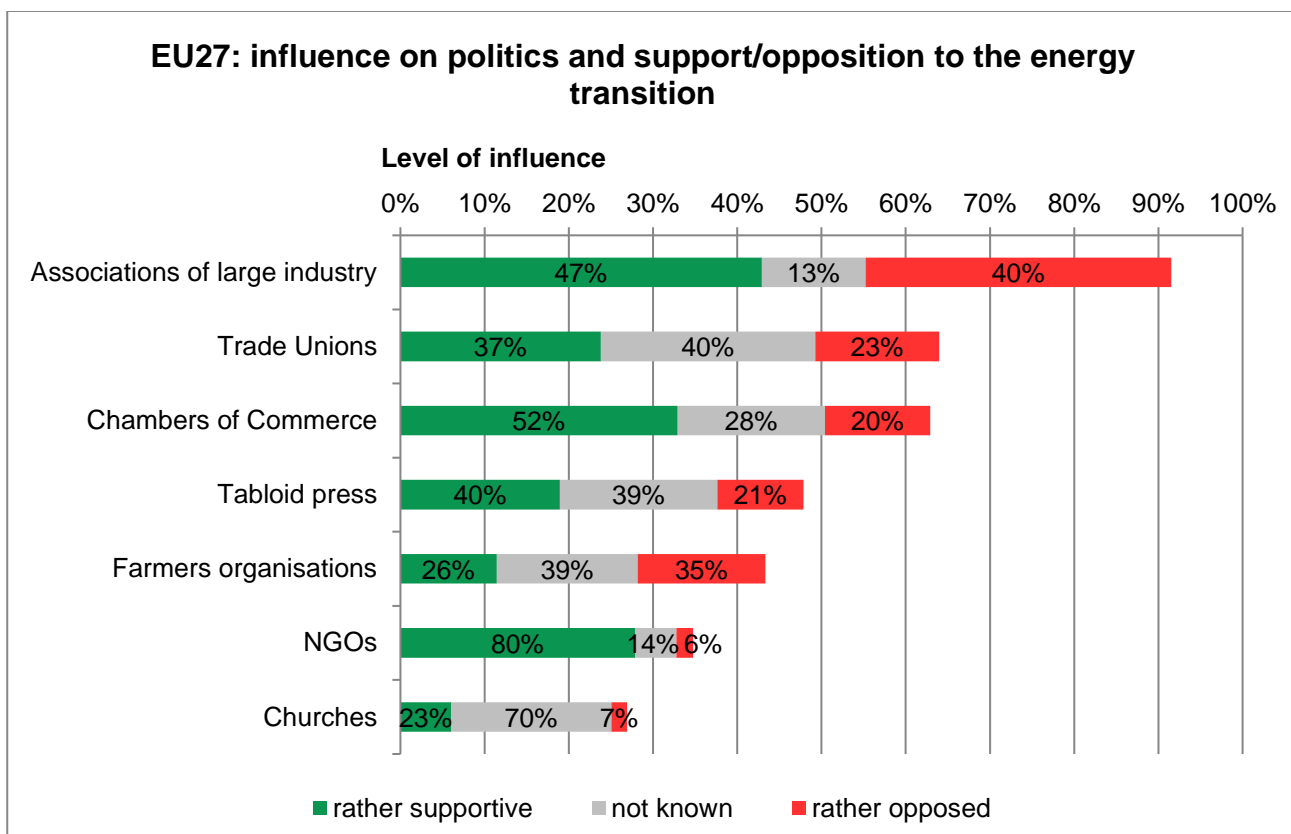
When comparing whether the debate around energy efficiency is positive or negative in overall terms, a significant spread can be found: In Portugal, Sweden and Spain, respectively 65 %, 64 % and 64 % of the answers are positive, whereas in the Netherlands and Germany, respectively 57 % and 56 % are negative, followed by Belgium and Ireland (both 50 %).

Actor groups

The third question related to the influence of different actor groups on the politics of their country and their position towards the energy transition. Narratives need to be widely supported by key actor groups in order to be effective.

Across countries, large industry is clearly in dominance. 92 % of experts rate them as very influential. This are followed by Trade Unions (64 % very influential) and Chambers of Commerce (63 %). Having three actor groups that relate to economy and employment at the top of the ranking for influence shows the primacy of these topics in politics and society.

In terms of the attitude of these actor groups towards the energy transition, a varied picture can be seen: In the EU average, associations of large industry are roughly 50 % supportive of the energy transition and 40 % opposed. For 13 % of experts, their position is not known. 37 % of experts see the overall attitude of Trade Unions as positive, 23 % see it as negative, and for 40 % it is unknown. For Chambers of Commerce, 52 % of experts report a supportive position, 20 % a negative position, and 28 % do not know.



This dominance of **large industry** is highly similar across EU countries - in 23 countries it is ranked as the most influential group. In 7 countries, 100 % of the respondents see them as "very influential", in another 13 countries, it is above 90 %. Only in Croatia and Romania this value is below 80 % (66 % and 70 % respectively). Only in 4 countries is industry not ranked as number 1 (in Croatia, Malta and Latvia it is number 2 and in Cyprus number 3).

Industry associations' importance across Member States is consistent, but their position on the energy transition greatly varies. In Austria, Germany and the Netherlands, more than 70 % of experts see a rather negative position. On the other end of the spectrum, in Denmark and Lithuania, more than 80 % observe a positive position. Also, the percentage of "position not known" is the lowest of all actor groups (13 %).

Trade Unions are ranked first in importance in Malta and second or third in 19 countries. They have the most influence in Sweden (89 % of respondents see them as "very influential"), Malta and Cyprus and least influence in Hungary (with the lowest value of 17 %), Estonia and Croatia. Also in this group, there is a rather wide range of attitudes towards the energy transition: most positive in Denmark, Finland and Sweden (rated supportive by respectively 71 %, 59 % and 58 % of experts), most negative in Germany, Austria and Poland (respectively 46 %, 40 % and 40 % opposed). The percentage of "position not known" is highest in Hungary and Lithuania.

Chambers of Commerce are ranked first in 2 countries (Cyprus and Latvia) and second or third in 12 countries. They are most influential in Latvia (rated "very influential" by 100 % of experts) and Austria (97 %). Their position on the energy transition is most positive in Malta and Cyprus, least positive in Austria and Germany.

Tabloid press is most influential in Greece, Portugal and Spain, most supportive of the energy transition in Malta, and most opposed in the Netherlands. **Farmers organisations** are highly influential in Ireland (rated "very influential" by 90 %), the Netherlands and Denmark. They are most supportive of the energy transition in Sweden, and least supportive in the Netherlands and Ireland. NGOs are not seen as highly influential on politics except for in the Netherlands. Similar goes for Churches (except in Croatia, Greece and Hungary).

Looking at total results, 44 % of all actor groups are seen as having a positive attitude towards the energy transition and 22 % as negative. The percentage of positive attitudes is highest in Sweden (59 %), Malta and Finland, of negative attitudes in Germany, the Netherlands and the Czech Republic.

For 35 %, the position on the energy transition was not known (highest in Portugal and Croatia, lowest in Germany, Austria and Denmark). These actor groups could possibly be interesting new allies for the energy transition (it might be easier to convince an organisation that has not yet communicated its position to take a positive stance towards the energy transition in public than changing the attitude of those with a negative opinion).

	Assoc. of large industry	Trade Unions	Chambers of Commerce	Tabloid press	Farmers organisations	NGOs	Churches
EU27	1	2	3	4	5	6	7
Austria	1	3	2	4	5	6	7
Belgium	1	2	3	6	4	5	7
Bulgaria	1	4	2	3	6	5	7
Croatia	2	3	4	5	6	7	1
Cyprus	3	2	1	5	6	7	4
Czech R.	1	3	2	5	4	6	7
Denmark	1	2	5	6	3	4	7
Estonia	1	4	2	3	4	4	7
Finland	1	2	4	3	5	6	7
France	1	2	4	5	3	6	7
Germany	1	2	4	5	3	6	7
Greece	1	4	5	3	7	6	2
Hungary	1	5	2	4	6	6	3
Ireland	1	3	4	5	2	6	7
Italy	1	2	5	3	6	7	4
Latvia	2	4	1	6	3	4	7
Lithuania	1	5	3	4	2	6	7
Lux	1	3	2	5	5	4	7
Malta	2	1	3	4	7	5	5
NL	1	4	6	5	2	3	7
Poland	1	3	7	4	5	5	2
Portugal	1	3	4	2	7	5	6
Romania	1	2	6	3	7	5	4
Slovak R.	1	2	2	6	6	5	4
Slovenia	1	2	3	5	6	4	7
Spain	1	3	4	2	6	7	5
Sweden	1	2	3	6	5	4	7

Key input factors for narrative development

Effective and strong narratives for the energy transition are needed to further drive change. The results of the survey provide information for narrative development in each country and across the EU. The data help to focus on topics and actor groups of importance in a specific country context and identify possible weaknesses in the current way energy efficiency and the energy transition are being approached and discussed in the public debate.

In order to be strong and widely adopted, new or strengthened narratives have to resonate with topics of general importance in society and have the support of important stakeholder groups. Often as a part of this process, counter-narratives need to be addressed and opposed stakeholder groups convinced.

The results of this survey are meant to support the development of wider societal narratives. In this sense, they aim to assist in focusing on the most important topics and stakeholder groups. Clearly, if a narrative is developed for a specific group (e.g., an

important actor group or a political party), then both the key topics and stakeholder groups are likely to vary.

In order to support such a narrative development process, the following chart summarises the results of the relevant survey questions. It should assist in cross-analysing the results and extracting of main elements for narrative as well as focusing on key topics and critical stakeholder groups (this is why detailed data are only presented for important topics and stakeholder groups).

The upper half of the chart focuses on the **topics** and presents:

- different topics present in the general debate and addressed by the survey (column 1)
- the ranking of these topics according to their importance in the general public debate, independent of energy and climate (column 2). This shows which topics resonate the most with members of society and attract their interest and attention.
- a ranking of how strongly these topics are already linked to energy efficiency in the public debate (column 3). This enables to see whether energy efficiency is being discussed in relation to the topics that interest people the most.
- whether these topics are positively or negatively discussed (columns 4 and 5)
- topics that are less important in the public debate (in grey)

The lower half of the chart deals with important **actor groups** and shows:

- the actor groups addressed in the survey (column 1)
- their ranking in regard to their level of influence on politics (column 2). This is meant to help in focussing on influential stakeholder groups and in gathering their support for the energy transition.
- these actor groups' position on the energy transition – expressed as the share of experts that perceive them as supportive, opposed or unknown (columns 3, 4 and 5)
- topics that are less important in the public debate (in grey)
- stakeholder groups that are less influential on politics (in grey)

Logically, **topics of high importance** in society are those that are most likely to catch people's attention and get them interested in related benefits. Therefore, it is key to know which topics currently resonate with people. It is equally important to understand what topics are not perceived as top priorities for society, since concentrating energy efficiency and the energy transition discussions around these topics would not have the desired level of impact.

In the EU27, jobs, industrial competitiveness, and investments are of highest importance in the public debate. In comparison, rural development, dependence/independence from other countries and air quality spur much less interest.

When comparing the **current positioning of energy efficiency in the public debate** to subjects identified as generally important, we can see that the most important subject – jobs – is low on the list (only number 6). On the positive side, it is mostly considered in a

positive manner. Industrial competitiveness, the second most important topic, is also second in ranking for its link to energy efficiency – so better aligned to topics of high importance and it is mostly positive. Modernisation and investments in infrastructure is ranked third in terms of its list for its importance in the general public debate. It is, however, the subject most strongly linked to energy efficiency. Here the debate is less positive than for jobs and competitive (negative aspects are discussed slightly more often than the positive aspects).

Similarly, understanding which **actor groups** are most influential on politics in a specific country context is an essential element, since effective narratives need wider stakeholder support. Across the EU Member States, associations of large industry, Trade Unions and Chambers of Commerce have the largest influence on politics. The views and actions of Churches, NGOs, farmers organisations and the tabloid press have much lower impact.

When analysing the actor groups' positions, the results for the EU27 show that the three most influential groups (associations of large industry, Trade Unions and Chambers of Commerce) are slightly more supportive of the energy transition than opposed.

EU27: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	72 %	28 %
Industrial competitiveness	2	2	63 %	37 %
Modernisation / investments	3	1	44 %	56 %
Housing / living costs	4	3		
Air quality	5	4		
Independence from other countries	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	47 %	13 %	40 %
Trade Unions	2	37 %	40 %	23 %
Chambers of Commerce	3	52 %	28 %	20 %
Tabloid press	4			
Farmers organisations	5			
NGOs	6			
Churches	7			

The following table provides some initial guidance on the narrative development process. In the following steps of the EEW4 project, this will be further refined, mostly based on stakeholder discussions and literature analysis.

Step 1 Important topics and actor groups → FOKUS

- Which topics are of key importance and which are not?
- Are the important topics already linked to energy efficiency or not?
And are they discussed in a positive or negative manner?
- Which actor groups are of key importance and which are not?
Are the important actor groups supportive of the energy transition or opposed?
What could be the "Why" (perceived key benefits) for a specific group?

Step 2 Other current and important trends → CONTEXT

- Which overall factors are currently strongly influencing the public debate?
- Which political groups are currently most important and what arguments do they use?
- Are there other external factors?
-

Step 3 Strategic planning and communication → NARRATIVE DEVELOPMENT

- Changes in messaging:
 - own messaging, that of own organisation, influencing others' messaging
 - focus on the "Why" for different groups in society
- Choose actor groups to focus on (e.g., key stakeholder group, political group):
 - supportive or opposed group?
 - are there "champions" in this group (for a deeper understanding of the views of this group and for "test" purposes)?
- Which arguments on key benefits ("why") could work specifically for this group?
 - Are these arguments currently discussed positively or negatively?
 - Do you have data to show the positive impacts around these arguments
 - Which arguments to stay away from (because they can backfire)?
- How to deal with "fake facts" and "killer arguments"?
- Which communication channels to use?
- Which "alliances" can be built?
etc.

Step 4 Implementation → NARRATIVE TESTING and ROLL-OUT

Survey results by Member State

The following chapter summarises the main results of the survey, first on a country-by-country basis and then across the Member States.

As with any survey, the results in this report present the perceptions of the interviewees and their opinions on energy efficiency policies and potential narrative elements in their own countries. This report is not an analysis of the absolute levels of energy efficiency in each Member State based on common measurement indicators, but rather the views on the progress in energy efficiency policies in each Member State of the experts in that specific country. Therefore, these results are not the views of the authors of this study.

The focus of the survey was to get an impression on the progress of energy efficiency policies in the last years and not to establish a ranking of absolute levels of energy policy developments. Additionally, it gathers inputs for narrative development.

Surveys are always "snapshot pictures" that are influenced by current events. The survey was carried out between February and June 2020. Country specific and overall results should be seen in this timing context.

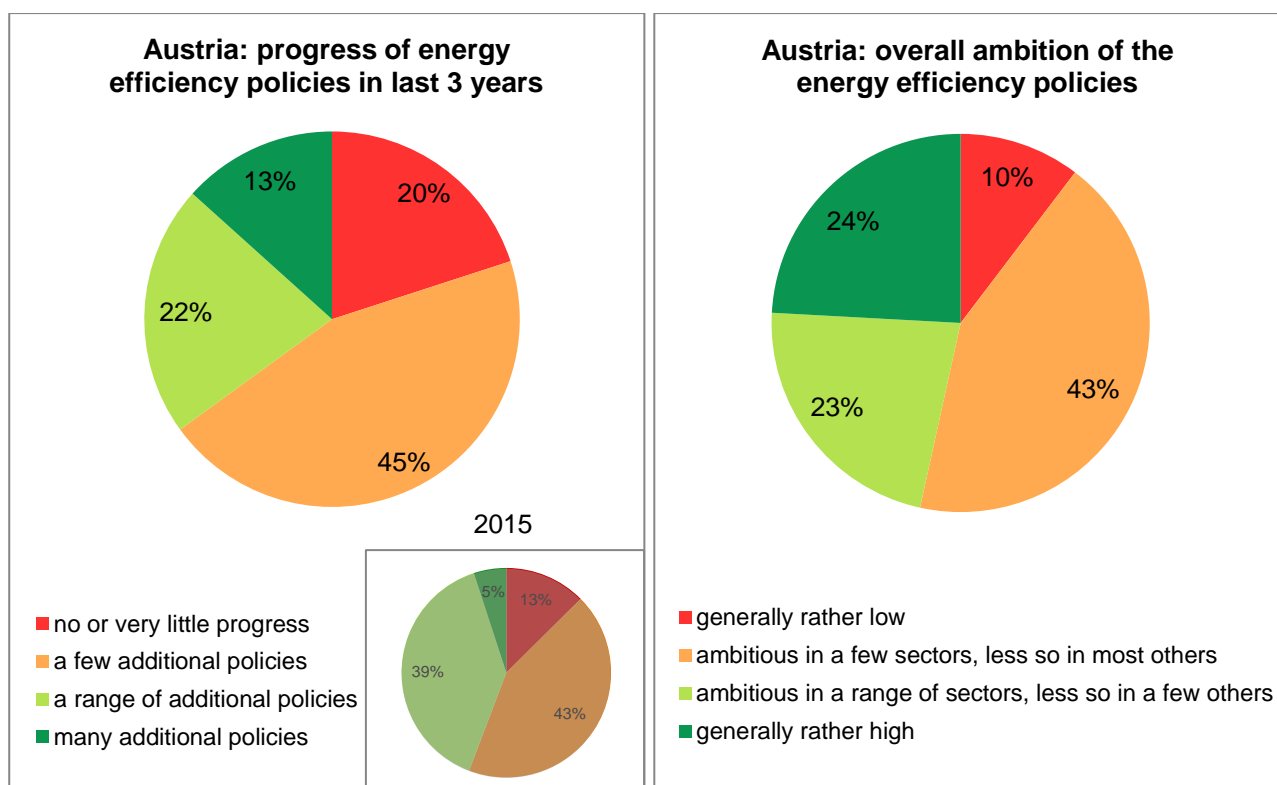
The following reports show the country specific analysis of the survey results (countries in alphabetical order). It highlights issues that stood out either positively or negatively from the comparison across countries. Where relevant, it compares results of the 2020 survey to those of the 2015 survey, and occasionally to the 2012 survey (see page 9).

Austria



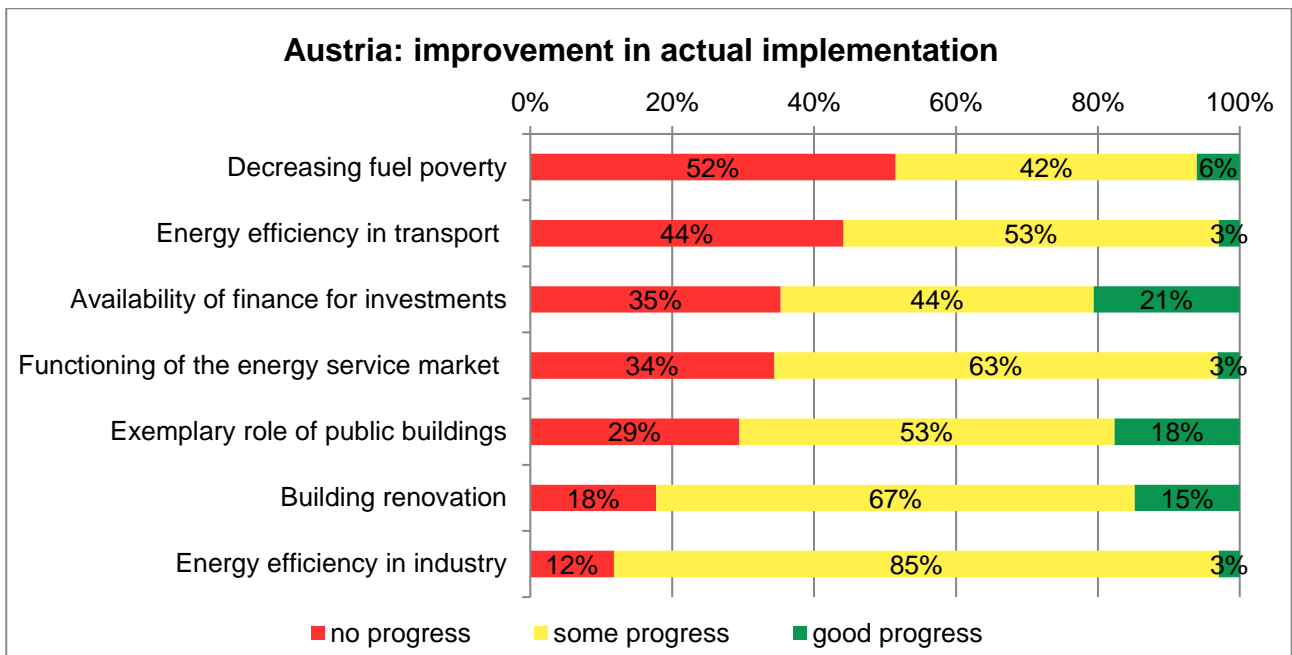
According to survey participants, Austria is among the Member States that have made medium progress in energy efficiency policies over the past 3 years (country progress indicator: 13 out of 27 – see page 14). After progressing comparatively well between the 2012 and 2015 surveys, the rate of progress has significantly slowed down and Austria has fallen back to its ranking of 2012 (country progress indicator: 5 in 2015, 13 in 2012).

One third of experts (35 %) find that a range or many additional policies were put in place in the past 3 years – somewhat less than in the 2015 survey (45 %) which looked back on the period 2012-2015. Opinions on the overall ambition of energy efficiency policies are divided: 53 % consider it as relatively low whereas 47 % find it ambitious in at least a range of sectors (similar results as in 2015).



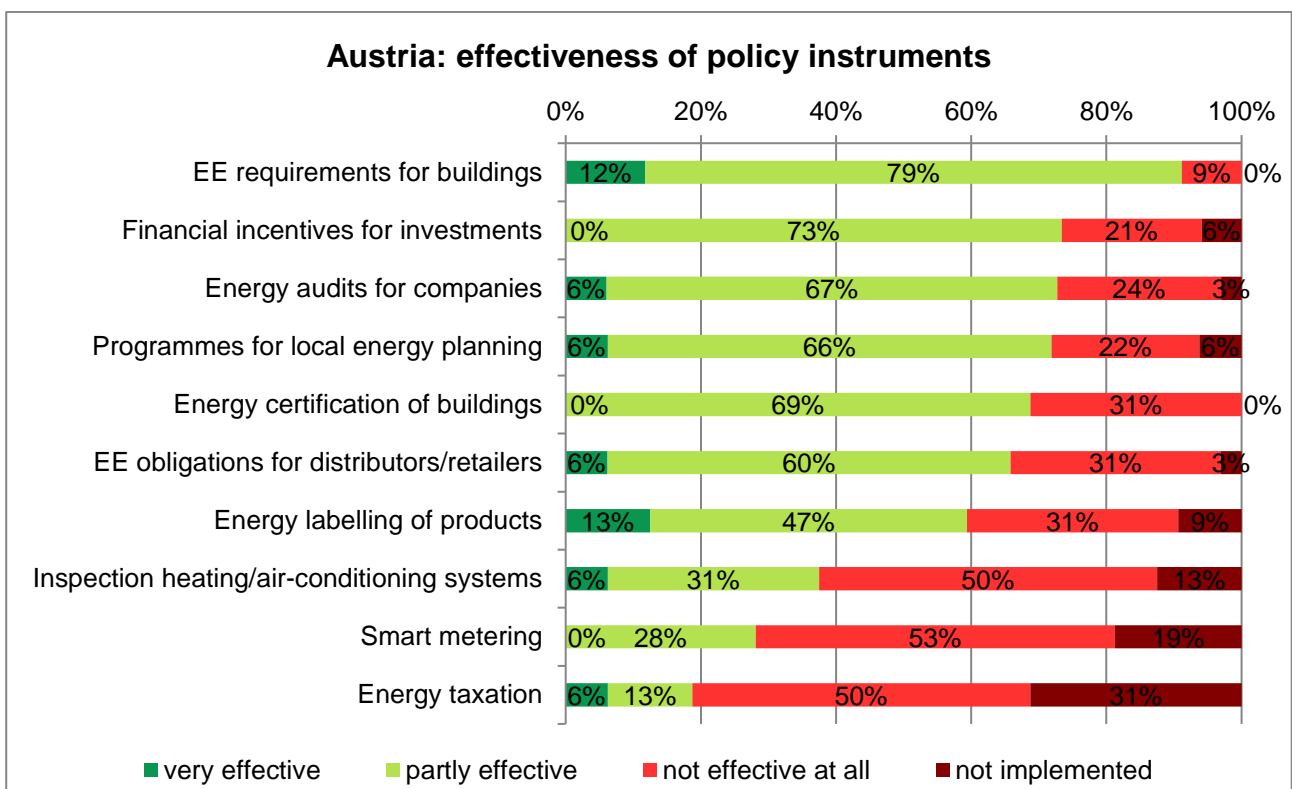
In regard to improvements in actual implementation of policies in the past 3 years, Austrian experts report progress rates similar to EU27 average levels. Experts saw the most progress in recent years in the areas of energy efficiency in industry and building renovation. 88 % and 82 % of experts report some or good progress in these fields. Similar to 2015 results, the highest ratings for "no progress" are given to decreasing fuel poverty (52 %) and energy efficiency in transport (44 %).

The experts report a slowdown in the rate of relative progress in almost all policy areas compared to the 2015 results – particularly regarding the exemplary role of public buildings – and one of the strongest overall decreases in progress among Member States.



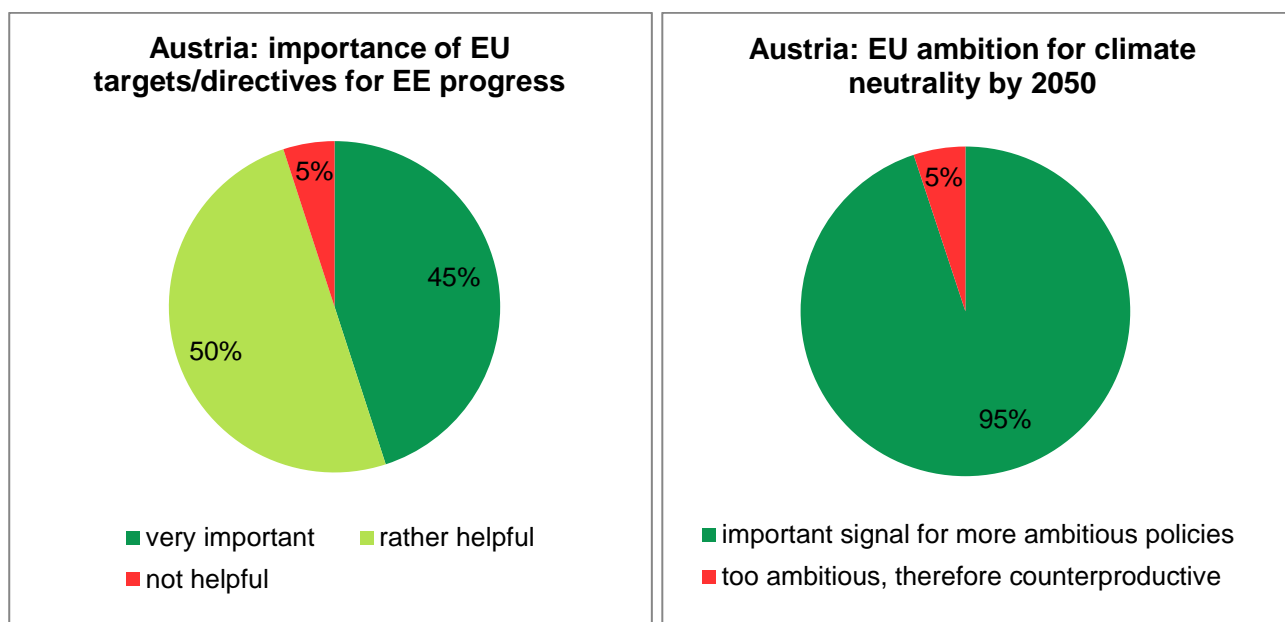
Among specific energy efficiency policy instruments, energy requirements for buildings are perceived as the most effective in the Austrian context. 91 % of surveyed experts rate it partly to very effective. This is followed by financial incentives for investments and energy audits for companies (both 73 %) and programmes for local energy planning (72 %).

The highest ratings for "not effective at all" are given to smart metering (53 %), energy taxation (50 %) and the inspection of heating/air-conditioning systems (50 %) – all among the highest in the EU. In general terms, Austrian experts see relatively low effectiveness ratings for a range of instruments, including smart metering, energy certification of buildings and energy labelling of products.



95 % of surveyed experts see EU targets and directives as positive for the progress of energy efficiency in Austria. 45 % consider them "very important" and 50 % "rather helpful".

Compared to other countries, experts in Austria are very supportive of the EU ambition for climate neutrality by 2050. 95 % consider it gives an important signal for more ambitious policies (EU27 average: 84 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Austria (for more details on the content of this table and how to analyse it, see page 32):

Austria: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	3	66 %	34 %
Industrial competitiveness	2	2	51 %	49 %
Modernisation / investments	3	1	46 %	54 %
Housing / living costs	4	4		
Independence from other countries	5	5		
Air quality	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	25 %	0 %	75 %
Chambers of Commerce	2	27 %	10 %	63 %
Trade Unions	3	25 %	35 %	40 %
Tabloid press	4			
Farmers organisations	5			
NGOs	6			
Churches	7			

In Austria, the most important topics in the general public debate are by far ‘loss and creation of jobs’ (with among the highest ratings of all Member States) and ‘industrial competitiveness’. They are followed by ‘modernisation and investments’ in rank 3 and ‘housing and living costs’ in rank 4 (with similar levels of importance). This is the same top-4 ranking as for EU27.

When asked about which subjects are currently linked to energy efficiency in the public debate, the same topics come out in the top, albeit in a different order: modernisation/investments (rank 1), industrial competitiveness (rank 2) (both discussed to a similar extent positively and negatively) and jobs (rank 3, 66 % discussed positively).

Survey results show that energy efficiency is already being strongly discussed in relation to the topics of high interest for society. Compared to other countries, Austria is among the Member States with the strongest alignment between arguments used in the energy efficiency debate and subjects of high interest for society. This could provide a good basis for positive narrative development and roll-out. However, in general, energy efficiency is discussed less positively in Austria than in many other Member States.

As in almost the entire EU, economic actor groups have the highest level of influence on Austrian politics. Associations of large industry rank first in influence (rated very influential by 100 % of experts), followed closely by the Chambers of Commerce (97 % very influential). Trade Unions come in third position. Overall, experts report that actor groups have more influence on politics in Austria than in most other Member States – making them interesting potential allies for driving change in society.

However, according to the experts, the energy transition does not yet find significant support among the most influential actor groups. In comparison to other EU countries, Austria ranks only 22 of 27 in regard to actor groups' support of the energy transition. Large industry and Chambers of Commerce are perceived as opposed to the energy transition by respectively 75 % and 63 % of experts. Trade Unions also received one of the highest ratings for "rather opposed" of all Member States, but seem to have an ambivalent and unclear position.

In conclusion, energy efficiency seems to be well positioned in the public debate in Austria and discussed in relation to some of the key topics for society. However, there seems to be a need for positive arguments for energy efficiency to help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

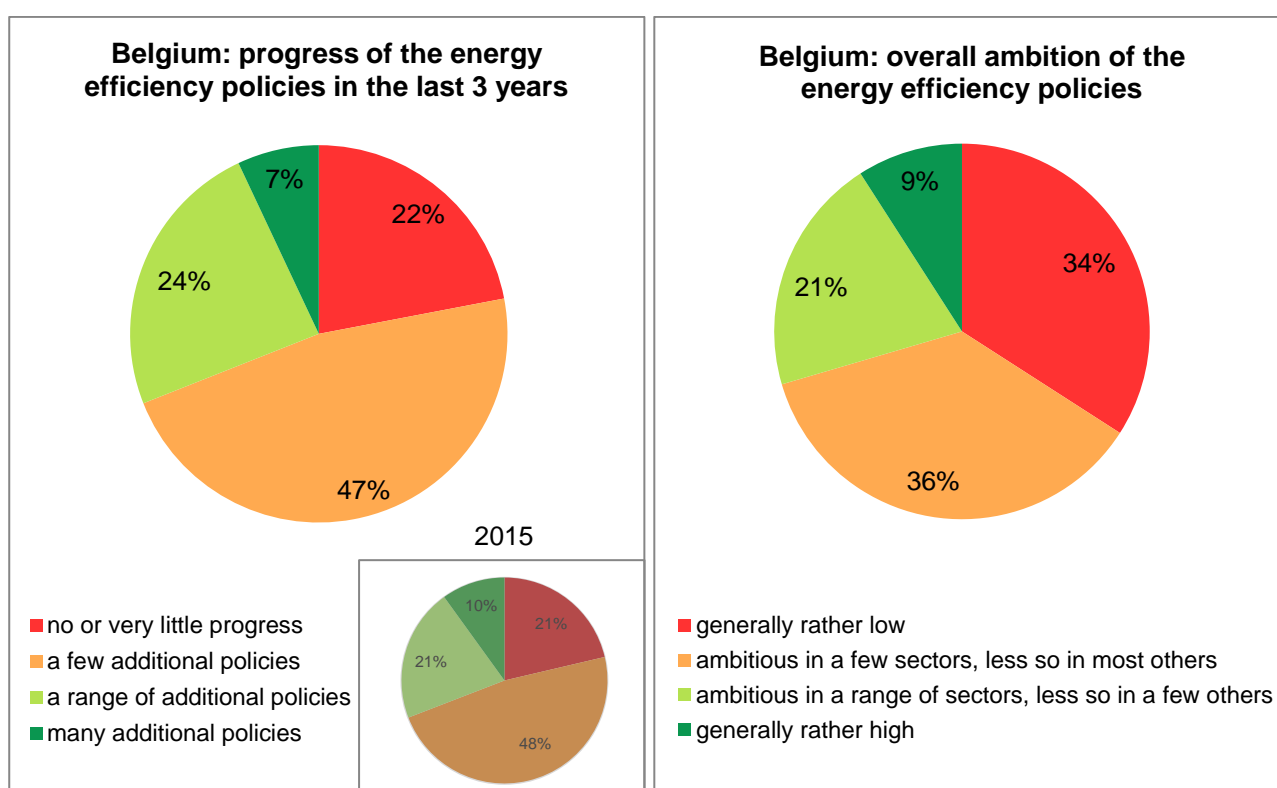
Considering their level of influence, it would be useful to gain stronger support from economic actors as stronger allies for the energy transition debate, especially since their agendas seem to coincide with topics of high interest for society (jobs, industrial competitiveness, modernisation/investments). Working with these groups and providing positive arguments in line with their ambitions (and backed with numbers) could contribute to increasing their support of the energy transition. In general terms, creating narratives that economic actor groups can "buy into" could have significant positive effect on triggering change.

Belgium

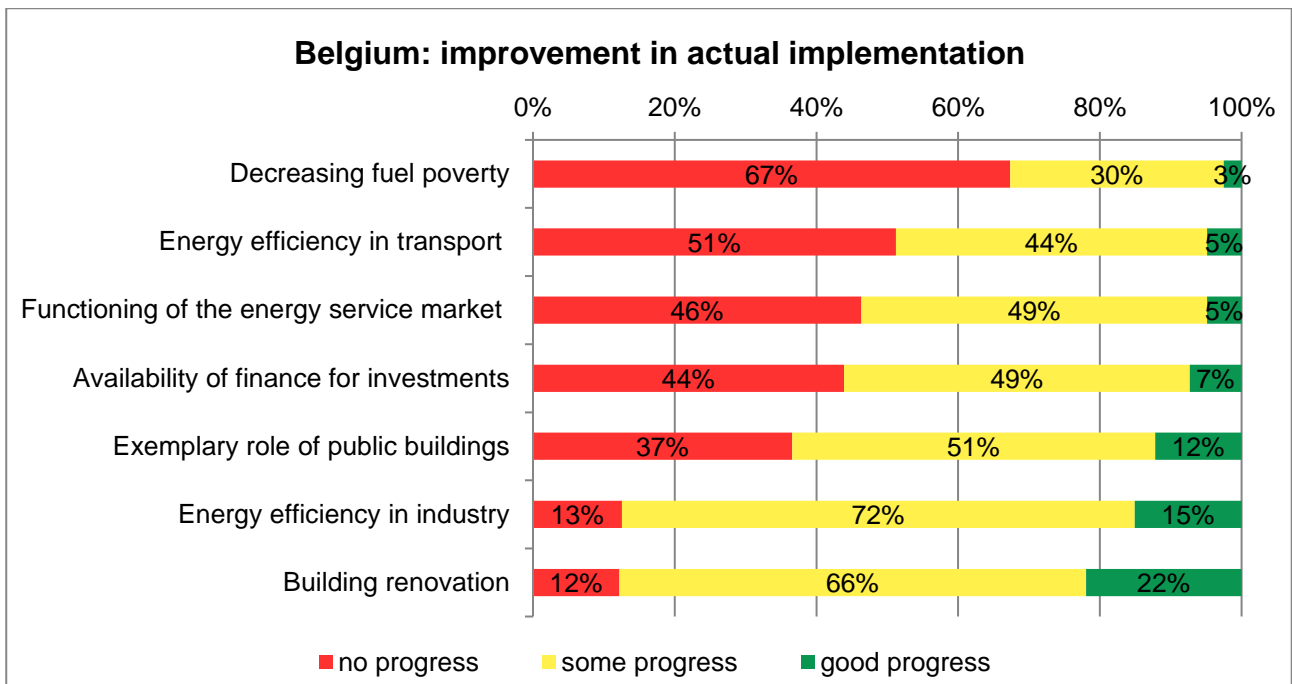


According to Belgian experts, Belgium is among the Member States that have made relatively little progress in energy efficiency policies over the past 3 years (country progress indicator: 22 out of 27 – see page 14). The rate of progress has significantly slowed down since 2015 (2015 survey: country progress indicator: 13 out of 28).

69 % of the survey participants report that no or only a few additional policies were introduced in the last three years. Only 31 % saw a range or many additional policies (among the lowest across the EU). These results are very similar to those of the 2015 survey (which looked back on the period 2012-2015). The majority of experts (70 %) consider the overall ambition of the energy efficiency policies as relatively low.



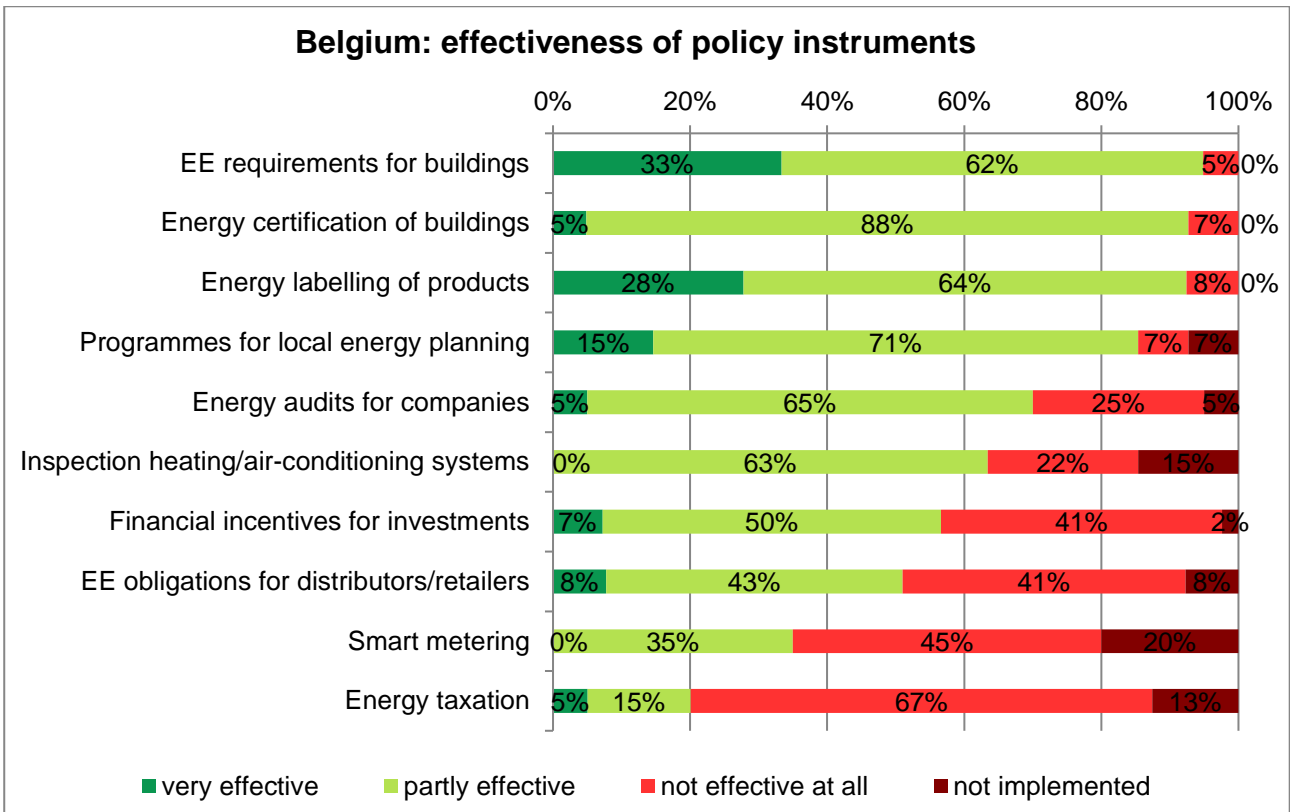
In terms of improvements in actual implementation, most progress was made in building renovation and energy efficiency in industry. Nevertheless, the levels of improvement reported are below EU27 average in almost all categories. Improvements in availability of finance for energy efficiency investments and decreasing fuel poverty are among the lowest of all Member States.



Regarding specific energy efficiency instruments, energy efficiency requirements for buildings, energy certification of buildings and energy labelling of products are seen as the most effective in the Belgian context (rated as "very effective" or "partly effective" by 95 %, 93 % and 92 % of experts, respectively).

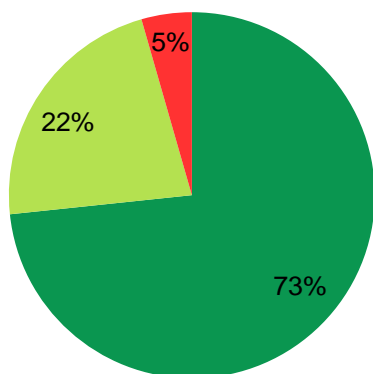
Since 2015, the effectiveness of some instruments went up, that of others went down. Significant increase in effectiveness was made in energy certification of buildings (the rate of "not effective" went down from 28 % to 7 %) and energy labelling of products. In comparison, the highest rating for "not effective at all" was given to energy taxation (67 %). Financial incentives for energy efficiency investments received one of the lowest effectiveness rating of all Members States (rated "not effective at all" by 41 % of Belgian experts).

Belgium: effectiveness of policy instruments



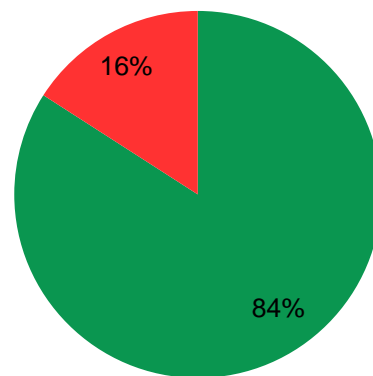
In total, 95 % of the experts consider EU targets and directives to be important and helpful for the progress in energy efficiency in Belgium. 73 % rated them as "very important" – among the highest rating of all Member States and significantly above EU27 average (56 %). 84 % find the EU ambition for climate neutrality by 2050 offers an important signal for more ambitious policies (same as EU27 average).

Belgium: importance of EU targets/directives for EE progress



■ very important ■ rather helpful
■ not helpful

Belgium: EU ambition for climate neutrality by 2050



■ important signal for more ambitious policies
■ too ambitious, therefore counterproductive

Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Belgium (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	5	85 %	15 %
Industrial competitiveness	2	3	51 %	49 %
Housing / living costs	3	2	28 %	72 %
Air quality	4	4		
Modernisation / investments	5	1		
Independence from other countries	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	35 %	2 %	63 %
Trade Unions	2	45 %	26 %	29 %
Chambers of Commerce	3	51 %	19 %	30 %
Farmers organisations	4			
NGOs	5			
Tabloid press	6			
Churches	7			

In Belgium, as in the majority of EU countries, the loss and creation of jobs and industrial competitiveness are the most important topics in the general public debate. The topics of affordable/healthy housing and living costs ranks 3rd (rank 4 in EU27).

When asked about which subjects are most often linked to energy efficiency in the general debate, experts first mentioned modernisation and investments, and the costs of housing/living. Both topics are primarily discussed negatively in regard to energy efficiency. This was followed by industrial competitiveness (discussed equally positively and negatively). In comparison, the link between energy efficiency and the topics of air quality and jobs are discussed largely positively in society. In overall terms, energy efficiency is perceived less positively in Belgium than in most other Member States (rank 24 in the EU for positive perception).

In terms of linking topics of highest interest (i.e., jobs, industrial competitiveness, housing / living costs) to positive energy efficiency arguments and narratives, results show that positive perception of job creation is currently overshadowed by negative cost arguments which would need to be addressed.

The dominance of economic factors continues when asked which actor groups are influential on Belgian politics. 100 % of the experts report that associations of large industry are very influential, followed by Trade Unions and Chambers of Commerce. This is the same top-3 ranking as for EU27 overall.

When asked how supportive these groups are of the energy transition, a divided picture emerges. Associations of large industry are reported as rather opposed by 63 % of survey participants. Around half of the experts consider the Trade Unions and Chambers of Commerce to be rather supportive. In overall terms, it seems that Belgian actor groups position themselves more clearly either in favour or against the energy transition than in most other EU countries (the percentage of "position not known" is smaller than in most other EU countries).

In conclusion, considering the level of influence economic actors have on Belgian politics, it could be helpful to work towards narratives they can "buy into" (e.g., industrial competitiveness). Economic actors already in favour of the energy transition (Trade Unions, Chambers of Commerce) could be interesting allies for the energy transition debate, particularly since their agendas seem to coincide with topics of high interest for society.

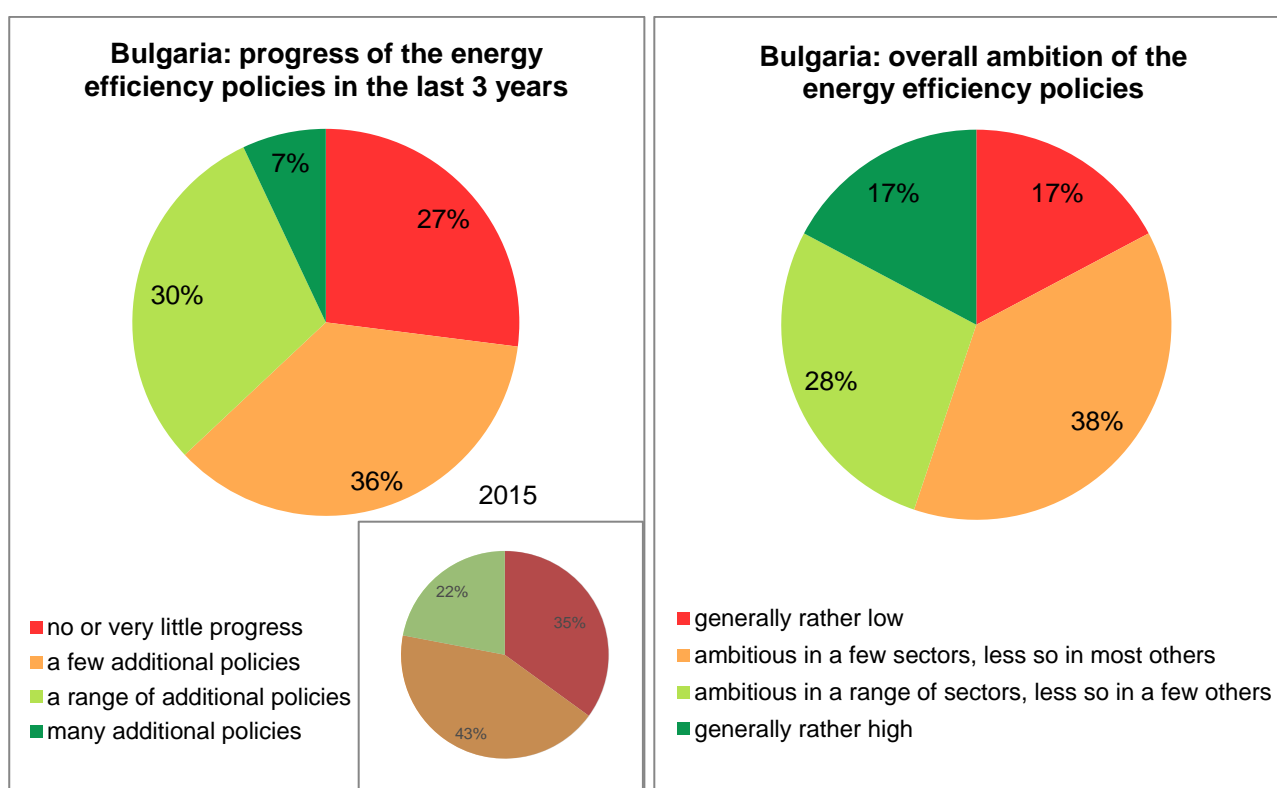
The development of new narratives could benefit from taking into account the importance of 'jobs' in the public debate and addressing this topic with positive numbers and data. Current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions.

Bulgaria



According to survey participants, Bulgaria is among the Member States that have made medium progress in energy efficiency policies over the past 3 years (country progress indicator: 13 out of 27 – see page 14). Since 2015, the comparative rate of progress has significantly increased (2015 survey: country progress indicator: 23 out of 28.)

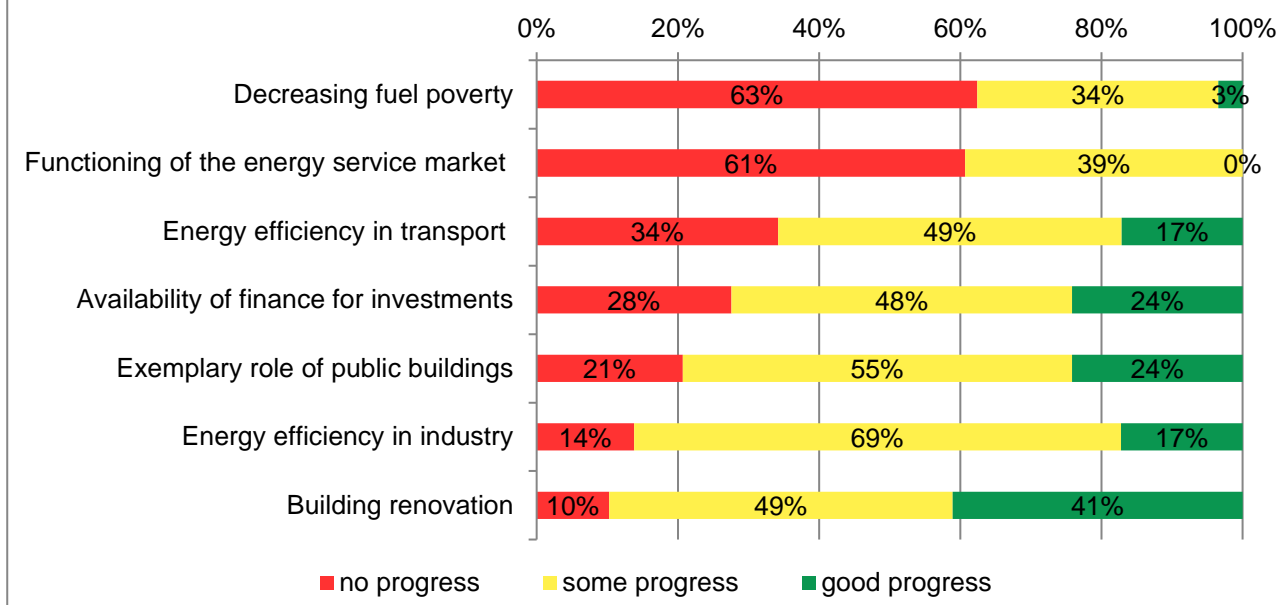
Nearly two thirds of the experts (63 %) report that no or only a few additional policies were put in place in recent years. However, we see a somewhat positive development since this number was 78 % in the 2015 survey (which looked back on the period 2012-2015). 55 % of the experts rank the overall ambition of energy efficiency policies as generally rather low or only partially ambitious – significantly more than in 2015 (31 %).



According to the experts, Bulgaria has achieved improvements in actual implementation of nearly all policy instruments and shows one of the largest relative improvements of all Member States compared to responses in the 2015 survey. The most significant improvements were made for building renovation and energy efficiency in industry.

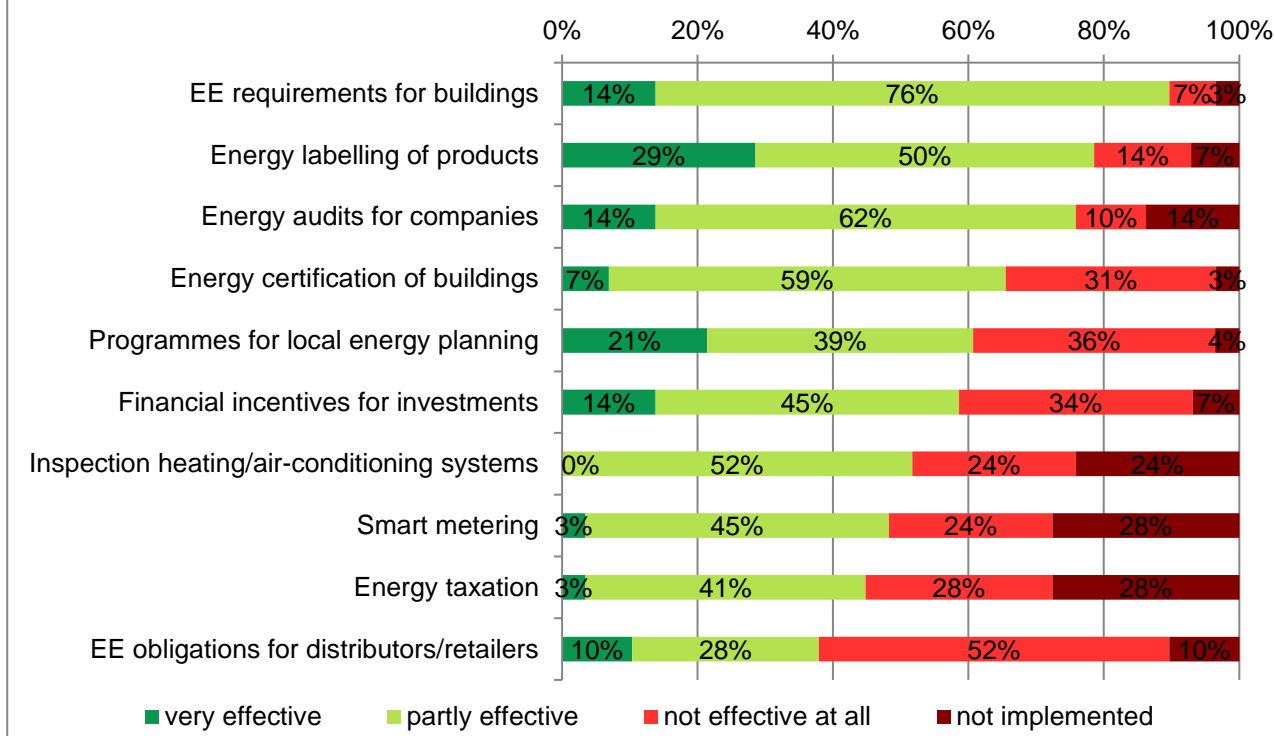
Despite having greatly improved since 2015, the progress of energy efficiency in industry in Bulgaria is the lowest of all Member States. Least progress was made in decreasing fuel poverty and in the functioning of the energy service market (both values are among the lowest in the EU).

Bulgaria: improvement in actual implementation

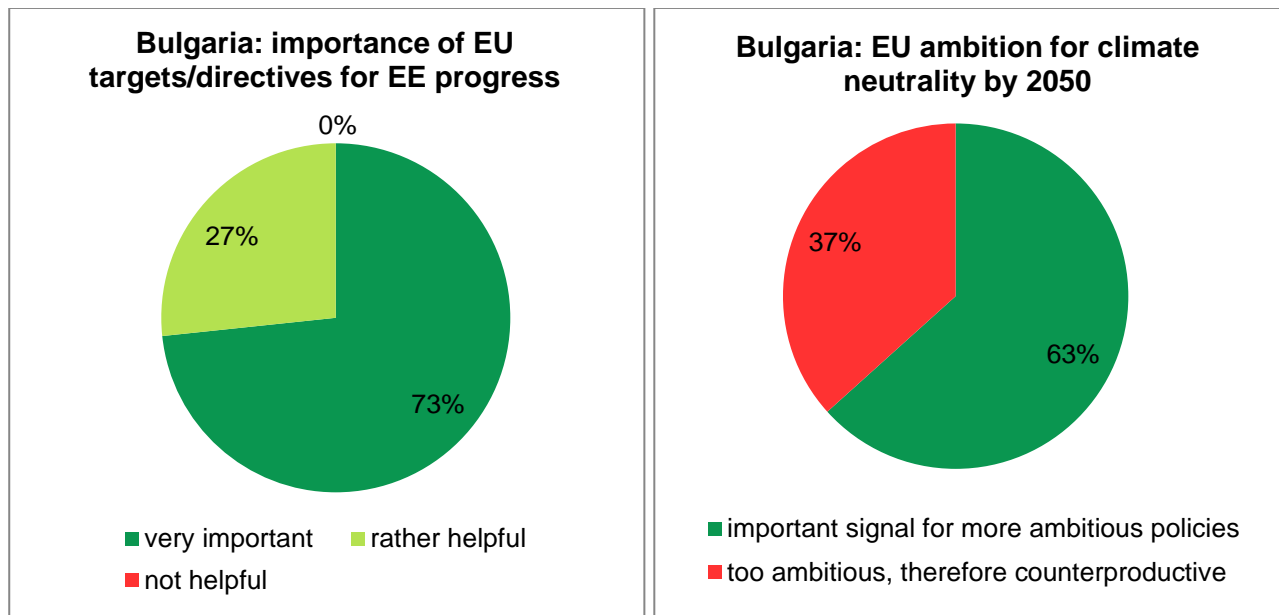


Regarding specific instruments, experts report that almost all instruments are more effective now than in 2015. Energy efficiency requirements for buildings and energy labelling of products are considered most effective (rated partly or very effective by respectively 90 % and 79 % of the Bulgarian experts). In contrast, obligations for distributors/retailers are considered as the least effective instruments (rated "not effective at all" by 52 % – the lowest rating of all Member States). Despite significant improvement in the effectiveness of smart metering over the past years, 52 % of experts still report that it is either not implemented or not effective at all (in 2015, this value was 82 %).

Bulgaria: effectiveness of policy instruments



Bulgaria is one of the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. However, more than a third find the EU ambition for climate neutrality by 2050 to be counterproductive in their country – the second highest percent of all Member States.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Bulgaria (for more details on the content of this table and how to analyse it, see page 32):

Bulgaria: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Modernisation / investments	1	4	42 %	58 %
Jobs	2	6	56 %	44 %
Industrial competitiveness	3	5	60 %	40 %
Air quality	4	1		
Independence from other countries	5	2		
Housing / living costs	6	3		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	41 %	11 %	48 %
Chambers of Commerce	2	74 %	19 %	7 %
Tabloid press	3	35 %	27 %	38 %
Trade Unions	4			
NGOs	5			
Farmers organisations	6			
Churches	7			

Similar to other countries in Central and Eastern Europe, modernisation and infrastructure investments are among the most important topics in the general public debate in Bulgaria. The loss and creation of jobs and industrial competitiveness are also of high importance (as in the majority of EU countries).

Experts report that energy efficiency is very present in the public debate in Bulgaria and already linked to many subjects. Compared to other Member States, Bulgaria showed the strongest link by far between energy efficiency and other topics. However, most topics are discussed to a similar level positively and negatively, showing that there is a divided opinion towards the energy transition in Bulgarian society.

When looking at which subjects in particular are most strongly linked to energy efficiency in the public debate, air quality, independence from other countries, and housing and living costs come out at the top of the list. Thus, although energy efficiency is significantly discussed, it is not (yet) being strongly linked to the topics of highest importance for society.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics in Bulgaria. The Chambers of Commerce rank 2nd for their level of influence. Tabloid press come in 3rd, but their level of influence is notably lower than the first two. In overall terms, Bulgarian experts report lower levels of influence for actor groups than in most other Member States. According to 74 % of the experts, the Chambers of Commerce are rather supportive of the energy transition. In comparison, the associations of large industry and tabloid press seem to have an ambivalent position, sometimes supportive, sometimes opposed.

In conclusion, developing narratives around the positive link between energy efficiency and the topics of highest importance for society (modernisation and investments, jobs, industrial competitiveness) could help heighten the general interest and positive attitude towards the energy transition. Strong numbers about the positive effects of the energy transition and communication efforts could help in this regard as well as collaborating with influential actors.

Due to their level of influence, Bulgarian associations of large industry and the Chambers of Commerce could be stronger allies for the energy transition debate, especially since their agendas seem to coincide with topics of high interest for society. The Chambers of Commerce, particularly, are already supportive of the cause.

Working with associations of large industry and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition. In general, it could be helpful to encourage influential actor groups to take a clearer stand towards the cause.

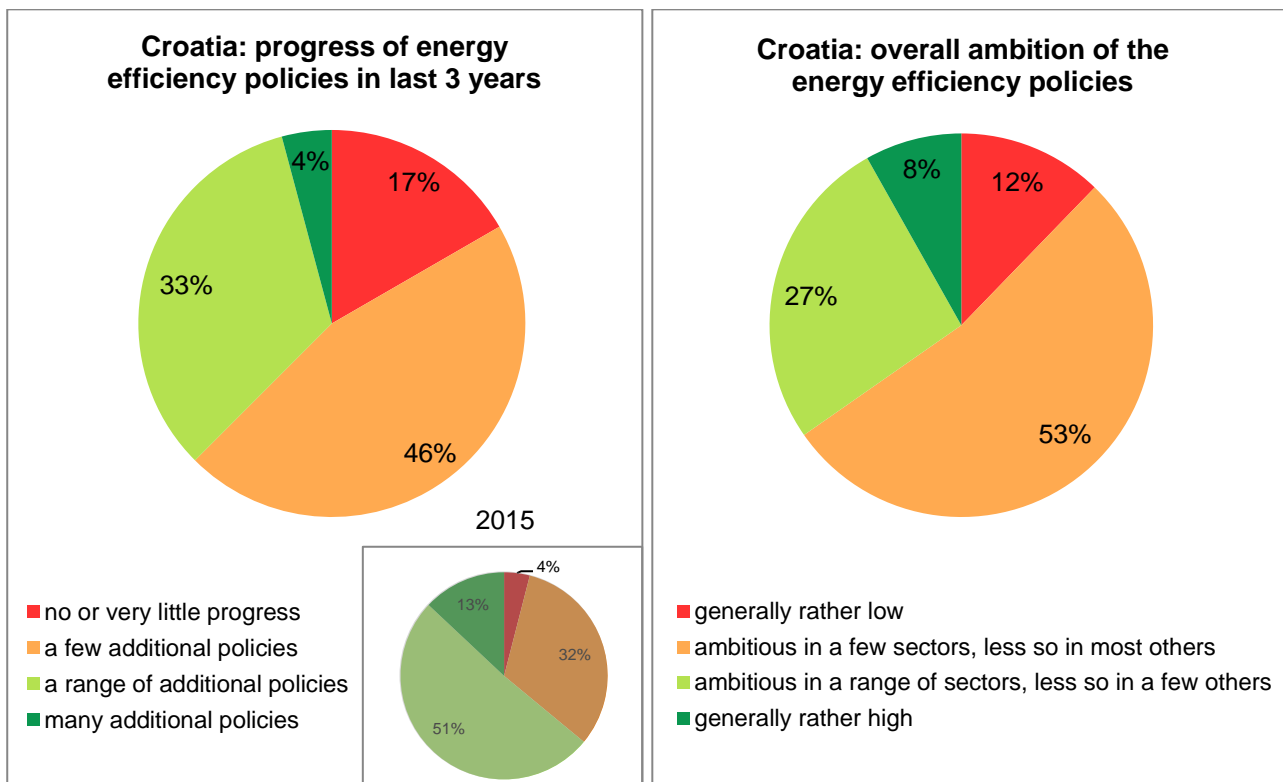
Croatia



Croatia is among the Member States that has made medium progress in energy efficiency policies in the last 3 years (country progress indicator: 11 out of 27 – see page 14). The rate of progress has remained unchanged since 2015 (2015 survey: country progress indicator: 10 of 28)

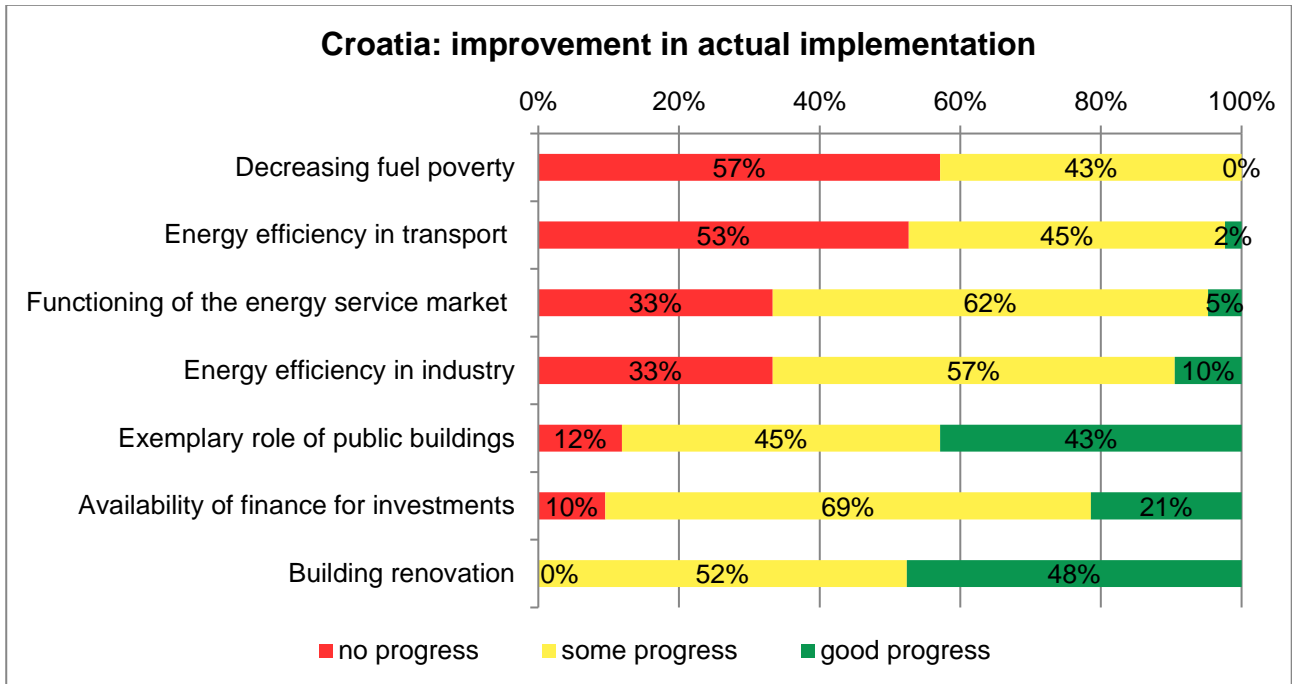
37 % of survey participants consider that a range of or many additional policies were introduced in recent years – a significant decrease since the 2015 survey (64 %). However, this was possibly connected to Croatia joining the EU in 2013. The implementation of the *acquis communautaire* resulted in a range of new energy efficiency policies in the first half of the 2010s. In overall terms, experts' view of Croatia's progress in the last 3 years is on the same level as the EU27 average.

35 % consider the overall ambition of the energy efficiency policies as relatively high – somewhat below the EU27 average of 46 %.



Like in the 2015 survey, most progress in actual implementation was made in building renovation and the exemplary role of public buildings. Respectively 48 % and 43 % of experts reported good progress in these fields and the levels of improvement are among the highest of all Member States (which was also the case in 2015).

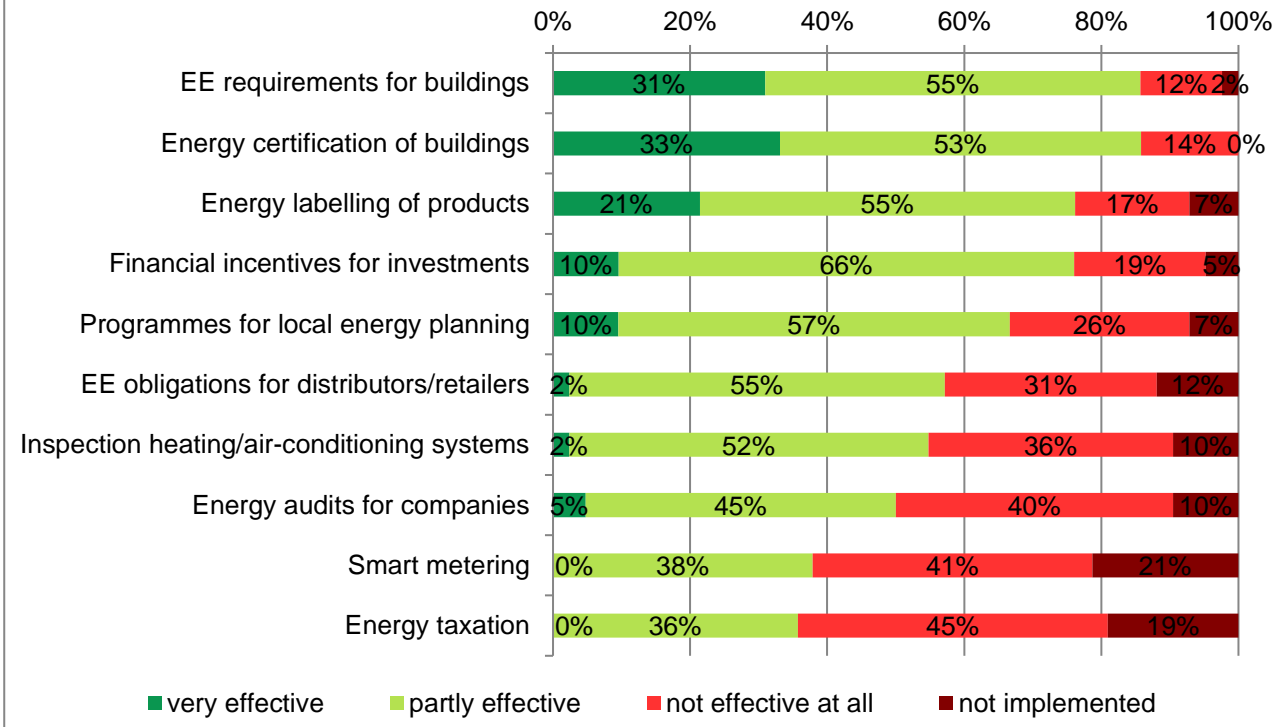
Least progress was made in decreasing fuel poverty and energy efficiency in transport, for which 57 % and 53 % of experts reported no progress at all. For the transport sector in Croatia, experts reported the strongest decrease in progress of all Member States.



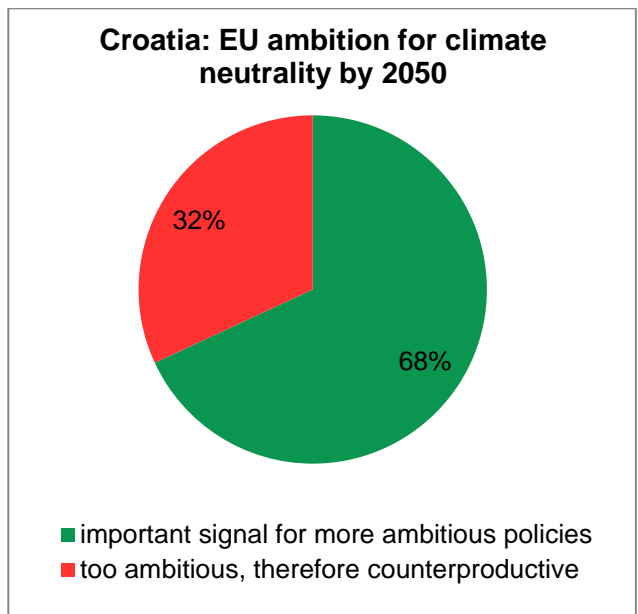
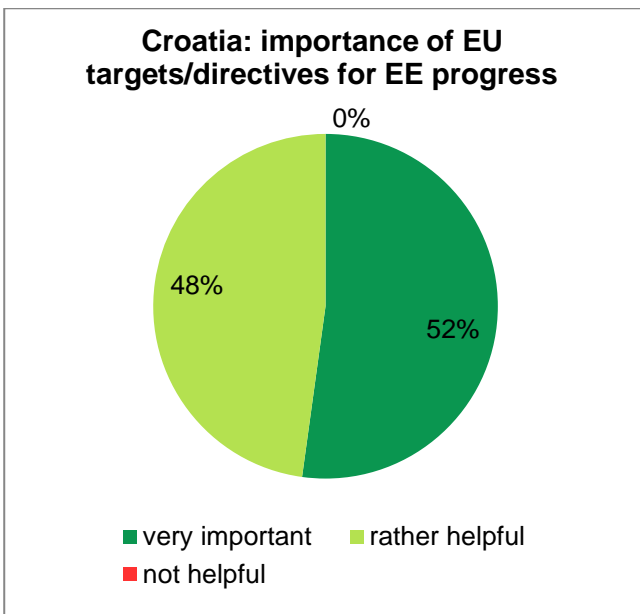
Although experts report an overall decrease of the effectiveness of energy efficiency instruments in comparison to 2015, levels remain around EU27 average. Energy efficiency requirement for buildings (86 % partly to very effective) and energy certifications for buildings (86 % partly to very effective – among the highest in the EU) are considered the most effective in the Croatian context.

The highest ratings for "not effective at all" are given to energy taxation (45 %), smart metering (41 %) and energy audits for companies (40 % – among the lowest ratings of all Member States).

Croatia: effectiveness of policy instruments



Croatia is among the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. However, 32 % find the EU ambition for climate neutrality by 2050 to be counterproductive in their context – double as many as the EU27 average of 16 %.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Croatia (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	5	78 %	22 %
Modernisation / investments	2	1	47 %	53 %
Housing / living costs	3	2	67 %	33 %
Industrial competitiveness	4	4		
Rural development	5	7		
Air quality	6	6		
Independence from other countries	7	3		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Churches	1	13 %	78 %	9 %
Associations of large industry	2	40 %	40 %	20 %
Trade Unions	3	37 %	51 %	12 %
Chambers of Commerce	4			
Tabloid press	5			
Farmers organisations	6			
NGOs	7			

According to survey results, loss/creation of jobs (which received among the highest ratings of all Members States) and modernisation/infrastructure investments are by far the most important topics in the public debate in Croatia. This is followed by housing and living costs.

Looking at which subjects in particular are currently most strongly linked to energy efficiency in the public debate, modernisation/investments and housing/living costs appear again in the top three. However, the most important topic – jobs – is rarely linked to energy efficiency. The effects of energy efficiency on housing and living costs are seen rather positively (67 % discussed positively). There is a divided opinion on its link to modernisation and investments.

Looking at which actor groups are influential on Croatian politics, experts report the Church in first position – this is the case in no other Member State. Economic actor groups follow, all with a similar level of influence: associations of large industry (rank 2) and Trade Unions (rank 3).

In Croatia, all actor groups are perceived as more supportive of the energy transition than opposed – albeit to different extents. 74 % of experts consider the Chambers of Commerce as supportive. For associations of large industry and Trade Unions, around 40 % of experts report them as supportive and 40-50 % say "position unknown". Also, the Church is not seen as taking a clear position. In Croatia, in overall terms, the percentage of "position not known" is the highest of all Member States.

In conclusion, due to their level of influence, economic actors could be stronger allies for the energy transition debate in Croatia, especially since their agendas seem to coincide with topics of high interest for society (jobs, investments). Chambers of Commerce, in particular, are already supportive of the energy transition.

Working with associations of large industry and Trade Unions and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. In general terms, creating narratives that economic actor groups can "buy into" could have significant positive effect on triggering change.

Churches could also be stronger allies in Croatia. In some other Member States (for example Germany and Austria), churches take an active position in public on climate protection.

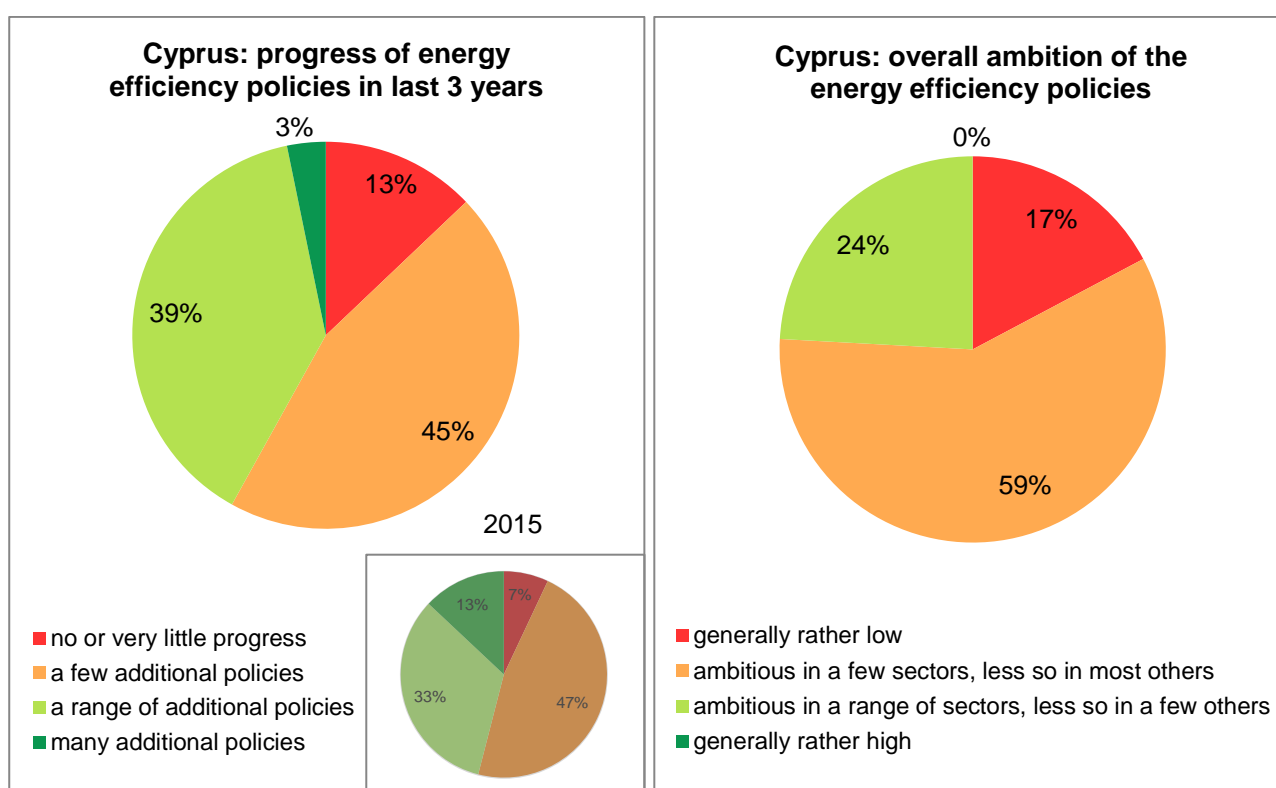
Croatian narratives for the energy transition could also benefit from taking into account the importance of 'jobs' in the public debate. The positive impact of energy efficiency on job creation is already recognised in society. Hence, increasing its presence in the public debate (backed with numbers) could help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Cyprus



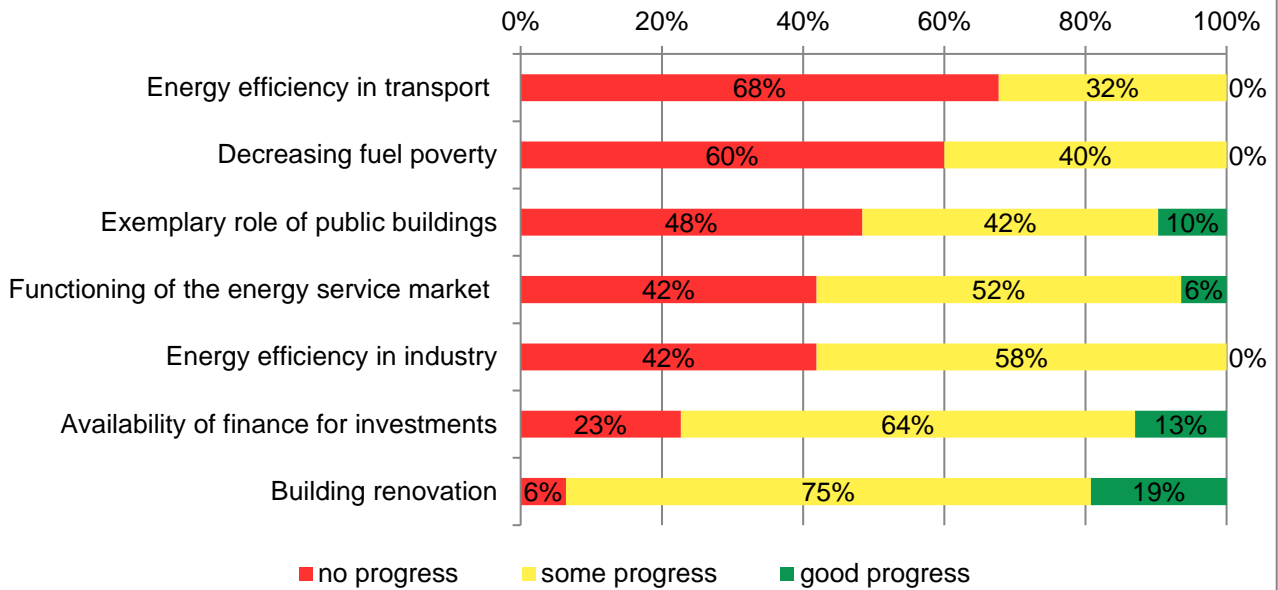
According to the Cypriot experts, Cyprus is among the Member States that have made relatively little progress in energy efficiency policy in the past 3 years (country progress indicator 22 out of 27 – see page 14). After having climbed to rank 5 in the 2015 survey, Cyprus has fallen back to its ranking of 2012 (2012 survey: country progress indicator: 22 out of 27).

More than half of the experts (58 %) report that no or only a few additional policies were put in place in recent years. Three quarters of experts (76 %) rank the overall ambition of energy efficiency policies in Cyprus as generally rather low or ambitious in only a few sectors.



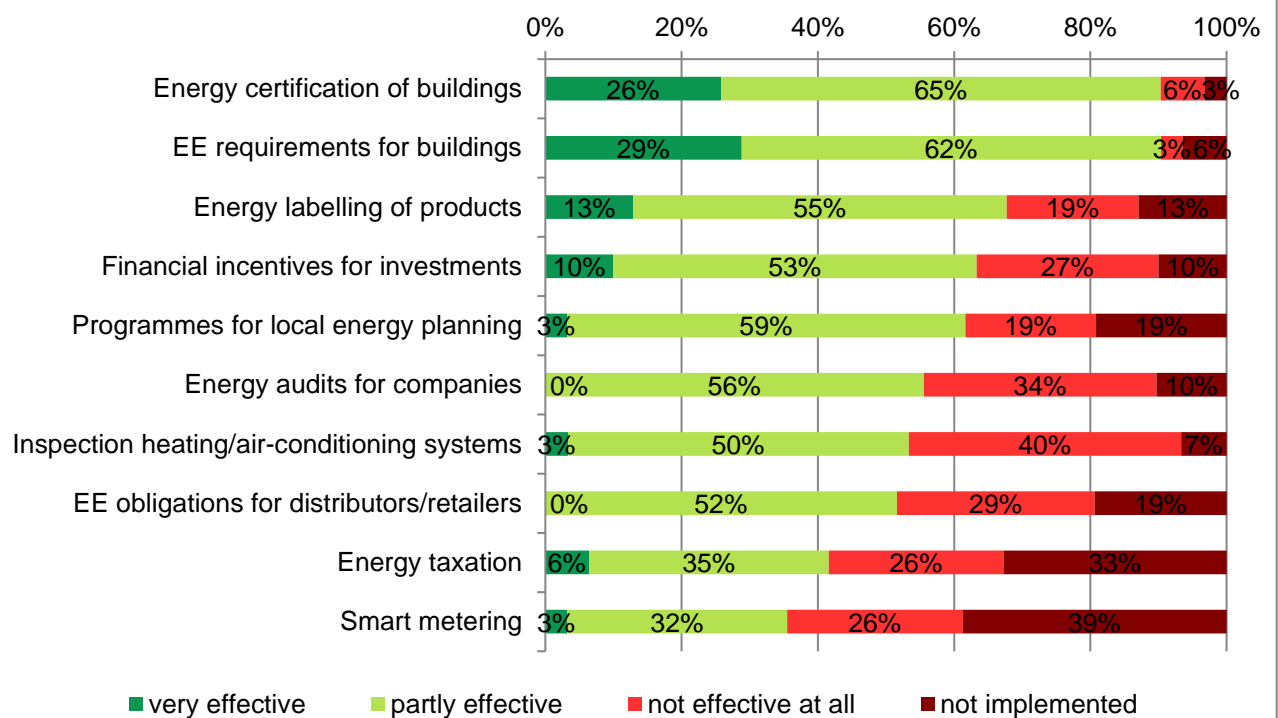
In terms of improvement in actual implementation of policies, in comparison to the 2015 survey, Cypriot experts reported the lowest level of progress among all Member States. The fields where experts have seen the most relative progress over the past three years are that of building renovation and in the availability of finance for energy efficiency investments (respectively 94 % and 77 % of experts report some or good progress). Least progress was made in energy efficiency in transport and in decreasing fuel poverty, for which respectively 68 % and 60 % of experts reported no progress at all.

Cyprus: improvement in actual implementation

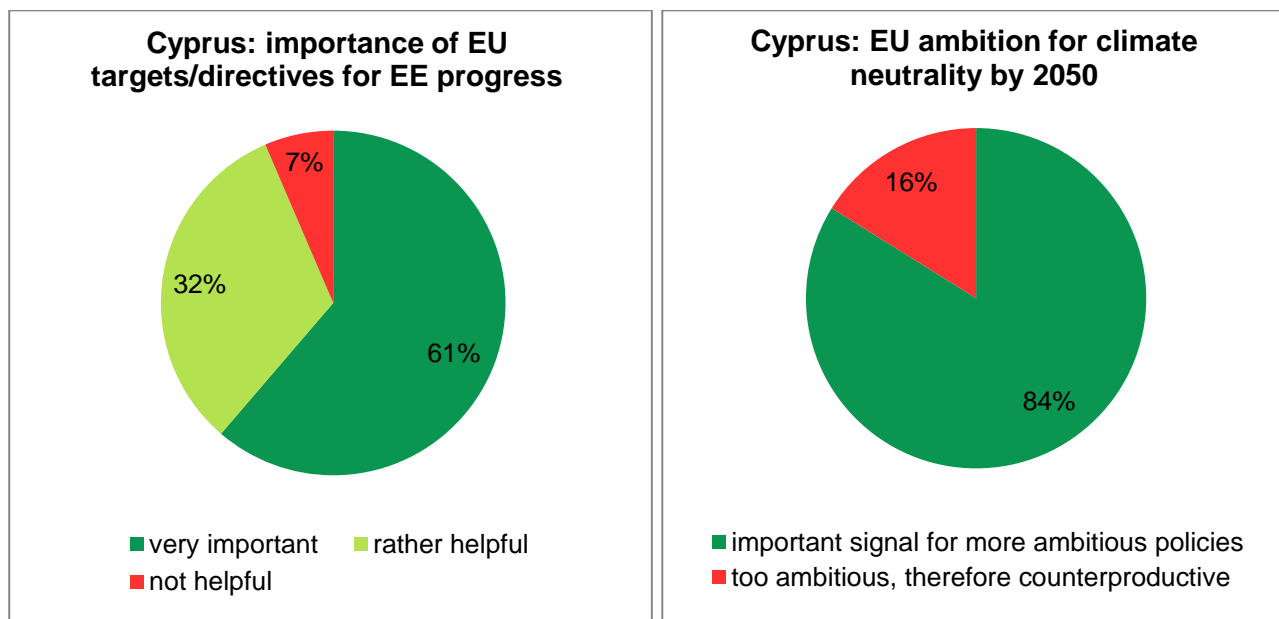


In regard to specific energy efficiency policy instruments, the Cypriot energy experts report overall lower effectiveness levels than in the 2015 survey. Energy certification of buildings and energy efficiency requirements for buildings are perceived as the most effective instruments in Cyprus, with 91 % of experts reporting them as partly or very effective. On the other end of the spectrum, around two thirds of the experts report that smart metering instruments are either not effective at all (26 %) or not implemented (39 % – one of the lowest ratings for this category among Member States).

Cyprus: effectiveness of policy instruments



93 % of survey respondents consider EU targets and directives to be positive for the progress in energy efficiency in Cyprus. 84 % find the EU ambition for climate neutrality by 2050 offers an important signal for more ambitious policies in their country versus 16 % who consider it as counterproductive – the same result as for EU27.



Key input factors for narrative development

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A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Cyprus (for more details on the content of this table and how to analyse it, see page 32):

Cyprus: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	7	83 %	17 %
Independence from other countries	2	2	61 %	39 %
Housing / living costs	3	3	53 %	47 %
Industrial competitiveness	4	5		
Modernisation / investments	5	1		
Air quality	6	4		
Rural development	7	6		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Chambers of Commerce	1	76 %	10 %	14 %
Trade Unions	2	34 %	42 %	24 %
Associations of large industry	3	62 %	24 %	14 %
Churches	4			
Tabloid press	5			
Farmers organisations	6			
NGOs	7			

Similar to the large majority of EU countries, the loss and creation of jobs is the most important topic in the general public debate in Cyprus. The topic of independence from other countries ranks 2nd in importance, much higher than in most other Member States (rank 6 in EU27). Affordable/healthy housing and living costs is the 3rd most discussed topic by the media and politicians in Cyprus.

When looking at which subjects in particular are most strongly linked to energy efficiency in the public debate, 'investments' clearly comes out at the very top of the list. This is followed by the topics of dependence/independence from other countries in rank 2 and costs of housing and living in rank 3. Although energy efficiency is discussed rather positively in relation to the topic of independence, results show a divided opinion on its link to investments and housing and living costs – it is perceived to a similar extent positively and negatively.

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in Cyprus (rank 7 in the EU for positive perception). It

is also being discussed in relation to some of the most important subjects for society. This provides a good basis for positive narrative development and roll-out.

However, very noteworthy in the case of Cyprus, is how little the topic of 'jobs' (the most important topic in the general public debate) is being used in positive arguments and narratives for the energy transition. And this, even though 83 % of experts report that the energy transition is considered to have a positive effect on job creation by society in general.

If we take a look at which actor groups are influential on Cypriot politics, economic actor groups are at the top of the list: Chambers of Commerce (rank 1), Trade Unions (rank 2) and associations of large industry (rank 3). Experts report quite similar levels of influence for all three. They are closely followed by churches in rank 4 (a level of influence seen in only a few Member States).

Twice as many experts perceive the Chambers of Commerce as supportive of the energy transition than opposed to it. The Chambers of Commerce and associations of large industry also seem to have a positive attitude towards the energy transition (76 % and 62 % of the experts, respectively, see them as supportive). In comparison, Trade Unions and churches have not expressed a clear or strong position on the energy transition. Due to their level of influence, they could be stronger allies for the energy transition debate.

In conclusion, Cypriot narratives for the energy transition could benefit from taking into account the importance of 'jobs' in the public debate. The positive impact of energy efficiency on job creation is already recognised in society. Hence, increasing its presence in the public debate (backed with numbers) could help heighten general interest in the energy transition.

Due to their level of influence, economic actors could act as stronger allies for driving the energy transition in Cyprus. Chambers of Commerce and associations of large industry, in particular, are already supportive of the energy transition.

Working with Trade Unions and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. This could be of particular interest, since their agendas seem to coincide with topics of high importance for society (jobs, costs of housing and living).

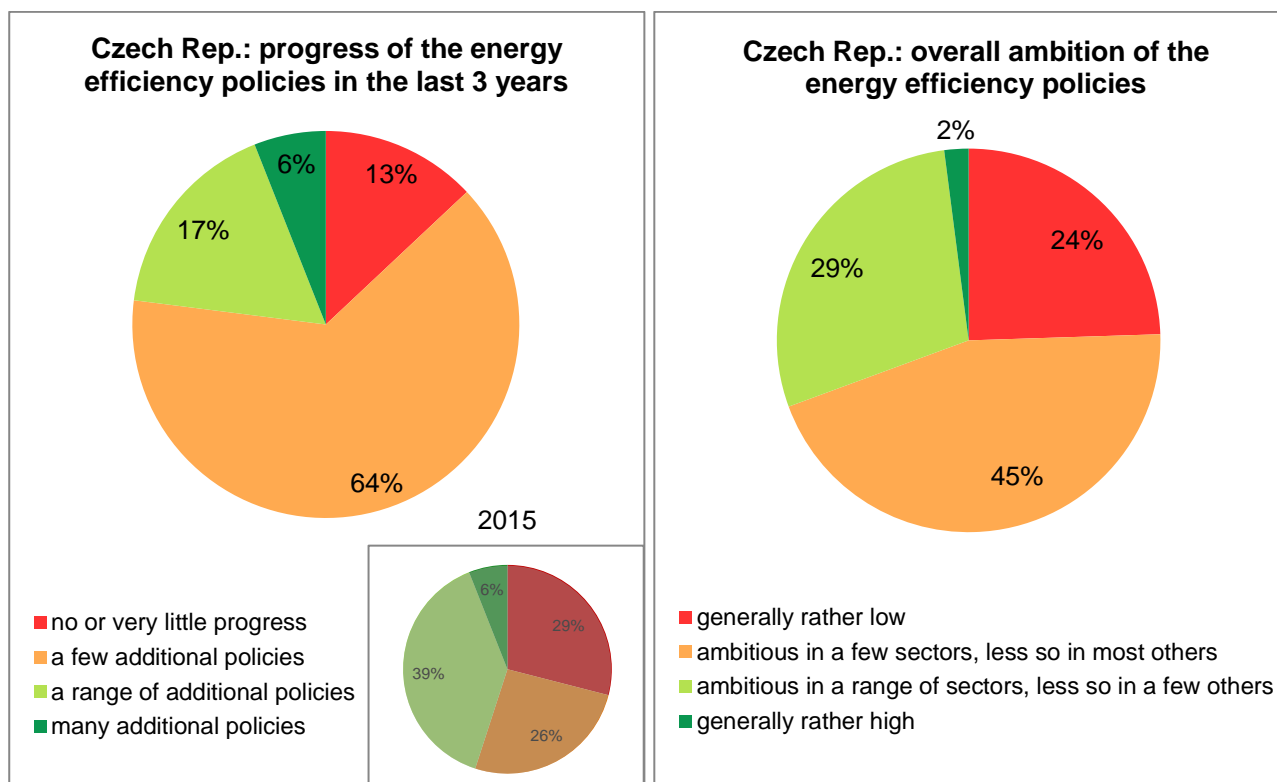
Overall, creating narratives that these groups can "buy into" could have significant positive effect on driving the energy transition in Cyprus.

Czech Republic

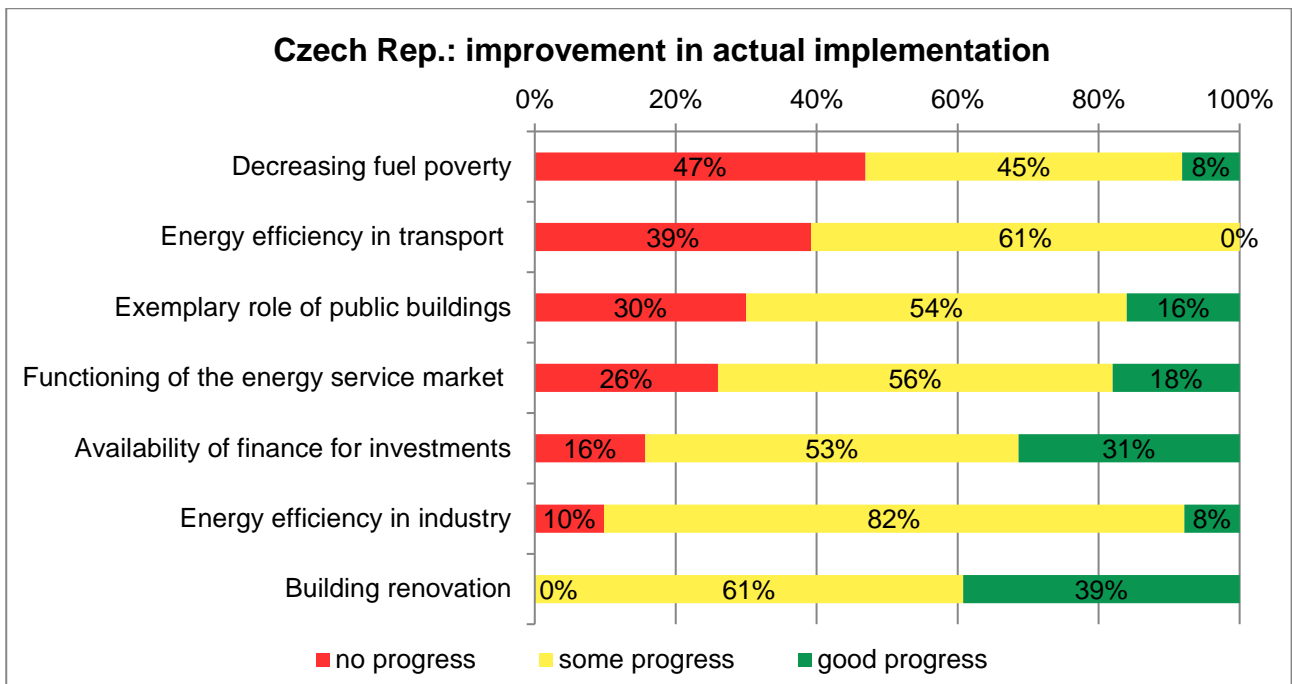


According to the Czech experts, the Czech Republic is among the Member States that have made medium progress in energy efficiency policies in the last 3 years (country progress indicator: 15 out of 27 – see page 14). The rate of progress has remained unchanged since the 2015 survey.

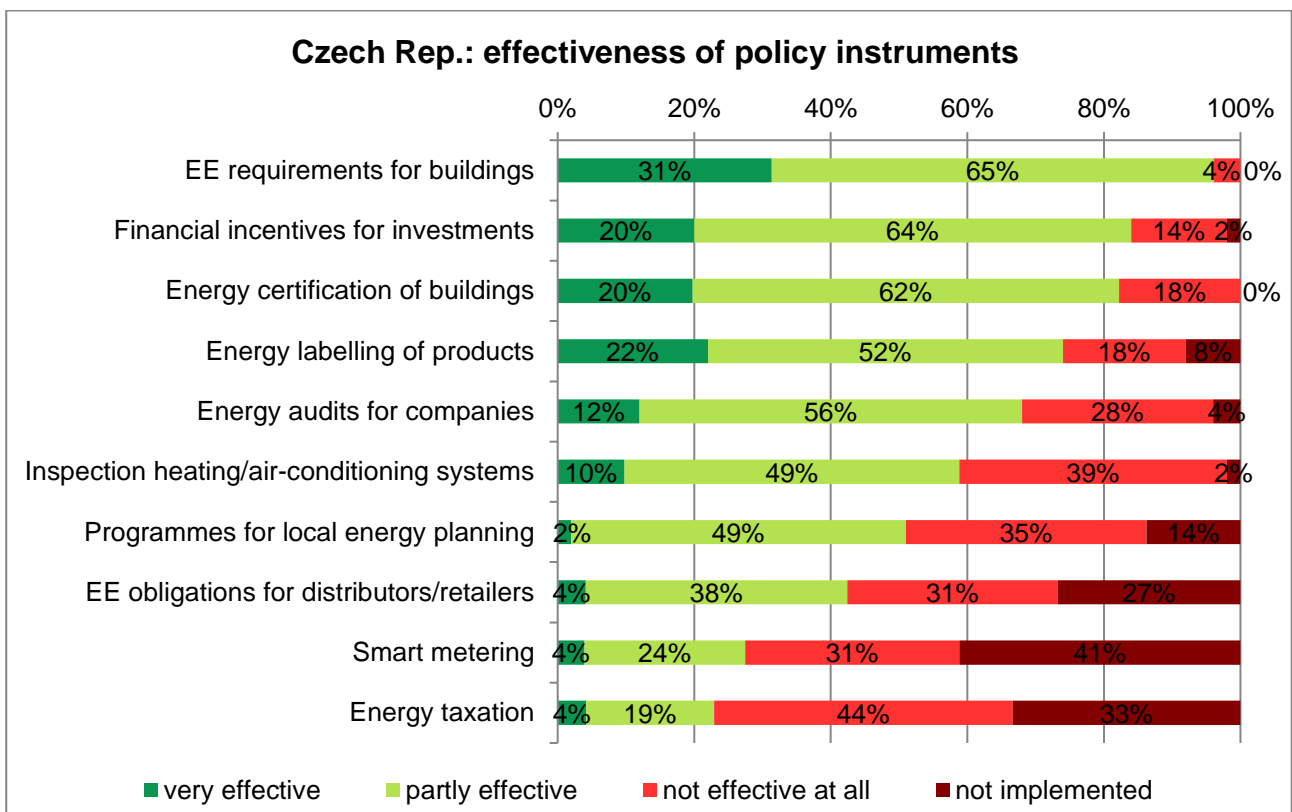
Only 23 % of experts report that a range or many additional policies were put in place in recent years. This is significantly less than in the 2015 survey (which looked back on the period 2012-2015) when 45 % of experts gave this answer. Regarding overall ambition of the energy efficiency policy, around two thirds of experts rank it as rather low or only partially ambitious – similar to the 2015 survey.



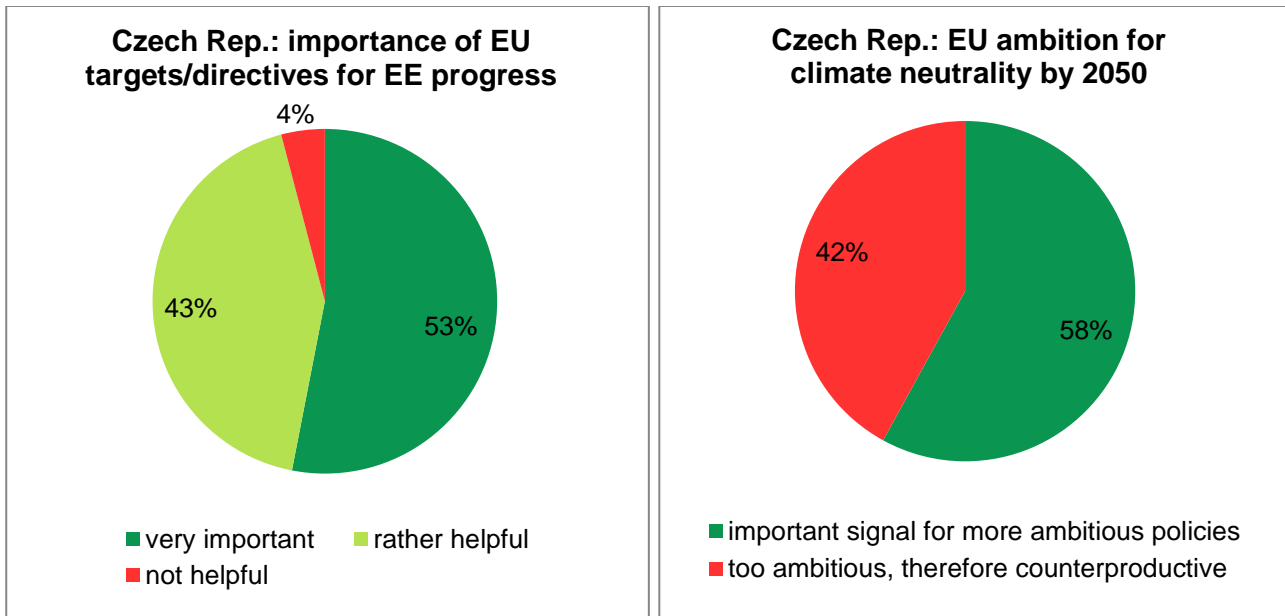
In overall terms, the experts report better progress in the actual implementation of policies in the last 3 years than for the period 2012-2015. The ranking of the categories has remained unchanged. The strongest improvement in the last 3 years was reported in building renovation. All surveyed experts consider at least some progress was made in this field, more than a third report good progress. The Czech Republic is among the Member States that made the most progress in the functioning of the energy service market. Least progress was made in decreasing fuel poverty and energy efficiency in transport. Respectively 47 % and 39 % of the experts saw no progress in these areas.



Energy efficiency requirements for buildings, financial incentives for investments and energy certification of buildings are seen as the most effective instruments in the Czech context (rated at least partly effective by 96 %, 84 % and 82 % of the experts respectively). The least effective instrument is energy taxation (44 % rate it "not effective at all"). 41 % of experts report that smart metering is not implemented yet in the Czech Republic. Only 28 % consider it at least partly effective – among the lowest ratings of all Member States.



96 % of surveyed experts see EU targets and directives as positive for the progress of energy efficiency in the Czech Republic. 53 % consider them to be very helpful and 43 % find them rather helpful – these are quite similar to EU27 average levels. However, 42 % of the experts report the EU ambition for climate neutrality by 2050 to be counterproductive in the Czech Republic – the strongest negative response rate across all Member States.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in the Czech Republic (for more details on the content of this table and how to analyse it, see page 32):

Czech Rep.: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Modernisation / investments	1	1	38 %	62 %
Industrial competitiveness	2	3	49 %	51 %
Housing / living costs	3	4	42 %	58 %
Air quality	4	5		
Independence from other countries	5	2		
Jobs	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	22 %	16 %	62 %
Chambers of Commerce	2	35 %	27 %	38 %
Trade Unions	3	23 %	43 %	34 %
Farmers organisations	4			
Tabloid press	5			
NGOs	6			
Churches	7			

According to the Czech experts, the topics most present in the general public debate are modernisation and investments (rank 1) and industrial competitiveness (rank 2). These are followed to a lesser extent by affordable/healthy housing and living costs (rank 3), and air quality (rank 4). It is worth noting that the topic of ‘jobs’, which is rated overall the most important topic by far in the EU27, ranks only 6th in the Czech context. Such a low ranking is only seen in one other Member State (Luxembourg).

When looking at which topics are already most strongly linked to energy efficiency in the public debate, ‘investments’ come out at the top of the list again – with a rather negative connotation. The topic second most frequently linked to energy efficiency is dependence/independence from other countries. However, this is a topic which is rather unimportant in the general debate and therefore less likely to constitute a successful narrative element. The topics of high societal relevance (i.e., industrial competitiveness and housing / living costs) are already linked to energy efficiency in the public debate. They are discussed to a similar extent negatively and positively in relation to energy efficiency.

The survey results show that energy efficiency is already linked to some of the key topics in the public debate. This could provide a good basis for positive narrative development and roll-out. However, in overall terms, energy efficiency is perceived less positively in the Czech Republic than in many other Member States (rank 23 in the EU for positive perception).

As in almost the entire EU, economic actor groups have the highest level of influence on Czech politics. Associations of large industry rank first in influence (rated very influential by 92 % of experts), followed closely by the Chambers of Commerce (87 %). Trade Unions come in third position.

According to 62 % of the experts, large industry in the Czech Republic has a rather negative attitude towards the energy transition. Only 22 % consider them supportive of the cause. In comparison, the Chambers of Commerce and Trade Unions seem to have an ambivalent and unclear position: sometimes supportive, sometimes opposed, but often unknown.

In the Czech Republic, all actor groups (except NGOs) are perceived as more opposed than supportive of the energy transition. However, in overall terms, it seems that many actor groups have not yet positioned themselves clearly either in favour or against the energy transition (the percentage of "position not known" is among the highest of all Member States).

In conclusion, considering the level of influence economic actors have on Czech politics, it could be helpful to work towards narratives they can "buy into" (e.g., industrial competitiveness, modernisation/investments), particularly since these are also topics of high interest for society. Working more closely with these groups and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express a clearer position in public.

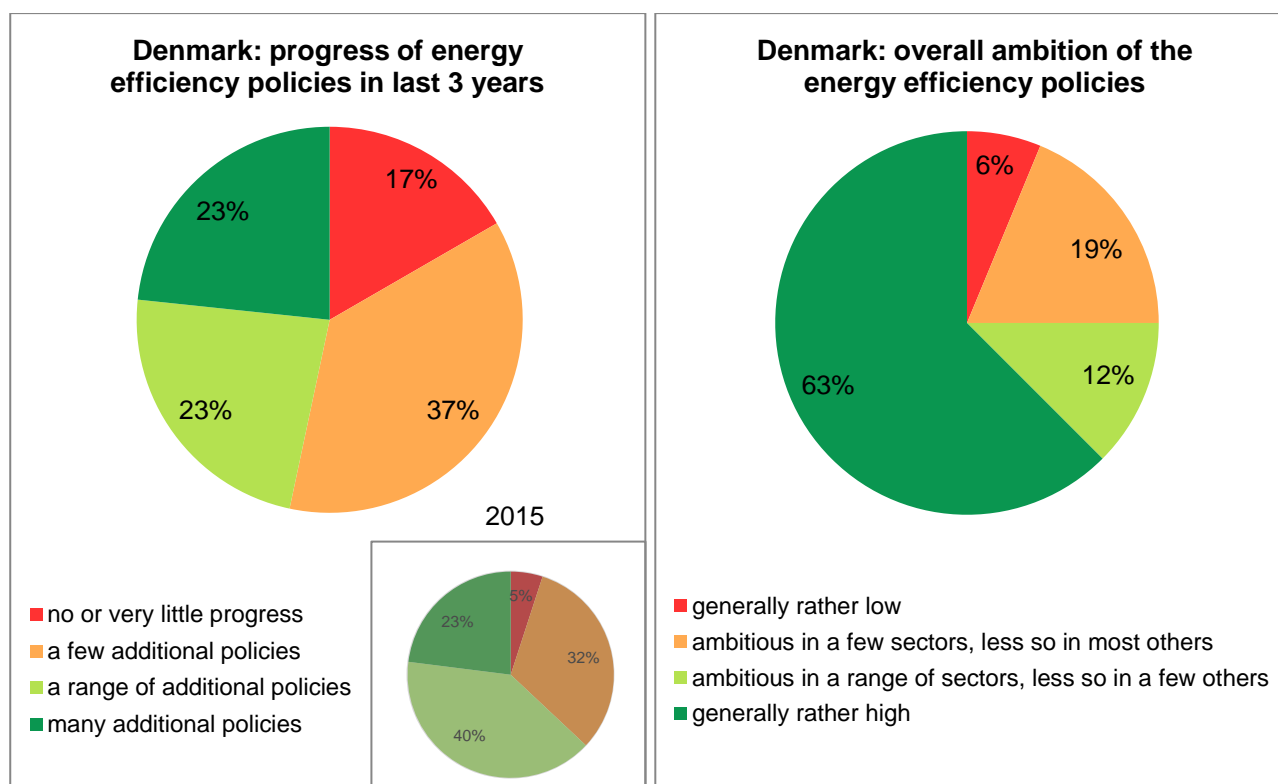
In overall terms, there seems to be a need for positive arguments for energy efficiency in the Czech Republic to help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors. Current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions.

Denmark



According to Danish experts, Denmark is among the Member States that have progressed very well in the past 3 years (country progress indicator: 2 out of 27 – see page 14). Denmark has held a stable top position in the country progress ranking (2015 survey: country progress indicator: 1 out of 28; 2012 survey: country progress indicator: 2 out of 27).

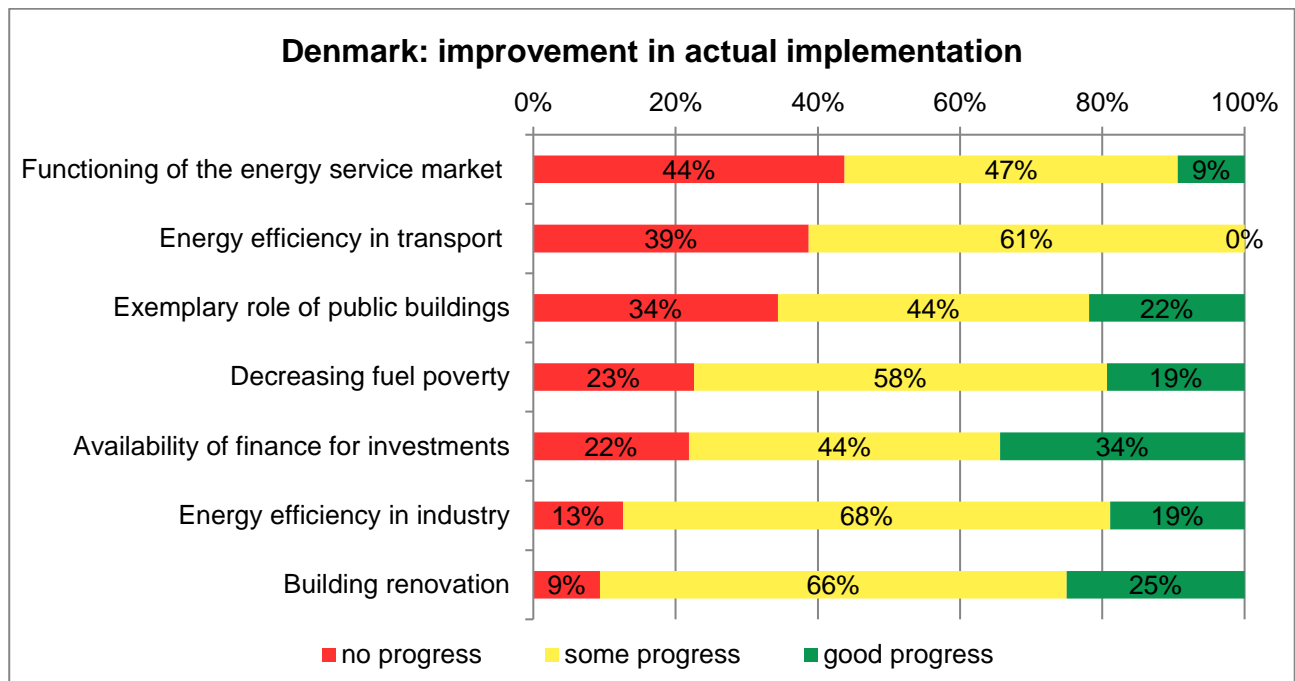
Regarding progress in energy efficiency policies, 46 % of experts report that a range or many additional policies were put in place in recent years. This result is down from 63 % in the 2015 survey (which looked back on the period 2012-2015). Although the overall level of ambition has also decreased since 2015, it is still the highest across the EU. 75 % of experts consider it at least ambitious in a range of sectors, compared to almost 90 % in 2015.



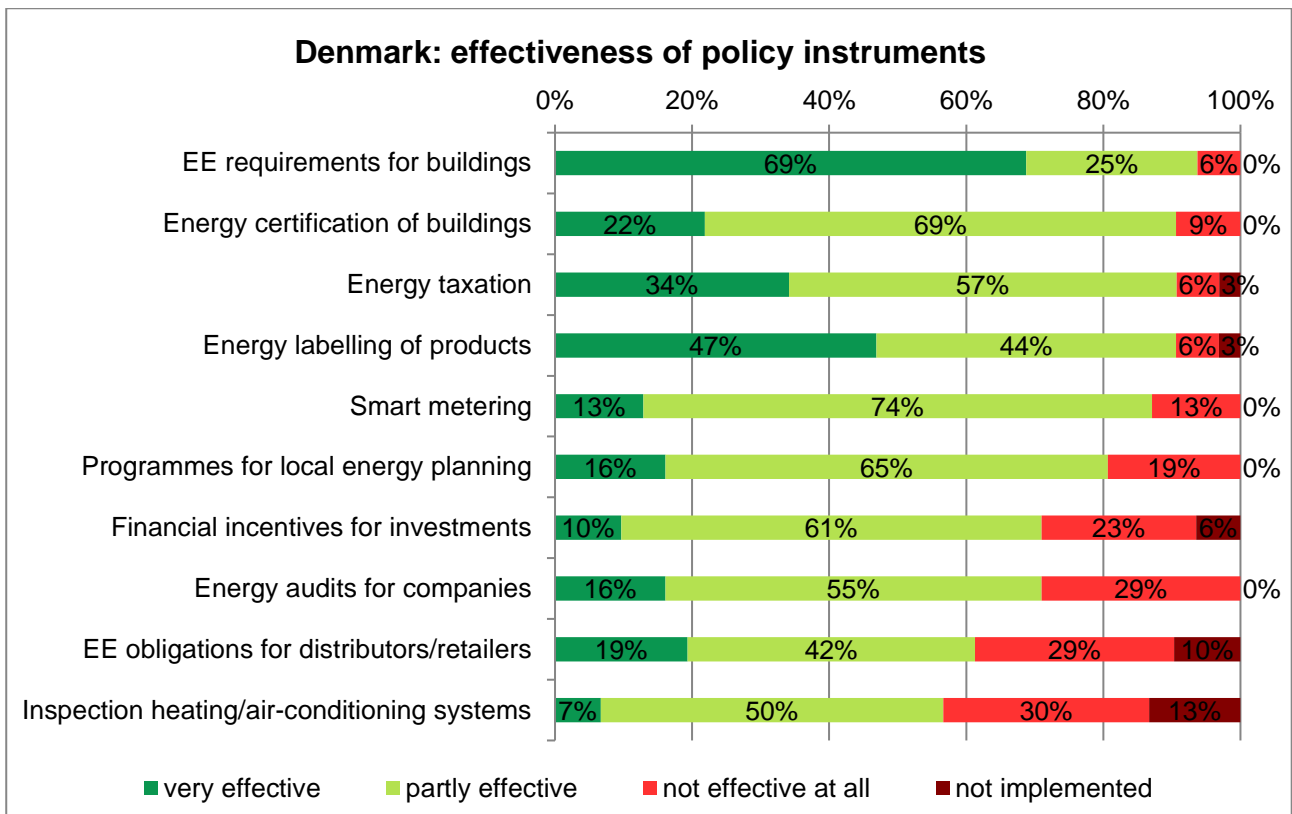
Regarding the improvement in actual implementation of energy efficiency policies in the past 3 years, the best progress in Denmark is reported for building renovation (91 % of experts report progress this area) and energy efficiency in industry (87 % of experts report at least some progress). The least progress was made in the functioning of the energy service market (44 % "no progress").

In overall terms, Danish energy experts report a lower rate of progress in policy areas in the past 3 years than in the period 2012-2015. Compared to other Member States, Denmark shows one of the strongest slowdowns in progress since the 2015 survey – especially regarding the functioning of the energy service market and energy efficiency in

industry. However, even though exports report lower progress in decreasing fuel poverty than in 2015, the reported rate of progress in Denmark in this area is still the highest among Member States.

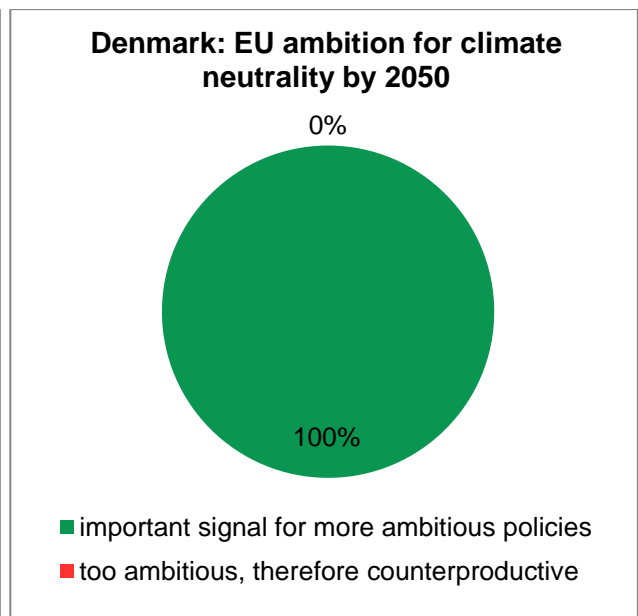
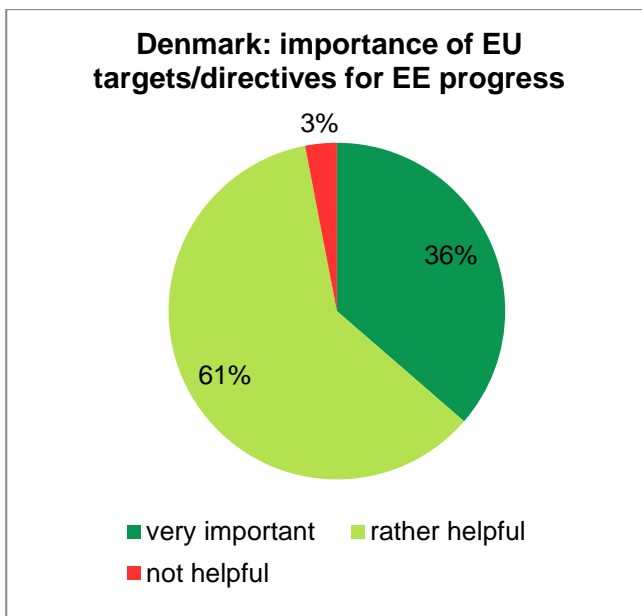


Danish experts think rather positively of a range of energy efficiency policy instruments. Among specific instruments, energy efficiency requirements for buildings (rated at least partly effective by 94 % of experts), energy certification of buildings, energy taxation and energy labelling of products (all rated 91 % partly or very effective) are seen as the most effective in the Danish context. Smart metering is also seen positively in Denmark and received a very high rating compared to other Member States. The highest ratings for "not effective at all" are given to the inspection of heating/air-conditioning systems (30 %), energy efficiency obligations for distributors/retailers (29 %) and energy audits for companies (29 %).



97 % of the experts consider EU targets and directives as positive for the progress in energy efficiency in Denmark. 36 % rate them as "very important" (significantly less than the average of 56 % for EU27), and 61 % as "rather helpful".

However, Denmark is also the only Member State where 100 % (!) of experts support the EU ambition for climate neutrality by 2050 and consider it an important signal for more ambitious policies.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Denmark (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Industrial competitiveness	1	2	68 %	32 %
Jobs	2	3	81 %	19 %
Independence from other countries	3	5	49 %	51 %
Modernisation / investments	4	1		
Housing / living costs	5	6		
Rural development	6	7		
Air quality	7	4		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	87 %	0 %	13 %
Trade Unions	2	71 %	16 %	13 %
Farmers organisations	3	29 %	13 %	58 %
NGOs	4			
Chambers of Commerce	5			
Tabloid press	6			
Churches	7			

According to survey results, industrial competitiveness (with among the highest ratings of all Member States) and creation/loss of jobs are by far the most important topics in the general public debate in Denmark. This is followed to a much lesser extent by dependence/independence from other countries and other topics.

When asked to which topics and arguments energy efficiency are already linked, experts reported modernisation and investments (rank 1), competitiveness (rank 2), and jobs (rank 3). The effects of energy efficiency on both competitiveness and jobs are perceived largely positively. In comparison, opinions seem divided on the relation between energy efficiency and investments and independence (both discussed equally positively and negatively).

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in Denmark (rank 4 in the EU for positive perception). It is also being discussed in relation to some of the most important subjects for society. This provides a good basis for positive narrative development and roll-out.

Associations of large industry are by far the most influential actor group on Danish politics. 100 % of experts rate them as "very influential". Trade Unions and farmers organisations rank 2nd and 3rd with nearly similar levels of influence. This is different to most other EU countries where farmers organisations are not as influential. Overall, experts report that actor groups have more influence on politics in Denmark than in most other Member States – making them interesting potential allies for driving change in society.

Also noteworthy is how strongly some influential actor groups support the energy transition in Denmark. Associations of large industry and Trade Unions are considered to have a positive attitude towards the energy transition by 87 % and 71 % of experts respectively. These are among the highest levels of support of all Member States. In comparison, two times more experts perceive farmers organisation as opposed to the energy transition than supportive.

In conclusion, there already seems to be strong positive narratives for the energy transition in Denmark. Energy efficiency is being strongly and positively linked to topics of high interest for society (industrial competitiveness, jobs). These messages are being backed by influential economic actor groups that clearly express their support to the energy transition. This could at least partly explain Denmark's progress in energy efficiency policy.

Further development of new narratives for the energy transition in Denmark could perhaps benefit from taking into account the importance of the topic of 'independence from other countries' in the public debate. Working more closely with farmer organisations and providing them positive arguments and narratives they can "buy into" might help increase their support of the energy transition.

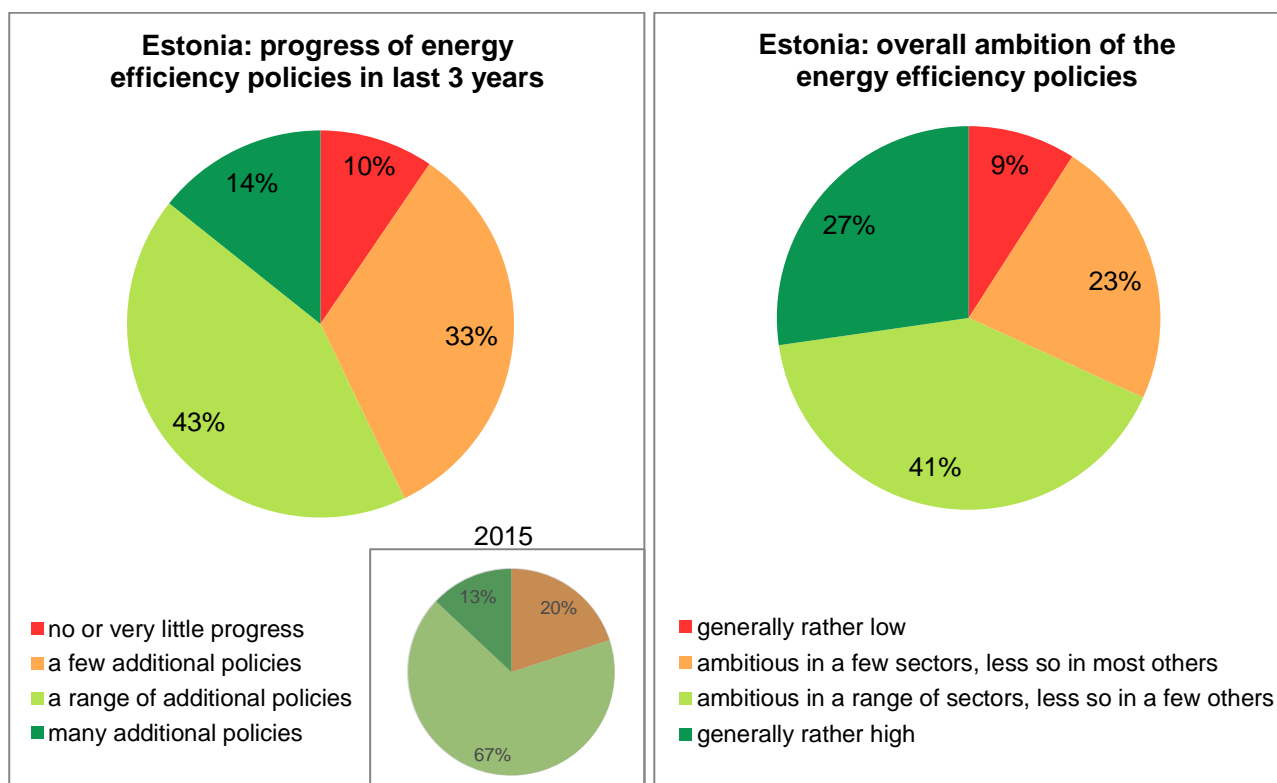
In addition, current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Estonia



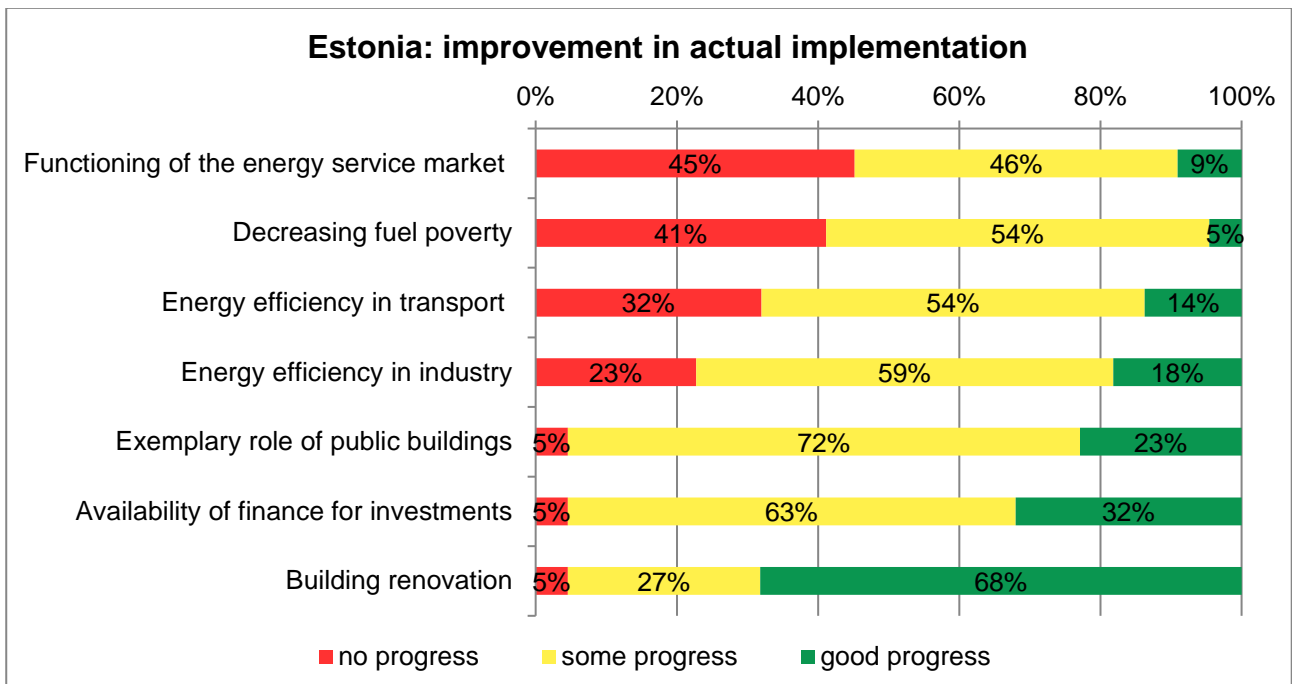
In the opinion of Estonian experts, Estonia is among the Member States that have made good progress in energy efficiency policies in the last 3 years (country progress indicator: 5 out of 27 – see page 14). The rate of progress has remained relatively unchanged throughout all three surveys (2015 survey: country progress indicator: 3 out of 28; 2012 survey: country progress indicator: 3 out of 27)

Despite holding rank 5 among Member States for overall progress, 43 % of Estonian energy experts report having seen no or only a few additional policies put in place in the last 3 years. This number was only 20 % in the 2015 survey (which looked back on the period 2012-2015). Experts consider the overall ambition of energy efficiency policies as very high: 68 % consider it at least ambitious in a range of sectors. However, this is significantly lower than in the 2015 survey (86 %) and one of the largest decreased in the EU.



According to the experts, the largest improvement in actual implementation in the past 3 years was made in the area of building renovation: 68 % of experts report good progress – the highest rating of all Member States. Good improvement in implementation was also made in the availability of finance for investments (95 % report at least some progress – among the best improvements across the EU for this area) and the exemplary role of public buildings (95 % at least some progress).

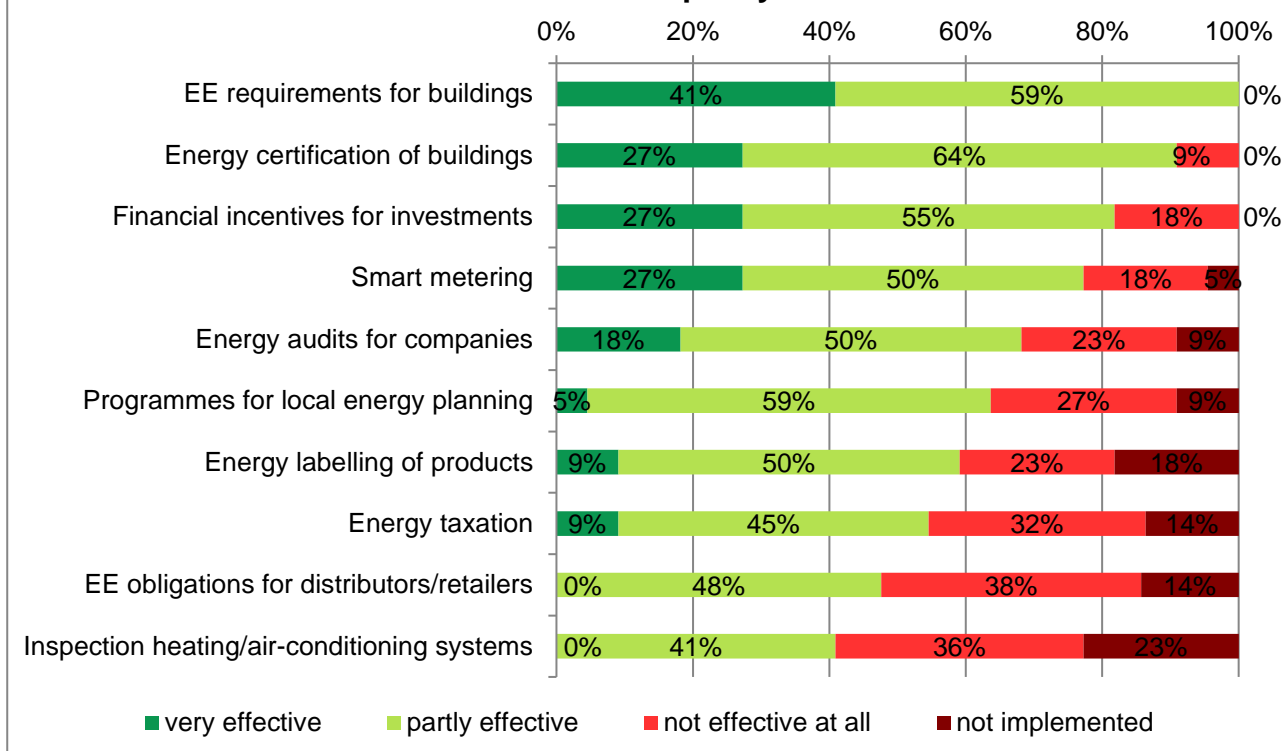
Least progress in implementation was seen in the functioning of the energy service market and decreasing fuel poverty (respectively 45 % and 41 % of experts report "no progress").



In terms of specific energy efficiency policy instruments, Estonian experts report mixed levels of effectiveness. Energy efficiency requirements for buildings (rated at least partly effective by 100 % of experts) and energy certification of buildings (91 % at least partly effective) are seen as the most effective in the Estonian context – both among the highest ratings of all Member States.

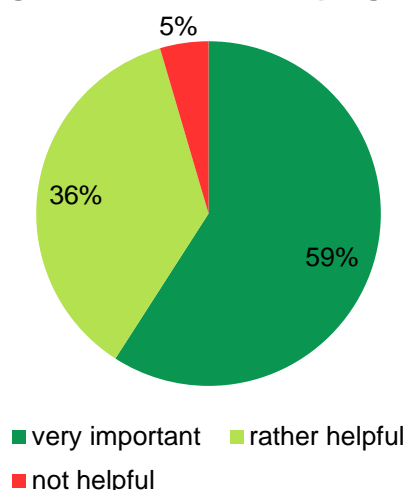
The highest ratings for "not effective at all" are given to the inspection of heating/air-conditioning systems (36 % – among the lowest in the EU) and energy efficiency obligations for distributors/retailers (38 %). Although the experts report higher levels of effectiveness for most instruments compared to the 2015 survey, this is not the case for energy labelling of products. Rated at least partly effective by 93 % in the 2015, this level has dropped to 59 % and now has the lowest effectiveness rating of all Member States.

Estonia: effectiveness of policy instruments

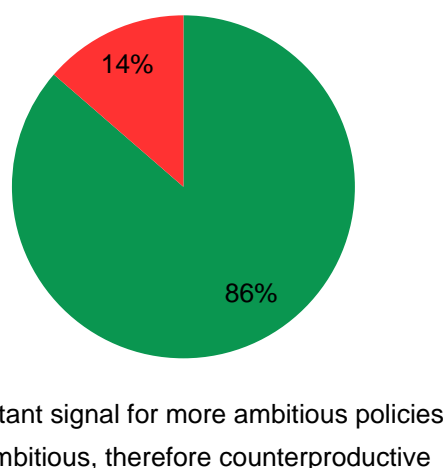


95 % of surveyed experts consider EU targets and directives as positive for energy efficiency progress in Estonia. 86 % find the EU ambition for climate neutrality by 2050 gives an important signal for more ambitious policies. These are quite similar to EU27 levels.

Estonia: importance of EU targets/directives for EE progress



Estonia: EU ambition for climate neutrality by 2050



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Estonia (for more details on the content of this table and how to analyse it, see page 32):

Estonia: Key input factors for narrative development				
Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Independence from other countries	1	1	53 %	47 %
Modernisation / investments	2	2	37 %	63 %
Jobs	3	4	46 %	54 %
Industrial competitiveness	4	5		
Housing / living costs	5	3		
Air quality	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	48 %	0 %	52 %
Chambers of Commerce	2	55 %	35 %	10 %
Tabloid press	3	43 %	33 %	24 %
Trade Unions	4			
Farmers organisations	4			
NGOs	4			
Churches	7			

As in all three Baltic states, the subjects of ‘independence from other countries’ (with among the highest ratings of all Member States) and ‘modernisation and investments in infrastructure’ are among the most important topics in the general public debate. In

Estonia, this is followed by the topic of 'loss and creation of jobs'. This level of interest in dependence/independence is only seen in a handful of Member States (topic ranked 6th in EU27).

When looking at which topics are already being linked to energy efficiency in the public debate, independence from other countries and modernisation/investments come out at the top of the list again. Housing and living costs rank 3rd and jobs rank 4th. The survey results show that energy efficiency is already linked to some of the topics of high interest for society. This could provide a good basis for positive narrative development and roll-out.

However, in overall terms, energy efficiency is perceived less positively in the public debate in Estonia than in many other Member States (rank 22 in the EU for positive perception). The topics most often linked to energy efficiency are discussed to a similar extent positively and negatively. The costly investments required for the energy transition are discussed negatively almost two third of the time (63 %).

As seen across almost the entire EU, associations of large industry have the strongest influence on politics. In Estonia, this is followed by the Chambers of Commerce in rank 2. Tabloid press come in 3rd position, but their level of influence is notably lower than the first two groups.

Estonian Chambers of Commerce seem to have a positive attitude towards the energy transition. 55 % of experts consider them supportive versus 10 % who see them as rather opposed. The tabloid press are also considered more supportive than opposed. In comparison, associations of large industry express a divided position, about equally supportive and opposed.

In conclusion, in Estonia, energy efficiency is already being linked to some of the key topics for society. It is also backed to a certain extent by influential actor groups. This provides a good basis for positive narrative development and roll-out and could at least partly explain Estonia's progress in energy efficiency policy.

Due to the divided opinions about the impacts of energy efficiency on societally important aspects (i.e., independence, investments, jobs), providing positive arguments (backed with strong numbers) could help heighten the positive attitude towards the energy transition. Communication efforts could help in this regard as well as collaborating with influential actors.

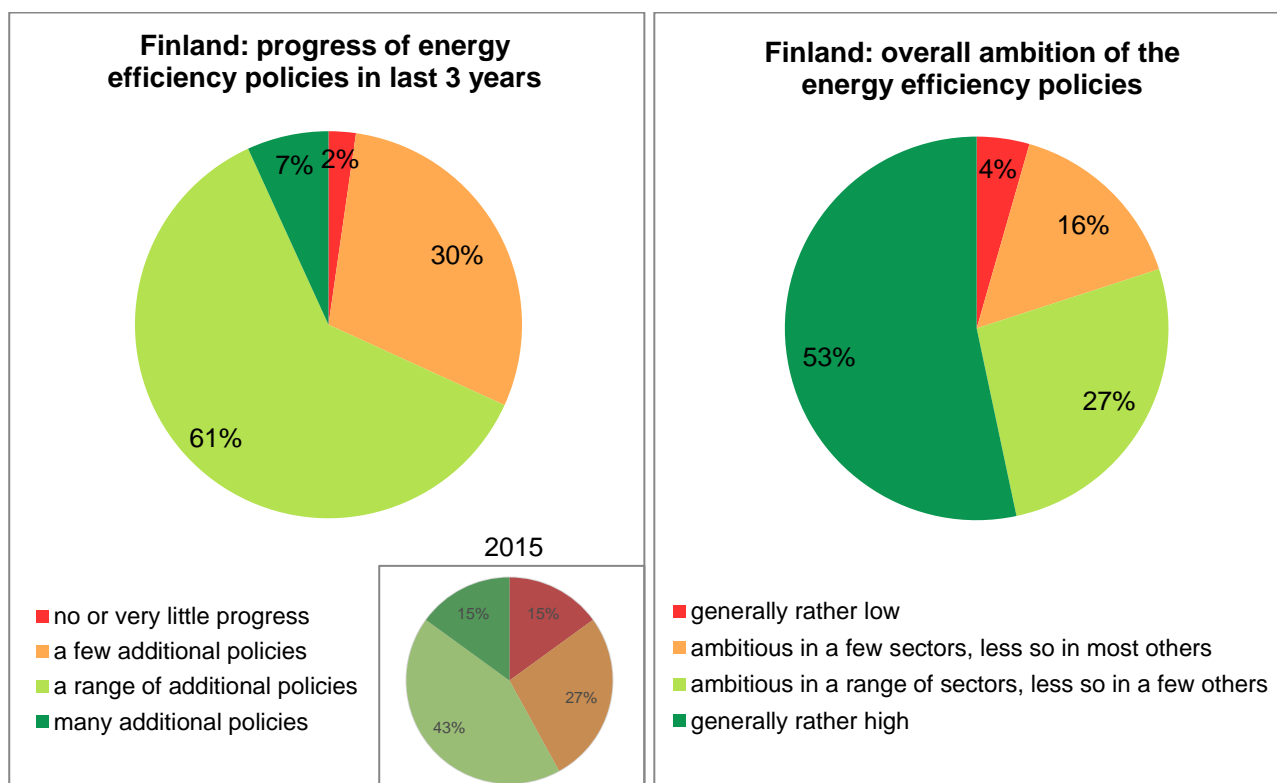
Considering the high level of influence economic actors have on Estonian politics, it could be helpful to work towards narratives they can "buy into" (e.g., modernisation/ investments, jobs, industrial competitiveness), particularly since these are also topics of high interest for society. Chambers of Commerce, in particular, could be stronger allies in the energy efficiency debate since they already support the cause. Additionally, it could be worthwhile to explore better communication on the positive impacts of energy efficiency and of the energy transition on the aspect of independence from other countries, possibly also through the influential tabloid press.

Finland



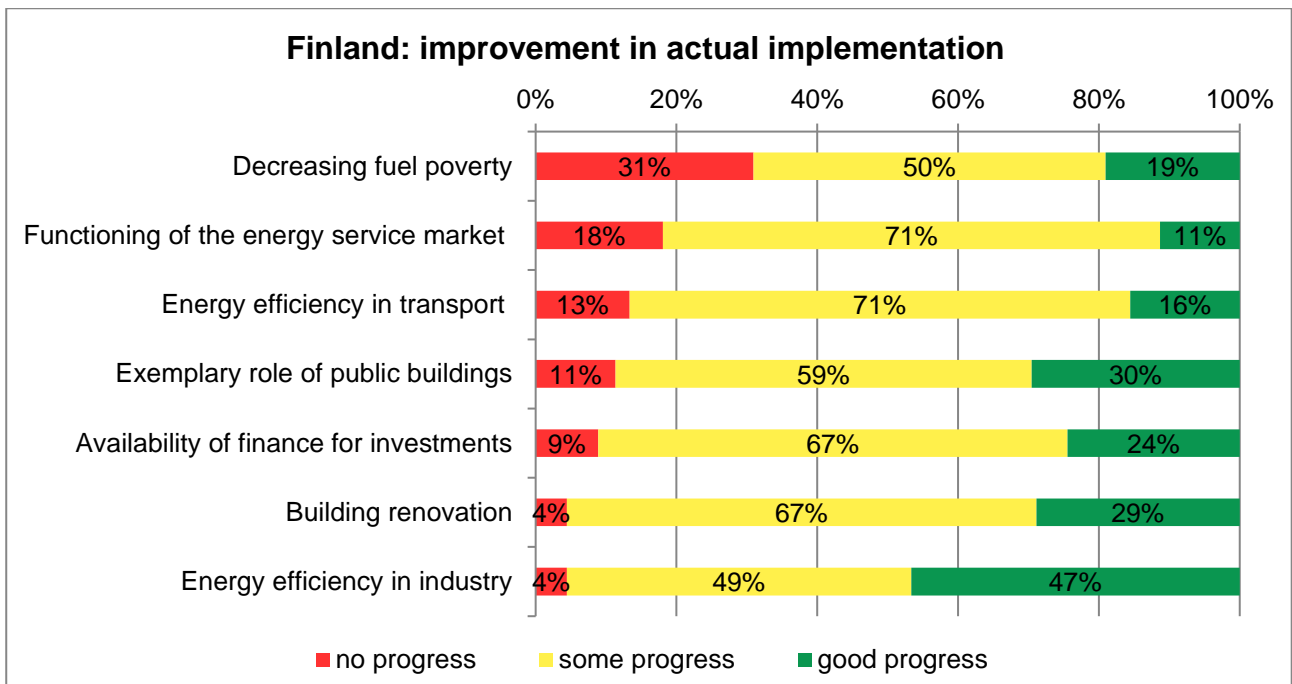
According to Finnish experts, Finland is the Member State that has made the most progress in energy efficiency policies in the past 3 years (country progress indicator: 1 out of 27 – see page 14). Finland has held a stable top position in the country progress ranking (2015 survey: country progress indicator 2 out of 28; 2012 survey: country progress indicator 1 out of 27).

68 % of the experts state that a range or many additional policies were introduced in the last 3 years. They also consider the overall ambition of energy efficiency policies as relatively high – 80 % consider it at least ambitious in a range of sectors. More than half of the experts (53 %) rate the overall ambition as "generally rather high" – significantly more than in 2015 (33 %).

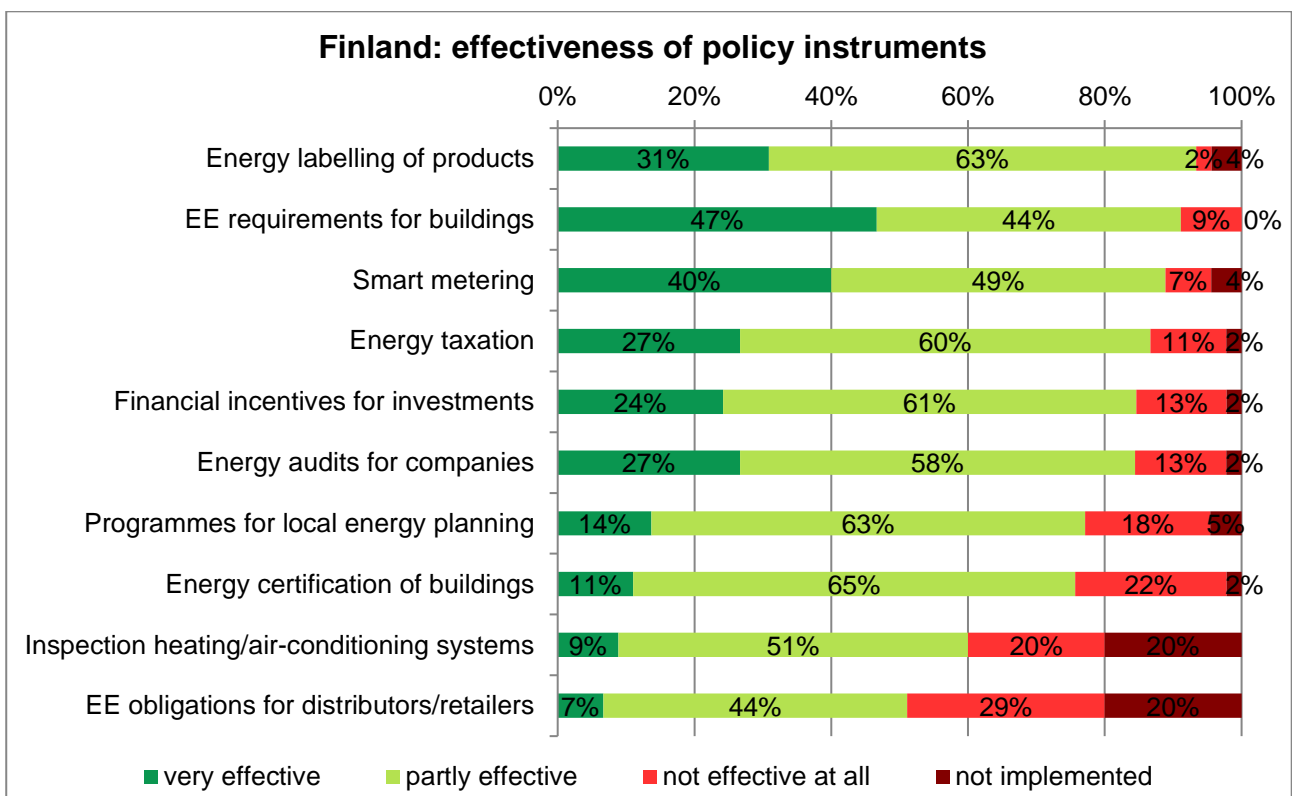


In regard to improvements in actual implementation in the past 3 years, in contrast to many other EU countries, experts see strong progress in several sectors – including in energy efficiency in industry, which received by far the highest rating among all Member States. Finnish experts see the least improvement in decreasing fuel poverty. Almost one third (31 %) consider that no progress was made in the past 3 years in this sector.

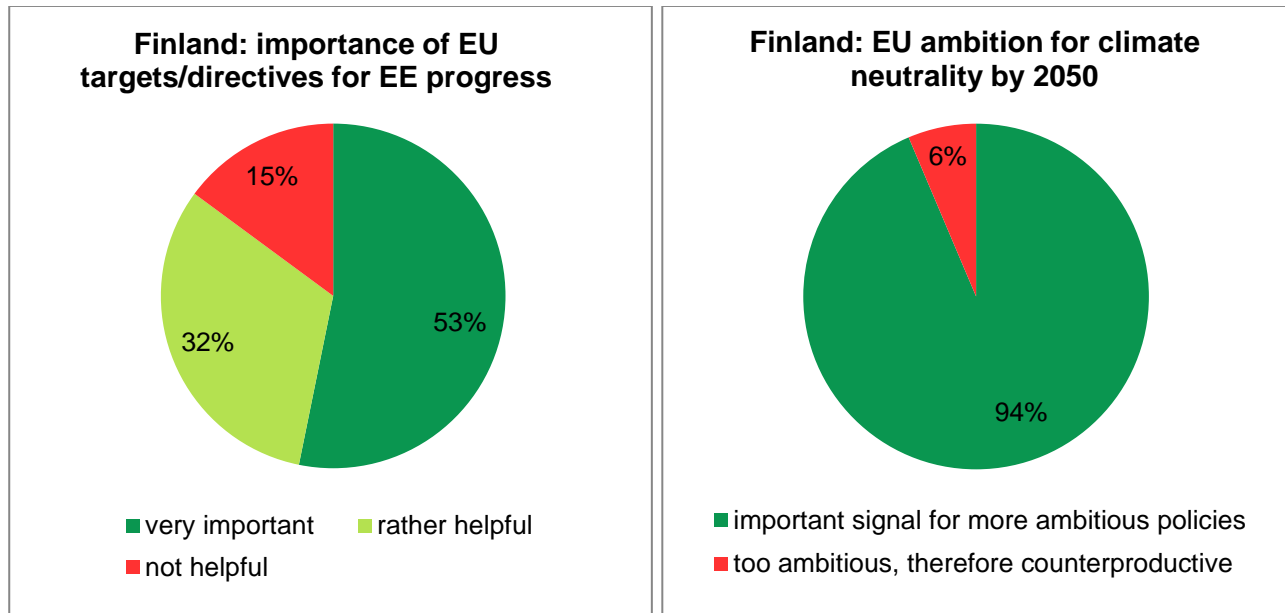
In overall terms, although Finland holds rank 1 in the EU for improvement in implementation, experts report lower rates of progress in the past few years than in the 2015 survey (which looked back on the period 2012-2015)



Finnish experts think rather positively of a range of energy efficiency policy instruments. Energy labelling of products, energy efficiency requirements for buildings and smart metering are rated as partly or very effective by 94 %, 91 % and 89 % of experts respectively. These instruments were also considered the most effective in the 2015 survey. Also consistent with the 2015 and 2012 surveys, smart metering received the most positive rating by far among all countries. Energy audits for companies and inspections of heating/air-conditioning systems were also attributed some of the highest effectiveness ratings in the EU. The instrument with the highest percentage of "not effective" is energy efficiency obligations for distributors/retailers (29 %).



Although 85 % of the experts consider that EU targets and directives have been positive for the progress of energy efficiency in Finland, 15 % reported them as "not helpful" – more than in any other EU country. Nevertheless, 94 % of the experts support the EU ambition for climate neutrality by 2050 and find it offers an important signal for more ambitious policies.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Finland (for more details on the content of this table and how to analyse it, see page 32):

Finland: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Industrial competitiveness	1	1	67 %	33 %
Jobs	2	6	82 %	18 %
Air quality	3	5	65 %	35 %
Housing / living costs	4	3		
Modernisation / investments	5	2		
Independence from other countries	6	4		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	65 %	11 %	24 %
Trade Unions	2	59 %	34 %	7 %
Tabloid press	3	42 %	42 %	16 %
Chambers of Commerce	4			
Farmers organisations	5			
NGOs	6			
Churches	7			

According to the surveyed experts, the subjects of industrial competitiveness (with among the highest ratings of all Member States) and loss/creation of jobs are by far the most important topics in the general public debate in Finland (similar to the EU27 average, though in EU27 jobs rank first and competitiveness second). Air quality ranks 3rd (higher than rank 5 for EU27), albeit with a much lower level of importance.

When asked about which topics are already being linked to energy efficiency by the media and politicians, experts again report that ‘competitiveness’ is in first position (and discussed positively two thirds of the time). It is followed by ‘investments’ and ‘housing and livings costs’ (with divided positive and negative perceptions).

Survey results show that energy efficiency is not (yet) being strongly discussed in relation to some of the key topics in the Finnish public debate. Compared to other countries, Finland is among the Member States with the weakest alignment between arguments used in the energy efficiency debate and subjects of high interest for society. In particular, energy efficiency is not being linked to the important topics of job creation and air quality. When these links are being made, the debate is largely positive (82 % positive for jobs and

65 % positive for air quality), making them strong arguments in favour of the energy transition.

As observed in most EU countries, associations of large industry have the strongest influence on politics in Finland. 93 % of experts rate them "very influential". Trade Unions rank 2nd in influence (similar to their ranking in EU27), followed by tabloid press in rank 3 (rated similarly influential as Chambers of Commerce and farmers organisations).

In Finland, in overall terms, the energy transition seems to already find good support among a number of actor groups. In comparison to other EU countries, it ranks 3 of 27 in regard to actor groups' support of the energy transition. All actor groups (except farmers organisations) are perceived as more supportive of the energy transition than opposed – although to different extents. 65 % of experts consider associations of large industry as supportive and 24 % as opposed. For Trade Unions and Chambers of Commerce, around 60 % see them as supportive versus 7 % as opposed. The tabloid press are also perceived to have a positive attitude towards the energy transition. However, over 40 % of experts responded with "position unknown".

In conclusion, there already seems to be a strong positive narrative for the energy transition in Finland around the topic of (industrial) competitiveness. This message is being backed by influential economic actor groups that clearly express their support to the energy transition. This could at least partly explain Finland's progress in energy efficiency policy.

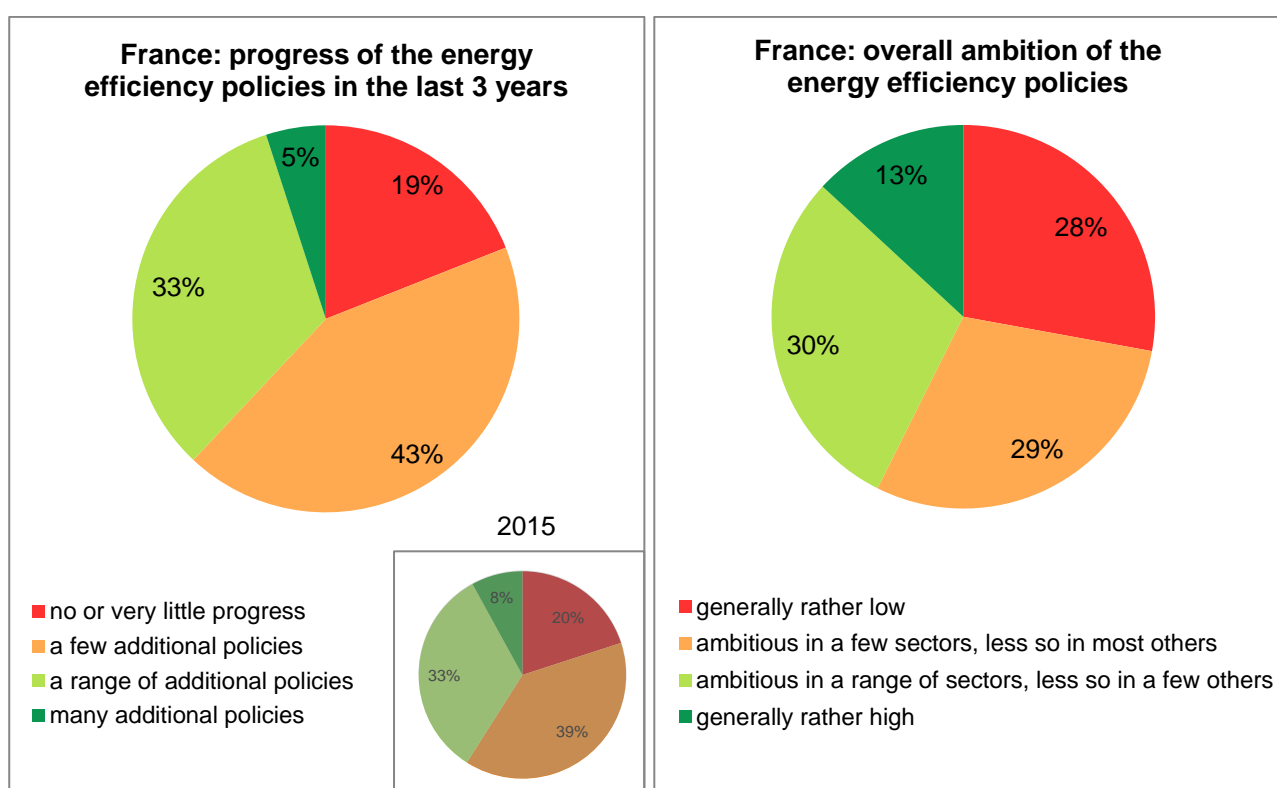
Further development of new narratives for the energy transition in Finland could benefit from taking into account the importance of jobs and air quality in the public debate, especially since the positive effects of energy efficiency on these areas are already recognised in the debate. Current arguments relating to costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actor groups.

Due to their level of influence and support, economic actors could act as stronger allies for driving the energy transition in Finland, especially since their agendas seem to coincide with topics of high importance for society (industrial competitiveness, jobs). Working with the tabloid press and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position.



France is among the Member States that has made medium-to-low progress in energy efficiency policies in the past 3 years (country progress indicator: 19 out of 27 – see page 14). Compared to other countries, the rate of progress has significantly slowed down since the 2015 survey (2015 survey: country progress indicator: 12 out of 28) and even more since the 2012 survey (2012 survey: country progress indicator: 10 out of 27).

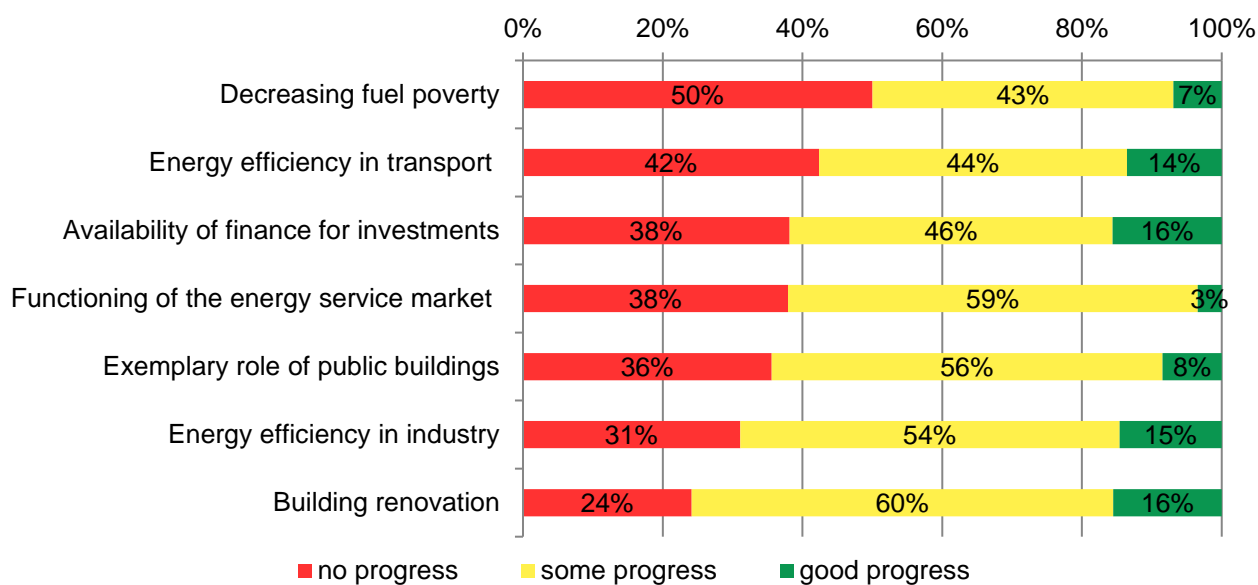
38 % of the experts consider that a range or many additional policies were implemented in the last three years, while 62 % see only a few or no additional policies. 57 % of the experts find that the overall level of ambition of the energy efficiency policies is low or only ambitious in a few sectors.



When questioned about the improvement in actual implemented of measures in the past 3 years, the experts report lower levels of progress than the EU average in almost all fields. Most progress was seen in building renovation and energy efficiency in industry (respectively 76 % and 69 % of experts report at least some progress in these areas).

In regard to the exemplary role of buildings, only 8 % of experts see good progress in the past 3 years – down from 26 % in the 2015 survey (which looked back on the period 2012-2015). The highest rating for "no progress" is given to decreasing fuel poverty (50 %).

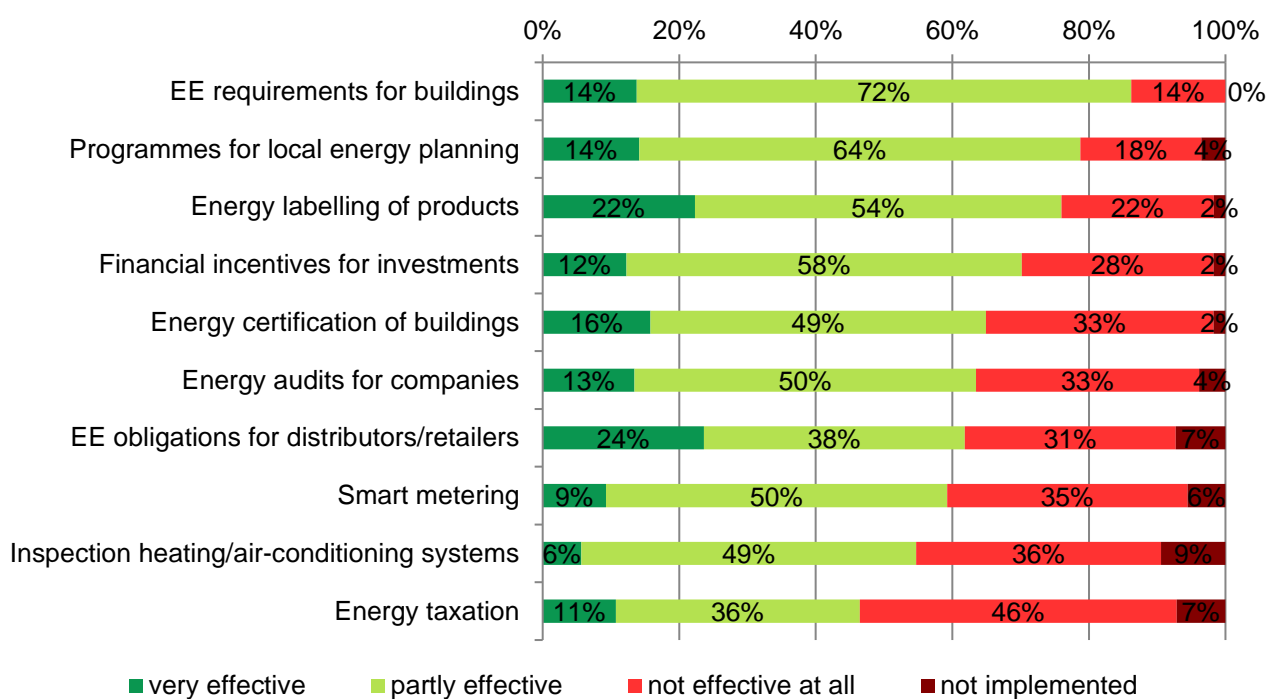
France: improvement in actual implementation



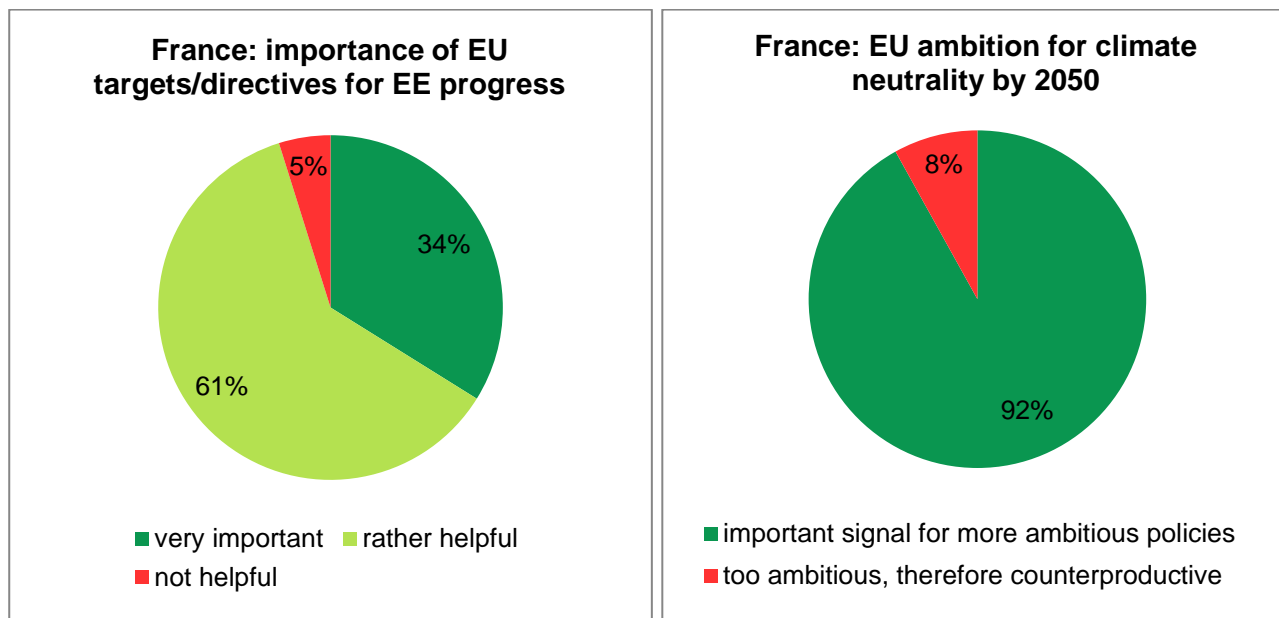
In terms of specific policy instruments, experts consider energy efficiency requirements for buildings and programmes for local energy planning as the most effective in the French context (rated at least partly effective by 86 % and 78 % respectively). 24 % of the experts report energy efficiency obligations for distributors/retailers as "very effective" – the highest response among all Member States. The perceived effectiveness of smart metering is much higher than at the time of the 2015 survey. 59 % of experts consider it at least partly effective compared to only 34 % in 2015.

The instruments seen to be the least effective are energy taxation (46 % "not effective at all") and the inspection of heating/air-conditioning systems (36 % "not effective at all").

France: effectiveness of policy instruments



95 % of the experts consider European targets and directives to be positive for the progress of energy efficiency in France. 34 % rate them as "very important" (significantly below the EU27 average of 56 % and one of the lowest rating across member states), 61 % rate them as "rather helpful". Looking at future objectives, 92 % of the French experts support the European ambition for climate neutrality by 2050 and find it gives an important signal for more ambitious policies.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in France (for more details on the content of this table and how to analyse it, see page 32):

France: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	2	79 %	21 %
Industrial competitiveness	2	6	70 %	30 %
Housing / living costs	3	3	43 %	57 %
Air quality	4	4		
Modernisation / investments	5	1		
Independence from other countries	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	17 %	19 %	64 %
Trade Unions	2	30 %	32 %	38 %
Farmers organisations	3	24 %	22 %	54 %
Chambers of Commerce	4			
Tabloid press	5			
NGOs	6			
Churches	7			

In France, similar to the EU27 average, the topics of loss/creation of jobs and industrial competitiveness are the two most important in the general public debate. The subject of 'affordable/healthy housing and living costs' is also high in importance (rank 3).

When looking at which subjects are already linked to energy efficiency in the public debate in France, 'investments' is by far at the top of the list. It is discussed equally positively and negatively. Other topics linked to energy efficiency are jobs (discussed positively 79 % of the time) and housing and living costs (discussed somewhat more negatively than positively).

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in France (rank 7 in the EU for positive perception). However, results show that it is not (yet) being discussed in relation to industrial competitiveness, despite this being a key topic in French society. When this link is being made, the debate is largely positive.

Associations of large industry are by far the most influential actor group on French politics – as in most EU countries. 96 % of experts rate them "very influential". Trade Unions and farmers organisations rank 2nd and 3rd with similar levels of influence. In most other EU countries farmers organisations are not very influential (rank 5 in EU27).

In France, the energy transition does not find significant support among the most influential actor groups. In comparison to other EU countries, France ranks only 22 of 27 in regard to actor groups' support of the energy transition. Associations of large industry and farmers organisations are perceived to be rather opposed by 64 % and 54 % of experts respectively. French Trade Unions received one of the highest ratings for "rather opposed" of all Member States, but in general terms, they seem to have an ambivalent and unclear position.

In conclusion, the development of new narratives in France could benefit from taking into account the importance of the topics of industrial competitiveness in the public debate. Current arguments about high costs (investments and housing/living costs) might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

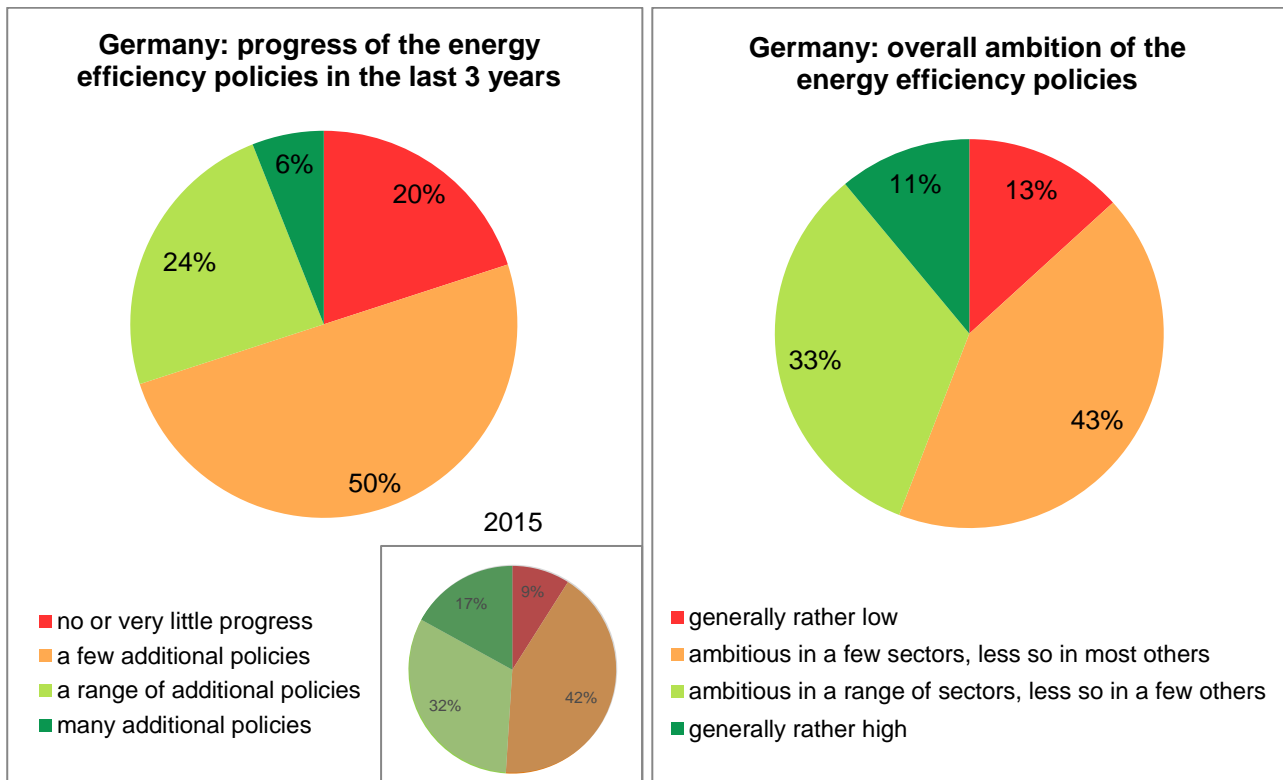
Due to the influence of large industry and Trade Unions, providing positive arguments in line with their ambitions (backed with numbers and data) could contribute to increasing their support of the energy transition. This could be of particular interest, since their agendas coincide with some of the topics of high importance for society (jobs, industrial competitiveness). Creating narratives they can "buy into" could have significant positive effect on driving the energy transition in France.

Germany



According to the German experts, Germany is among the countries that have made medium progress in energy efficiency policy in the past three years (country progress indicator: 17 out of 27 – see page 14). However, the rate of progress has strongly slowed down since the 2015 survey, which looked back on the period 2012-2015 (2015 survey: country progress indicator: 5 out of 28).

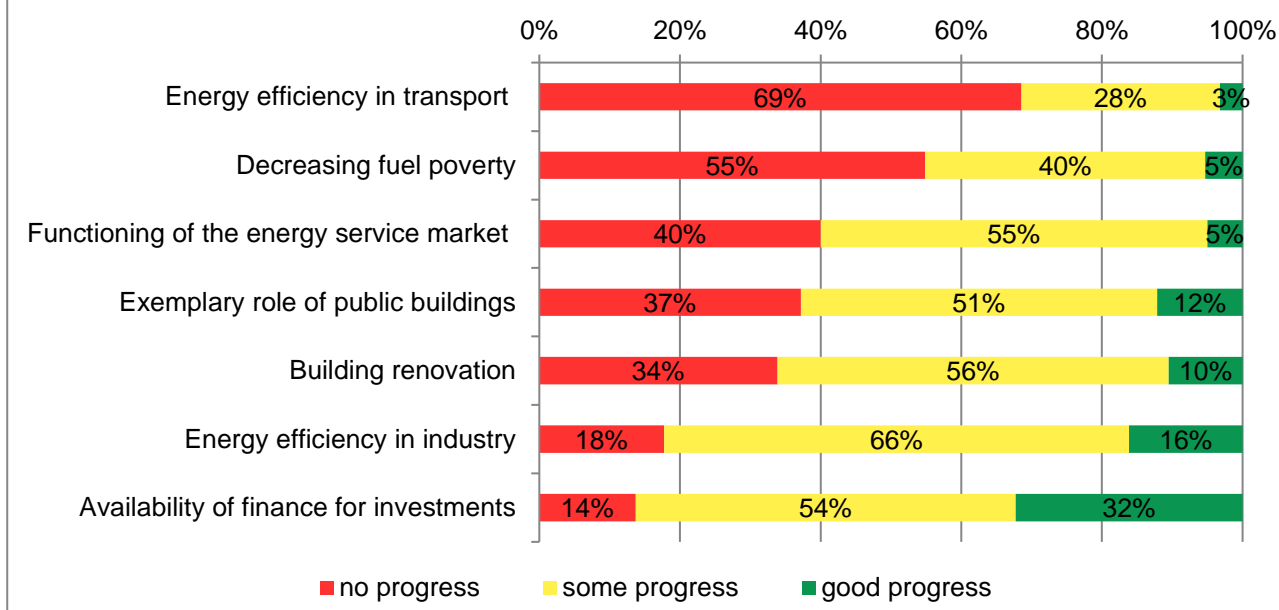
70 % of the experts report that no or only a few new policies were introduced in the last three years, whereas 30 % consider at least a range of additional policies were put in place. In 2015, these numbers were around 50:50. More than half of the experts (56 %) rate the overall ambition of energy efficiency policies in Germany as rather low or only ambitious in a few sectors. Only 44 % rate it at least ambitious in a range of sectors – this is below EU27 level and down from 63 % in the 2015 survey. Germany is the country where experts perceive the strongest decrease in ambition since the 2015 survey.



In regard to the past three years, the experts consider the most progress in actual implementation to have taken place in the fields of availability of finance for investments (among the highest ratings across Member States) and energy efficiency in industry. Respectively 86 % and 82 % of experts perceive at least some progress in these fields.

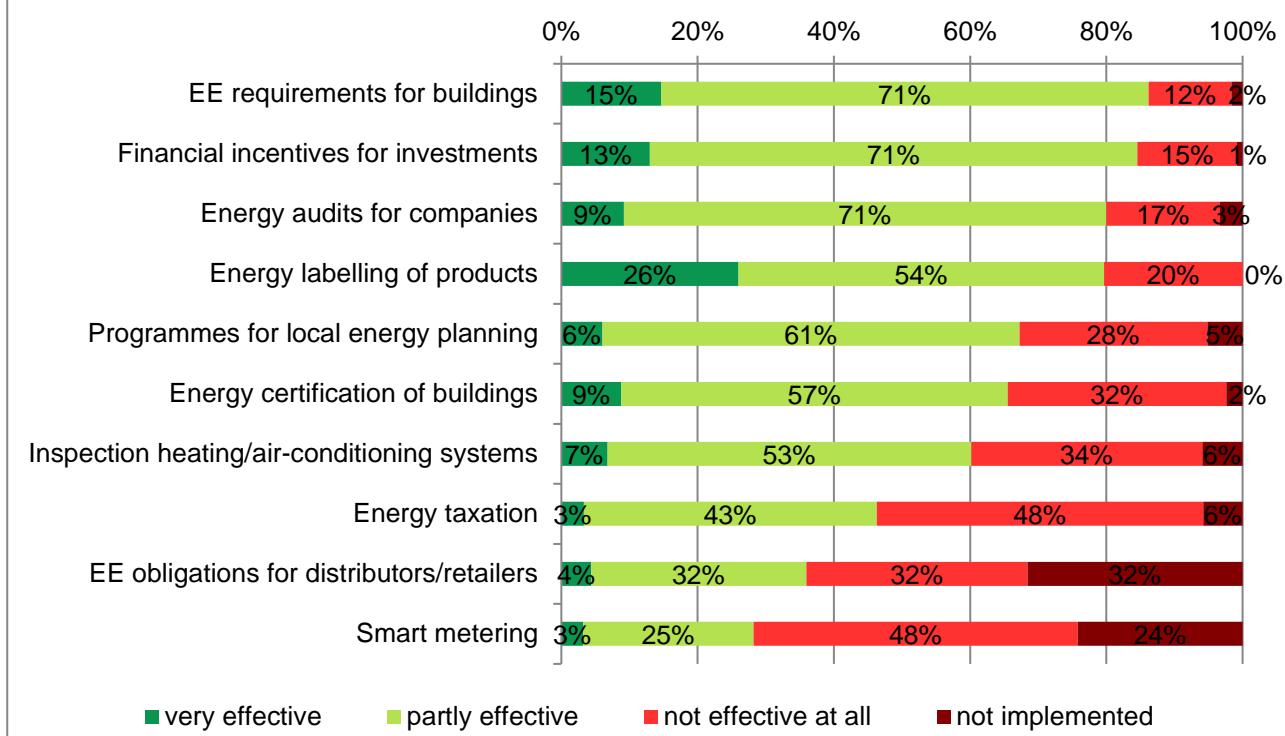
In contrast, 69 % of the experts responded that no progress has been made regarding energy efficiency in transport (among the lowest ratings of all countries). 55 % saw no progress in decreasing fuel poverty. Compared to other countries, German experts also perceive very low progress in actual implementation in the area of building renovation.

Germany: improvement in actual implementation

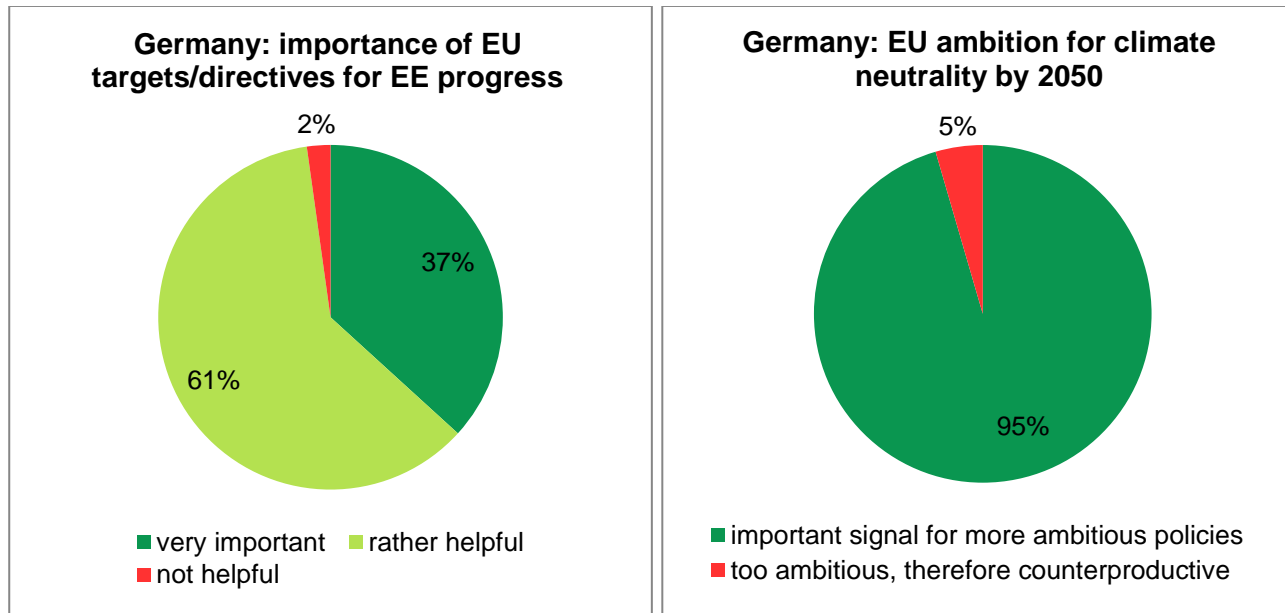


Among specific policy instruments, energy efficiency requirements for buildings and financial incentives for investments (rated at least partly effective by 86 % and 84 % respectively) as well as energy audits for companies and energy labelling of products (both rated 80 % partly or very effective) are perceived as the most effective by the German experts. The highest ratings for "not effective at all" are given to smart metering (48 % – among the highest across the EU and even higher than in the 2015 survey) and energy taxation (48 %) and. In overall terms, the experts consider most instruments as less effective than in 2015.

Germany: effectiveness of policy instruments



German energy experts consider EU targets and directives to be good drivers for energy efficiency progress. 98 % perceive them as positive: 37 % rate them "very important" (though significantly less than the EU27 average 56 %), 61 % rate them "rather helpful". Compared to other countries, experts are very supportive of the EU ambition for climate neutrality by 2050. 95 % consider it gives an important signal for more ambitious policies. 5 % consider it too ambitious, therefore counterproductive.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Germany (for more details on the content of this table and how to analyse it, see page 32):

Germany: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	4	53 %	47 %
Industrial competitiveness	2	2	52 %	48 %
Housing / living costs	3	3	22 %	78 %
Air quality	4	5		
Modernisation / investments	5	1		
Independence from other countries	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	20 %	6 %	74 %
Trade Unions	2	23 %	30 %	47 %
Farmers organisations	3	14 %	23 %	63 %
Chambers of Commerce	4			
Tabloid press	5			
NGOs	6			
Churches	7			

In Germany, similar to the EU27 average, the topics of loss/creation of jobs and industrial competitiveness are the two most important in the general public debate. The subject of 'affordable/healthy housing and living costs' is also high in importance (rank 3).

When looking at which subjects are already linked to energy efficiency in the public debate in Germany, economic factors are again at the top of the list: investments and competitiveness clearly rank 1st and 2nd. The topic of housing/living costs ranks 3rd and jobs ranks only 4th.

There are divided opinions on the relation between energy efficiency and both industrial competitiveness and jobs. They are discussed similarly positively and negatively in the public debate. The link to investments and to housing/living costs are perceived rather negatively (discussed negatively respectively 69 % and 78 % of the time). In overall terms, energy efficiency is perceived less positively in Germany than in most other Member States (rank 26 in the EU for positive perception).

The dominance of economic factors continues when asked which actor groups are influential on German politics. 98 % of the experts report that associations of large industry are very influential. They are followed by Trade Unions (rank 2), farmers organisations (rank 3) and Chambers of Commerce (rank 4), all with similar levels of influence. In most other EU countries farmers organisations are not as influential (rank 5 in EU27).

In Germany, in general terms, the energy transition does not find significant support among the most influential actor groups. In comparison to other EU countries, it ranks 25 of 27 in regard to actor groups' support of the energy transition. Associations of large industry and farmers organisations are seen as rather opposed by respectively 74 % (one of the highest rating among Member States) and 63 % of experts. German Trade Unions and Chambers of Commerce also received among the highest ratings for "rather opposed" of all Member States, though in general terms, they seem to have an ambivalent and unclear position.

In conclusion, considering the level of influence economic actors have on German politics, it could be helpful to work towards narratives they can "buy into" (e.g. jobs, industrial competitiveness, housing/living costs), particularly since these are also topics of high interest for society. Also farmers organisations could be stronger allies.

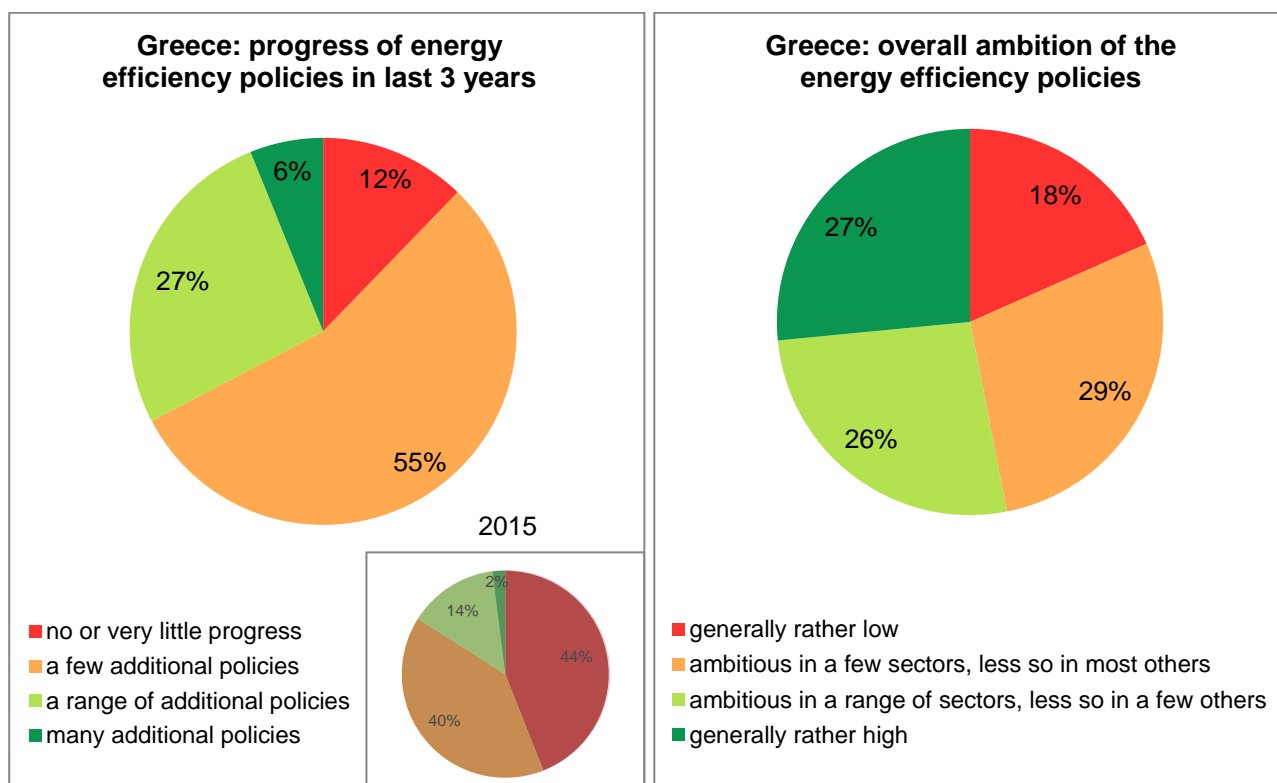
Working more closely with influential actor groups and providing positive arguments in line with their ambitions (backed with numbers and data) could contribute to increasing their support of the energy transition and encourage them to express a clearer position in public.

In overall terms, there seems to be a need for positive arguments for energy efficiency in Germany to help heighten general interest and positive attitude towards the energy transition. Communication efforts could help in this regard as well as collaborating with influential actors. Current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions.



In the opinion of Greek experts, Greece is among the countries that have made medium progress in energy efficiency policies in the past three years (country progress indicator: 11 out of 27 – see page 14). However, the rate of progress has strongly increased compared to the 2015 survey, which considered the period 2012-2015 (country progress indicator: 24 out of 28). Greece is one of the countries that made the strongest positive leap in country ranking since 2015.

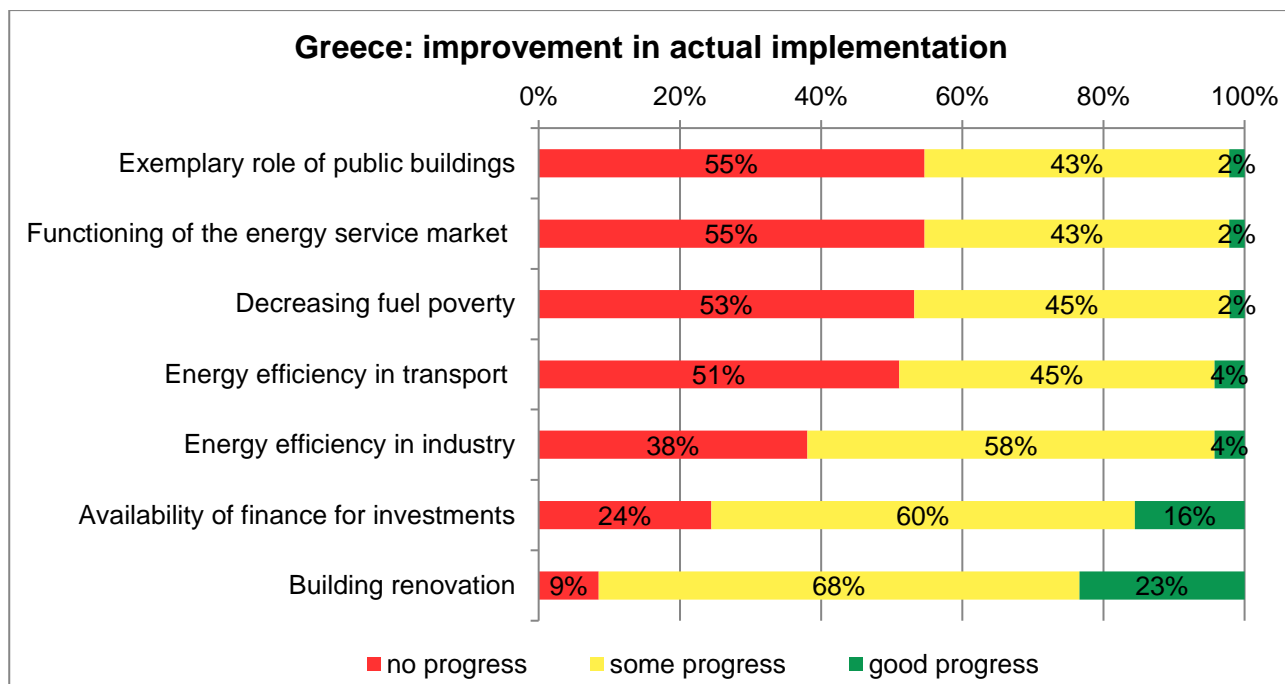
Although two thirds of the surveyed experts find that no or only a few additional policies were introduced in recent years, it is significantly less than in the 2015 survey (84 %) and one of the strongest improvements across Member States. The perception of the overall ambition of energy efficiency policies has also increased. More than half (53 %) of the experts consider them at least ambitious in a range of sectors – much more than in 2015 (26 %).



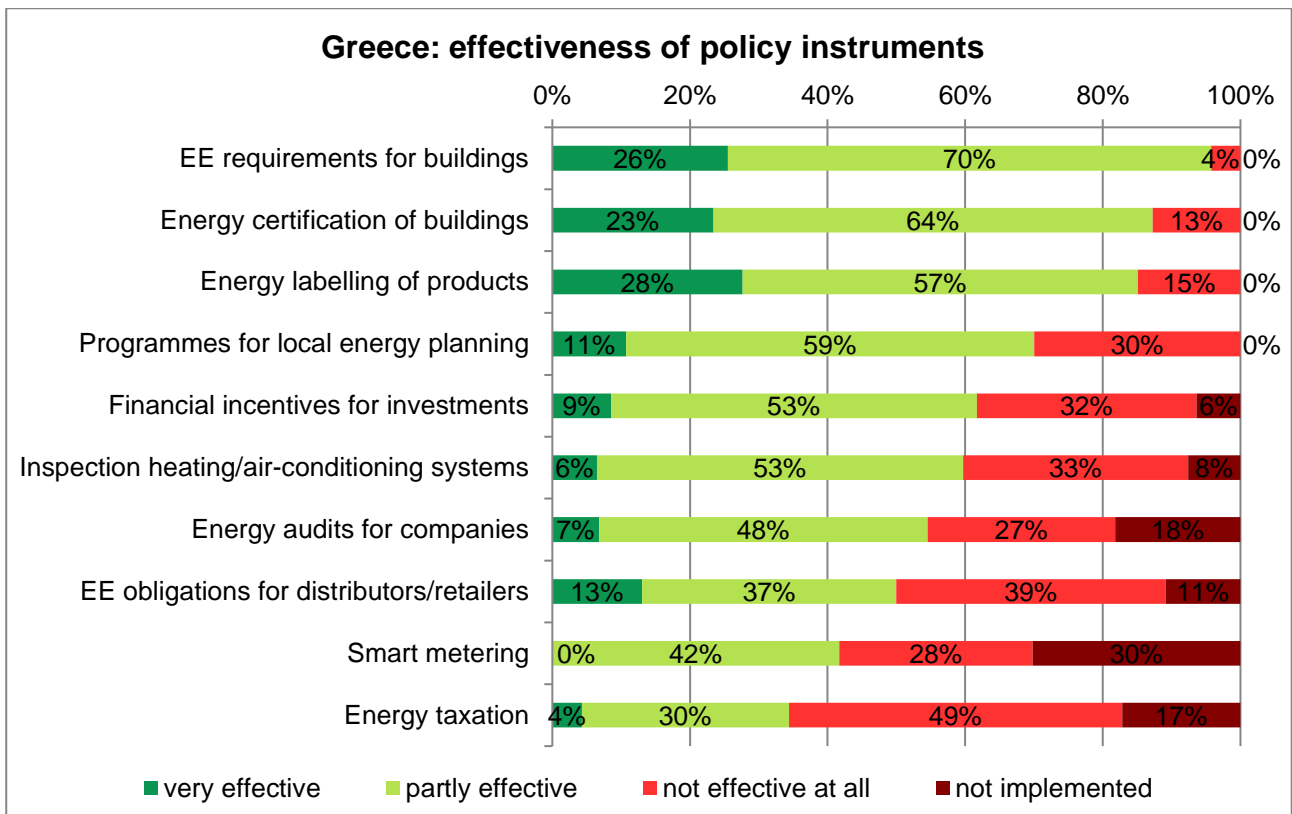
Regarding improvements in actual implementation, experts perceive the strongest progress in the area of building renovation (91 % report at least some progress) and in the availability of finance for investments (76 % at least some progress). The highest ratings for "no progress" were given to the exemplary role of public buildings (55 % – highest of all countries), the functioning of the energy service market (55 %) and decreasing fuel poverty (53 %).

According to the experts, Greece has achieved improvements in actual implementation in nearly all policy fields compared to responses of the 2015 survey. Compared to 2015, the

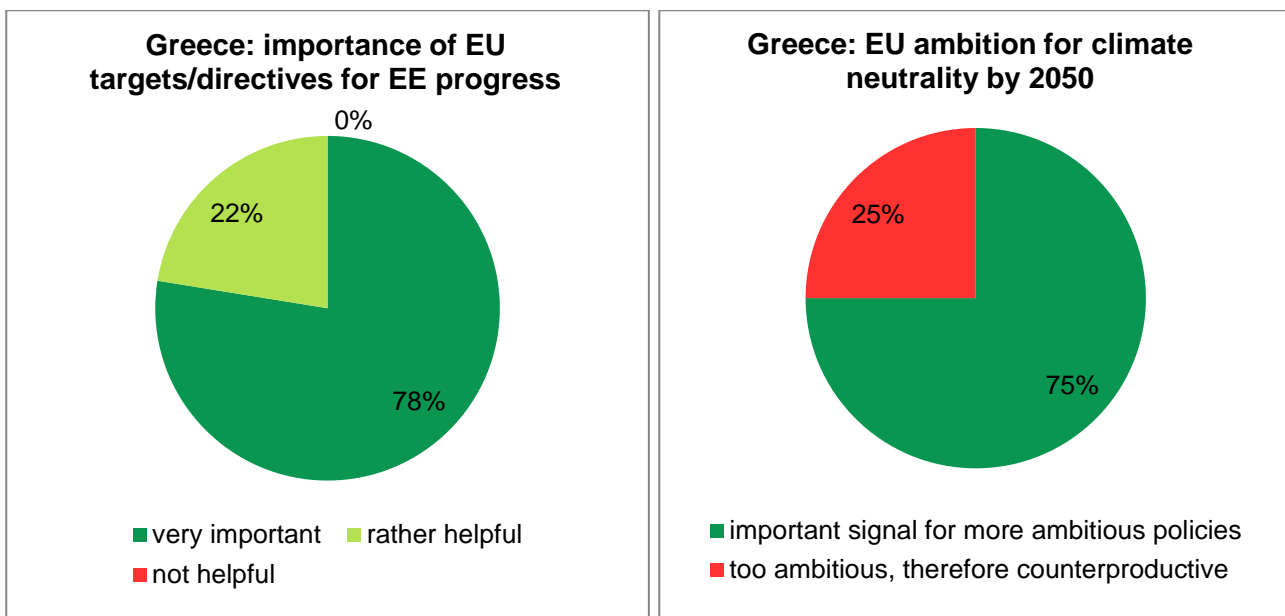
progress in decreasing fuel poverty reported by Greek experts is among the highest of all Member States.



When looking at the effectiveness of specific policy instruments, experts also report positive developments since the 2015 survey. Energy efficiency requirements for buildings, energy certification of buildings and energy labelling of products are currently seen as the most effective in the Greek context (rated as partly to very effective by 96 %, 87 % and 85 % respectively). Similar to the 2015 survey, the instrument considered to be the least effective is energy taxation (rated "not effective at all" by 49 % of experts). Energy audits for companies in Greece received the lowest effectiveness rating among Member States.



Greece is among the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. However, a quarter find the EU ambition for climate neutrality by 2050 to be counterproductive in Greece (EU27 average is 16 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development (for more details on the content of this table and how to analyse it, see page 32):

Greece: Key input factors for narrative development				
Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	3	71 %	29 %
Housing / living costs	2	2	46 %	54 %
Modernisation / investments	3	1	52 %	48 %
Independence from other countries	4	4		
Air quality	5	5		
Industrial competitiveness	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	69 %	9 %	22 %
Churches	2	11 %	68 %	21 %
Tabloid press	3	54 %	20 %	26 %
Trade Unions	4			
Chambers of Commerce	5			
NGOs	6			
Farmers organisations	7			

The topic of ‘loss and creation of jobs’ is by far the most important subject in the general public debate in Greece (with highest rating of all Members States). It is followed by the topic of ‘affordable/healthy housing and living costs’ in rank 2 (higher than in many other countries – EU27 rank 4), and ‘modernisation and infrastructure investments’ in rank 3.

When looking at which subjects are already being linked to energy efficiency in the public debate, the same 3 topics come out at the top of the list: modernisation/investments (rank 1), housing/living costs (rank 2), jobs (rank 3). The survey results show that energy efficiency is already linked to some of the topics of high interest for society. This could provide a good basis for positive narrative development and roll-out. Compared to other Member States, experts report that energy efficiency is quite present in the public debate in Greece and already linked to many subjects.

The relations between energy efficiency and both modernisation/investments and housing/living costs are discussed to a similar extent negatively and positively, indicating that there are divided opinions in this regard. In comparison, the positive effects of energy efficiency measures on job creation seem to be well recognised in Greece (71 % discussed positively), making it a strong argument in favour of the energy transition.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics. In Greece, the Church ranks 2nd – a level of influence seen in only very few EU countries (Churches rank 7 in EU27). Greek tabloid press rank 3rd and received one of the highest influence ratings among Member States. Overall, experts report that actor groups have more influence on politics in Greece than in all other Member States – making them interesting potential allies for driving change in society.

In regard to their attitude towards the energy transition, associations of large industry are perceived supportive by 69 % of the experts (one of the strongest levels of support among Member States). 54 % see the tabloid press as supportive. The Church is not seen as taking a clear position. 68 % of experts report "position unknown".

In conclusion, energy efficiency already seems to be well positioned in the public debate and discussed in relation to some of the key topics for society (i.e. modernisation/investments, housing/living costs, jobs). These messages are being backed by some influential actor groups that support the energy transition (industry, tabloid press).

Further development of new narratives for the energy transition in Greece could perhaps benefit from taking even more into account the importance of the topic of jobs in the public debate. Current arguments about high costs (ex: required investments, increased costs of housing and living) might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actor groups.

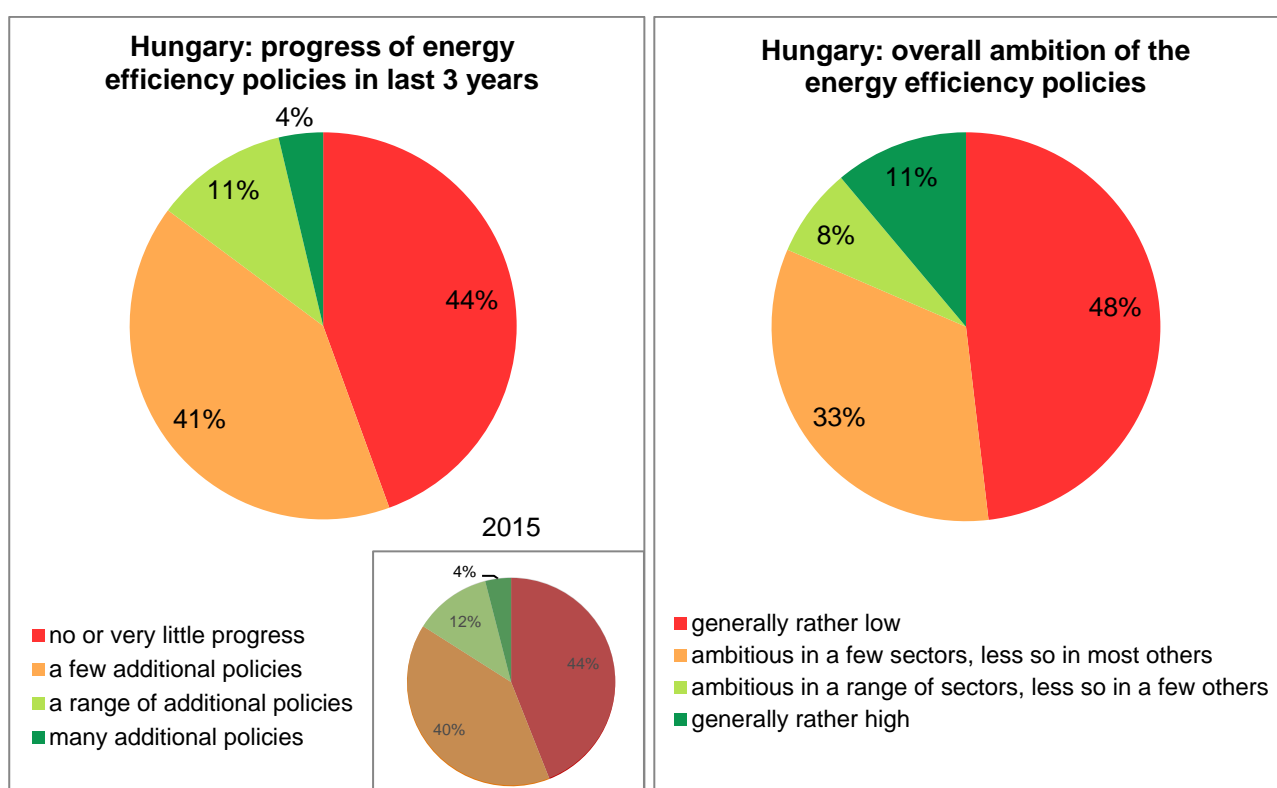
Associations of large industry and the tabloid press could be strong allies for the energy transition debate seeing as they are both influential on Greek politics and supportive of the cause. Also Churches could be stronger allies in Greece. In some other Member States (for example Germany and Austria), churches take an active position in public on climate protection. In general, working closely with influential actor groups, providing them positive arguments in line with their ambitions and creating narratives they can "buy into" could have significant positive effect on driving the energy transition in Greece.

Hungary



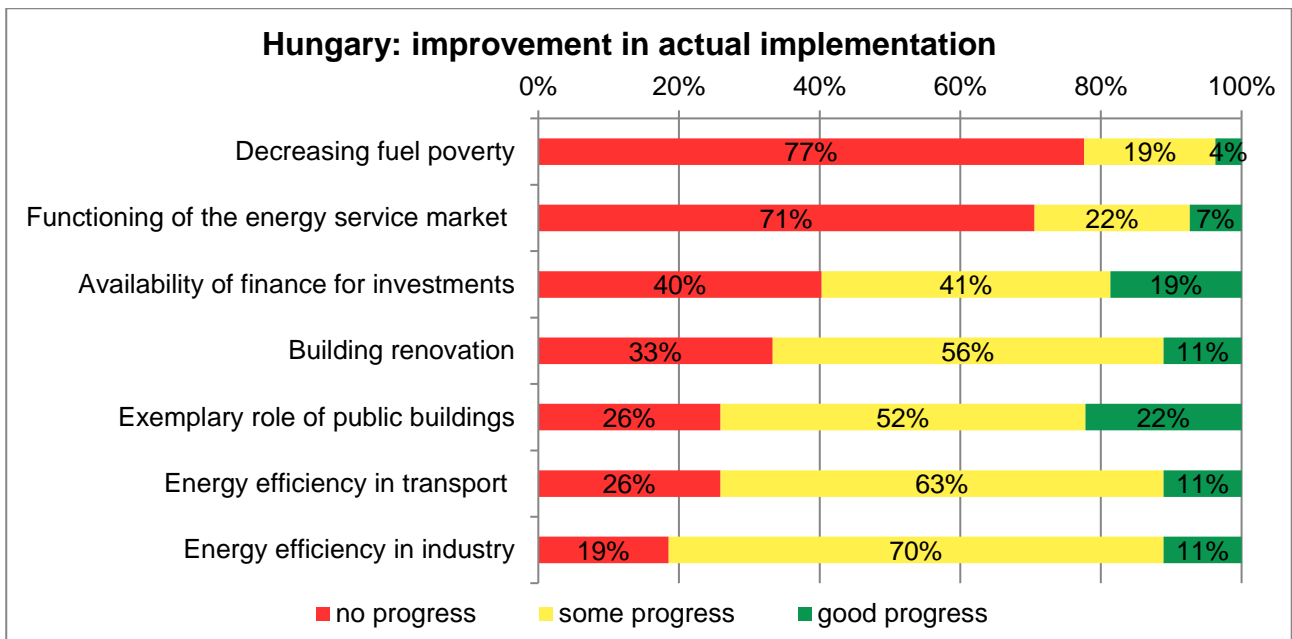
According to the Hungarian experts, Hungary is the Member State that has made the least progress in energy efficiency policies in the past 3 years (country progress indicator: 27 out of 27 – see page 14). The rate of progress has continually decreased throughout the three surveys (country progress indicator: 26 in 2015 and 10 in 2012).

85 % of surveyed experts think that no or only a few additional policies were introduced in the last three years. Similarly, 81 % of interviewed experts consider the overall ambition of energy efficiency policies as rather low (48 %) or ambitious in only a few sectors (33 %). Although experts rank the overall ambition slightly higher than in 2015, the ratings for both progress and ambition are among the lowest in the EU.



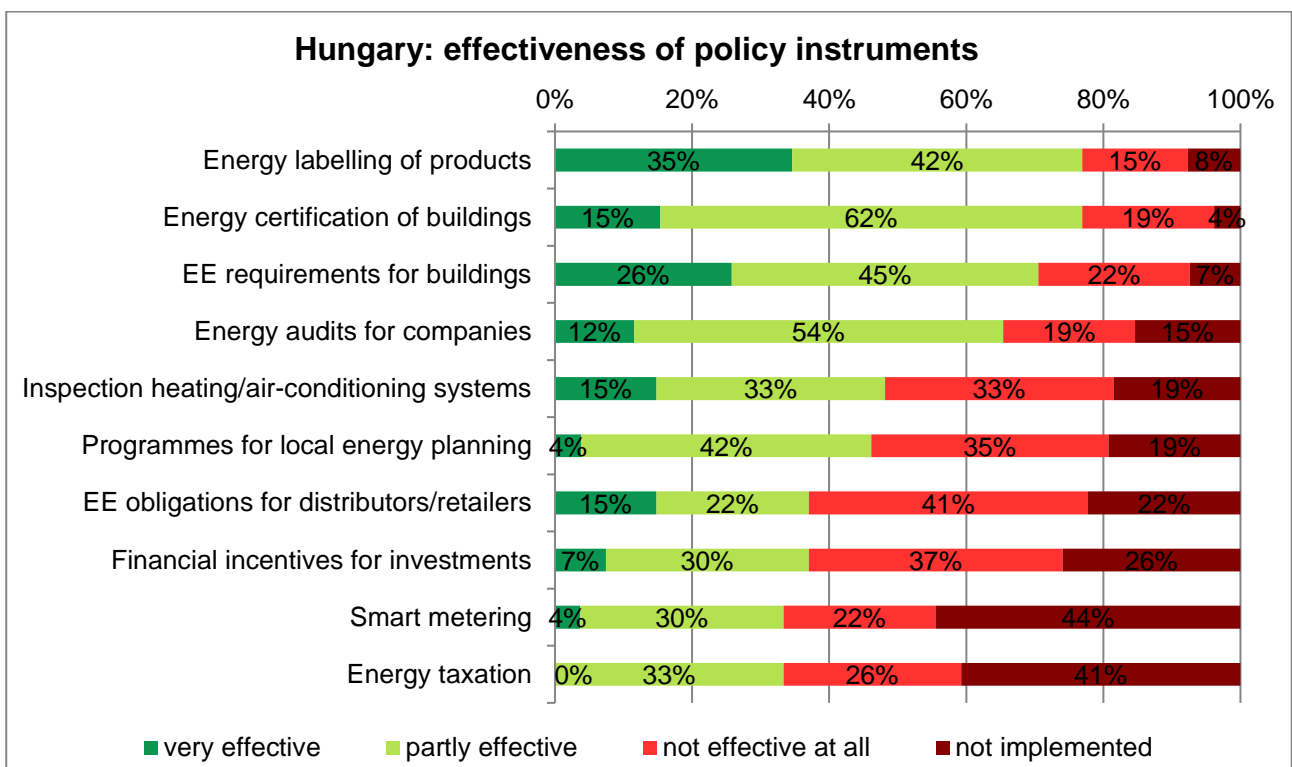
In terms of improvements in actual implementation, most progress was made in energy efficiency in industry (81 % of experts report some or good progress), energy efficiency in transport and exemplary role of public buildings (both 74 % some or good progress). For the latter two, the experts report above EU27 levels of progress in these areas.

In comparison, the progress in actual implementation in the fields of building renovation, functioning of the energy service market and decreasing fuel poverty are among the lowest in the EU and show some of the strongest slowdowns in progress since the 2015 survey among Member States.

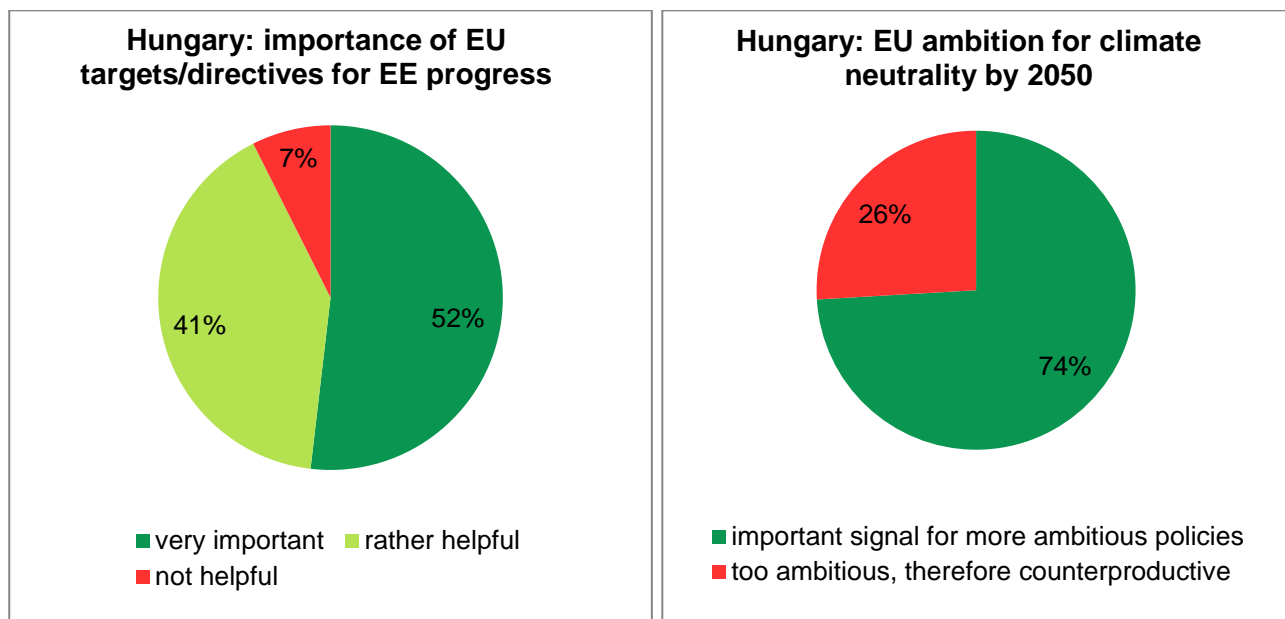


Among specific energy efficiency policy instruments, energy labelling of products, energy certification of buildings and energy efficiency requirements for buildings are seen as the most effective in the Hungarian context (rated at least partly effective by 77 %, 77 % and 71 % of experts respectively). These were also rated the most effective instruments in the 2015 survey. Compared to the 2015 results, Hungarian experts report one of the strongest increases in the impact of energy audits for companies of all other Member States.

At the other end of the spectrum, the highest rating for "not effective at all" is given to energy efficiency obligations for distributors/retailers (41 % – among the highest in the EU). According to 44 % of the surveyed experts, smart metering is not yet implemented in Hungary (the highest rating for "not implemented" of all Member States).



93 % of the experts consider European targets and directives to be positive for the progress of energy efficiency in Hungary. More than half (52 %) think that they are "very important". However, 26 % of the surveyed experts find the EU ambition for climate neutrality by 2050 to be counterproductive in Hungary (EU27 average is 16 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Hungary (for more details on the content of this table and how to analyse it, see page 32):

Hungary: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	71 %	29 %
Independence from other countries	2	1	59 %	41 %
Industrial competitiveness	3	4	69 %	31 %
Modernisation / investments	4	2		
Air quality	5	5		
Rural development	6	7		
Housing / living costs	7	3		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	29 %	13 %	58 %
Chambers of Commerce	2	36 %	32 %	32 %
Churches	3	27 %	64 %	9 %
Tabloid press	4			
Trade Unions	5			
Farmers organisations	6			
NGOs	6			

According to survey results, the subject of 'loss and creation of jobs' is by far the most important topic in the general public debate in Hungary. This is followed by the topic of independence from other countries (rank 2, much higher than in most other Member States (rank 6 in EU27)) and affordable/healthy housing and living costs (rank 3).

Looking at which subjects in particular are currently most strongly linked to energy efficiency in the public debate, independence from other countries (discussed somewhat more positively than negatively) and modernisation/investments (discussed negatively 62 % of the time) clearly rank 1st and 2nd. Energy efficiency is also often discussed in relation to housing/living costs, although this topic seems to be of little importance in the public debate (the lowest ranking of all Member States)

Noteworthy in the case of Hungary is the fact that energy efficiency is not (yet) being discussed by media and politicians in relation to 'jobs'. When this link is being made, the debate is largely positive (71 % discussed positively). Also the link to competitiveness is

discussed quite positively (69 %). These make strong arguments in favour of the energy transition.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics in Hungary. 96 % of experts rate them "very influential". The Chambers of Commerce rank 2nd for their level of influence. Churches come in 3rd – a level of influence seen in only a few Member States (EU27: rank 7). Other stakeholder groups are reported as not significantly influential. In overall terms, Hungarian experts report that actor groups have lower levels of influence on politics than in most other Member States.

According to the experts, associations of large industry have a rather negative attitude towards the energy transition: 58 % see them as opposed, 29 % as supportive. In comparison, Chambers of Commerce and churches seem to have an ambivalent and unclear position: sometimes supportive, sometimes opposed, but often unknown.

In conclusion, due to their level of influence, economic actors (industry, Chambers of Commerce) could be stronger allies for the energy transition debate in Hungary, especially since their agendas seem to coincide with some of the topics of high interest for society (jobs, competitiveness). Also churches could be stronger allies in Hungary. In some other Member States (for example Germany and Austria), churches take an active position in public on climate protection.

Working with influential actor groups and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. In general terms, creating narratives these groups can "buy into" could have significant positive effect on triggering change.

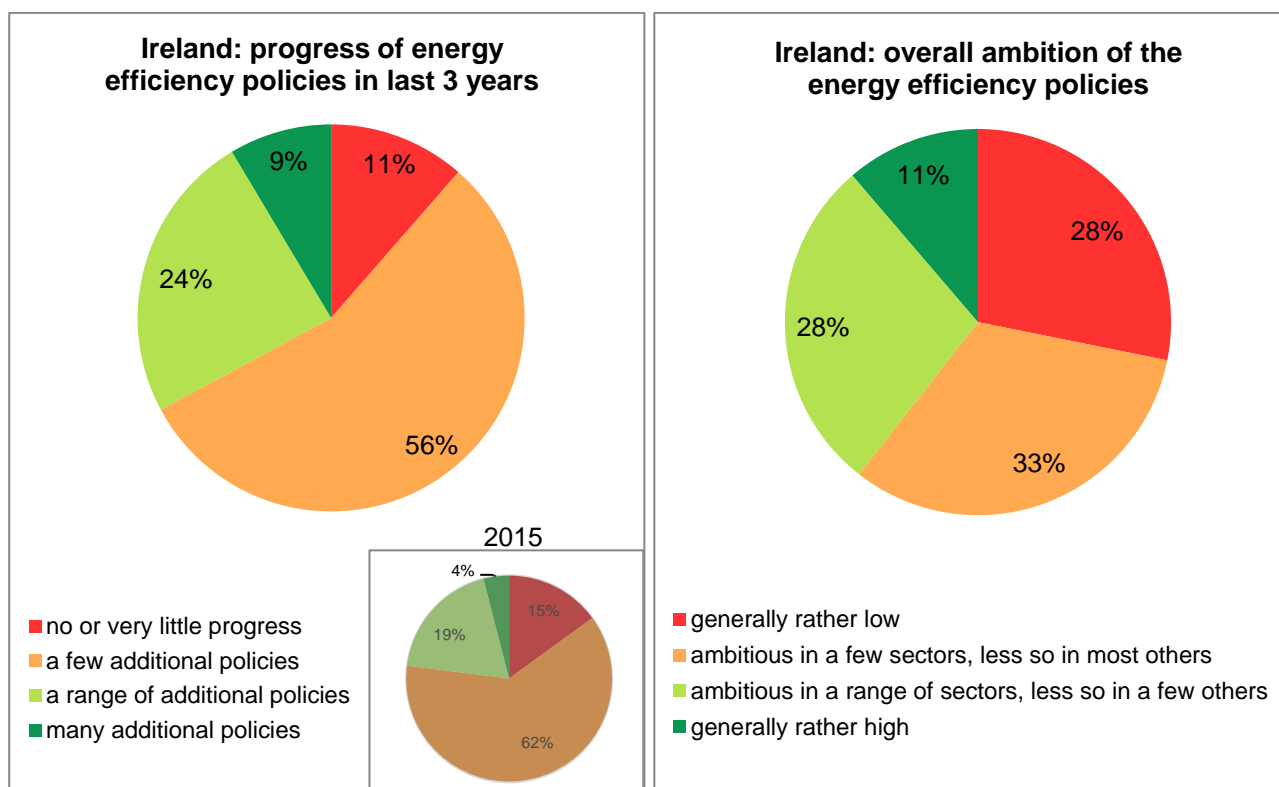
Hungarian narratives for the energy transition could benefit from taking into account the importance of 'jobs' and 'industrial competitiveness' in the public debate. The positive effects of energy efficiency on these two areas are already recognised in society. Hence, increasing their presence in the public debate (backed with numbers) could help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Ireland

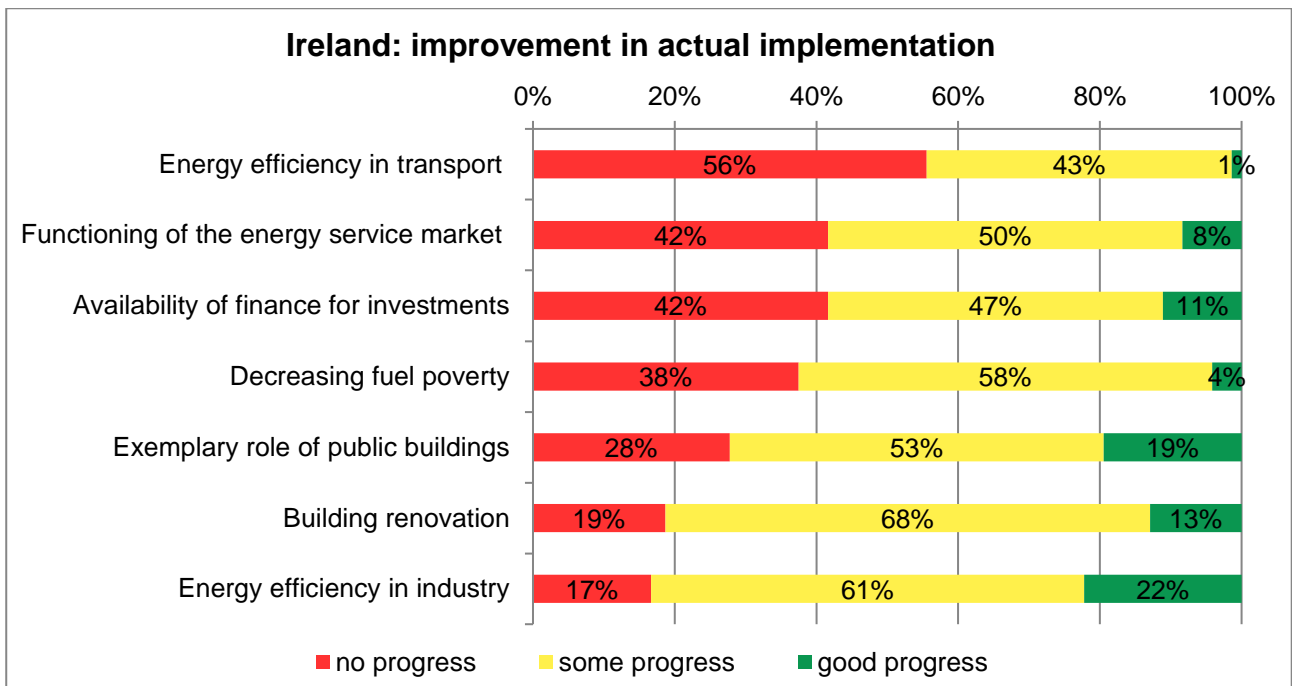


Ireland is among the Member States that has made medium-to-low progress in energy efficiency policies in the last 3 years (country progress indicator: 19 out of 27 – see page 14). The rate of progress has constantly slowed down since the first survey (country progress indicator: 15 in 2015 and 11 in 2012).

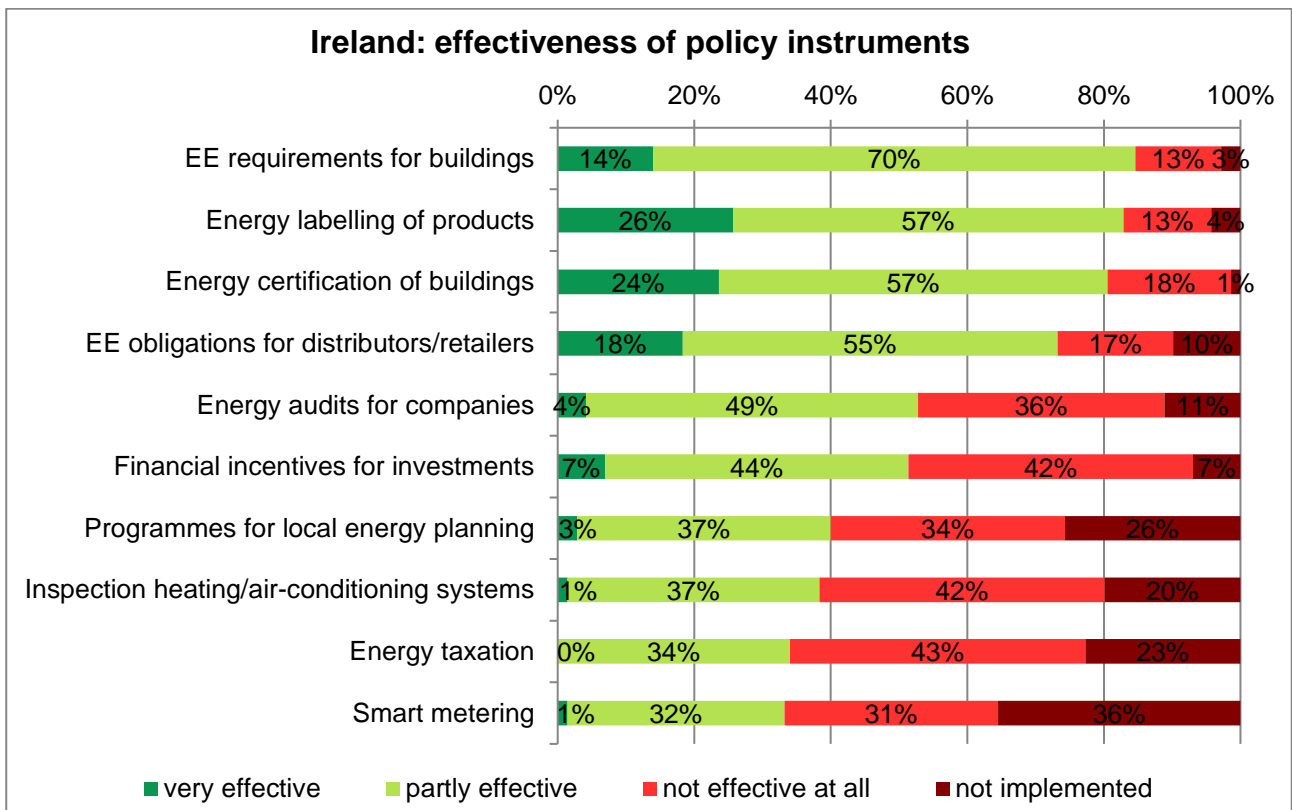
Two thirds of the Irish experts say that only a few or no additional energy efficiency policies were introduced in the last 3 years – somewhat less than in 2015 (77 %). Opinions on the level of overall ambition of policies are divided among experts and remain relatively unchanged since 2015: 39 % think it is ambitious in a range of sectors or even generally rather high, whereas 61 % find it ambitious only in a few sectors or generally rather low.



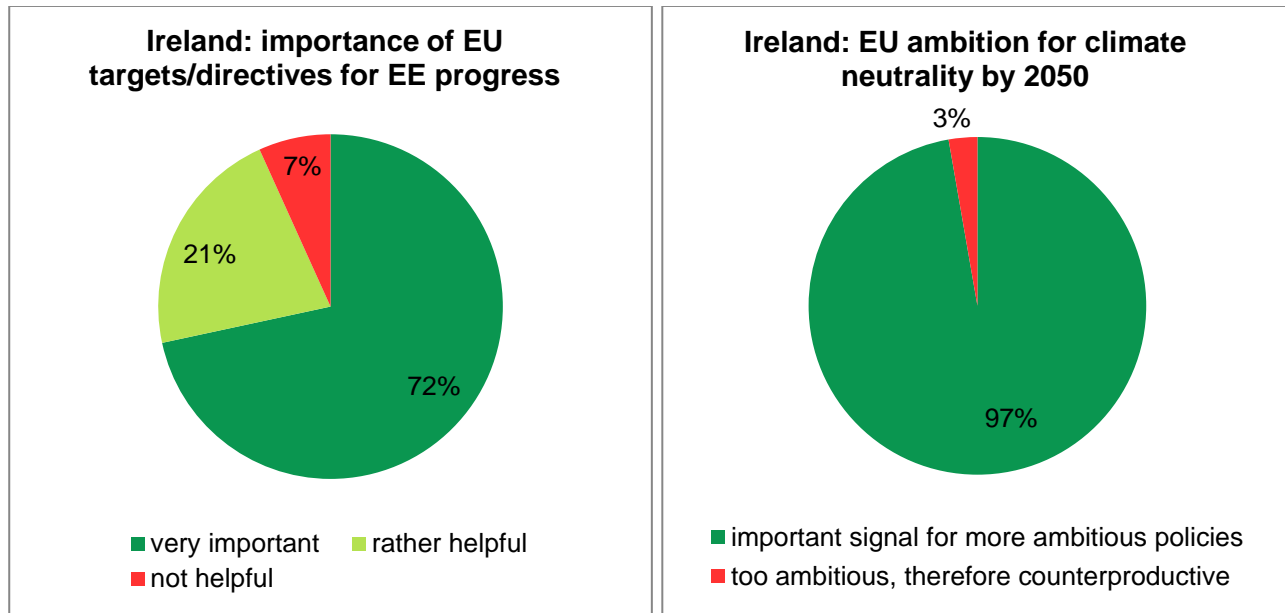
In terms of improvements in actual implementation, experts see the most progress over the past 3 years in the areas of energy efficiency in industry and building renovation (respectively 83 % and 81 % of experts report some or good progress). The least progress was seen in energy efficiency in transport (56 % of experts see no progress, one of the lowest ratings across EU countries for this field). Little improvement was also observed in the functioning of the energy service market and in the availability of finance for investments (42 % of experts reported no progress in both fields).



Among specific energy efficiency policy instruments, energy requirements for buildings and energy labelling of products are perceived as the most effective in the Irish context. Respectively 84 % and 83 % of surveyed experts rate them partly to very effective. Energy efficiency obligations for energy distributors/retailers received among the highest effectiveness rating among all Member States. Three quarters (73 %) of experts see them as at least partly effective. At the other end of the spectrum, Irish experts report the lowest effectiveness ratings among all EU countries for smart metering, inspection of heating/air-conditioning systems and energy audits for companies.



Irish energy experts consider EU targets and directives to be good drivers for energy efficiency progress. 93 % perceive them as positive, of which 72 % rate them "very important" (EU27 average: 56 %). Compared to other countries, experts in Ireland are very supportive of the EU ambition for climate neutrality by 2050. 97 % consider it gives an important signal for more ambitious policies (EU27 average: 84 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Ireland (for more details on the content of this table and how to analyse it, see page 32):

Ireland: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	68 %	32 %
Housing / living costs	2	2	38 %	62 %
Rural development	3	4	48 %	52 %
Industrial competitiveness	4	7		
Modernisation / investments	5	1		
Air quality	6	3		
Independence from other countries	7	5		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	57 %	18 %	25 %
Farmers organisations	2	23 %	7 %	70 %
Trade Unions	3	24 %	53 %	23 %
Chambers of Commerce	4			
Tabloid press	5			
NGOs	6			
Churches	7			

Similar to the large majority of EU countries, the topic of 'loss and creation of jobs' is the most important subject in the general public debate in Ireland. The topic of affordable/healthy housing and living costs ranks 2nd in importance in Ireland (much higher than in many other countries). Rural development ranks 3rd in importance (with among the highest ratings of all Members States), although it is by far the least important topic in the EU27 overall.

When looking at which subjects are currently linked to energy efficiency in the public debate, we see that it is most strongly linked to investments and to housing and living costs (both discussed negatively around two thirds of the time), and to air quality (80 % discussed positively). In overall terms, energy efficiency is perceived less positively in Ireland than in several other Member States (rank 24 in the EU for positive perception).

Noteworthy in the case of Ireland is the fact that energy efficiency is not being linked to 'jobs' in the general public debate, although it is the most important topic and discussed

rather positively. In general, energy efficiency is not (yet) being linked to some of the topics of highest interest for society.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics in Ireland. Farmers organisations rank 2nd for their level of influence. This is quite different to most other EU countries where they are much less influential (EU27: rank 5). Trade Unions and Chambers of Commerce are also quite influential actor groups, as in the EU27 in general.

Twice as many experts perceive large industry as supportive of the energy transition than as opposed. In comparison, farmers organisations show a negative attitude towards the energy transition (70 % opposed) and Trade Unions have not expressed a clear or strong position in regard to the subject. Due to their level of influence, these 2 groups could be stronger allies for driving the energy transition, especially since their agendas seem to coincide with topics of high interest for society.

In conclusion, Irish narratives for the energy transition could benefit from taking into account the importance of 'jobs' in the public debate. Increasing the awareness in society about the positive effects of energy efficiency on job creation (backed with numbers) could help heighten the general interest and positive attitude towards the energy transition. Current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions.

Due to their level of influence on Irish politics, and since they already support the cause, associations of large industry could be interesting allies for the energy transition debate.

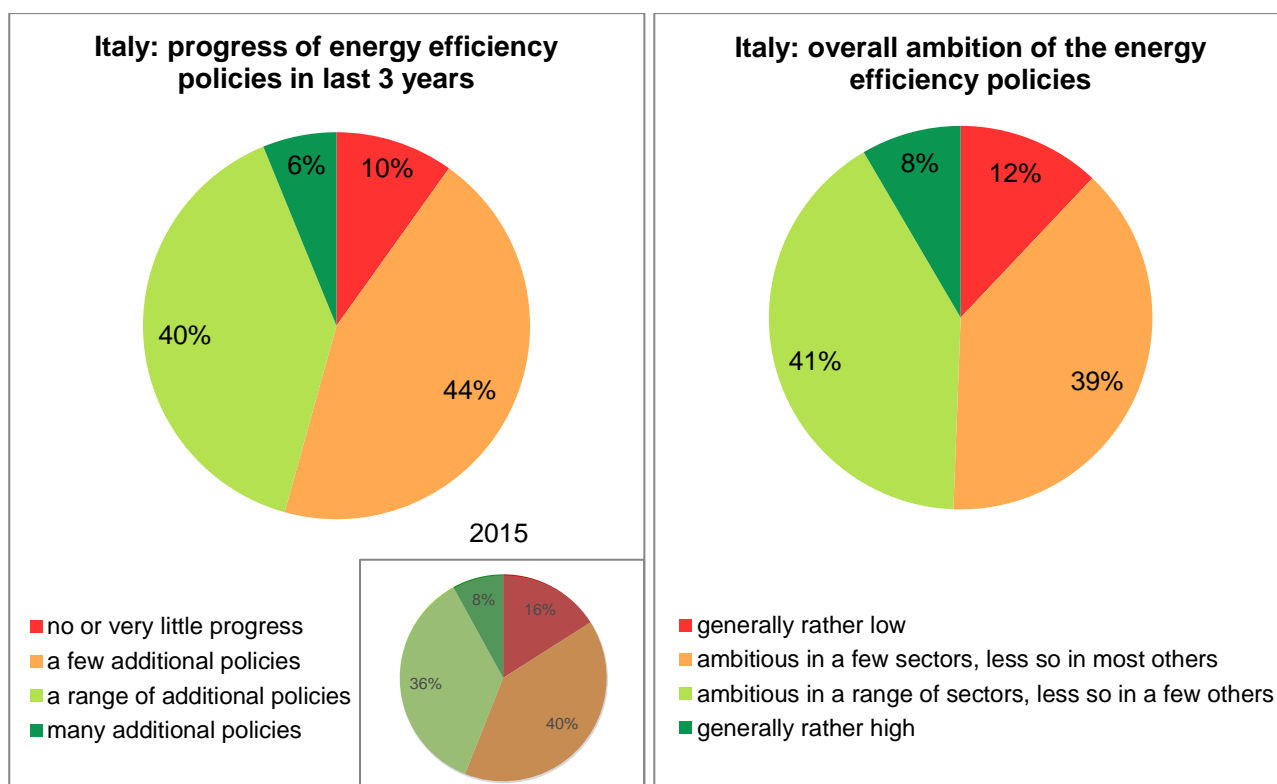
Working with farmers organisations and Trade Unions and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition. This could be of particular interest, since their agendas seem to coincide with topics of high importance for society (jobs, rural development). Creating narratives they can "buy into" could have significant positive effect on driving the energy transition in Ireland.

Italy

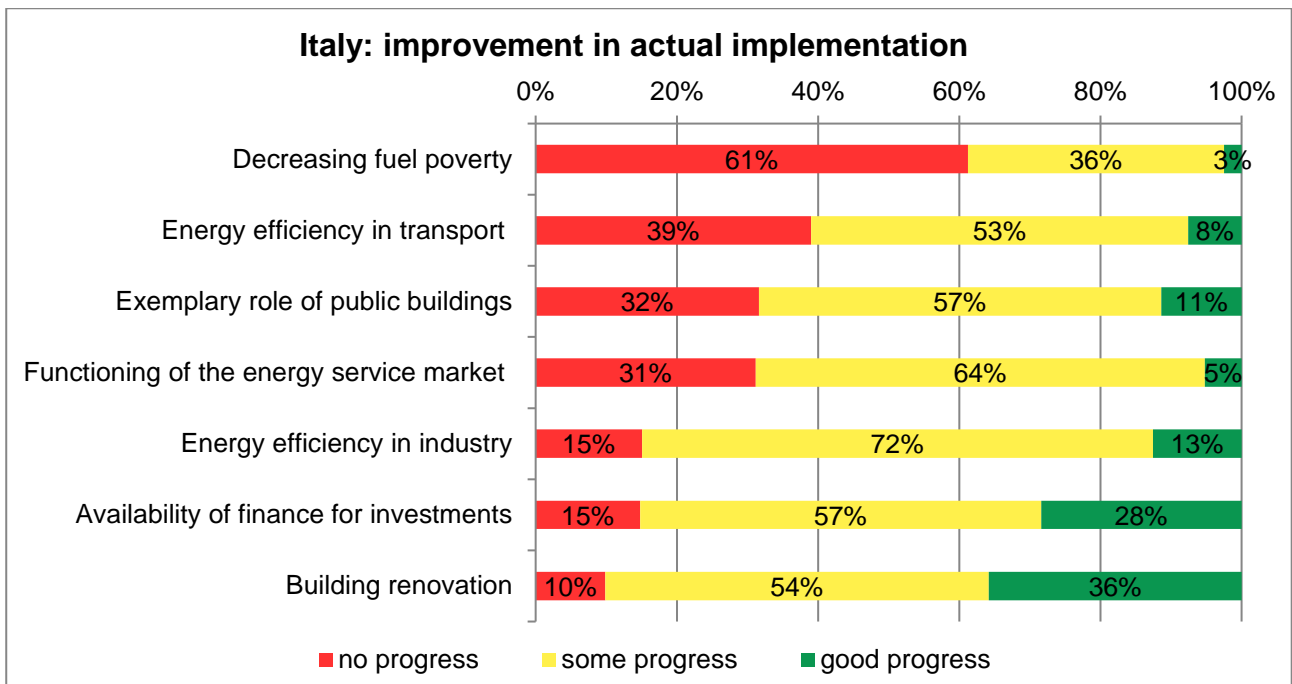


In the opinion of Italian experts, Italy is among the countries that have progressed comparatively well in energy efficiency policy in the past 3 years (country progress indicator: 7 out of 27 – see page 14). Italy is one of the 4 countries where the rate of progress has constantly increased since the first survey in 2012 (country progress indicator: 13 in 2015 and 27 in 2012).

Regarding the introduction of new policies, 46 % of the surveyed experts saw at least a range of additional policies implemented in the past three years. Italian energy experts have a divided view of the overall level of ambition in their country: half consider it ambitious in at least a range of sectors, half find it ambitious in only a few sectors or rather low. However, there has been a positive development since 2015 (62 % rated it ambitious in only a few sectors or rather low).



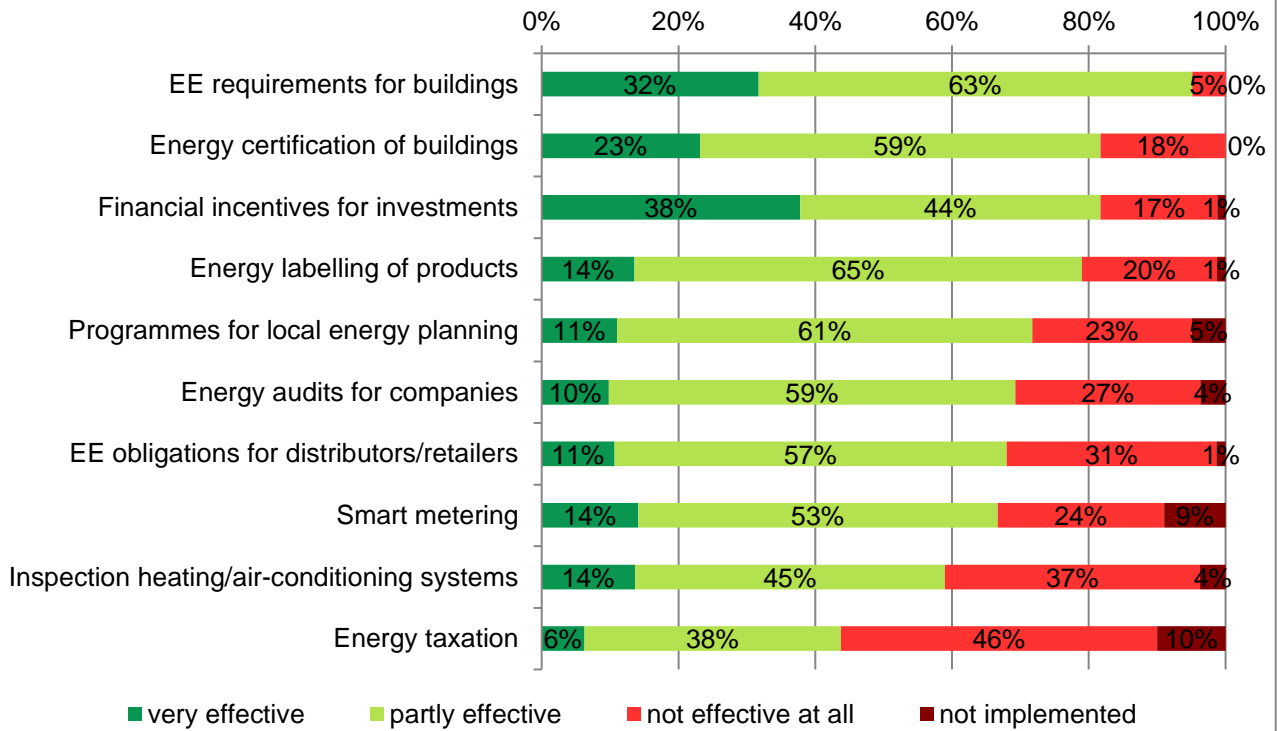
In terms of improvements in actual implementation, most progress was seen in the field of building renovation: 36 % of experts report "good progress" and 54 % "some progress" in the past 3 years. This is followed by progress in the availability of finance for investments and in energy efficiency in industry (in both cases, 85 % of experts report at least some progress). The least progress was seen in decreasing fuel poverty where 61 % of experts report no progress.



Regarding specific policy instruments, energy efficiency requirements for buildings are considered the most effective by the Italian experts: 95 % rate them as partly to very effective – a somewhat higher rating than in 2015 (around 85 %). The Italian energy efficiency experts also see energy certification of buildings and financial incentives for energy efficiency investments as effective (both 82 % partly to very effective). In the case of financial incentives for investments, this is by far the highest effectiveness rating of all Member States.

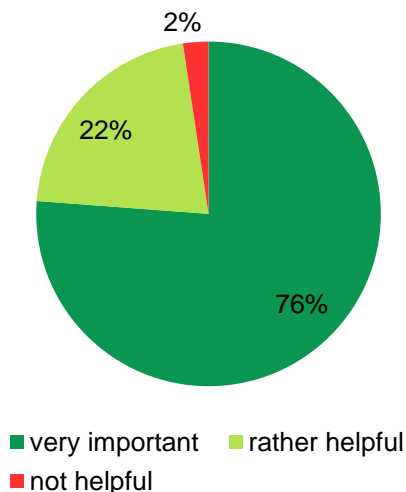
The least effective instruments in Italy are energy taxation (46 % "not effective at all") and the inspection of heating/air-conditioning systems (37 % "not effective at all"). However, compared to other countries, inspection of heating/air-conditioning systems received one of the highest effectiveness rating among all EU countries.

Italy: effectiveness of policy instruments

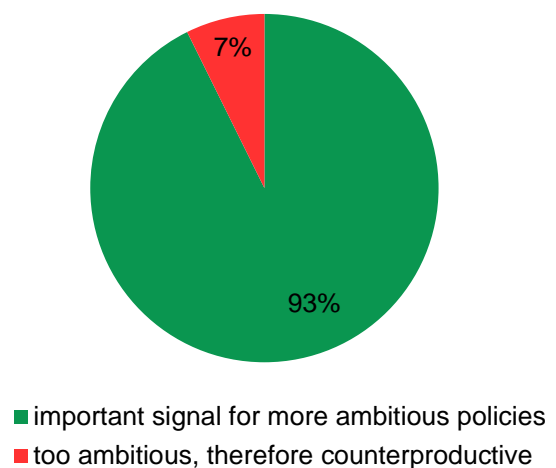


Three quarters of Italian energy experts consider EU targets and directives to be very important for the progress in energy efficiency in their country (among the highest of all countries). An additional 22 % consider them to be "rather helpful". 93 % support the EU ambition for climate neutrality by 2050 and find it offers an important signal for more ambitious policies in Italy.

Italy: importance of EU targets/directives for EE progress



Italy: EU ambition for climate neutrality by 2050



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Italy (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	5	85 %	15 %
Industrial competitiveness	2	3	74 %	26 %
Air quality	3	2	75 %	25 %
Modernisation / investments	4	1		
Independence from other countries	5	4		
Housing / living costs	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	50 %	18 %	32 %
Trade Unions	2	46 %	35 %	19 %
Tabloid press	3	51 %	33 %	16 %
Churches	4			
Chambers of Commerce	5			
Farmers organisations	6			
NGOs	7			

In Italy, similar to the overall EU27 ranking, 'loss and creation of jobs' and 'industrial competitiveness' are the most important topics in the general public debate. Air quality ranks 3rd in importance (rank 5 in EU27).

When looking at which subjects are currently linked to energy efficiency in the public debate, we see that it is most strongly linked to investments (rank 1, discussed equally positively and negatively). This is followed by air quality (rank 2) and industrial competitiveness (rank 3). Both of these topics are discussed positively three quarters of the time).

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in Italy (rank 4 in the EU for positive perception). However, results show that it is not (yet) being discussed in relation to 'jobs' – despite this being the topic of highest interest for society. When this link is being made, the debate is strongly positive.

As observed in most EU countries, associations of large industry have the strongest influence on politics in Italy. 95 % of experts rate them "very influential". Trade Unions come in rank 2 (72 % very influential), followed by Tabloid press (68 %).

The 3 most influential actor groups in Italy are perceived as more supportive of the energy transition than opposed. They are considered supportive by around 50 % of experts. Although significantly more experts consider Trade Unions and Tabloid press as supportive than opposed, it seems that these groups have not yet expressed a clear position on this topic. In both cases, around one third of the experts answered "position not known".

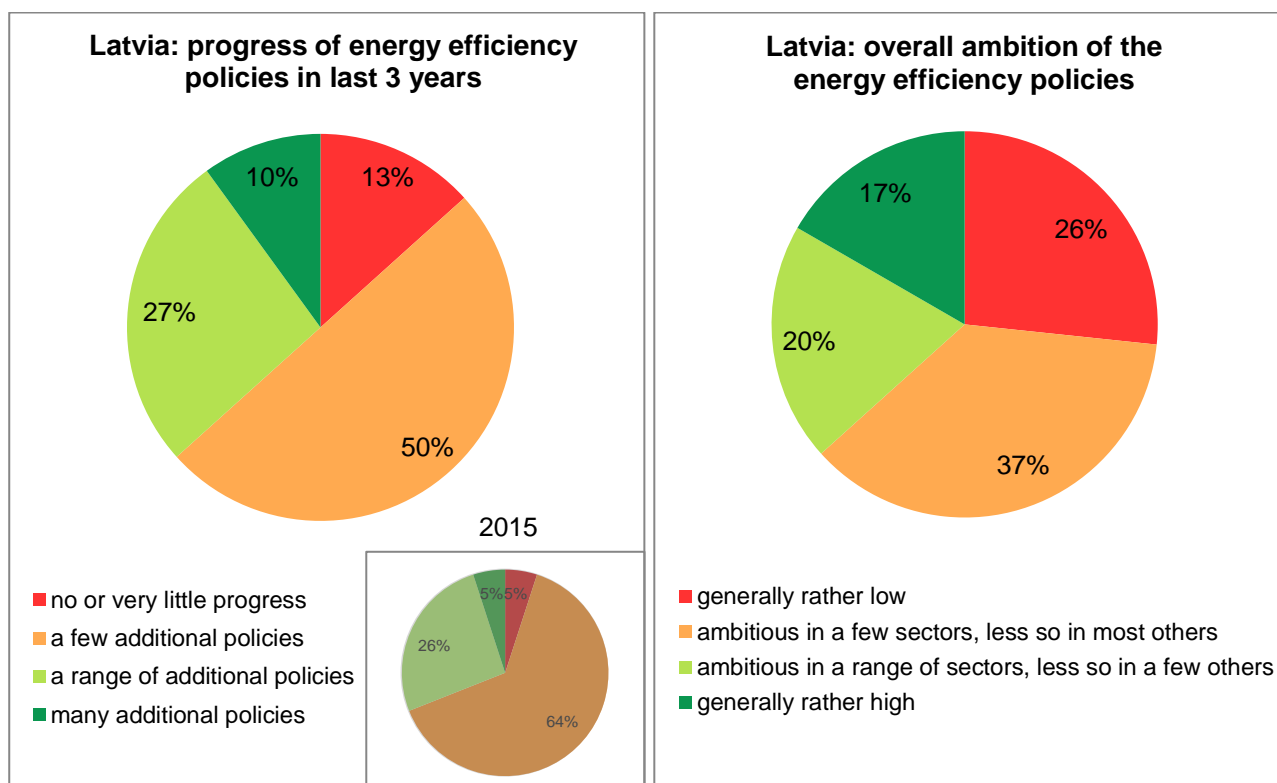
In conclusion, due to their level of influence, large industry and Trade Unions could be stronger allies for the energy transition debate in Italy, especially since their agendas seem to coincide with topics of high interest for society (jobs, industrial competitiveness). Working with these groups and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. In general terms, creating narratives they can "buy into" could have significant positive effect on triggering change.

The development of new narratives for the energy transition in Italy could benefit from taking into account the importance of 'jobs' in the public debate. Increasing its presence in the public debate could help heighten general interest in the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.



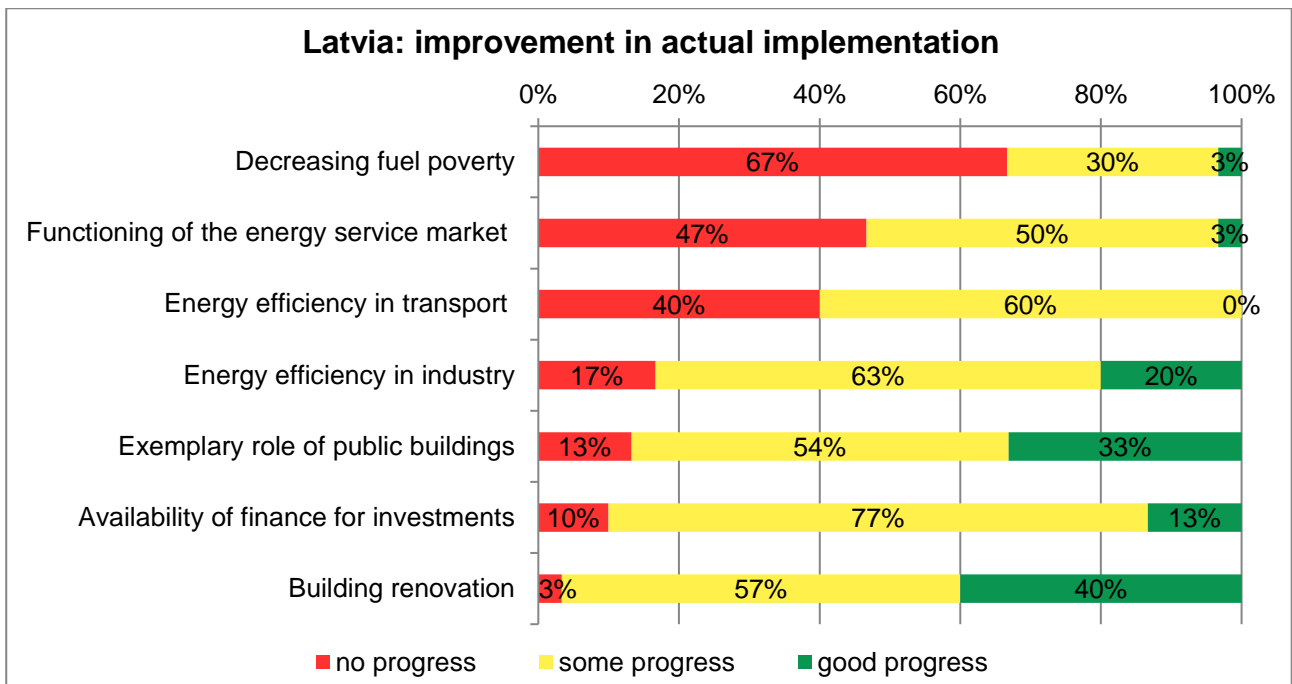
According to the Latvian experts, Latvia is among the Member States that have made medium progress in energy efficiency policies in the past 3 years (country progress indicator: 13 out of 27 – see page 14). The rate of progress has remained relatively similar throughout the three surveys (2015 survey: country progress indicator 15 out of 28, 2012 survey: 12 out of 27).

63 % of the survey participants saw no or very few additional policies in the last 3 years, whereas 37 % report that at least a range of policies were put in place. Latvian experts have divided opinions on the overall ambition of energy efficiency policy in their country: 17 % consider it rather ambitious, 20 % find it ambitious in a range of sectors, 37 % see it as ambitious only in a few sectors and 26 % rate the level of ambition as rather low.



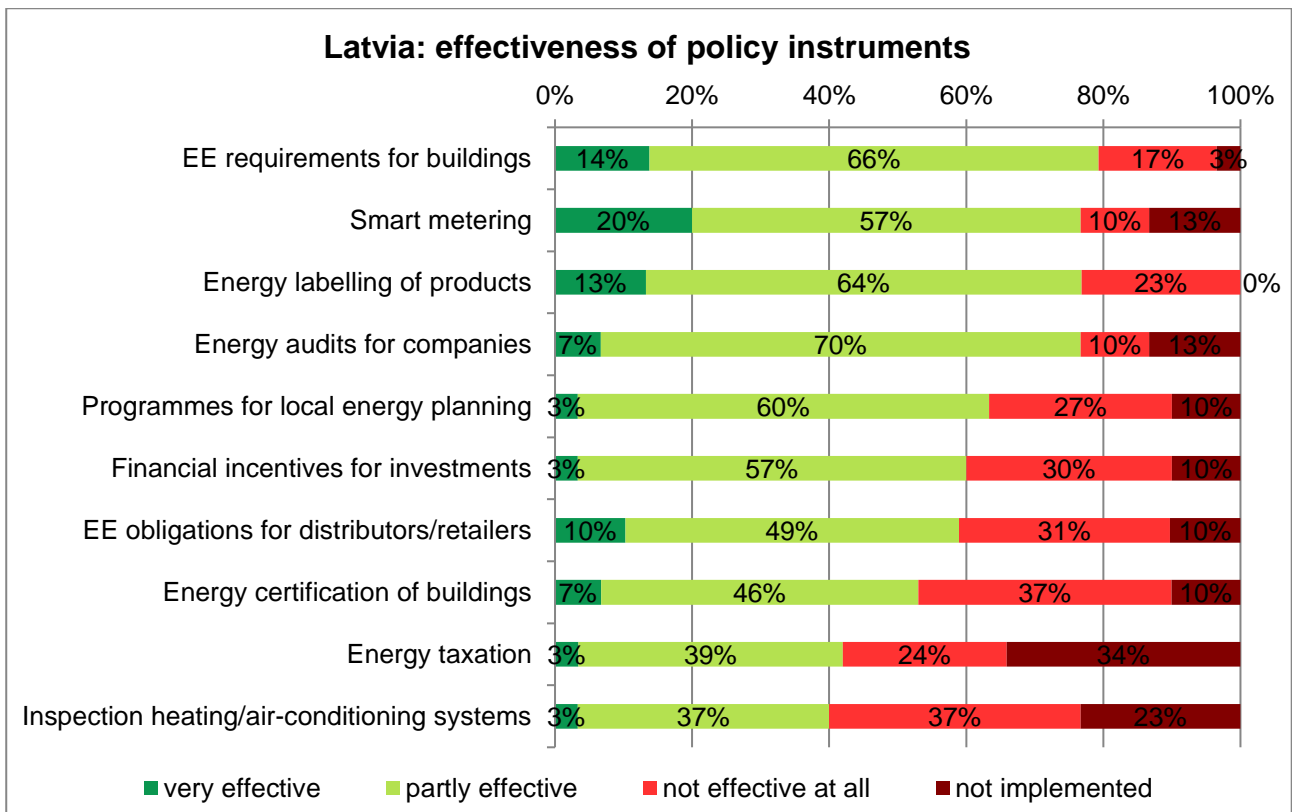
In Latvia, the most progress in actual implementation in the last 3 years is seen in the field of building renovation (97 % of experts report "some progress" or "good progress") and in the availability of finance for investments (90 % "some progress" or "good progress"). This is followed by the exemplary role of public buildings (87 % some or good progress, of which 33 % report "good progress" – one of the highest ratings of all Member States.)

Experts find the least amount of progress was made in decreasing fuel poverty. 67 % report that "no progress" was made in this area, among the lowest ratings in the EU. In general, compared to the 2015 survey results, experts report positive developments in a number of areas.

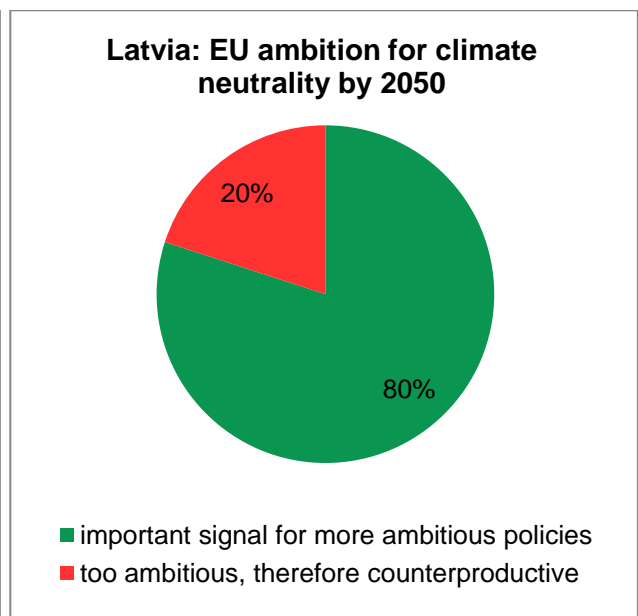
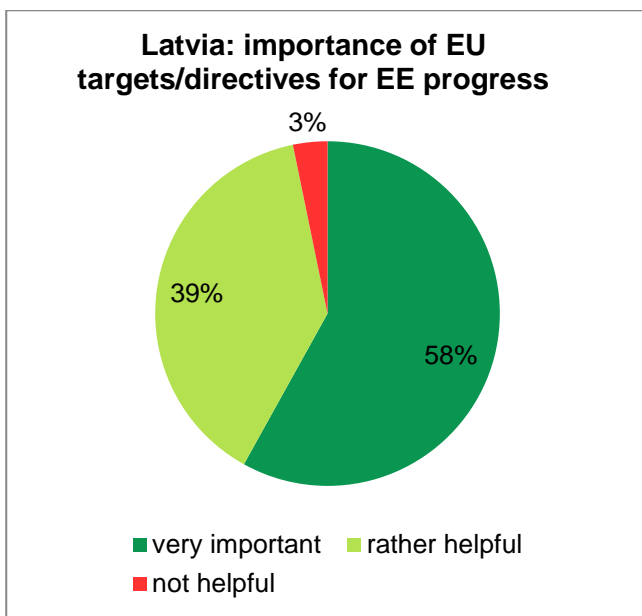


In terms of specific policy instruments, energy efficiency requirements for buildings (rated "partly to very effective" by 80 % of experts), smart metering, energy labelling of products and energy audits for companies (all three 77 % "partly to very effective") are viewed most positively by Latvian experts. The highest ratings for "not effective at all" are given to inspection of heating/air-conditioning systems and energy certification of buildings (both 37 %).

In overall terms, experts report higher levels of effectiveness for a range of instruments compared to the 2015 survey, including for smart metering, energy audits for companies, energy taxation and the inspection of heating and air-conditioning systems (although still seen as the least effective in the Latvian context). Contrary to this, experts' opinion of energy efficiency requirements for buildings has decreased since 2015 (95 % "partly to very effective" in the 2015 survey), though it is still considered the most effective instrument in the Latvian context.



97 % of the surveyed experts view European targets and directives positively and find they support the progress in energy efficiency policy in Latvia: 58 % rate them "very helpful" and 39 % "rather helpful". However, 20 % consider the EU ambition for climate neutrality by 2050 as counterproductive in their country – slightly above the EU27 average of 16 %.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Latvia (for more details on the content of this table and how to analyse it, see page 32):

Latvia: Key input factors for narrative development				
Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Modernisation / investments	1	1	31 %	69 %
Independence from other countries	2	2	56 %	44 %
Industrial competitiveness	3	4	67 %	33 %
Jobs	4	6		
Housing / living costs	5	3		
Air quality	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Chambers of Commerce	1	58 %	17 %	25 %
Associations of large industry	2	52 %	20 %	28 %
Farmers organisations	3	24 %	32 %	44 %
Trade Unions	4			
NGOs	4			
Tabloid press	6			
Churches	7			

As in all three Baltic states, the subjects of ‘modernisation and investments in infrastructure’ and ‘independence from other countries’ are among the most important topics in the general public debate. In Latvia, this is followed by industrial competitiveness

(rank 3) and jobs (rank 4). This level of interest in dependence/independence is only seen in a handful of Member States (topic ranked 6th in EU27).

When looking at which topics are already being linked to energy efficiency in the public debate, modernisation/investments and independence from other countries again come out at the top of the list. Housing/living costs rank 3rd and industrial competitiveness ranks 4th. The survey results show that energy efficiency is already linked to some of the topics of high interest for society. This could provide a good basis for positive narratives.

Experts report that the relation between energy efficiency and modernisation/investments is discussed rather negatively in the public debate. The link to dependence from other countries is seen to a similar extent positively and negatively. In comparison, when energy efficiency is linked to competitiveness, jobs and housing/living costs, the debate is primarily positive – making them good arguments for the energy transition.

Looking at which actor groups are influential on Latvian politics, Chambers of Commerce and associations of large industry rank 1st and 2nd. They are rated "very influential" by 100 % and 96 % of experts respectively. Farmers organisations rank 3rd. This is different to most other EU countries where farmers organisations are not as influential (EU27: rank 5).

The two most influential actor groups in Latvia are perceived as more supportive of the energy transition than opposed. Chambers of Commerce are perceived as supportive by 58 % of experts versus opposed by 25 %. Similar results are seen for associations of large industry. In overall terms, it seems that many actor groups in Latvia have not yet positioned themselves clearly either in favour or against the energy transition (the percentage of "position not known" is among the highest of all Member States).

In conclusion, in Latvia, energy efficiency is already being linked to some of the key topics for society (modernisation/investments, independence from other countries, industrial competitiveness). It is also backed to a certain extent by influential actor groups that have a positive attitude towards the energy transition (Chambers of Commerce and industry). This provides a good basis for positive narrative development and roll-out.

Due to their level of influence, economic actors could be stronger allies for the energy transition debate in Latvia. It could be helpful to work towards narratives they can "buy into" (e.g. modernisation/investments, industrial competitiveness), particularly since these are also topics of high interest for society. Additionally, it could be worthwhile to explore better communication on the positive impacts of energy efficiency and of the energy transition on the aspect of independence from other countries.

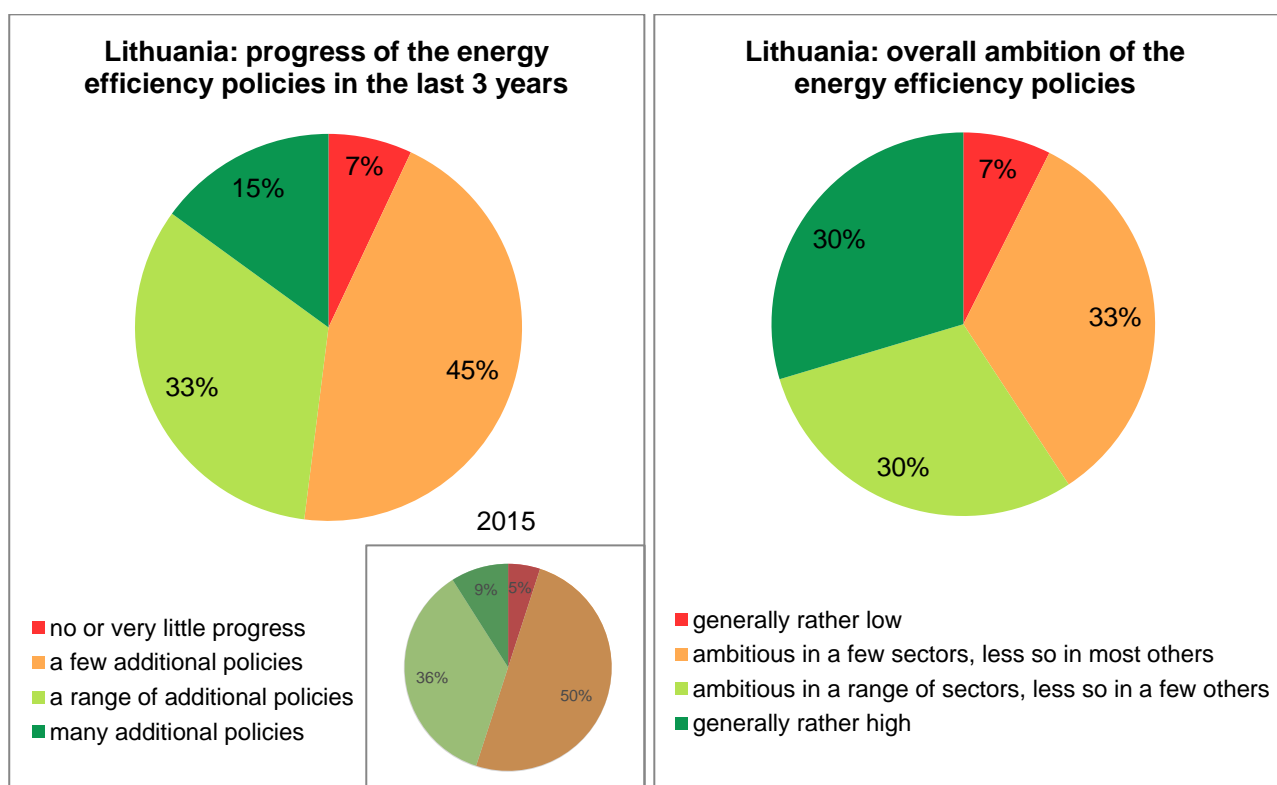
Development of new narratives for the energy transition in Latvia could also benefit from taking into account the importance of industrial competitiveness and jobs in the public debate. Increasing their presence in the public debate could help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Lithuania

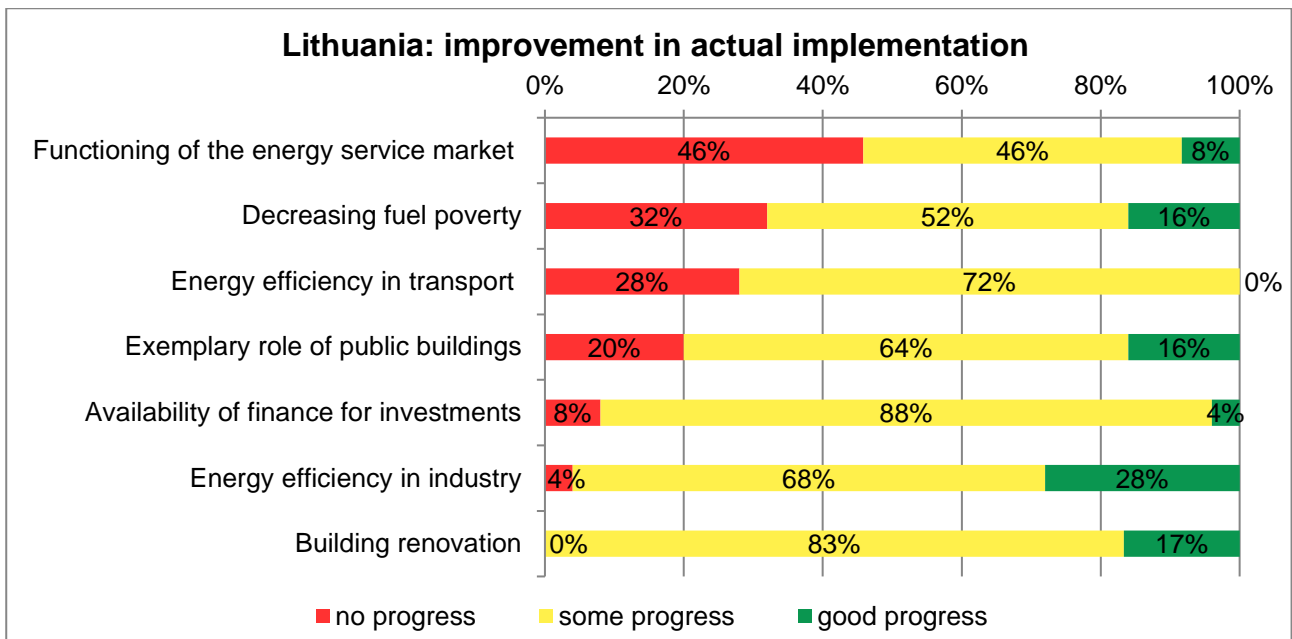


According to Lithuanian experts, Lithuania has progressed comparatively well in terms of energy efficiency policies in the past 3 years (country progress indicator: 6 out of 27 – see page 14). The rate of progress has increased a bit compared to the 2015 survey, which looked back in the period 2012-2015 (country progress indicator: 9 out of 28) and has significantly increased since the 2012 survey (country progress indicator: 18 out of 27). This makes Lithuania one of the four countries where the rate of progress has consistently increased over the course of all three surveys.

Opinions are divided regarding the introduction of new policies: around half of the experts (48 %) saw a range or many additional policies in the past three years, the others saw no or only a few additional policies. Opinions are also divided regarding the overall ambition of energy efficiency policies (although, in general, perceived as more ambitious than in 2015). Around 30 % of surveyed experts rated policies as each "ambitious in a few sectors", "ambitious in a range of sectors" and "generally rather ambitious".

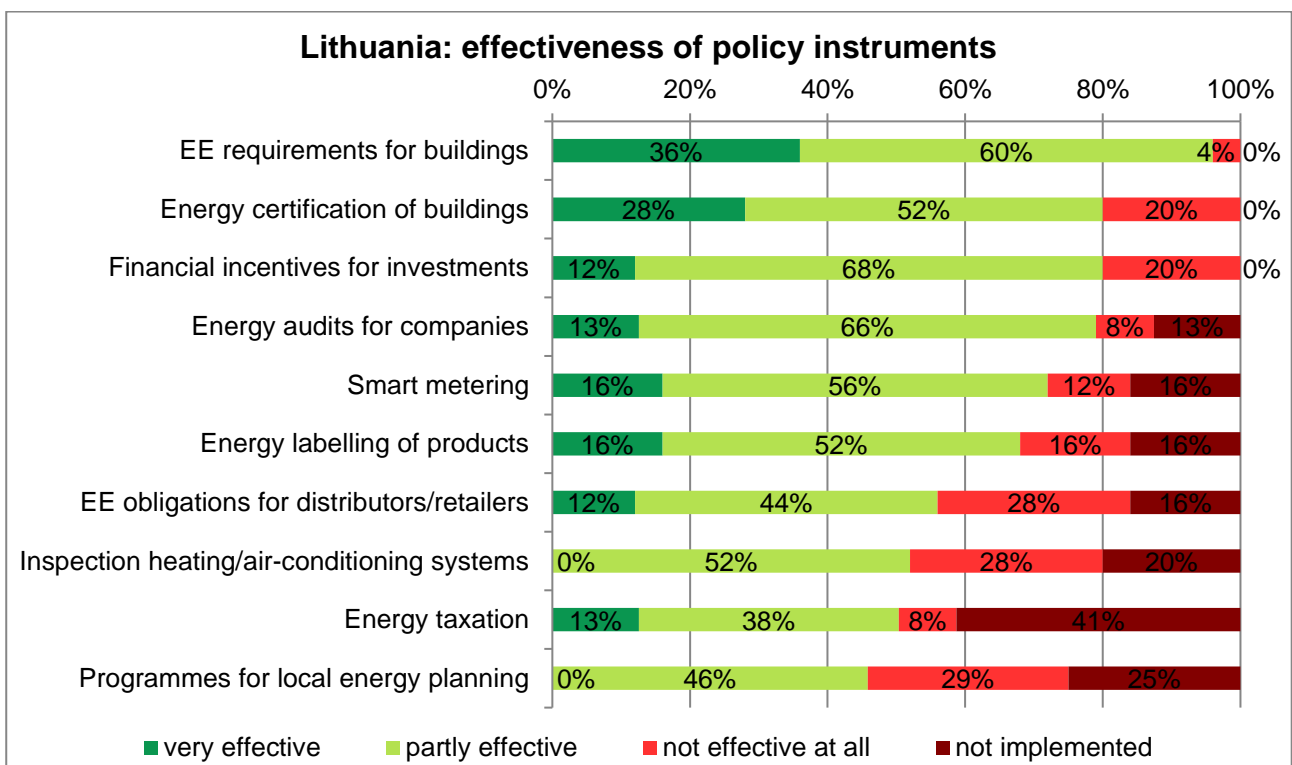


Looking back on the past 3 years, experts perceive the strongest improvement in actual implementation in the fields of building renovation, energy efficiency in industry and availability of finance for investments: 100 %, 96 % and 92 %, respectively, report some or good progress in these fields. For energy efficiency in industry, Lithuanian experts report one of the highest rates of progress of all EU countries. The highest ratings of "no progress" is given to the functioning of the energy service market (46 %) and decreasing fuel poverty (32 %). However, compared to the 2015 results, Lithuania has made among the strongest progress in these two areas of all Member States.

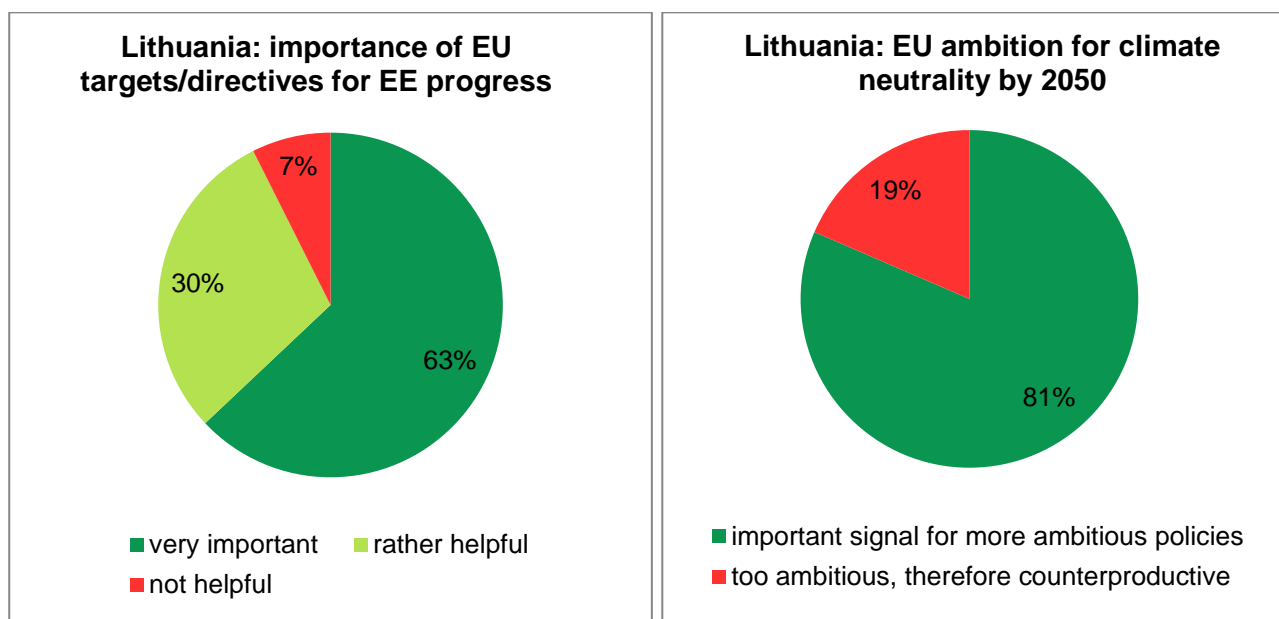


In terms of specific policy instruments, energy efficiency requirements for buildings are considered the most effective in the Lithuanian context (rated partly or very effective by 96 % of experts). This is followed by energy certification of buildings and financial incentives for investments (both 80 % partly to very effective). On the other end of the spectrum, the highest ratings for "not effective at all" are given to programmes for local energy planning (29 %), inspection of heating/air-conditioning systems (28 %) and energy obligations for distributors/retailers (28 %, although a strong improvement from 52 % in the 2015 survey).

Compared to the 2015 survey, Lithuanian experts report higher levels of effectiveness for almost all instruments, including among the highest increases in impact of smart metering, energy audits for companies and building certification.



European targets and directives are viewed positively by 93 % of Lithuanian expert. 63 % consider them "very helpful" for progressing energy efficiency in Lithuania, 30 % say "rather helpful". However, 19 % (slightly more than EU27 average of 16 %) perceive the EU ambition for climate neutrality by 2050 as too ambitious and thus counterproductive.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Lithuania (for more details on the content of this table and how to analyse it, see page 32):

Lithuania: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Independence from other countries	1	1	60 %	40 %
Industrial competitiveness	2	4	70 %	30 %
Modernisation / investments	3	2	44 %	56 %
Jobs	4	5		
Housing / living costs	5	3		
Air quality	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	83 %	4 %	13 %
Farmers organisations	2	28 %	48 %	24 %
Chambers of Commerce	3	64 %	28 %	8 %
Tabloid press	4			
Trade Unions	5			
NGOs	6			
Churches	7			

As in all three Baltic states, the subjects of ‘independence from other countries’ (with the highest rating of all Member States) and ‘modernisation and investments in infrastructure’ are among the most important topics in the general public debate. In Lithuania, these topics rank 1st and 3rd in importance. Industrial competitiveness ranks 2nd (also rank 2 in EU27). Such a high level of interest in dependence/independence is only seen in a handful of Member States (rank 6 in EU27).

When looking at which topics are already being linked to energy efficiency in the public debate, independence from other countries and modernisation/investments again come out in the top 3. Housing/living costs rank 3rd and industrial competitiveness ranks 4th.

Although energy efficiency is discussed primarily positively in relation to dependence/independence (60 % positive) and competitiveness (70 % positive), opinions are more divided on the effects of energy efficiency on modernisation/investments (discussed 56 % negatively, 44 % positively).

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in Lithuania (rank 4 in the EU for positive perception).

It is also being discussed in relation to some of the most important subjects for society. This provides a good basis for positive narrative development and roll-out.

Associations of large industry are by far the most influential actor group on Lithuanian politics. 96 % of experts rate them "very influential". Farmers organisations and Chambers of Commerce rank 2nd and 3rd with lower and quite similar levels of influence (around 56 %). In the case of farmers organisations, this is different to most other EU countries where they rank 5th in influence.

In Lithuania, in general, the energy transition seems to already find good support among a number of actor groups. Associations of large industry, in particular, are perceived as supportive by 83 % of experts – one of the highest ratings in the EU27. Chambers of Commerce are seen as having a positive attitude towards the energy transition by 64 % of experts. In comparison, farmers organisations seem to have an ambivalent and unclear position: sometimes supportive, sometimes opposed, but mostly unknown.

In conclusion, energy efficiency already seems to be well positioned in the public debate in Lithuania and discussed in relation to some of the key topics for society (i.e. independence from other countries, modernisation/investments). These messages are being backed by some influential actor groups that have a positive attitude towards the energy transition (large industry, Chambers of Commerce). This provides a good basis for positive narrative development and roll-out.

Due to their level of influence, economic actors could be stronger allies for the energy transition debate in Lithuania. It could be helpful to work towards narratives they can "buy into" (e.g. industrial competitiveness, modernisation/investments), particularly since these are also topics of high interest for society. Working with farmers organisations and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position.

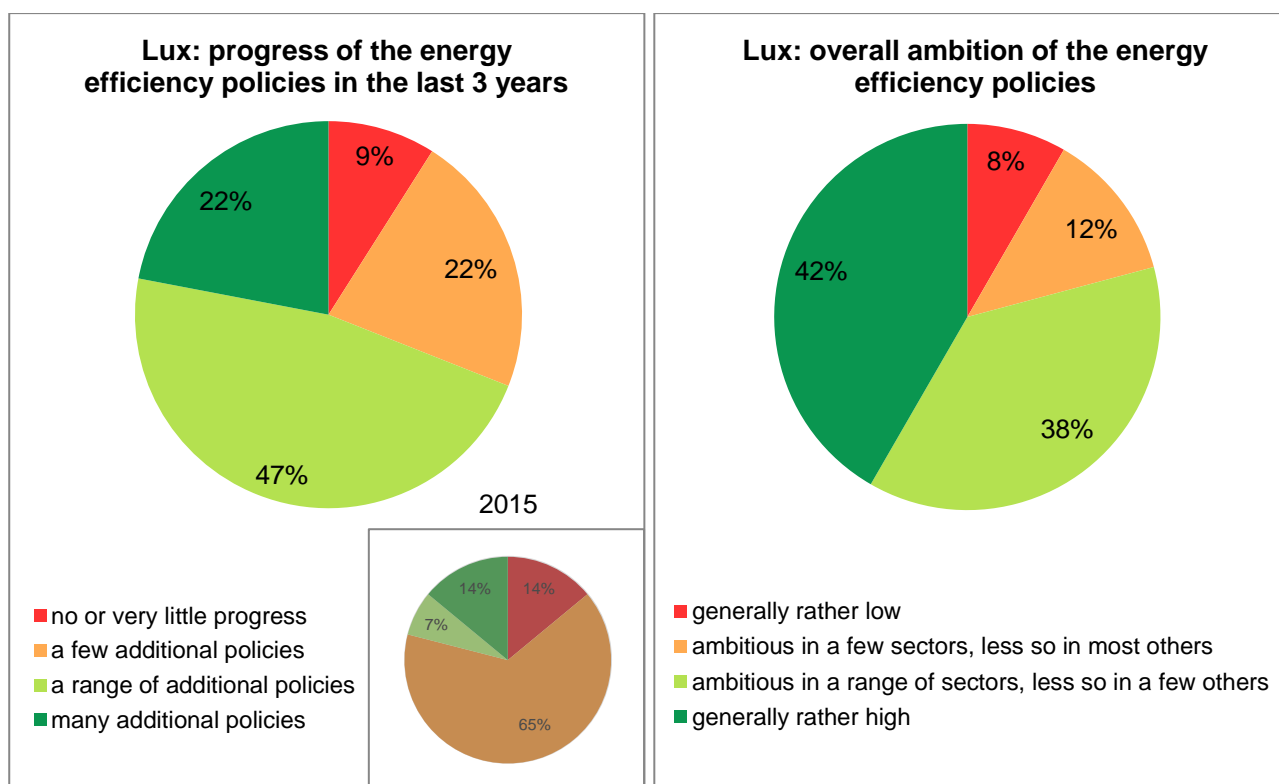
The development of new narratives for the energy transition in Lithuania could also benefit from taking more into account the importance of industrial competitiveness in the public debate. The positive effects of energy efficiency on competitiveness are already recognised. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Luxembourg



According to the Luxembourgish experts, Luxembourg is among the Member States that progressed very well in energy efficiency policy in the past 3 years (country progress indicator: 3 out of 27 – see page 14). After experiencing a decrease in rate of progress between the 2012 and 2015 surveys, Luxembourg has bounced back to its first country progress indicator of 2012 (country progress indicator: 10 in 2015, 3 in 2012).

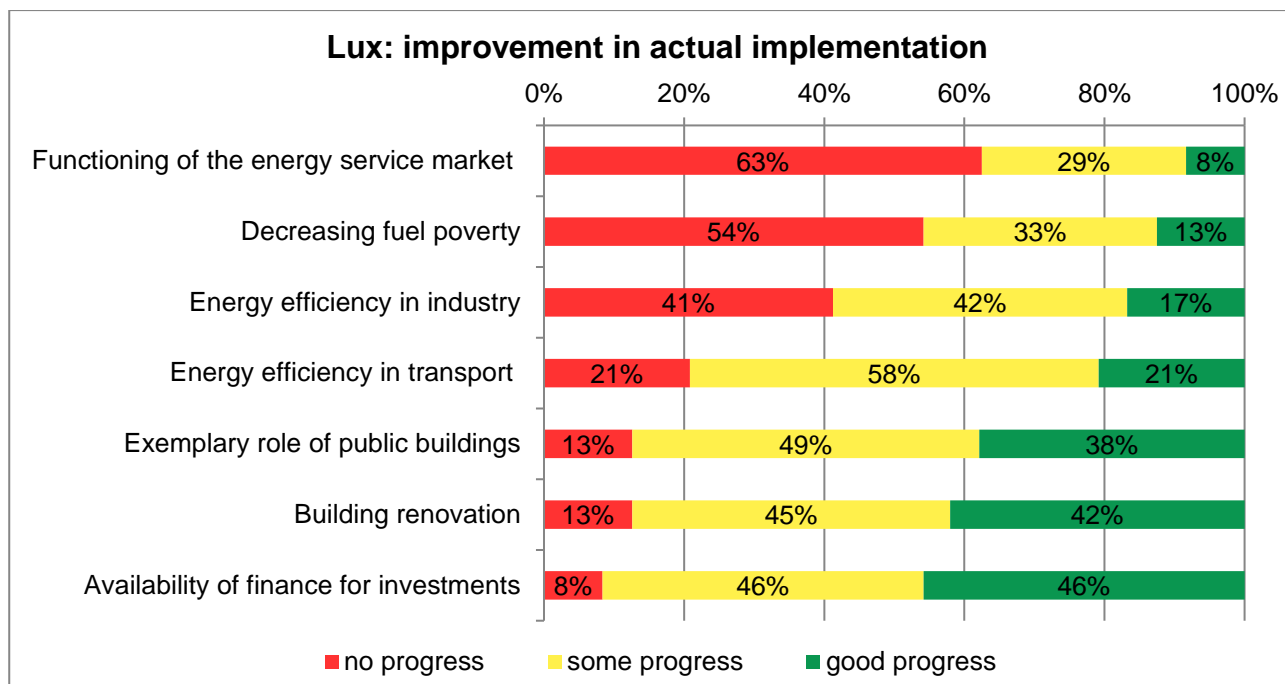
69 % of experts saw a range or many additional policies put in place in recent years. This number was only 21 % in the 2015 survey (which looked back on the period 2012-2015). Experts also perceive a high overall ambition of energy efficiency policies: 80 % consider it rather high or ambitious in a range of sectors while 20 % rate it as low or only ambitious in a few sectors – a significant positive improvement to 2015 results (51 % rather high or ambitious in a range of sectors).



Regarding improvements in actual implementation of policies in the last 3 years, surveyed experts report most progress in the availability of finance for investments (highest progress among Member States) and building renovation. Respectively 92 % and 87 % of experts report some or good progress in these fields. Experts also report among the highest ratings of progress in the EU for the exemplary role of public buildings and energy efficiency in transport.

The highest ratings for "no progress" are given to the functioning of the energy service market (63 %) (which also received the lowest progress rating of all Member States) and decreasing fuel poverty (54 %). However, in general terms, compared to the 2015 survey

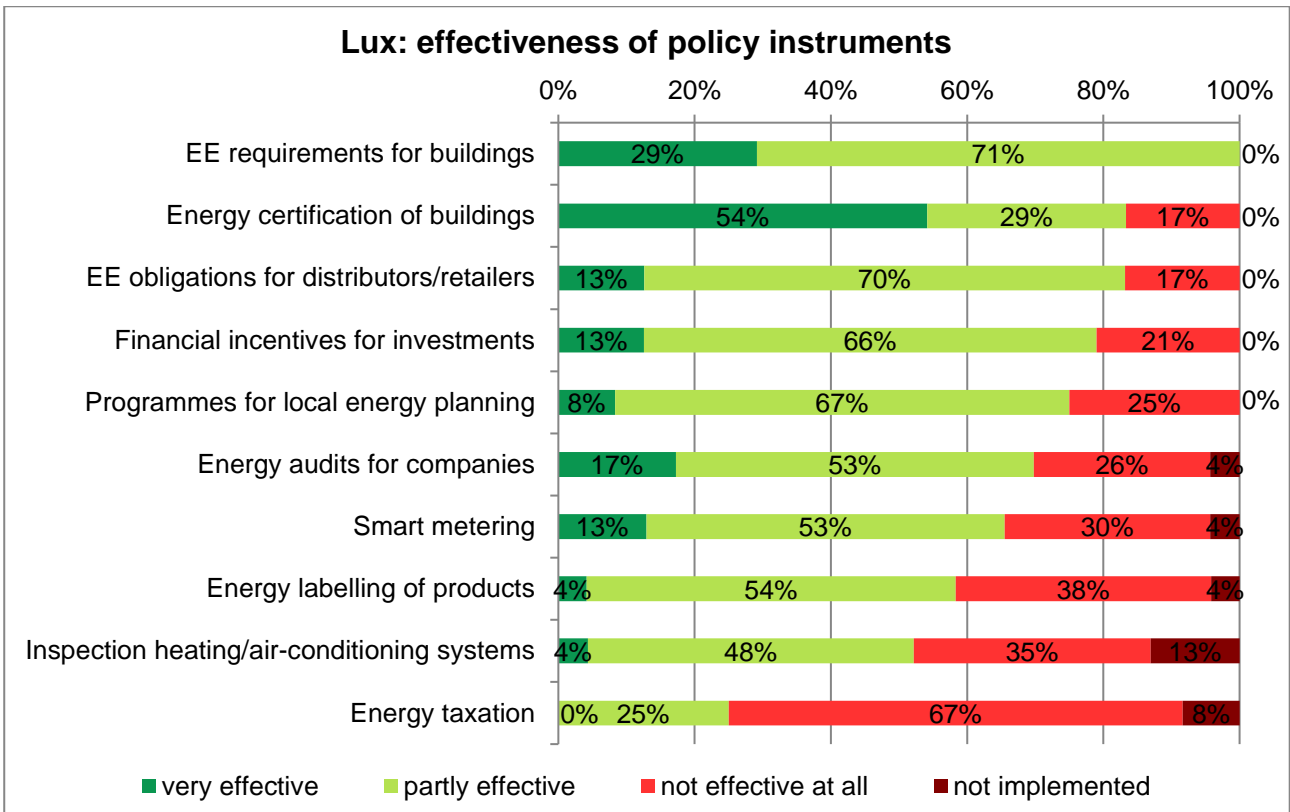
results, experts report positive developments in a number of areas, including in decreasing fuel poverty (strongest improvement since 2015 of all Member States).



In terms of specific policy instruments, energy efficiency requirements for buildings are rated partly or very effective by 100 % of the experts. This is the case in only 3 countries. Other instruments that are perceived very positively by experts are energy certification of buildings and energy efficiency obligations for distributors/retailers. Both received the highest effectiveness rating among Member States.

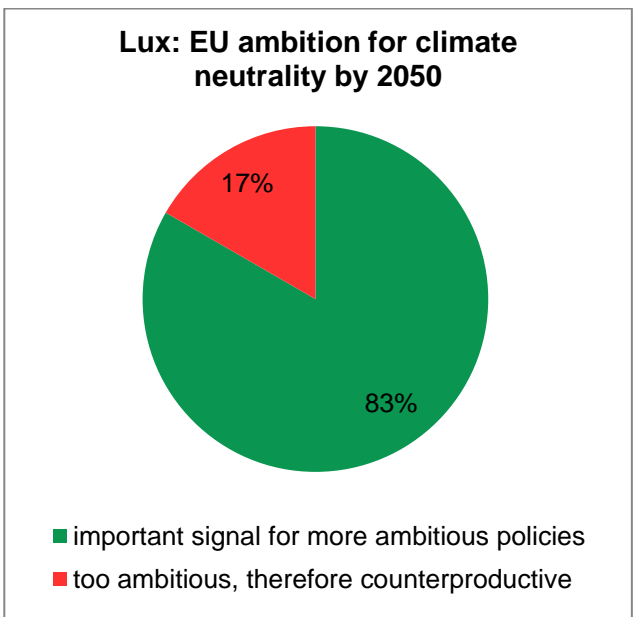
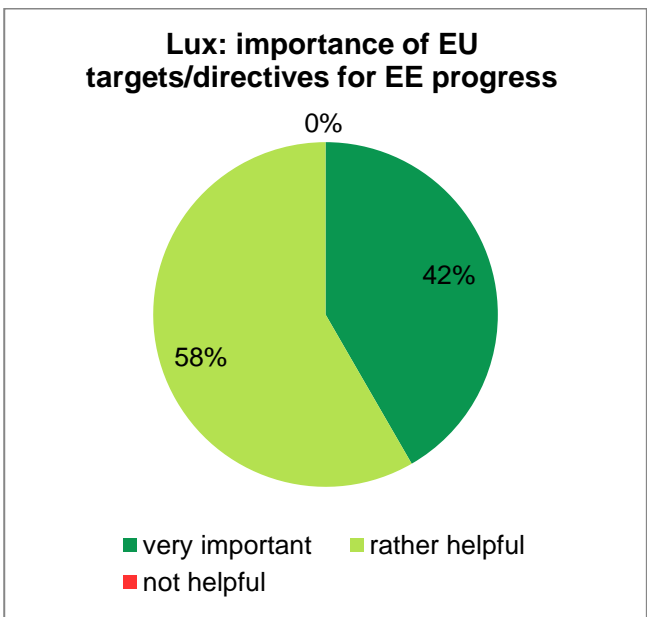
At the other end of the spectrum, 67 % of experts perceive energy taxation instruments in Luxembourg as "not effective at all" – second highest in the EU. Also considered among the least effective instruments in Luxembourg are energy labelling of products (lowest overall effectiveness in the EU) and the inspection of heating/air-conditioning systems (35 % "not effective at all").

Compared to the 2015 survey, experts report good positive developments in the impact of a number of instruments (i.e. smart metering, energy audits for companies and energy certification of buildings), but a significant decrease in the impact of energy labelling of products.



Luxembourg is one of the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. 42 % find them "very important" and 58 % consider them "rather helpful".

According to 83 % of the surveyed experts, the EU ambition for climate neutrality by 2050 is positive and offers an important signal for more ambitious policies.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Luxembourg (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Housing / living costs	1	4	40 %	60 %
Industrial competitiveness	2	3	58 %	42 %
Modernisation / investments	3	1	52 %	48 %
Independence from other countries	4	2		
Jobs	5	6		
Air quality	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	25 %	8 %	67 %
Chambers of Commerce	2	53 %	17 %	30 %
Trade Unions	3	55 %	18 %	27 %
NGOs	4			
Tabloid press	5			
Farmers organisations	5			
Churches	7			

According to the Luxembourgish experts, the topic most present in the general public debate is 'housing and living costs' (with the highest rating of all Member States). This is the case in no other Member State (EU27: rank 4). 'Industrial competitiveness' is ranked 2nd in importance and 'modernisation/investments' is ranked 3rd (these topics also hold ranks 2 and 3 in EU27). It is worth noting that the topic of 'jobs', which is rated overall the most important topic by far in the EU27, ranks only 5th in Luxembourg. Such a low ranking is only seen in one other Member State (Czech Republic).

When asked about which topics are already being discussed in relation to energy efficiency in the public debate, experts report 'modernisation/investments' in 1st position (discussed similarly negatively and positively) and 'independence/dependence' as 2nd (perceived rather positively). These are followed by 'industrial competitiveness' (rank 3, with divided opinions) and 'housing/livings costs' (rank 4, discussed 60 % negatively).

The survey results show that energy efficiency is already being linked to some of the topics of high interest for society. This could provide a good basis for positive narrative development and roll-out. However, compared to other EU countries, experts report that energy efficiency is not as present in the public debate or strongly linked to many subjects.

As in almost the entire EU, economic actor groups have the highest level of influence on politics in Luxembourg. Associations of large industry rank first in influence (rated "very influential" by 91 %), followed by the Chambers of Commerce and Trade Unions.

Two thirds of the experts perceive large industry as rather opposed to the energy transition, 25 % perceive them as supportive. In comparison, Chambers of Commerce and Trade Unions express a more positive attitude towards the energy transition. Around half of the experts see them as supportive versus about 30 % as opposed.

In conclusion, in Luxembourg, energy efficiency is already being discussed in relation to some of the key topics for society (i.e. modernisation/investments, industrial competitiveness) and backed by some influential actor groups that have a positive attitude towards the energy transition (Chambers of Commerce, Trade Unions). This provides a good basis for positive narrative development and roll-out.

The development of new narratives for the energy transition in Luxembourg could possibly benefit from taking into account the importance of 'housing/livings costs' in the public debate and addressing this topic with positive numbers and data. Current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions.

Considering their level of influence, economic actors could be stronger allies for the energy transition debate in Luxembourg, especially since their agendas seem to coincide with topics of high interest for society. Working with associations of large industry and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition. In general terms, creating narratives that economic actor groups can "buy into" could have significant positive effect on triggering change.

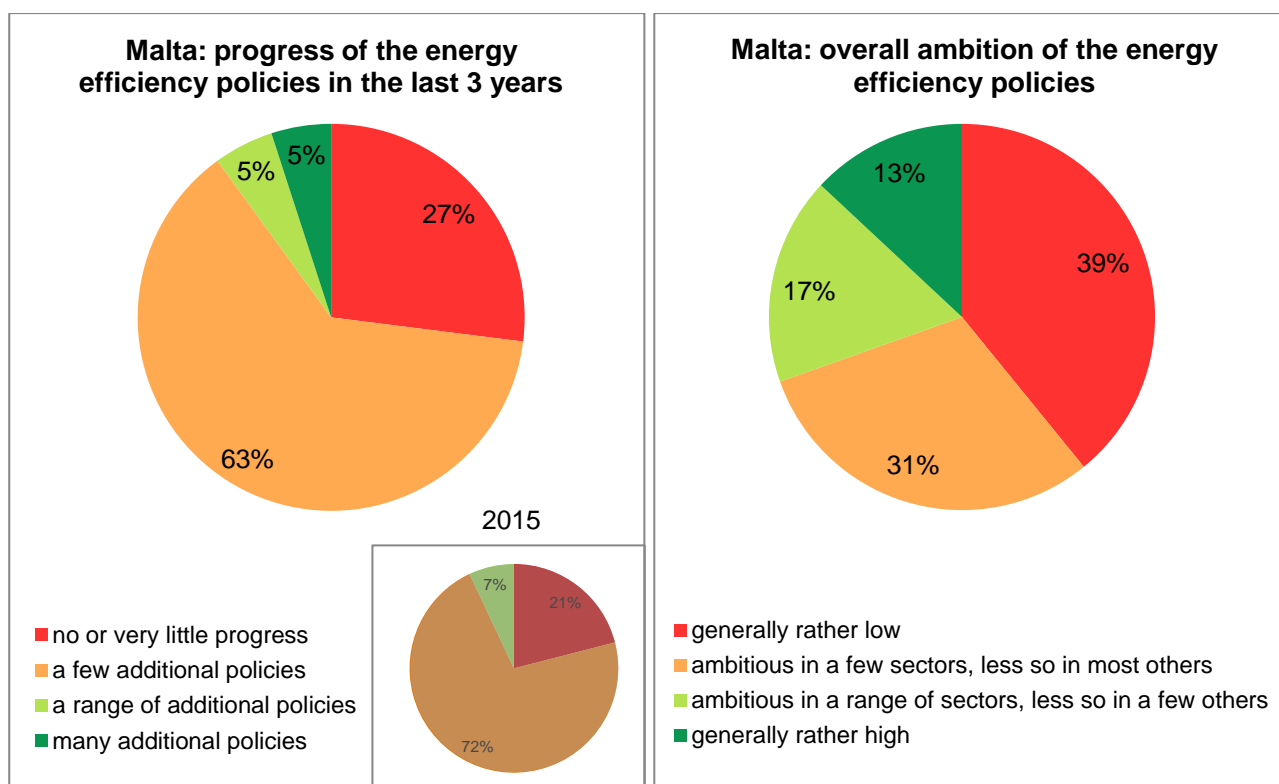
Malta



According to the Maltese experts, Malta is among the Member States that have made relatively little progress in energy efficiency policies over the past 3 years (country progress indicator: 26 out of 27 – see page 14). The rate of progress has remained unchanged 2015 (2015 survey: country progress indicator: 25 out of 28).

Similar to the 2015 results, experts rate the progress and overall ambition of energy efficiency policies as relatively low: 90 % report that no or only a few additional policies were introduced in the last 3 years. 70 % consider the overall ambition of energy efficiency policies as rather low or ambitious in only a few sectors.

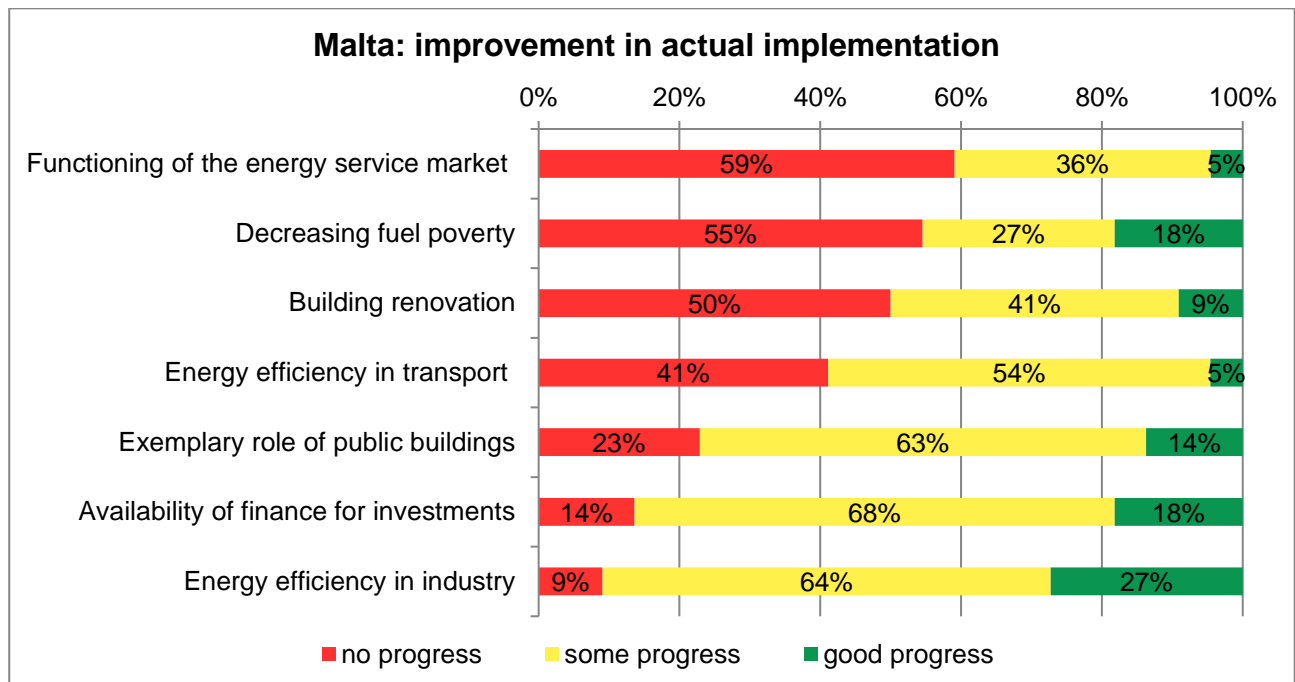
Although still among the lowest levels of progress and ambition in the EU, overall, the results indicate that experts feel energy efficiency policy is not quite living up to ambitions.



Regarding improvements in actual implementation of policies in the last 3 years, surveyed experts report the most relative progress in energy efficiency in industry and in the availability of finance for investments. Respectively 91 % and 86 % of experts report some or good progress in these fields.

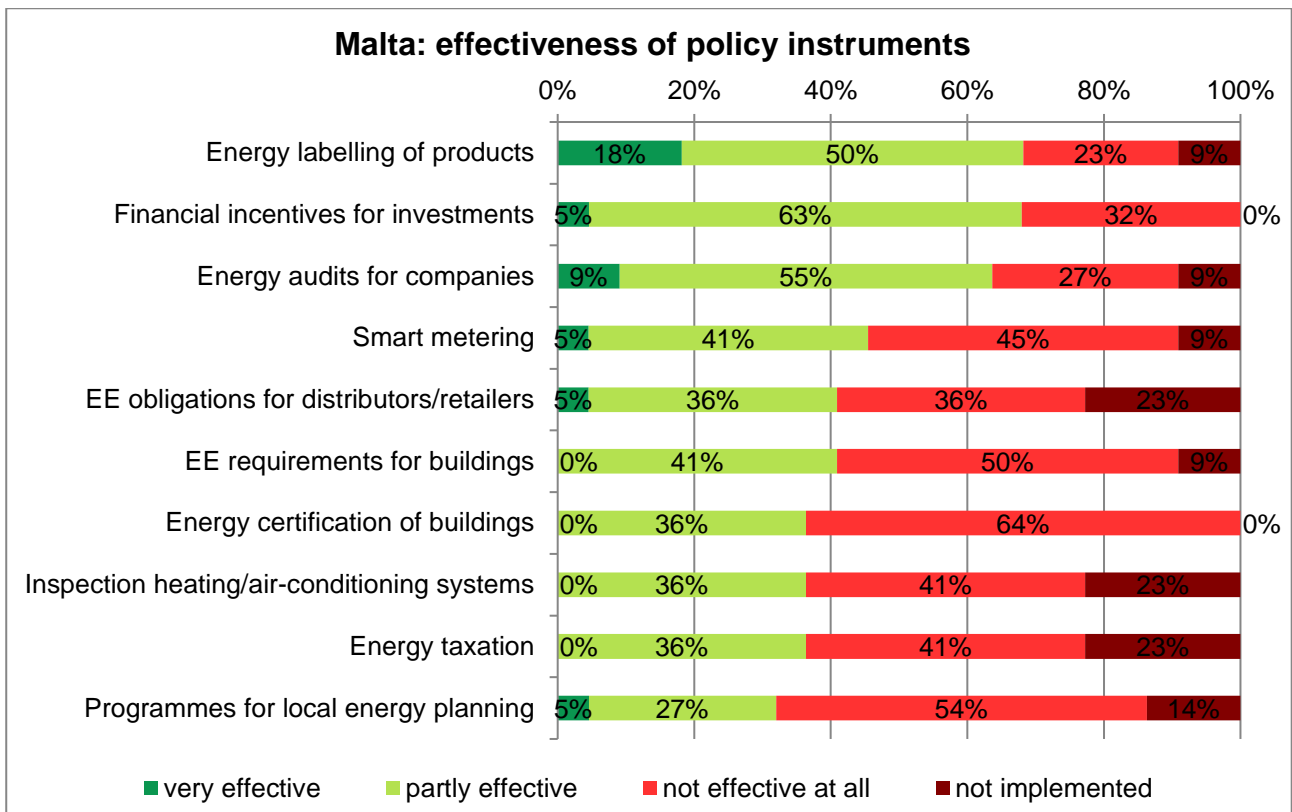
The highest ratings for "no progress" are given to the functioning of the energy service market (59 % – among the highest in the EU, though down from 75 % in 2015) and decreasing fuel poverty (55 %). Experts also report among the lowest ratings of progress in the EU for building renovation.

In comparison to the 2015 survey results, Maltese experts report among the strongest improvements of all Member States in the exemplary role of public buildings and the functioning of the energy service market.



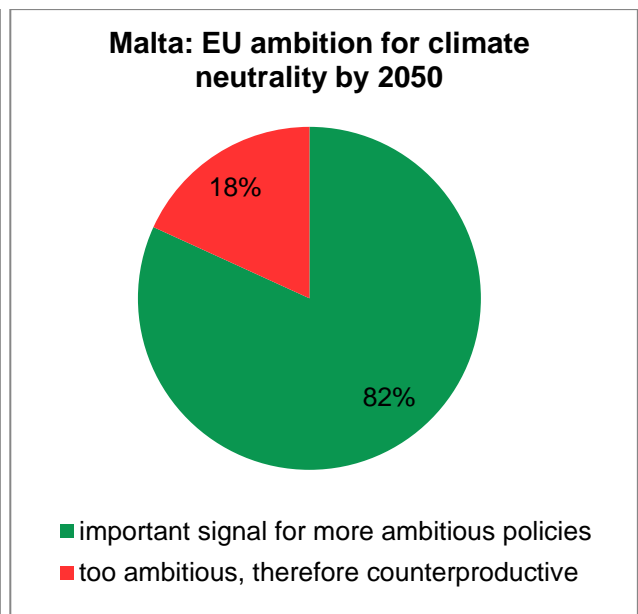
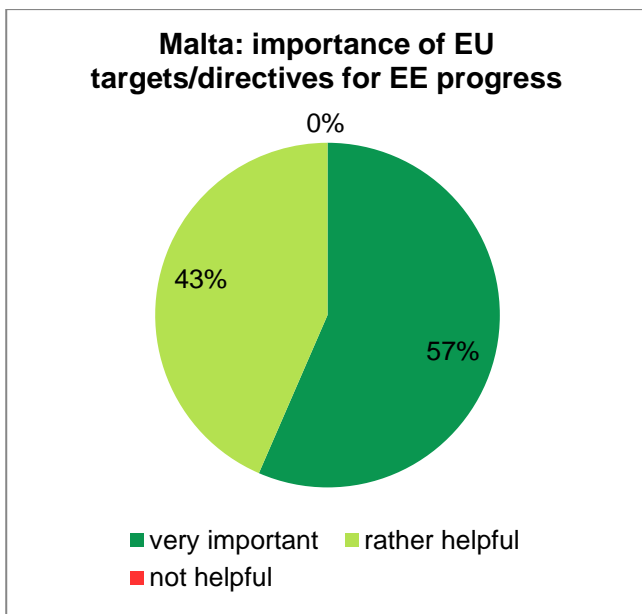
In terms of specific policy instruments, energy labelling of products and financial incentives for investments are seen as the most effective in the Maltese context. They are both rated partly or very effective by 68 % of the experts. At the other end of the spectrum, energy certification of buildings and programmes for local energy planning are rated "not effective at all" by 64 % and 54 % of experts.

In Malta, experts do not see the inspection of heating/air-conditioning systems, energy certification of buildings and energy efficiency requirements for buildings as positive (given among the lowest effectiveness ratings of all countries). Compared to the 2015 survey, a relative drop in the impact of a range of instrument measures is reported.



Malta is among the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. 57 % find them "very important" and 43 % consider them "rather helpful".

According to 82 % of the surveyed experts, the EU ambition for climate neutrality by 2050 is positive and offers an important signal for more ambitious policies (similar to EU27 average: 84 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Malta (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	81 %	19 %
Modernisation / investments	2	1	44 %	56 %
Air quality	3	2	61 %	39 %
Housing / living costs	4	5		
Rural development	5	7		
Industrial competitiveness	6	3		
Independence from other countries	7	4		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Trade Unions	1	29 %	52 %	19 %
Associations of large industry	2	52 %	24 %	24 %
Chambers of Commerce	3	81 %	5 %	14 %
Tabloid press	4			
NGOs	5			
Churches	5			
Farmers organisations	7			

According to the Maltese experts, 'loss/creation of jobs', 'modernisation/infrastructure investments' are the most important topics in the general public debate. The topic of 'air quality' ranks 3rd in importance in Malta – higher than in EU27 (rank 5).

Looking at which subjects are currently most strongly linked to energy efficiency in the public debate, modernisation/investments and air quality receive rank 1st and 2nd (with similar ratings), followed by industrial competitiveness. There are divided opinions on energy efficiency in relation to modernisation/investments (discussed similarly positively and negatively). In comparison, the link to air quality and industrial competitiveness is perceived rather positively.

The survey results show that energy efficiency is already being linked to some of the topics of high interest for society. This could provide a good basis for positive narrative development and roll-out. However, compared to other EU countries, experts report that energy efficiency is not as present in the public debate in Malta or strongly linked to many subjects. Also noteworthy is the fact that energy efficiency is not (yet) being discussed by media and politicians in relation to 'jobs', although it is a topic of key interest for society. When this link is being made, the debate is largely positive (81 % discussed positively).

As in almost the entire EU, economic actor groups have the highest level of influence on Maltese politics. Trade Unions rank 1st (with the highest influence rating among Member States), associations of large industry 2nd and Chambers of Commerce 3rd. In Malta, they are perceived as significantly more influential on politics than other actor groups.

In overall terms, the energy transition seems to already find good support among a number of actor groups. In comparison to other EU countries, Malta ranks 2 of 27 in regard to actor groups' support of the energy transition. 81 % consider Chambers of Commerce as supportive (the highest level of support in the EU). Half of the experts consider that associations of large industry have a positive attitude. Trade Unions are not seen as taking a clear position. 52 % of experts report "position unknown".

In conclusion, due to their level of influence, economic actors could be stronger allies for the energy transition debate in Malta, especially since their agendas seem to coincide with topics of high interest for society (i.e. jobs, investments). Chambers of Commerce and large industry, in particular, are already supportive of the energy transition.

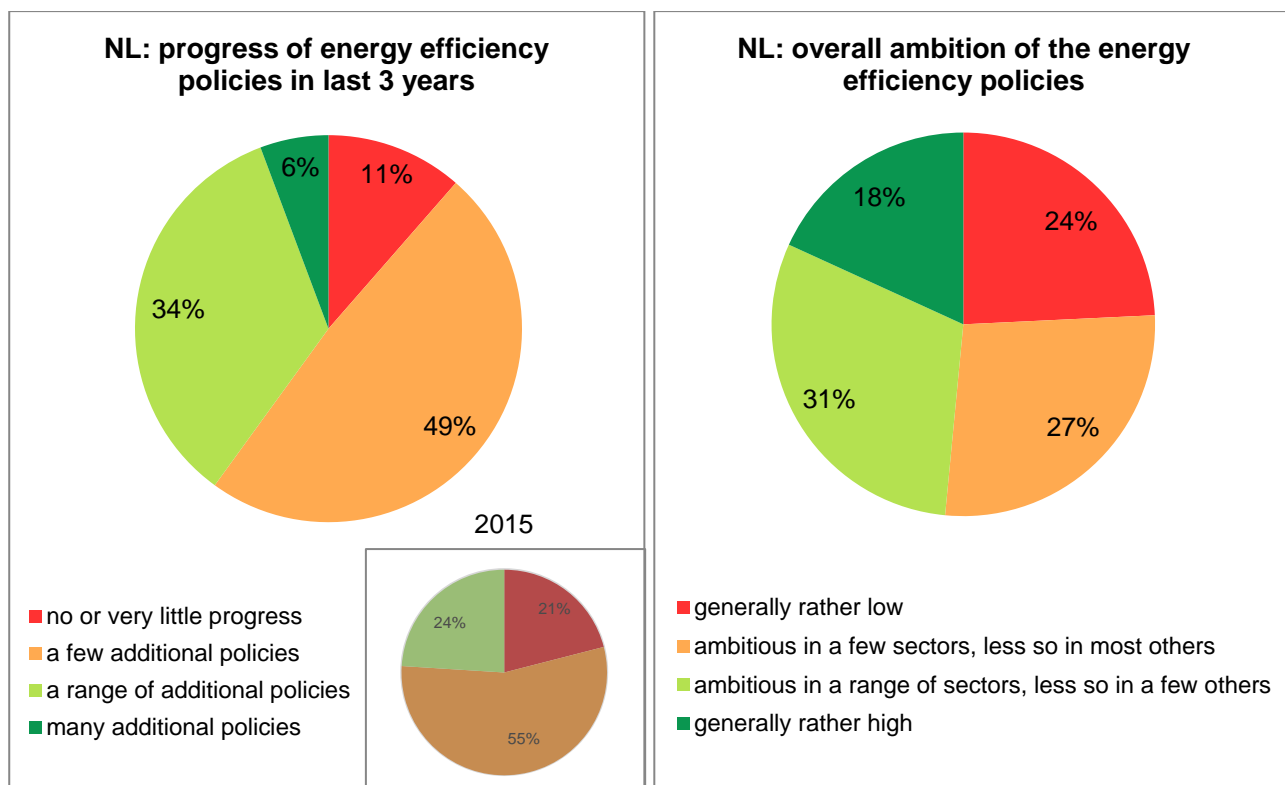
Working with associations of large industry and Trade Unions and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. In general terms, creating narratives that economic actor groups can "buy into" could have significant positive effect on triggering change. The development of new narratives for the energy transition in Malta could benefit from taking into account the importance of 'jobs' in the public debate. The positive impact of energy efficiency on job creation is already recognised in society. Hence, increasing its presence in the public debate (backed with numbers) could help heighten general interest in the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

The Netherlands

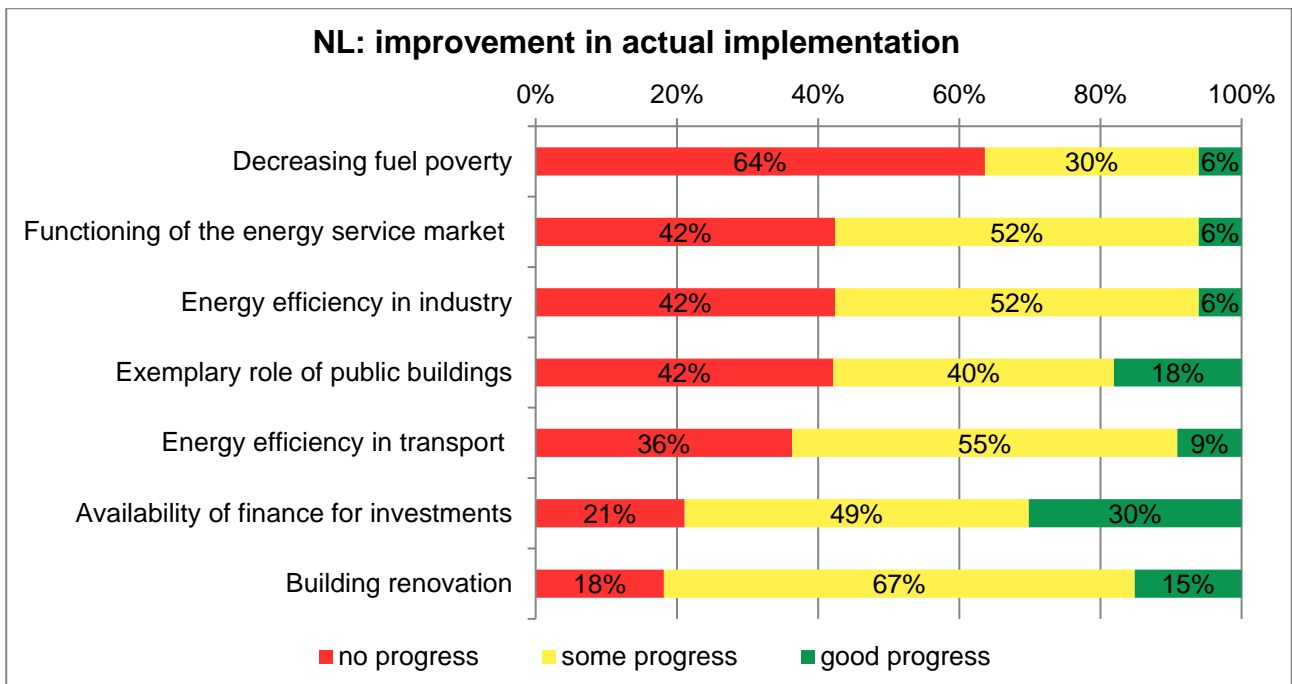


According to the Dutch experts, the Netherlands have made medium progress in energy efficiency policies in the past three years (country progress indicator: 13 out of 27 – see page 14). The rate of progress has steadily increased since the first survey (country progress indicator: 19 in 2015 and 24 in 2012).

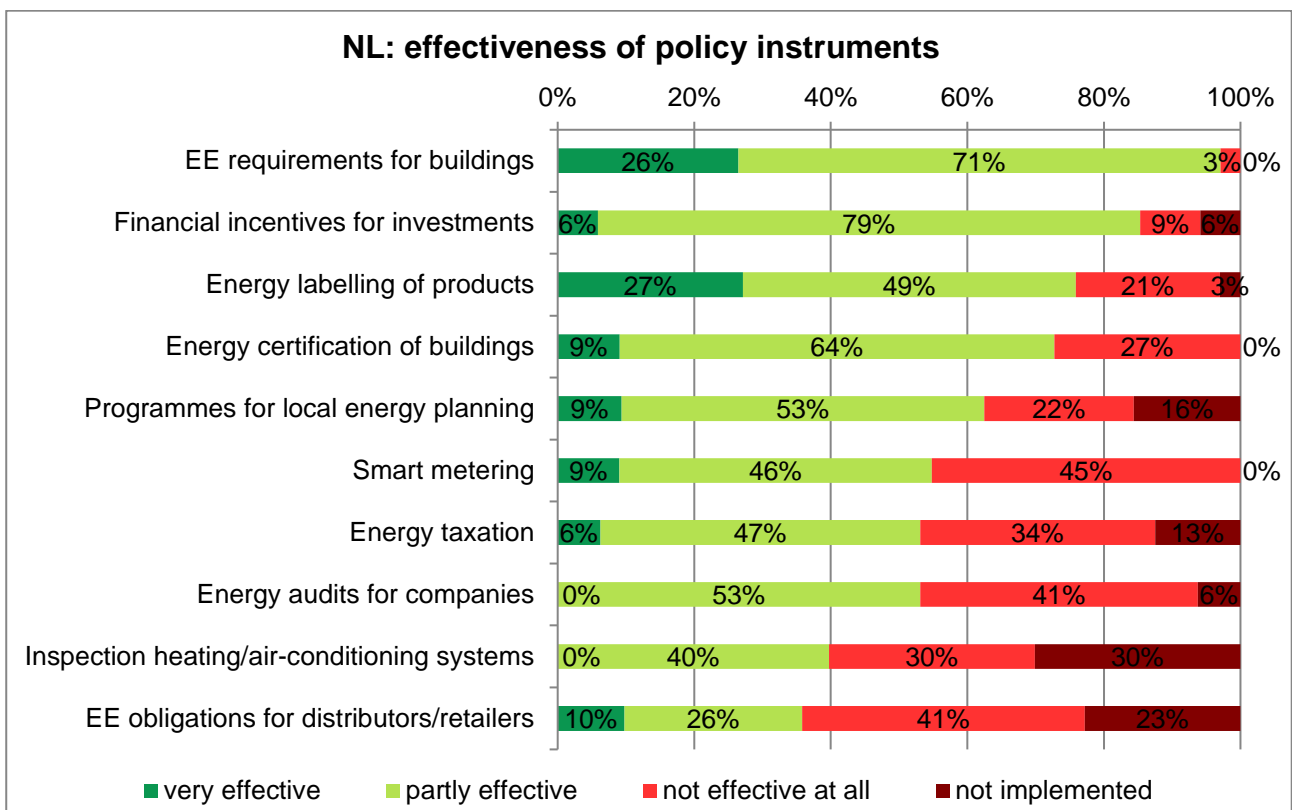
40 % of experts saw a range or many additional energy efficiency policies in the last three years – up from 24 % in the 2015 survey. Opinions are very divided regarding the overall ambition of energy efficiency policies. Around half (51 %) consider it rather low or ambitious in only a few sectors, the other half (49 %) rate it ambitious in at least a range of sectors. However, experts see an improvement in ambition since the 2015 survey (75 % reported rather low ambition or ambitious in only a few sectors). In overall terms, it seems that progress in policies is not quite living up to ambitions.



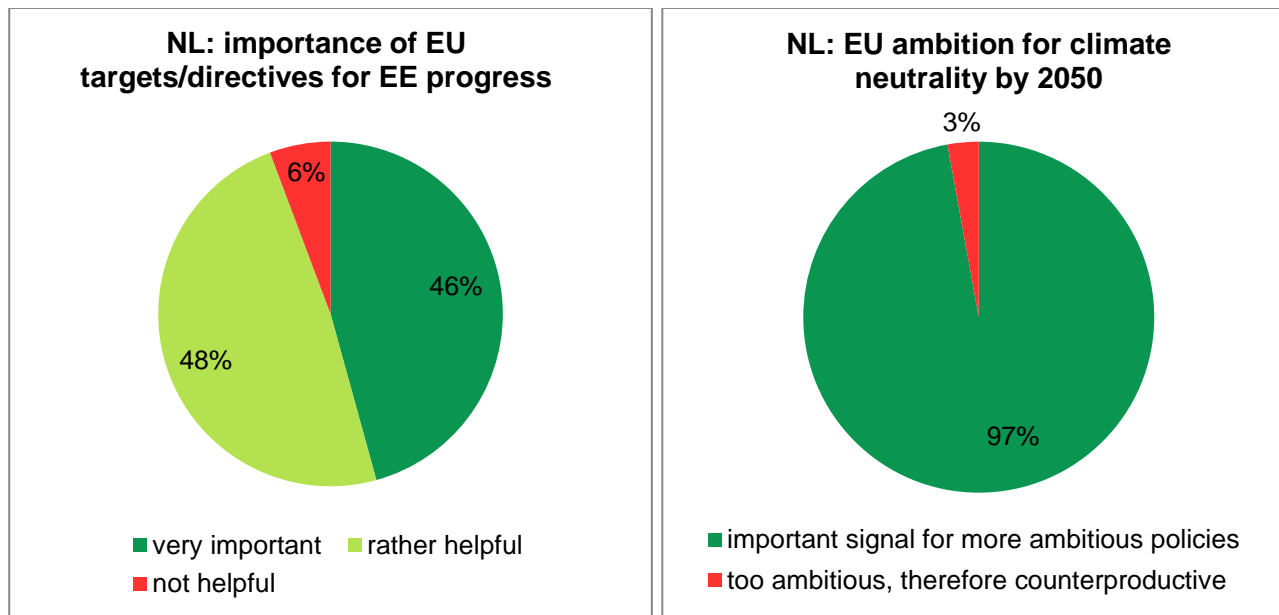
In regard to improvements in actual implementation of policies in the past 3 years, experts report the most progress in the areas of building renovation and the availability of finance for investments. Respectively 82 % and 79 % of experts see at least some progress in these fields. Least progress was made in decreasing fuel poverty (64 % see no progress), followed by the functioning of the energy service market and energy efficiency in industry (both 42 % no progress). Energy efficiency in industry in the Netherlands received among the lowest progress rating of all Member States (as was also the case in 2015). Compared to the results of the 2015 survey (which looked at progress in the period 2012-2015), Dutch experts report overall lower rates of progress in actual implementation.



Among specific policy instruments, energy efficiency requirements for buildings and financial incentives for investments are seen as the most effective in the Dutch context. They are considered partly to very effective by 97 % and 85 % of experts respectively. Experts report a significant relative increase in the effectiveness of energy certification of buildings since the 2015 survey. The highest ratings for "not effective at all" are given to smart metering (45 % – among the highest in the EU), energy efficiency obligations for distributors and retailers (41 %) and energy audits for companies (41 %). This last instrument received one of the lowest effectiveness rating of all Member States.



94 % of surveyed experts see EU targets and directives as positive for the progress of energy efficiency in the Netherlands: 46 % consider them to be "very helpful" and 48 % find them "rather helpful". Compared to other countries, experts in the Netherlands are very supportive of the EU ambition for climate neutrality by 2050. 97 % consider it gives an important signal for more ambitious policies (EU27 average: 84 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in the Netherlands (for more details on the content of this table and how to analyse it, see page 32):

NL: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Industrial competitiveness	1	1	54 %	46 %
Jobs	2	5	72 %	28 %
Housing / living costs	3	3	22 %	78 %
Air quality	4	4		
Modernisation / investments	5	2		
Independence from other countries	6	6		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	26 %	3 %	71 %
Farmers organisations	2	14 %	14 %	72 %
NGOs	3	94 %	3 %	3 %
Trade Unions	4			
Tabloid press	5			
Chambers of Commerce	6			
Churches	7			

According to survey results, 'industrial competitiveness' (with among the highest ratings of all Members States) and 'loss/creation of jobs' are the most important topics in the general public debate in the Netherlands. Industrial competitiveness received among the highest ratings of all Members States. These also correspond to the most important topics in EU27 (although in EU27 jobs rank first, followed by industrial competitiveness). The subject of 'affordable/healthy housing and living costs' are also high in importance in the Netherlands (rank 3).

When looking at which subjects are currently linked to energy efficiency in the public debate, we see that industrial competitiveness again comes in first position (discussed to a similar extent positively and negatively). This is followed by the topics of investments and housing/living costs (both discussed negatively around three quarters of the time). However, results show that it is not (yet) being discussed in relation to 'jobs' – despite this being the topic of highest interest for society. In addition, the positive impact of energy efficiency measures on job creation seems to be well recognised (72 % discussed positively), making it a strong argument in favour of the energy transition.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics in the Netherlands. 100 % of experts rate them "very influential". Farmers organisations rank 2nd in influence and NGOs rank 3rd. This is very different to most other EU countries where these two groups are much less influential (rank 5 and 6 respectively for EU27). Other actor groups are reported to be much less influential on politics in the Netherlands.

When asked how supportive these groups are of the energy transition, clear positions appear. Associations of large industry and farmers organisations are reported as rather opposed by just over 70 % of survey participants. In comparison, 94 % of experts consider NGOs as supportive of the energy transition. These three actor groups position themselves more clearly either in favour or against the energy transition in the Netherlands than in most other EU countries. Nevertheless, in general terms, the energy transition does not find significant support among the most influential actor groups in the Netherlands. In comparison to other EU countries, the Netherlands ranks 26 of 27 in regard to actor groups' support of the energy transition.

The development of new narratives in the Netherlands could benefit from taking into account the importance of 'jobs' in the public debate, especially since the positive effects of energy efficiency on job creation are already recognised in the debate. Current arguments about high costs (ex: required investments, increased costs of housing and living) might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions. Strong numbers and communication efforts could help in this regard.

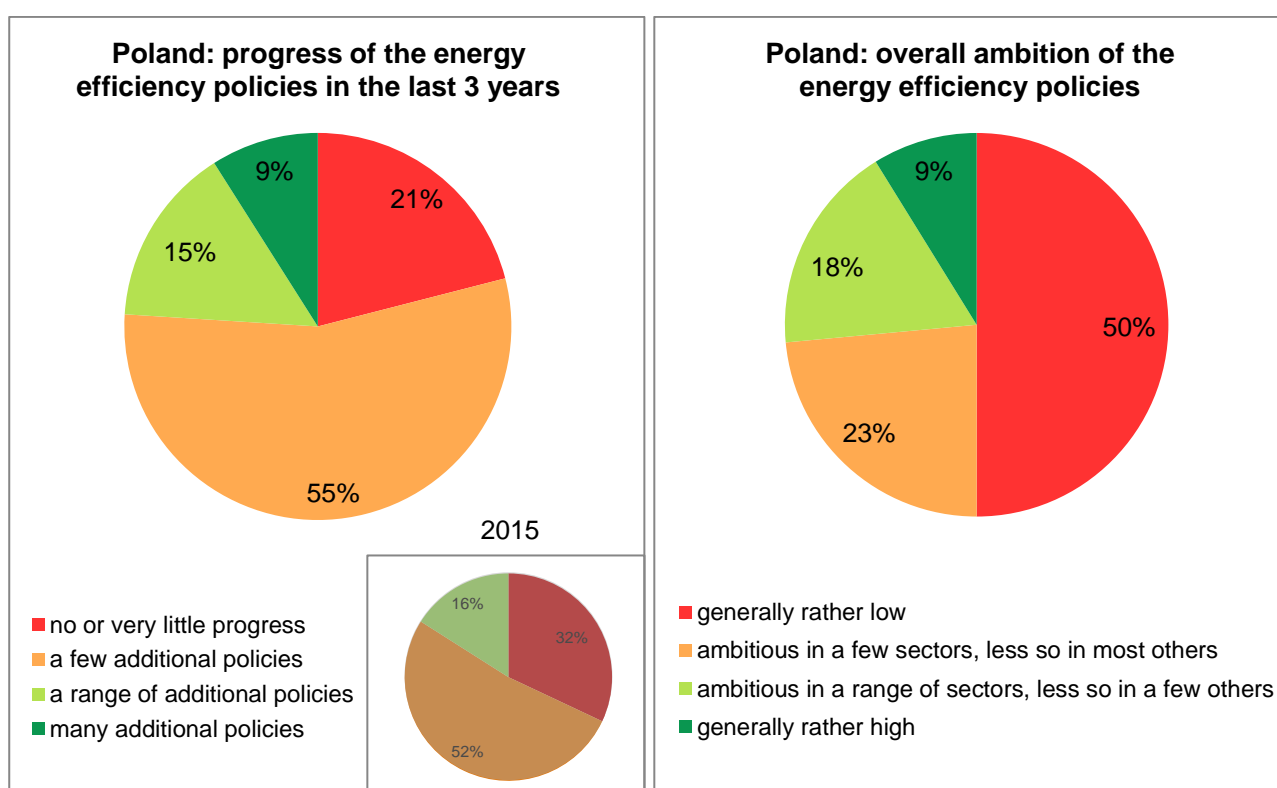
NGOs could be stronger allies for the energy transition debate seeing as they are both influential on Dutch politics and supportive of the cause. Due to the level of influence of large industry, it could be helpful to work towards narratives they can "buy into", particularly since their agendas seem to coincide with topics of high interest for society (e.g. industrial competitiveness, jobs). In general, working with influential actor groups that are opposed to the energy transition and providing them positive arguments in line with their ambitions (backed with numbers and data) could contribute to increasing their support, and thus help drive the energy transition in the Netherlands.

Poland



According to Polish experts, Poland is among the Member States that have made relatively little progress in energy efficiency policies over the past 3 years (country progress indicator: 24 out of 27 – see page 14). The relative rate of progress was similar to the two previous surveys (country progress indicator: 22 in 2015 and 21 in 2012).

Although experts rate the progress and overall ambition of energy efficiency policies as relatively low, they see improvements since the 2015 survey: 9 % consider many additional policies were put in place in recent year – up from 0 % in 2015 (which looked back on the period 2012-2015). 27 % consider the overall ambition as ambitious in at least a range of sectors – also more than in 2015 (16 %).

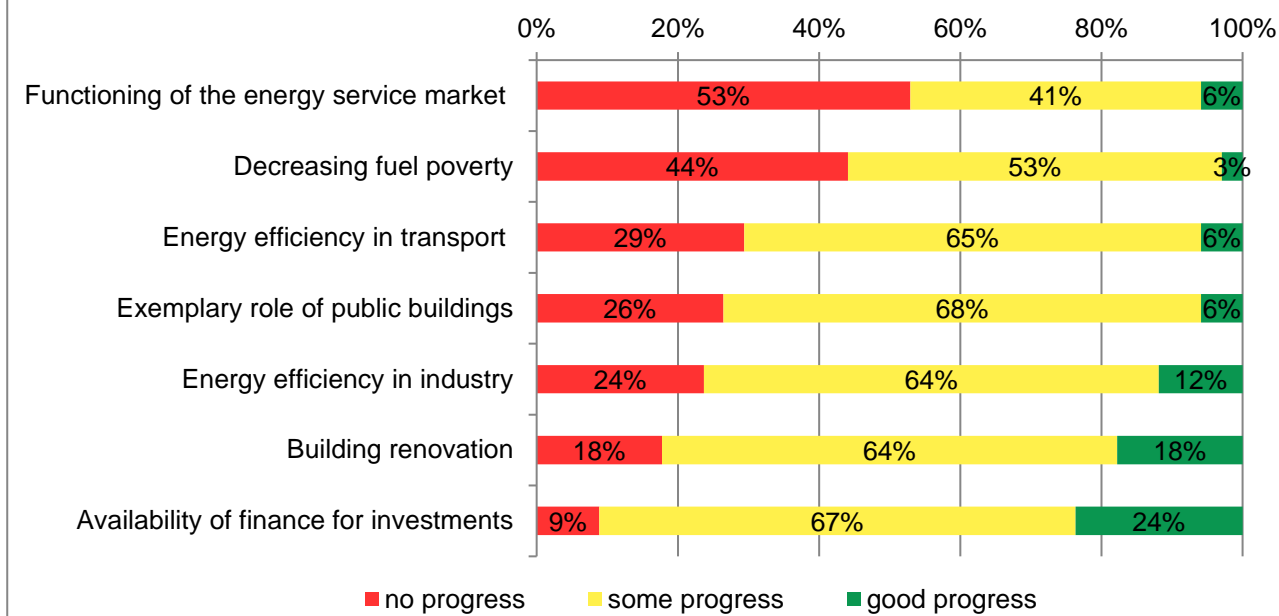


In regard to improvements in actual implementation of policies in the past 3 years, Polish experts report the most progress (and above EU27 average) in the availability of finance for investments. 91 % of experts saw "some progress" or "good progress" in this area. This is followed by building renovation and energy efficiency in industry – although both given slightly lower progress ratings than in the 2015 survey.

The least progress in recent years was seen in the functioning of the energy service market and decreasing fuel poverty. Respectively 53 % and 44 % of experts reported "no progress" in these fields.

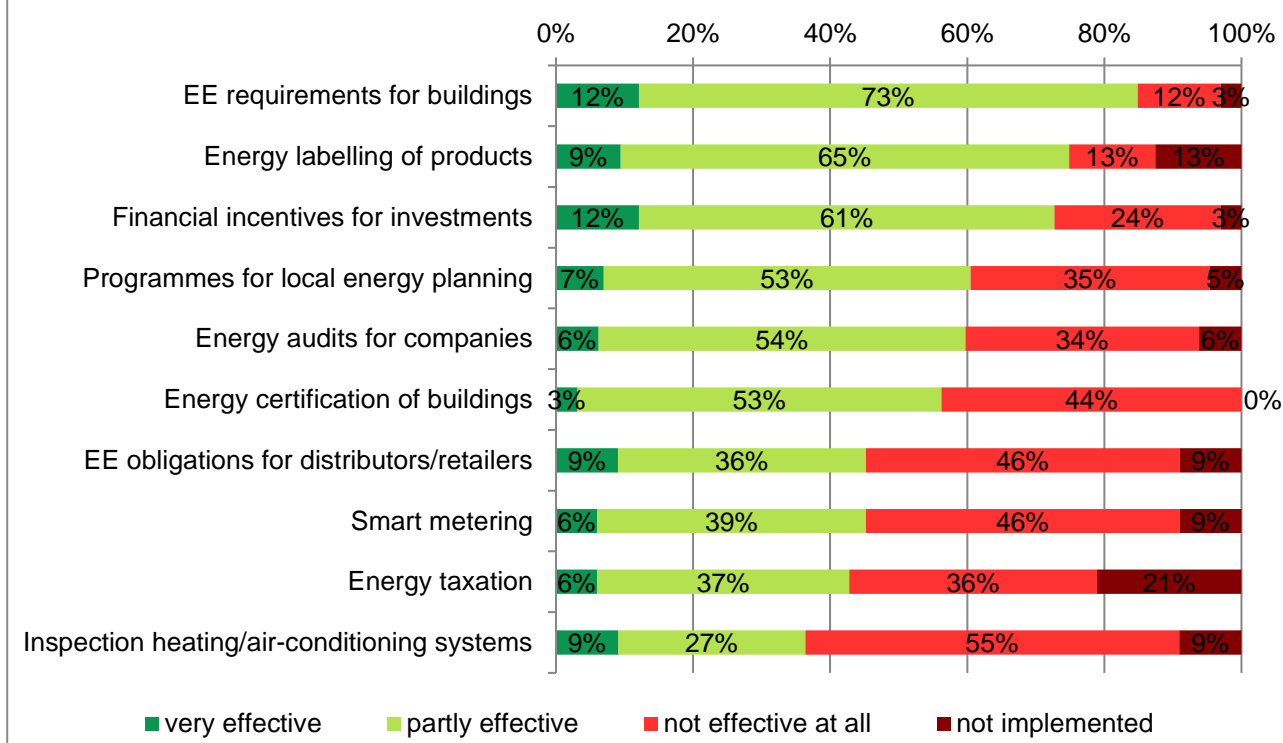
In comparison to the 2015 results, experts saw a slight increase in progress in some fields, and slight decrease in others.

Poland: improvement in actual implementation



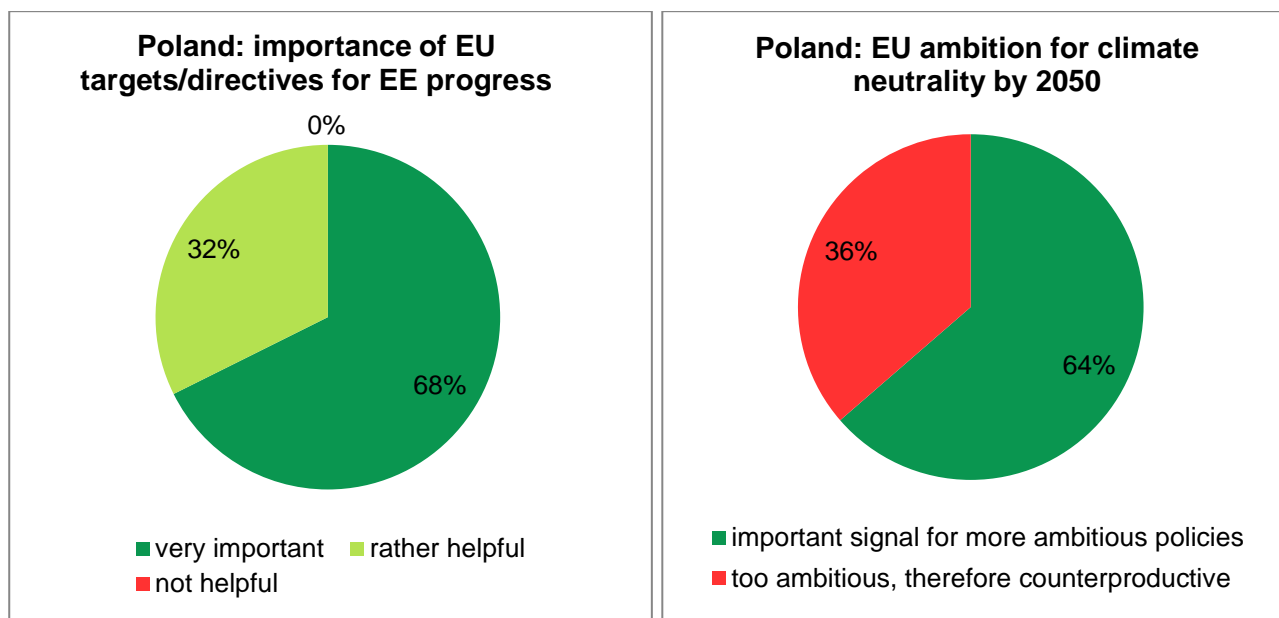
In terms of specific policy instruments, energy requirements for buildings, energy labelling of products and financial incentives for investments are seen as the most effective in the Polish context. They are rated "partly or very effective" by 85 %, 74 % and 73 % of experts respectively. At the other end of the spectrum, the highest ratings for "not effective at all" are given to the inspection of heating/air-conditioning systems (55 %), smart metering (46 % - among the highest in the EU), and energy efficiency obligations for distributors and retailers (46 %). Energy certification of buildings received one of the lowest overall effectiveness ratings among Member States.

Poland: effectiveness of policy instruments



Poland is one of the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country.

However, more than a third (36 %) find the EU ambition for climate neutrality by 2050 to be counterproductive in their country – among the highest percentages of all Member States (EU average 16 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Poland (for more details on the content of this table and how to analyse it, see page 32):

Poland: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Air quality	1	1	60 %	40 %
Jobs	2	6	44 %	56 %
Independence from other countries	3	2	53 %	47 %
Modernisation / investments	4	4		
Housing / living costs	5	3		
Industrial competitiveness	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	46 %	17 %	37 %
Churches	2	19 %	59 %	22 %
Trade Unions	3	20 %	40 %	40 %
Tabloid press	4			
Farmers organisations	5			
NGOs	5			
Chambers of Commerce	7			

According to the Polish experts, ‘air quality’ (with the highest rating of all Member States), ‘loss and creation of jobs’ and ‘independence from other countries’ are the 3 most important topics in the general public debate. This is quite different to the ranking in most EU countries (in EU27, air quality ranks 5th, independence ranks 6th). Poland is the only Member States where air quality ranks 1st in importance.

When looking at which subjects are currently most strongly linked to energy efficiency in the public debate, ‘air quality’ and ‘independence from other countries’ again come out at the top of the list. ‘Housing and living costs’ ranks 3rd and ‘modernisation/investments’ 4th.

The survey results show that energy efficiency is already linked to some of the topics of high interest for society. This could provide a good basis for positive narrative development and roll-out. Compared to other Member States, experts report that energy efficiency is quite present in the public debate and already linked to many subjects. However, most topics are discussed to a similar level positively and negatively.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics. In Poland, Churches rank 2nd – a level of influence seen in only very few EU countries (Churches rank 7 in EU27) and Trade Unions rank 3rd (rank 2 in EU27). According to survey results, these 3 groups are ranked clearly as the most influential on politics in Poland. However, in overall terms, Polish experts report that actor groups have lower levels of influence than in most other Member States.

In regard to their attitude towards the energy transition, the 3 most influential actor groups do not seem to be taking a clear position. 46 % of experts see associations of large industry as supportive versus 37 % as opposed. Trade Unions and Church received among the highest ratings for "rather opposed" of all Member States, but in general seem to have an ambivalent and unclear position ("position unknown" by respectively 40 % and 59 % of experts).

In conclusion, Polish narratives for the energy transition could benefit from taking into account the importance of 'jobs' in the public debate. Overall, there seems to be a need for positive arguments for energy efficiency to help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Associations of large industry could be strong allies for the energy transition debate seeing as they are both influential on Polish politics and rather supportive of the cause. Also Churches could be stronger allies in Poland. In some other Member States (for example Germany and Austria), churches take an active position in public on climate protection.

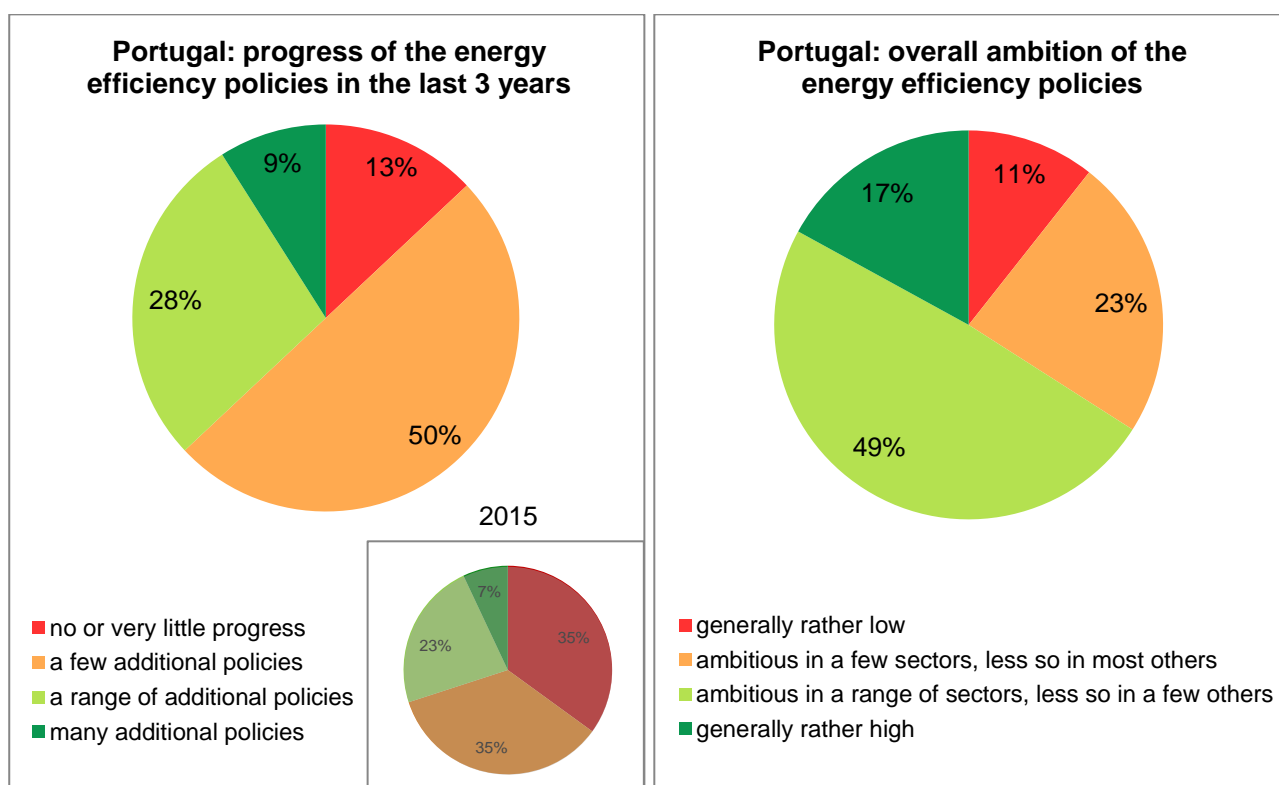
In general, working closely with influential actor groups and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. Creating narratives that influential actors can "buy into" could have significant positive effect on driving the energy transition in Poland.

Portugal



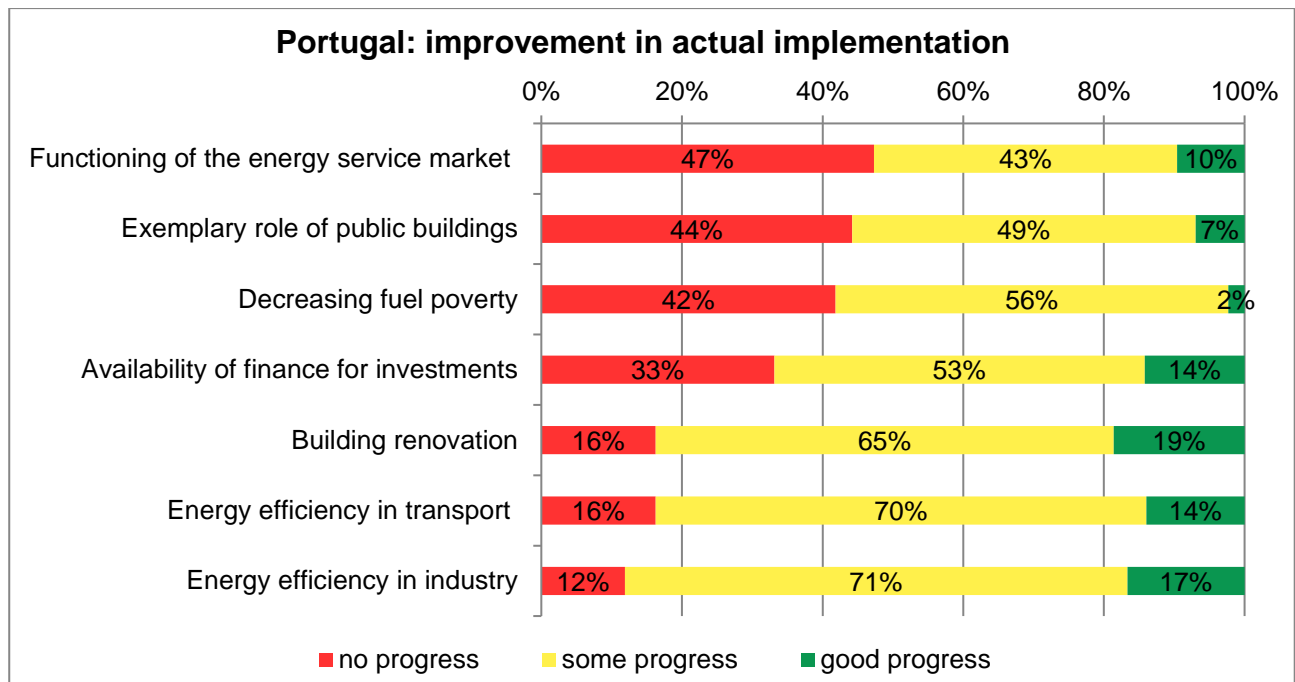
According to the Portuguese experts, Portugal is among those countries that have progressed comparatively well in energy efficiency policies over the past 3 years (country progress indicator: 7 out of 27 – see page 14). After reporting a significant slowdown in the rate of progress between the 2012 and 2015 surveys, the country bounced back to its 2012 ranking level (country progress indicator 6 in 2012 and 24 in 2015). Among all Member States, Portugal has seen the strongest increase in progress since the 2015 survey.

37 % of experts saw at least a range of additional policies in the past 3 years. Only 13 % report no or very little progress in policies (down from 35 % in the 2015 survey). Two thirds of Portuguese experts consider the overall ambition of energy efficiency policies to be ambitious in at least a range of sectors. This is significantly more than at the time of the 2015 survey (40 %). These results indicate that experts feel energy efficiency policy is not sufficiently living up to ambitions.



In terms of improvements in the implementation of energy policies in the past 3 years, experts report overall higher progress rates than at the time of the 2015 survey (second strongest increase in progress rate among EU countries). Experts saw the most progress in energy efficiency in industry, energy efficiency in transport, and building renovation. 88 %, 84 % and 84 % of experts report at least some progress in these fields. Portugal's progress in the field of energy efficiency in transport is among the highest of all Member States. At the other end of the spectrum, experts saw the least improvement in the

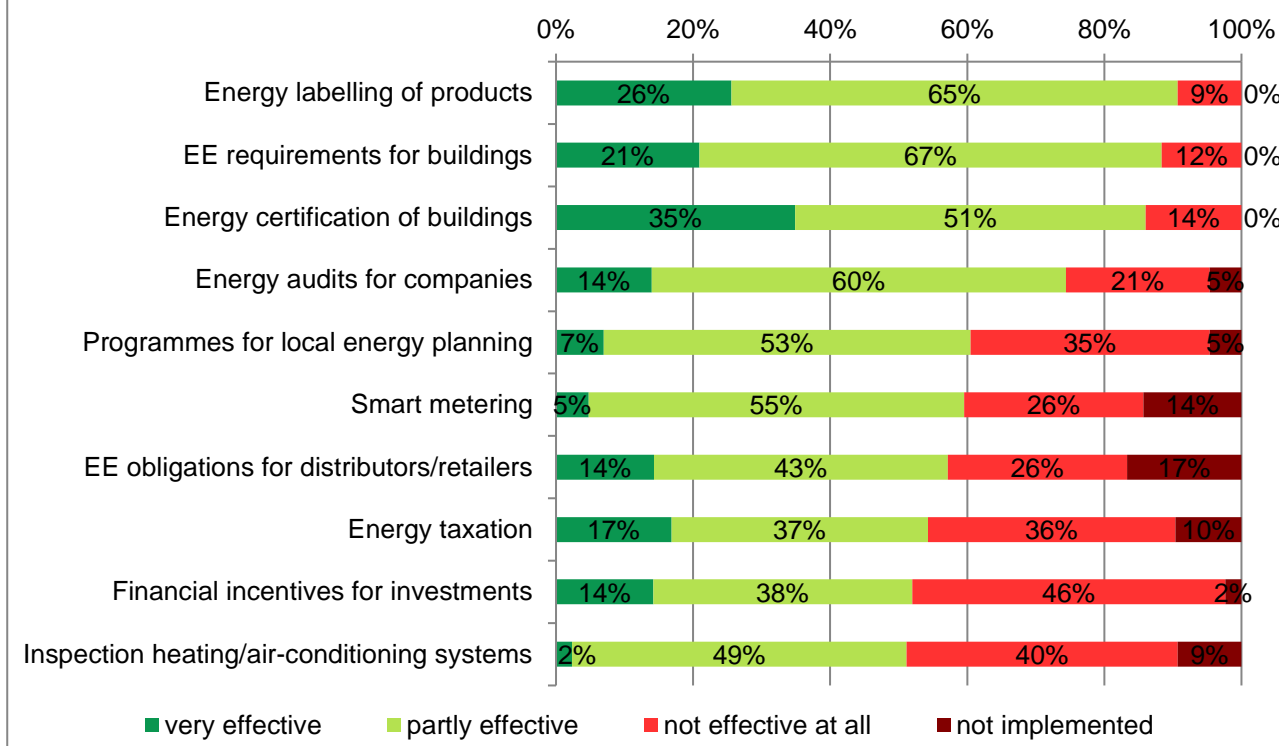
functioning of energy service markets (47 % report "no progress"). The exemplary role of buildings received the lowest progress rating of all Member States.



Regarding specific policy instruments, energy labelling of products, energy efficiency requirements for buildings, and energy certification of buildings are seen as the most effective in the Portuguese context. They were rated partly or very effective by 91 % (among the highest in the EU), 88 % and 86 % respectively. These were also seen as the most effective instruments in 2015. 35 % of experts consider the energy certification of buildings as very effective (the second highest rating in the EU).

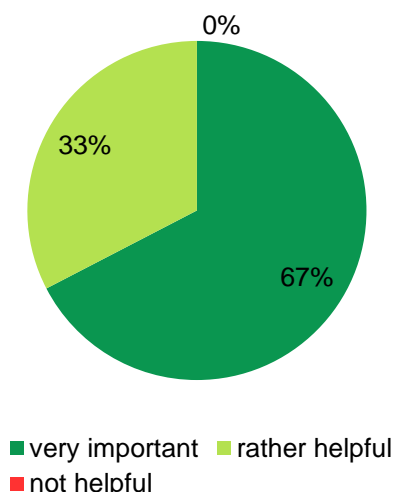
The highest rating for "not effective at all" is given to financial incentives for investments (46 % – among the lowest ratings of all Member States). In overall terms, the percentage of "not implemented" is significantly lower than in the 2015 survey.

Portugal: effectiveness of policy instruments

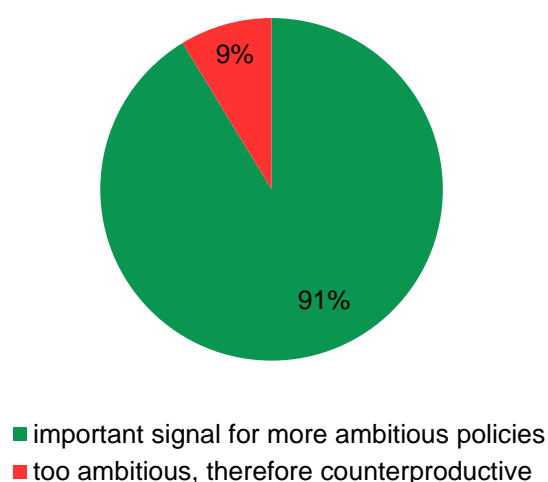


Portugal is among the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. In regard to the EU ambition for climate neutrality by 2050, 91 % find it to be an important signal for more ambitious policies. Only 9 % consider it too ambitious – less than the EU27 average of 16 %.

Portugal: importance of EU targets/directives for EE progress



Portugal: EU ambition for climate neutrality by 2050



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Portugal (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	86 %	14 %
Industrial competitiveness	2	2	79 %	21 %
Modernisation / investments	3	1	47 %	53 %
Housing / living costs	4	5		
Air quality	5	4		
Independence from other countries	6	3		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	59 %	24 %	17 %
Tabloid press	2	57 %	39 %	4 %
Trade Unions	3	41 %	50 %	9 %
Chambers of Commerce	4			
NGOs	5			
Churches	6			
Farmers organisations	7			

Similar to the overall EU27 ranking, the most important topics in the general public debate in Portugal are the loss and creation of jobs, industrial competitiveness and modernisation and investments.

When asked about which subjects are currently linked to energy efficiency in the public debate, experts report strongest links to investments, industrial competitiveness, and independence from other countries.

Worth noting in the case of Portugal is the fact that energy efficiency is not (yet) being discussed in relation to 'jobs' in the general public debate, even though this is the most important topic for society and the link is discussed primarily positively (86 %) – making it a strong positive argument for the energy transition.

In overall terms, the many benefits of energy efficiency seem to be well recognised in Portugal. Energy efficiency is discussed more positively in the public debate than in all other Member States. The topics that seem to cause some concern are the large investments required for the energy transition and the higher costs of housing and living.

As we see across almost the entire EU, associations of large industry have the strongest influence on politics in Portugal. Tabloid press rank 2nd for their level of influence (higher than the EU average rank 4). Trade Unions are also quite influential (rank 3 in Portugal, rank 2 in the overall EU27).

In Portugal, all actor groups are perceived as more supportive of the energy transition than opposed. 59 % of experts see large industry as supportive, compared to 17 % as opposed. For the tabloid press, this is 57 % supportive and only 4 % opposed. In the case of Trade Unions, 41 % see them as supportive, but 50 % are not sure what their position is. In overall terms, it seems that many actor groups have not yet positioned themselves clearly either in favour or against the energy transition (the percentage of "position not known" is the highest of all Member States).

In conclusion, Portuguese narratives for the energy transition could benefit from taking into account the importance of 'jobs' in the public debate. The positive impact of energy efficiency on job creation is already recognised in society. Hence, increasing its presence in the public debate (backed with numbers) could help heighten general interest in the energy transition. Current arguments about high costs might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions.

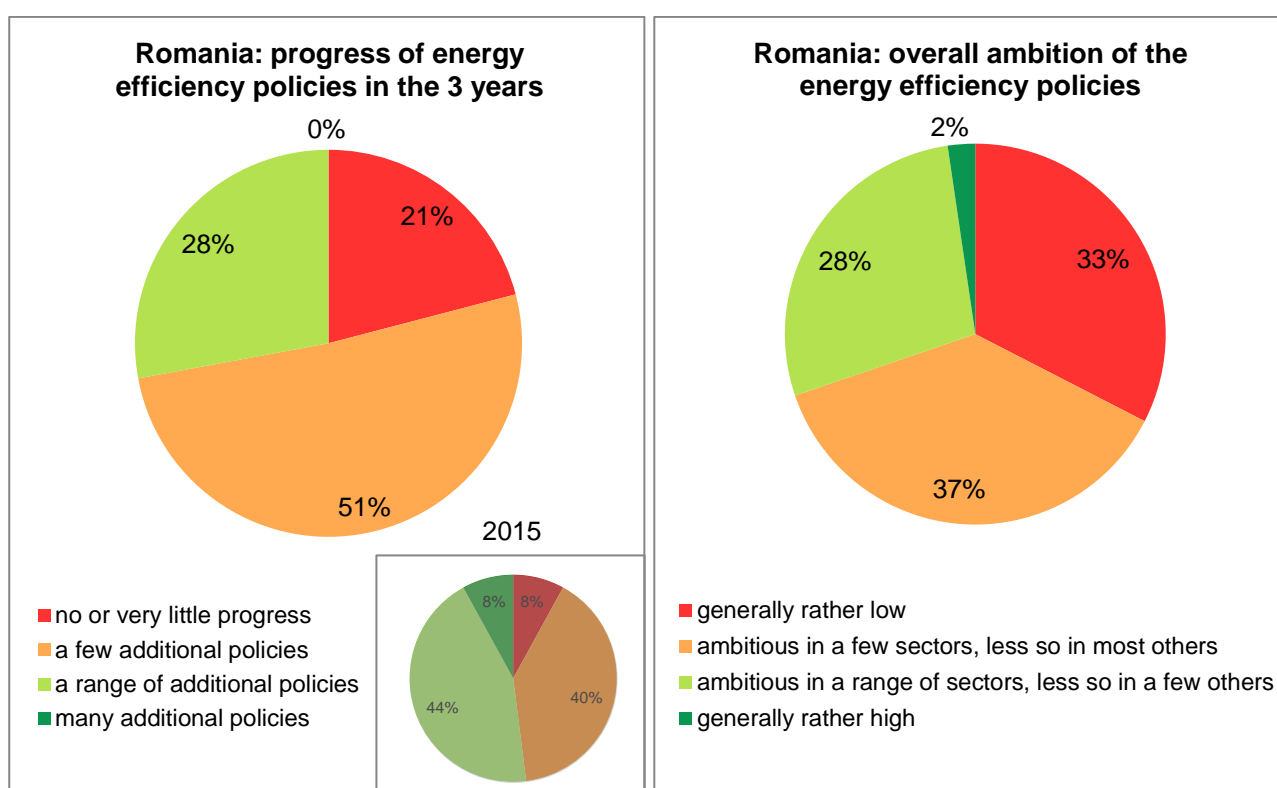
Influential economic actors already in favour of the energy transition (associations of large industry, Trade Unions) could be interesting allies for the energy transition debate, particularly since their agendas seem to coincide with topics of high interest for society (jobs, industrial competitiveness). Due to their level of influence, working with these groups and encouraging them to express a clearer position on the energy transition by providing narratives they can "buy into" could have significant positive effect on driving this cause in Portugal.

Romania



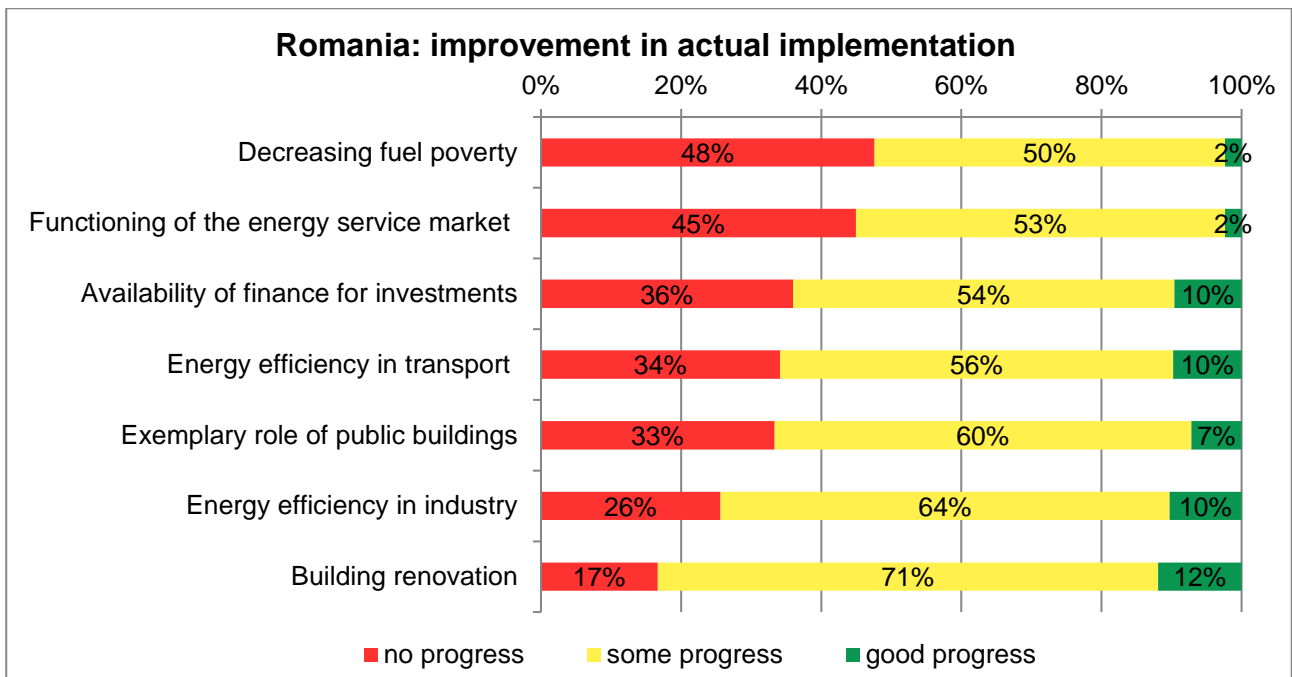
According to Romanian experts, Romania is among the Member States that have made relatively little progress in energy efficiency policies over the past 3 years (country progress indicator: 24 out of 27 – see page 14). The rate of progress has slowed down somewhat since 2015 (2015 survey: country progress indicator: 20 out of 28).

72 % of the survey participants report that no or only a few additional policies were introduced in the last 3 years. 28 % saw a range of additional policies put in place. In comparison, in the 2015 survey, half of the experts (52 %) reported a range or many additional policies for the period 2012-2015. The majority of experts (70 %) consider the overall ambition of the energy efficiency policies as relatively low.

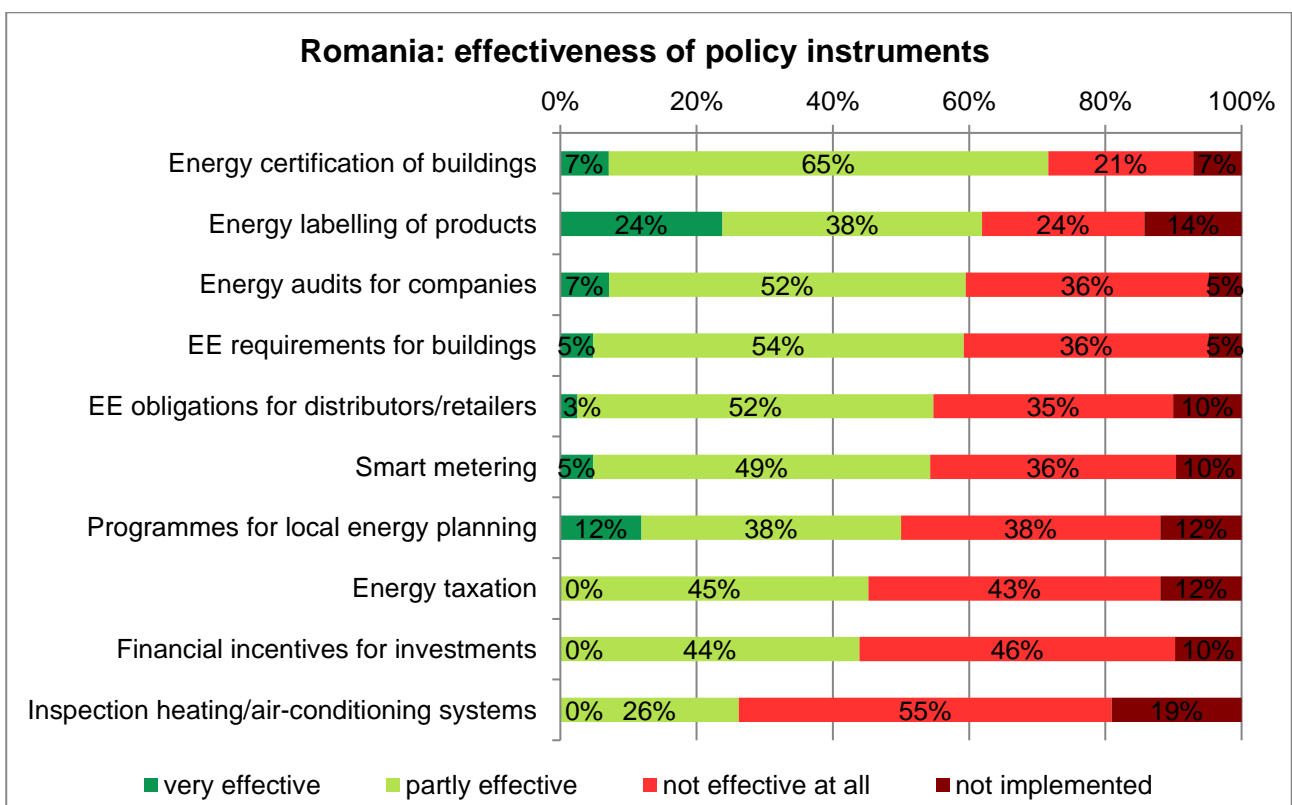


In terms of the improvement in actual policy implementation in the past 3 years, most progress was made in the areas of building renovation and energy efficiency in industry. 83 % and 74 % of experts, respectively, saw some or good progress in these fields.

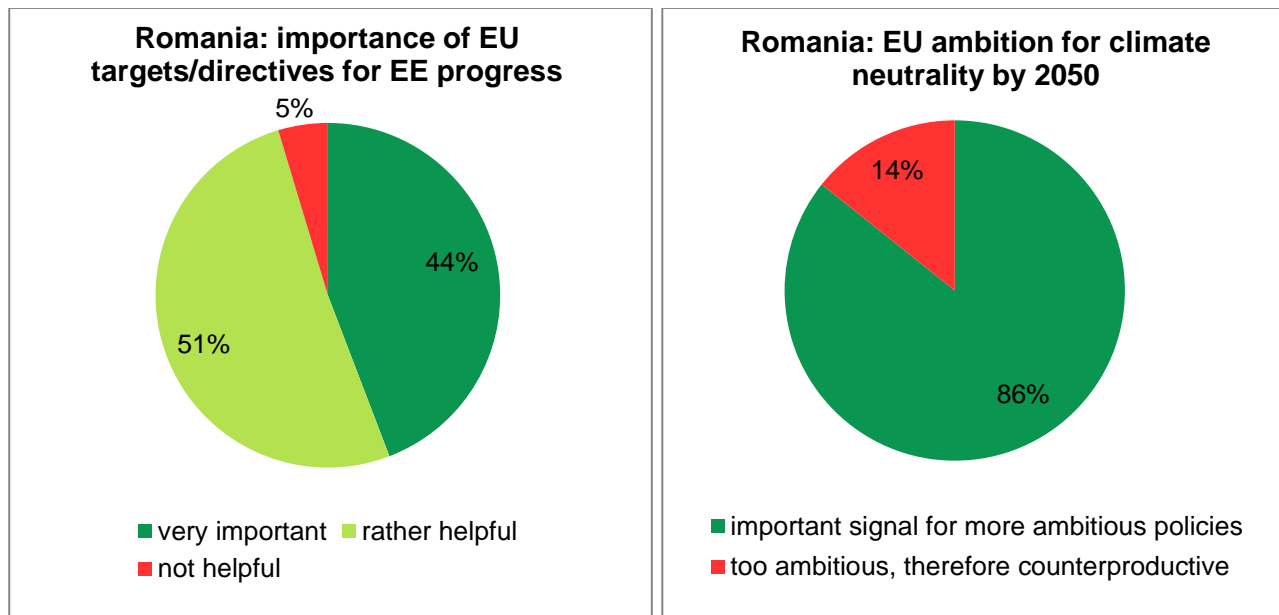
The highest ratings of "no progress" were given to decreasing fuel poverty (48 %) and the functioning of the energy service market (45 %). Improvement in the availability of finance or energy efficiency investments in Romania is the lowest among all Member States. In overall terms, the results are very similar to those of the 2015 survey. This means that progress is not picking up speed.



Among specific policy instruments, energy certification of buildings is seen as the most effective in the Romanian context (rated at least partly effective by 72 % of experts), followed by energy labelling of products (62 %) and energy audits for companies (59 %). The inspection of heating/air-conditioning systems is considered the least effective instrument (55 % "not effective at all") – as was the case in the 2015 survey. Energy requirements for buildings and the inspection of heating/air-conditioning systems received among the lowest effectiveness ratings of all Member States. Compared to the 2015 survey, in general terms, Romanian experts report an overall decrease in effectiveness of policy instruments.



95 % of surveyed experts see EU targets and directives as positive for the progress of energy efficiency in Romania: 44 % consider them "very helpful" and 51 % "rather helpful". 86 % of the experts find the EU ambition for climate neutrality by 2050 offers an important signal for more ambitious policies (similar to the EU27 average).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Romania (for more details on the content of this table and how to analyse it, see page 32):

Romania: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Modernisation / investments	1	1	46 %	54 %
Jobs	2	6	52 %	48 %
Air quality	3	2	59 %	41 %
Rural development	4	7		
Industrial competitiveness	5	4		
Independence from other countries	6	5		
Housing / living costs	7	3		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	60 %	14 %	26 %
Trade Unions	2	37 %	43 %	20 %
Tabloid press	3	46 %	51 %	3 %
Churches	4			
NGOs	5			
Chambers of Commerce	6			
Farmers organisations	7			

Similar to other countries in Central and Eastern Europe, the subject of ‘modernisation and infrastructure investments’ is among the most important topics in the general public debate in Romania. The topics of ‘loss and creation of jobs’ (rank 1 in EU27) and ‘air quality’ (rank 5 in EU27) are also of high importance.

When looking at which subjects are currently linked to energy efficiency in the public debate, we see that it is most strongly linked to investments (rank 1) and air quality (rank 2). In third position, it is most often linked to housing and living costs – despite this being a topic of very little importance in the public debate. Also noteworthy is the fact that energy efficiency is not being linked to ‘jobs’ in the general public debate, although it is one of the most important topics for society.

In general, there seems to be a divided opinion in the public debate. The impacts of energy efficiency on different aspects of society are discussed to a similar extent positively and negatively. One of the positive links that seems to be well recognised is the effect of energy efficiency on industrial competitiveness (discussed positively 70 % of the time).

As we see across almost the entire EU, associations of large industry have the strongest influence on politics in Romania. 70 % of experts rate them "very influential". Trade Unions come in rank 2 (55 % very influential), followed by Tabloid press (49 % very influential). In overall terms, Romanian experts report lower levels of influence for actor groups than in all other Member States.

All three of the most influential actor groups in Romania are perceived as more supportive of the energy transition than opposed. Large industry is perceived as supportive by 60 % of experts versus opposed by 26 %. Although Trade Unions and tabloid press are also reported as supportive of the cause, respectively 43 % and 51 % of experts did not know their position. In general, survey results indicate that many actor groups are not yet expressing a clear position in the energy transition debate.

The development of new narratives for the energy transition in Romania could benefit from taking into account the importance of 'jobs' in the public debate. Increasing awareness of the positive link between energy efficiency and the topics of highest importance for society (modernisation and investments, jobs, air quality) could help heighten the general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

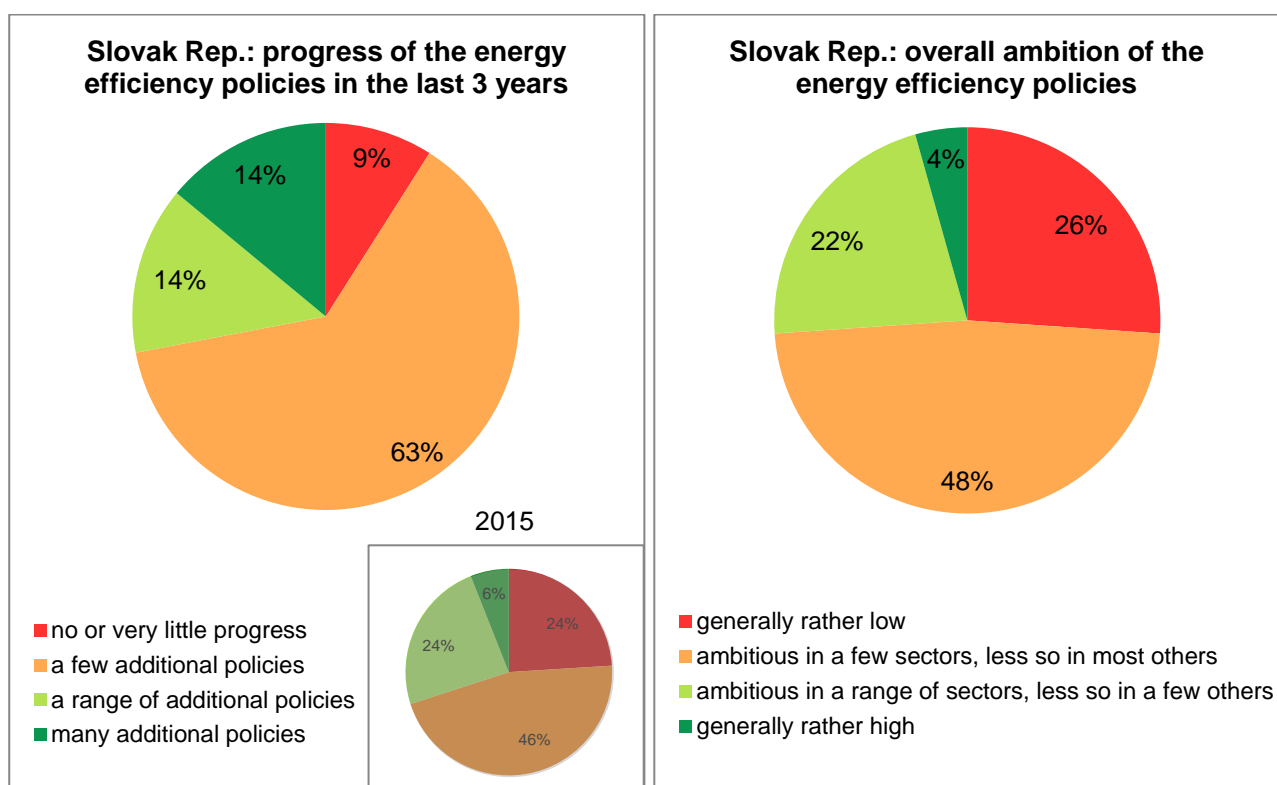
Due to their level of influence, associations of large industry, Trade Unions and tabloid press could be interesting allies for the energy transition debate. Working with these groups and providing positive arguments in line with their ambitions (ex: jobs, investments) could contribute to increasing their support of the energy transition and encourage them to express a clearer stand. Creating narratives they can "buy into" could have significant positive effect on driving the energy transition in Romania.

Slovak Republic

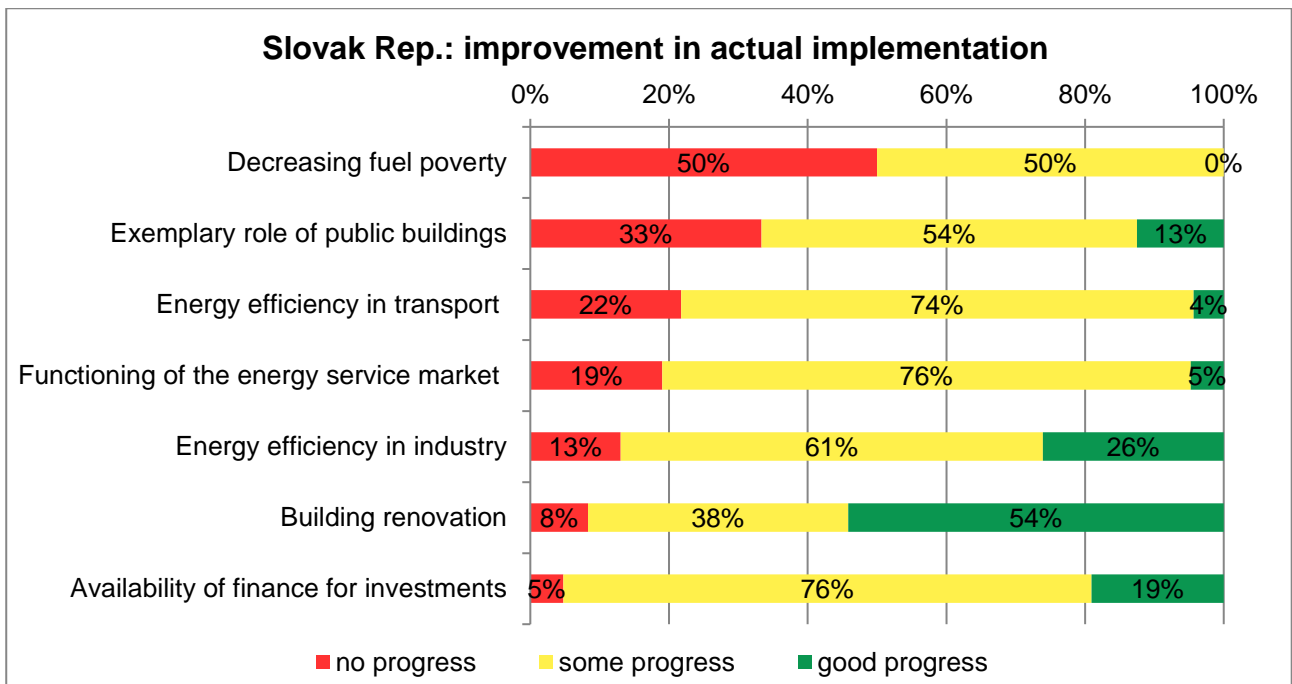


The Slovak Republic is among the Member States that has made medium progress in energy efficiency policies in the last 3 years (country progress indicator: 10 out of 27 - see page 14). It is one of the four countries where the rate of progress has steadily increased over the course of all three surveys (country progress indicator: 15 in 2015 and 26 in 2012).

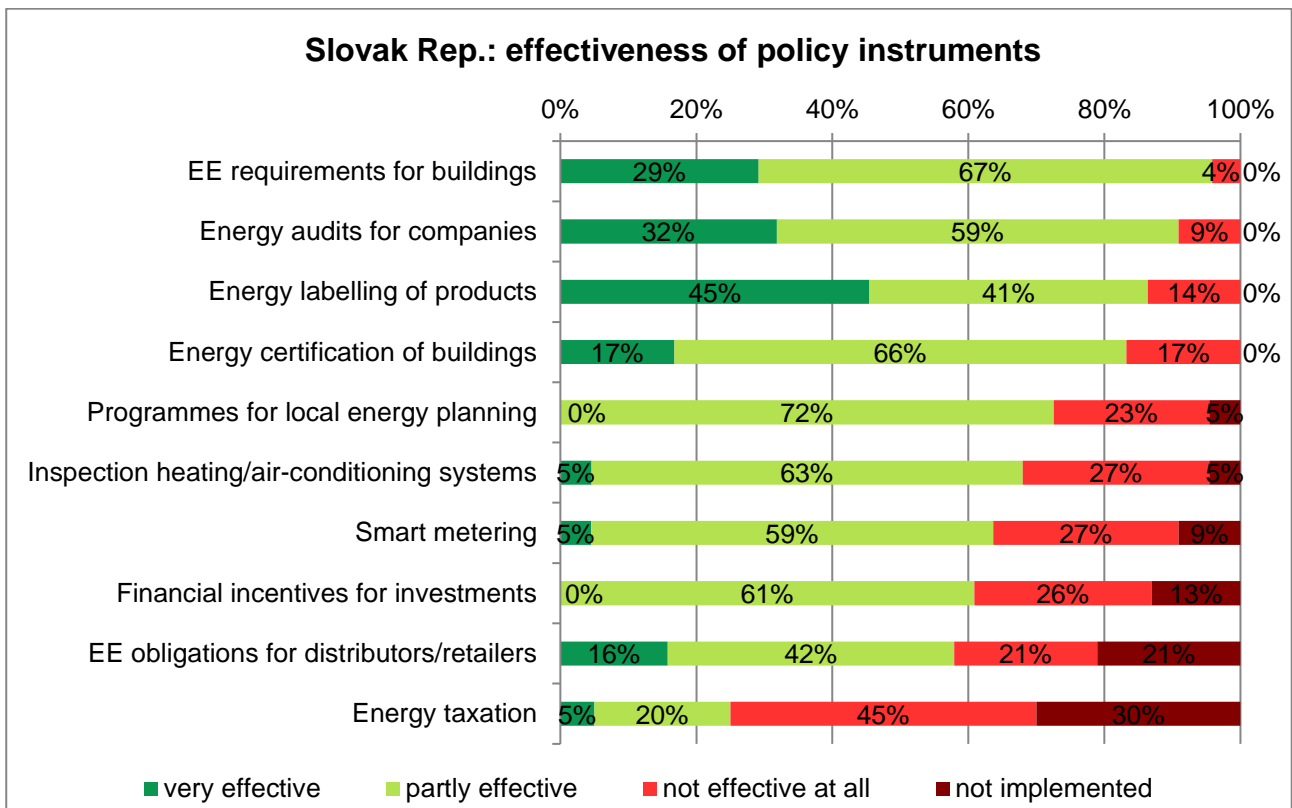
28 % of experts find that a range or many additional energy efficiency policies were put in place in the recent years, 63 % report a few additional policies. Only 9 % report seeing no or very little progress – compared to 24 % in 2015. Despite these improvements, experts still see a relatively low overall ambition of energy efficiency policies: around three quarters consider it rather low or ambitious in only a few sectors.



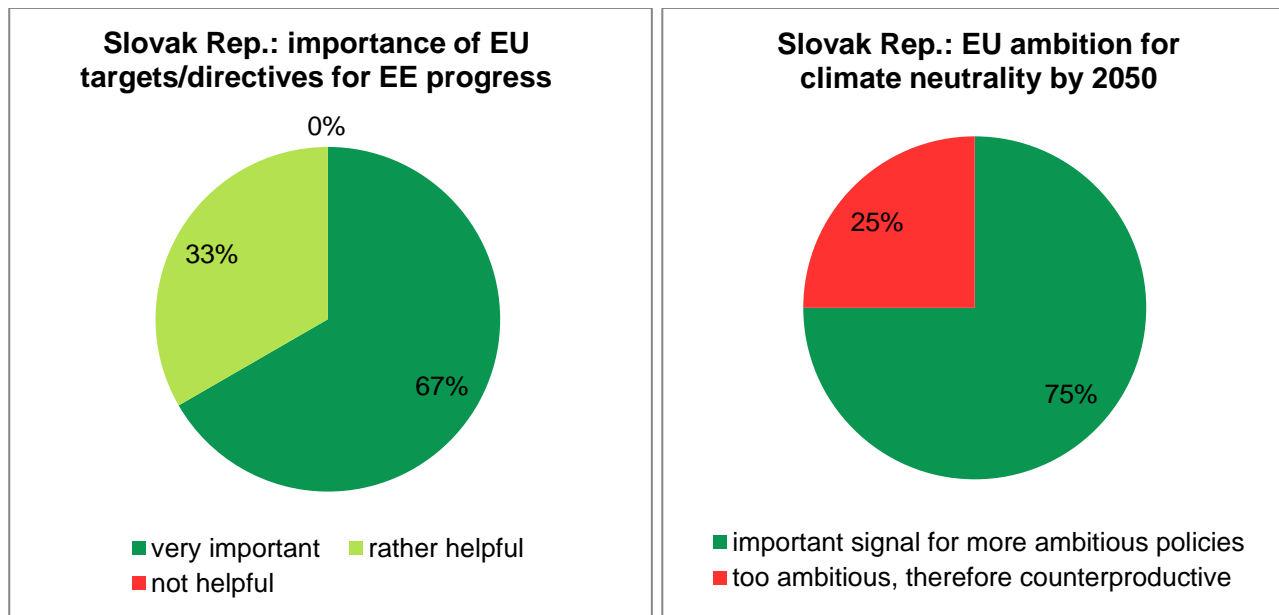
According to the experts, the largest relative improvements in actual implementation in the past 3 years were made in the availability of finance for investments (95 % of experts report some or good progress) and in building renovation (92 % some or good progress, of which 54 % "good progress"). The area of building renovation in the Slovak Republic received one of the highest relative progress ratings among Member States. Least progress in implementation was seen in decreasing fuel poverty, for which half of all experts report no progress at all. The Slovak Republic is among the 4 Member States where no experts reported "good progress" in this field. For a range of areas, experts see greater improvements in implementation in the past 3 years than at the time of the 2015 survey (which looked back on the period 2012-2015). One exception is the area of decreasing fuel poverty, for which progress has fallen to below EU27 average levels.



Slovak experts think rather positively of the effectiveness of a range of energy efficiency policy instruments and report a strong increase in their impact compared to 2015. Energy requirements for buildings is seen as partly or very effective by 96 % of experts. Energy audits for companies, energy labelling of products and inspections of heating/air-conditioning systems received among the highest effectiveness ratings of all Member States. At the other end of the spectrum, 45 % of experts find energy taxation not effective at all and 30 % state that it is not implemented in the Slovak Republic. This instrument was also considered the least effective in the 2015 survey.



The Slovak Republic is one of the 8 Member States where 100 % (!) of the experts consider EU targets and directives to be positive for the progress in energy efficiency in their country. 67 % rate them "very important" and 33 % "rather helpful". However, a quarter find the EU ambition for climate neutrality by 2050 to be counterproductive in the Slovak Republic (more than the EU27 average of 16 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in the Slovak Republic (for more details on the content of this table and how to analyse it, see page 32):

Slovak Rep.: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Modernisation / investments	1	2	51 %	49 %
Jobs	2	5	73 %	27 %
Industrial competitiveness	2	3	64 %	36 %
Air quality	4	1		
Housing / living costs	5	4		
Rural development	6	6		
Independence from other countries	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	52 %	11 %	37 %
Trade Unions	2	40 %	45 %	15 %
Chambers of Commerce	2	60 %	35 %	5 %
Churches	4			
NGOs	5			
Tabloid press	6			
Farmers organisations	6			

Similar to other countries in Central and Eastern Europe, modernisation and infrastructure investments are among the most important topics in the general public debate in the Slovak Republic (and received the highest rating of all Members States). The subjects of loss/creation of jobs and industrial competitiveness are also of high importance (as in the majority of EU countries) and given the same rating by experts.

When asked about which subjects are currently linked to energy efficiency in the public debate, experts report strongest links to air quality (discussed largely positively), followed by modernisation/investments (discussed similarly positively and negatively) and industrial competitiveness (discussed largely positively).

Worth noting in the case of the Slovak Republic is the fact that energy efficiency is not (yet) being discussed in relation to 'jobs' in the general public debate, even though this is a key topic of interest for society and the link is discussed primarily positively (73 %) – making it a strong positive argument for the energy transition.

In term of which actor groups are most influential on Slovak politics, economic actor groups are in clear dominance. Association of large industry are seen as "very influential"

by 100 % of experts. Trade Unions and Chambers of Commerce both come in 2nd position. These are the same top 3 influential groups as for the EU27. In the Slovak Republic, churches are ranked 4th in influence – a level of influence seen in only a few Member States.

In regard to actor groups' attitude towards the energy transition, large industry is perceived as supportive by 52 % of expert versus opposed by 37 %. Although Chambers of Commerce and Trade Unions are reported to be supportive by 60 % and 40 % of experts respectively, a large percentage of experts (35-45 %) did not know their position. Also churches have not taken a stand (90 % "position unknown"). In overall terms, it seems that a number of actor groups in the Slovak Republic have not yet positioned themselves clearly either in favour or against the energy transition (the percentage of "position not known" is among the highest of all Member States).

In conclusion, Slovak narratives for the energy transition could benefit from taking into account the importance of 'jobs' in the public debate. The positive impact of energy efficiency on job creation is already recognised in society. Hence, increasing its presence in the public debate (backed with numbers) could help heighten general interest in the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Due to their level of influence, economic actors could be stronger allies for the energy transition debate in the Slovak Republic, especially since their agendas seem to coincide with topics of high interest for society (modernisation/investments, jobs, industrial competitiveness). Although they already seem to have a positive attitude towards the cause, in general, it could be helpful to encourage influential actor groups to take a clearer stand.

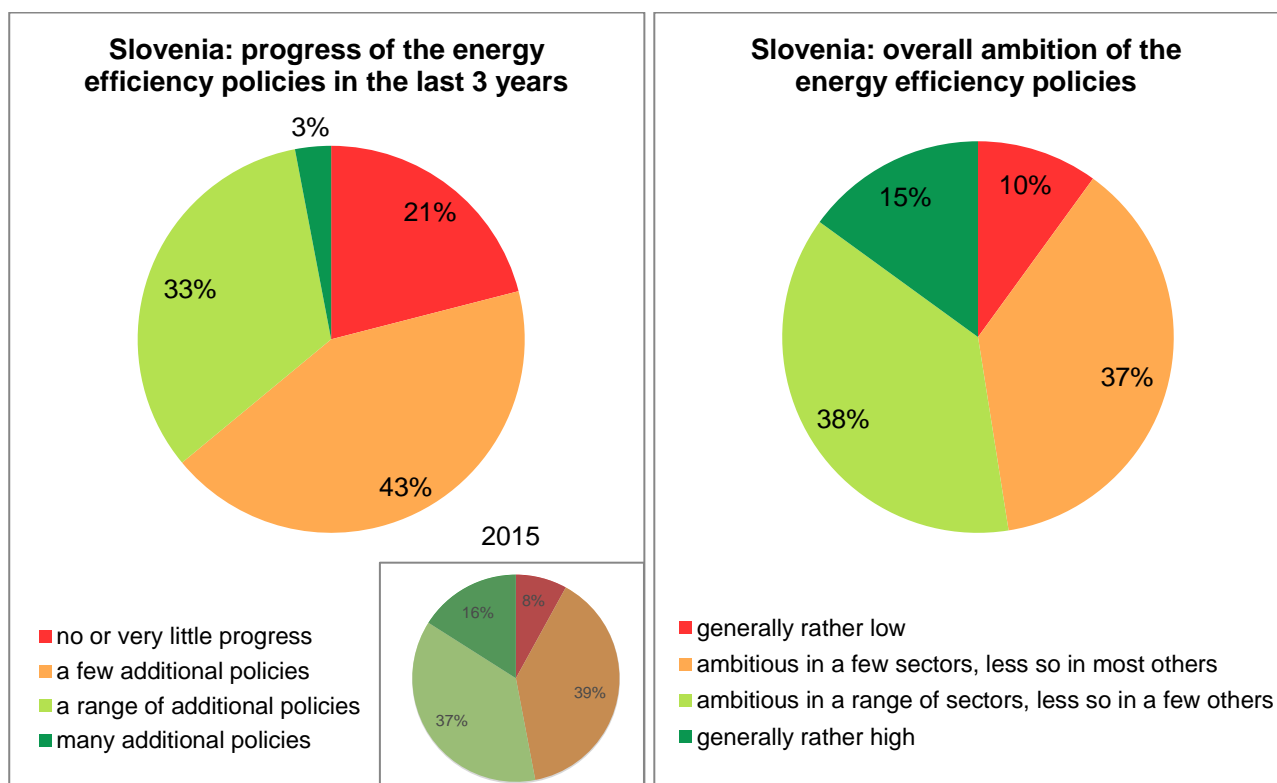
Working with these groups and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. In general terms, creating narratives they can "buy into" could have significant positive effect on triggering change.

Slovenia

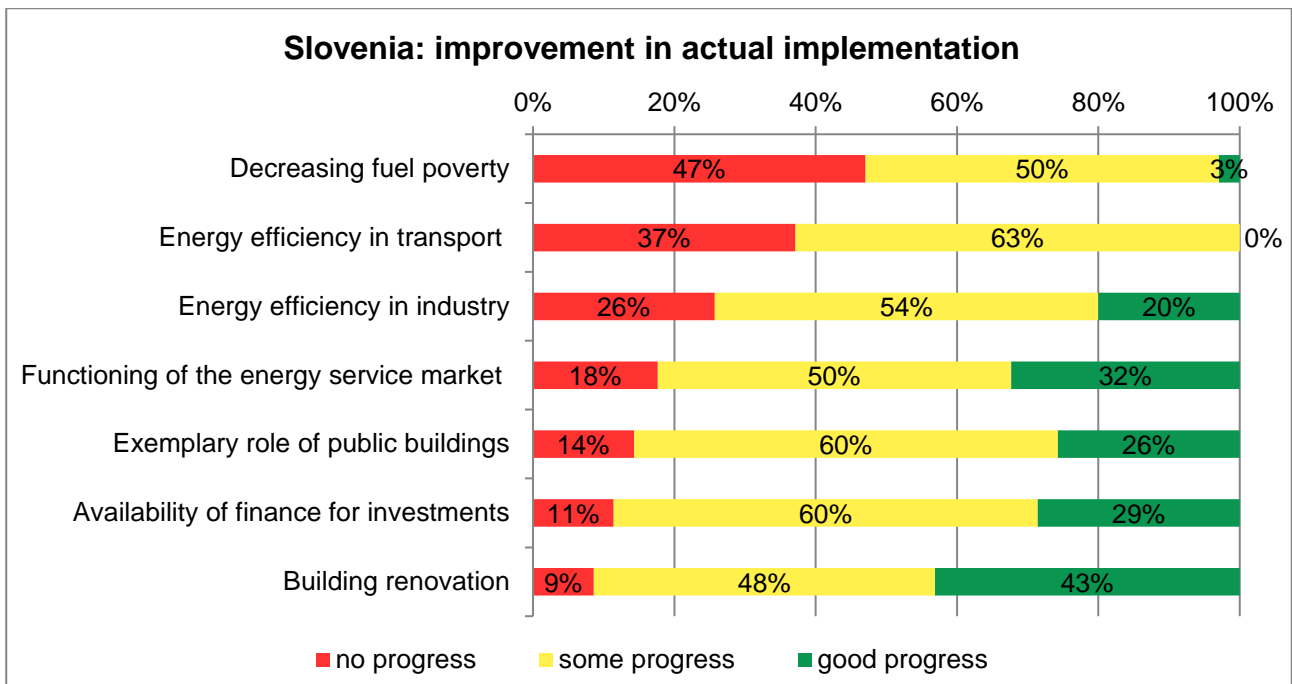


According to the Slovene experts, Slovenia made good-to-medium progress in energy efficiency policies in the last 3 years (country progress indicator: 9 out of 27 – see page 14). The relative rate of progress has slowed down somewhat since 2015 (2015 country progress indicator: 5 out of 28).

Two thirds (64 %) of survey participants report that no or only a few additional policies were introduced in the last 3 years. In comparison, in the 2015 survey (which looked back on the period 2012-2015), this value was only 47 %. Opinions are divided regarding the overall ambition of the energy efficiency policies: 53 % of experts find it at least ambitious in a range of sectors, 47 % see the ambition as rather low or consider it ambitious in only a few sectors. These results are also slightly lower than in 2015.

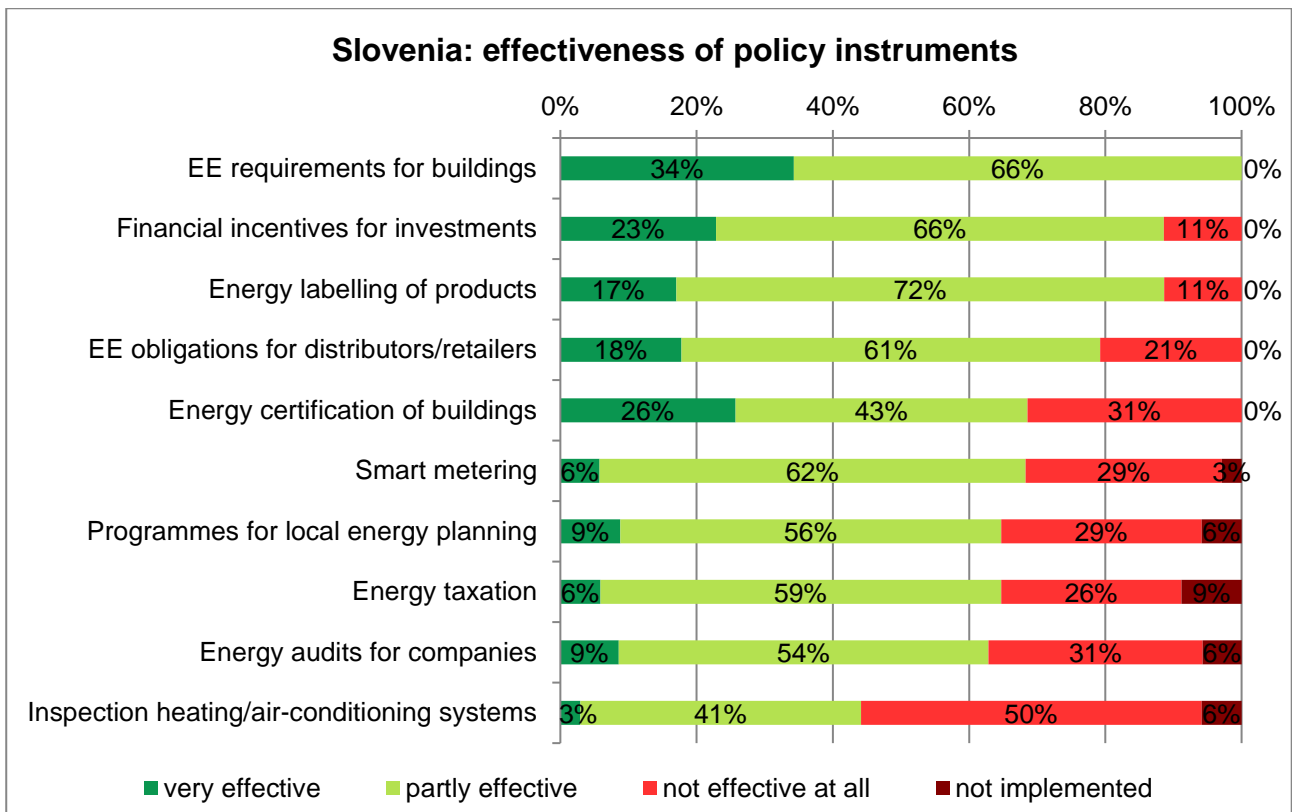


Regarding improvements in actual implementation, experts saw the most progress over the past 3 years in the area of building renovation (91 % of experts report some or good progress). This is followed by progress in the availability of finance for energy efficiency investments and in the functioning of the energy service market. In these two categories, Slovenia shows among the highest levels of improvements across the EU. 32 % of experts saw good progress in the functioning of the energy service market – the highest rating by far for this field among all Member States. The least progress was seen in decreasing fuel poverty, for which 47 % of experts report no progress at all.



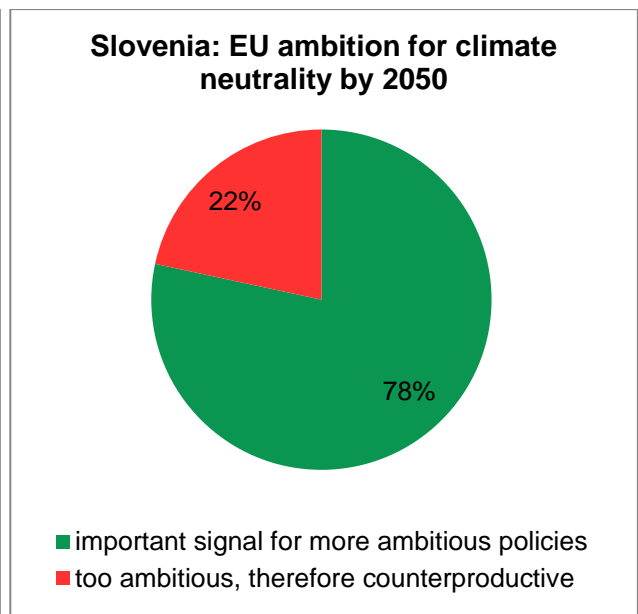
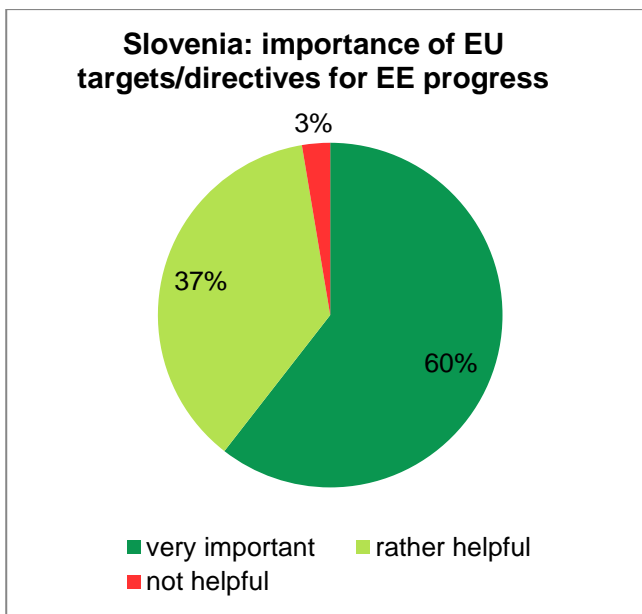
Slovene experts think rather positively about the effectiveness of a range of energy efficiency policy instruments. Those seen as the most effective in the Slovene context are energy efficiency requirements for buildings (rated at least partly effective by 100 % of experts), financial incentives for investments and energy labelling of products (both 89 % at least partly effective). In the case of financial incentives for investments, this is the highest rating among all Member States. Energy efficiency obligations for energy distributors was also given one of the most positive effectiveness ratings in the EU for this instrument.

The least effective instrument in Slovenia is the inspection of heating/air-conditioning systems (reported "not effective at all" by 50 % of experts – among the lowest among all Member States).



Slovene energy experts consider EU targets and directives to be good drivers for energy efficiency progress. 97 % perceive them as positive, of which 60 % rate them "very important". These results are similar to the EU27 average.

Regarding the EU ambition for climate neutrality by 2050, the level of support is slightly below EU27 average. 22 % of experts consider it to be too ambitious and thus counterproductive in Slovenia (EU27 average: 16 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Slovenia (for more details on the content of this table and how to analyse it, see page 32):

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	79 %	21 %
Industrial competitiveness	2	4	62 %	38 %
Modernisation / investments	3	1	45 %	55 %
Air quality	4	2		
Housing / living costs	5	3		
Independence from other countries	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	30 %	27 %	43 %
Trade Unions	2	35 %	38 %	27 %
Chambers of Commerce	3	60 %	11 %	29 %
NGOs	4			
Tabloid press	5			
Farmers organisations	6			
Churches	7			

Similar to the overall EU27 ranking, the most important topics in the general public debate in Slovenia are the loss and creation of jobs, industrial competitiveness and modernisation and investments.

When asked about which subjects are currently linked to energy efficiency in the public debate, experts report strongest links to modernisation and investments (discussed to a similar extent positively and negatively), air quality (discussed 71 % positively), and housing and living costs (similarly positively and negatively). Noteworthy in the case of Slovenia is the fact that energy efficiency is not being linked to 'jobs' in the general public debate, and only somewhat linked to 'industrial competitiveness'. However, when they are discussed, it is done primarily positively in regard to energy efficiency – making them strong arguments in favour of the energy transition.

If we take a look at which actor groups are most influential on Slovene politics, economic actor groups are in clear dominance: associations of large industry, Trade Unions and Chambers of Commerce come out at the top of the list, all three with very similar ratings of influence. This is the same top-3 ranking as for EU27 overall.

Twice as many experts perceive the Chambers of Commerce as supportive of the energy transition than opposed to it. However, both the associations of large industry and Trade Unions have not expressed a clear or strong position in regard to the energy transition.

In conclusion, due to their level of influence, economic actors could be stronger allies for the energy transition debate in Slovenia, especially since their agendas seem to coincide with topics of high interest for society (jobs, industrial competitiveness, modernisation/investments). Chambers of Commerce, in particular, already show a positive attitude towards the energy transition.

Working with associations of large industry and Trade Unions and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express their position. In general terms, creating narratives that economic actor groups can "buy into" could have significant positive effect on triggering change.

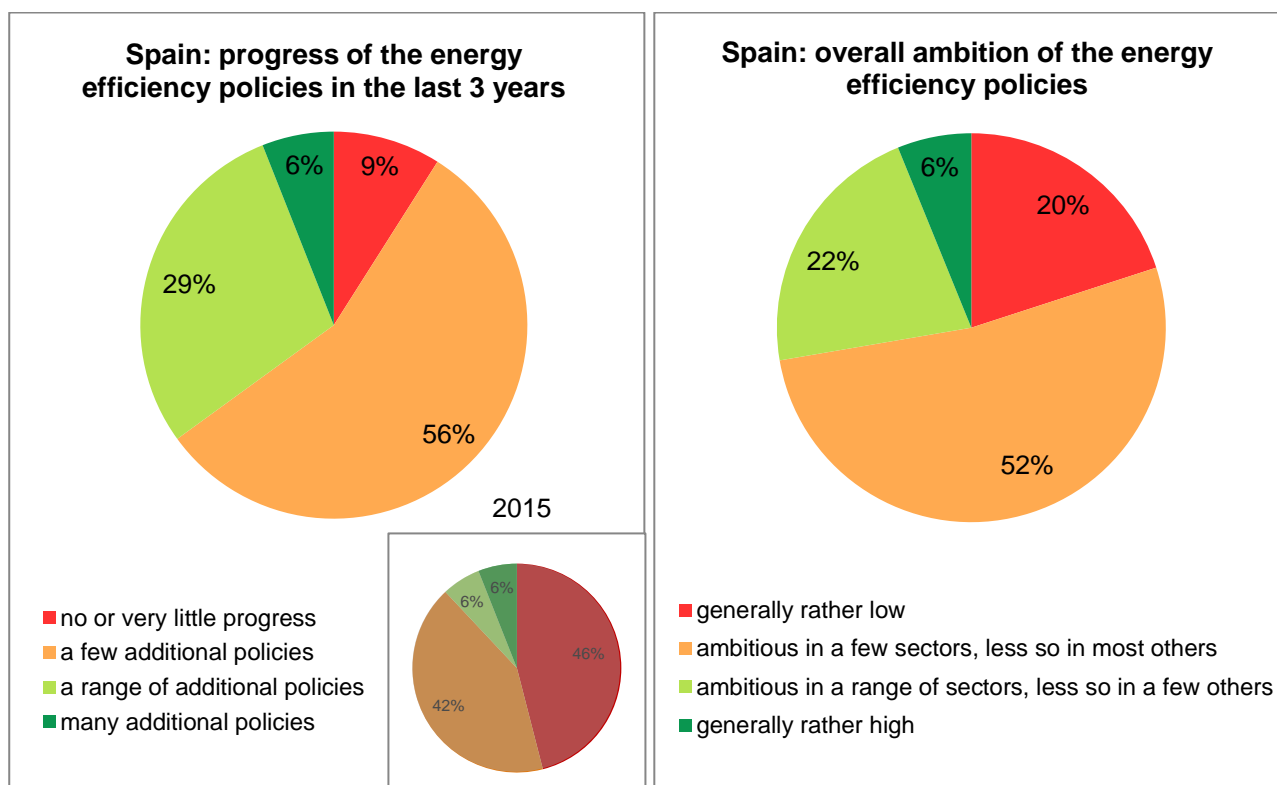
Slovene narratives for the energy transition could benefit from taking into account the importance of 'jobs' and 'industrial competitiveness' in the public debate. The positive effects of energy efficiency on these aspects are already recognised in society. Hence, increasing their presence in the public debate could help heighten general interest and positive attitude towards the energy transition. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Spain



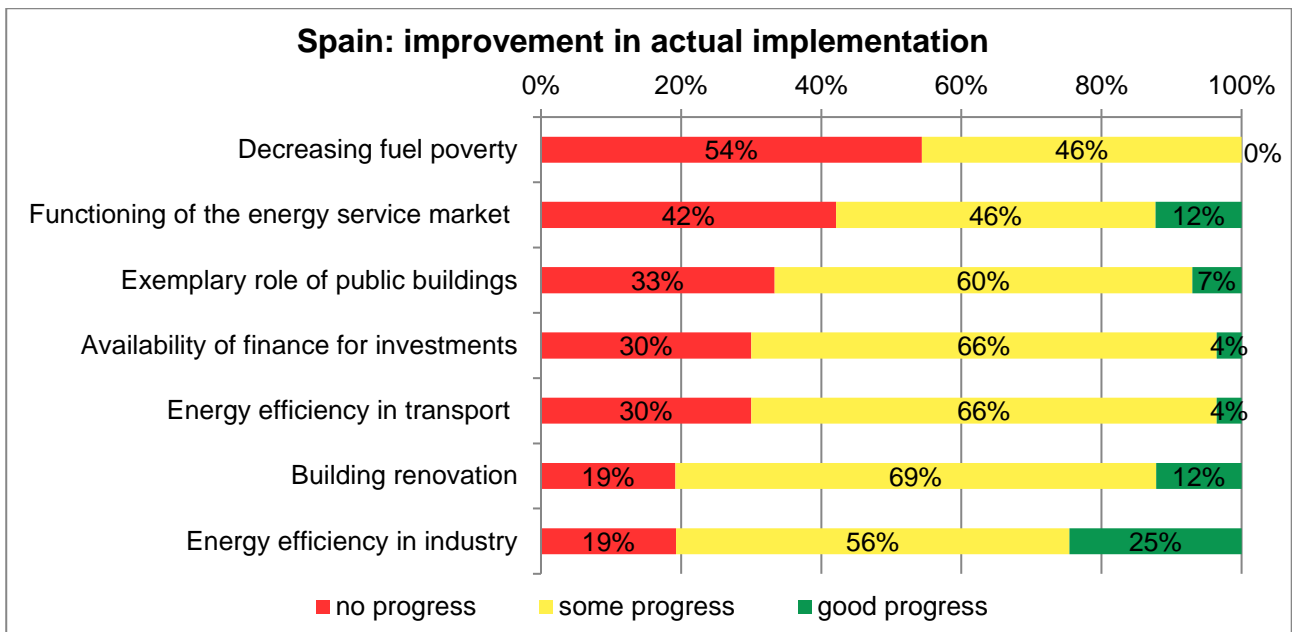
According to the Spanish experts, Spain is among the Member States that have made relatively little progress in energy efficiency policy in the past 3 years (country progress indicator 21 out of 27 – see page 14). However, since 2015, the comparative rate of progress has significantly increased (2015 survey: country progress indicator: 28 out of 28.)

Nearly two third of the surveyed experts (65 %) report that no or only a few additional policies were put it place in recent years. This is a positive development since the 2015 survey (88 %). 72 % of experts rank the overall ambition of energy efficiency policies in Spain as generally rather low or ambitious in only a few sectors (also down from 88 % in 2015).



According to the experts, Spain has achieved improvements in actual implementation in all policy areas compared to results of the 2015 survey and shows one of the largest relative improvements of all Member States. Compared to 2015 results (which looked back on the period 2012-2015), the most significant improvements were made in building renovation, the exemplary role of public buildings and the functioning of the energy service market.

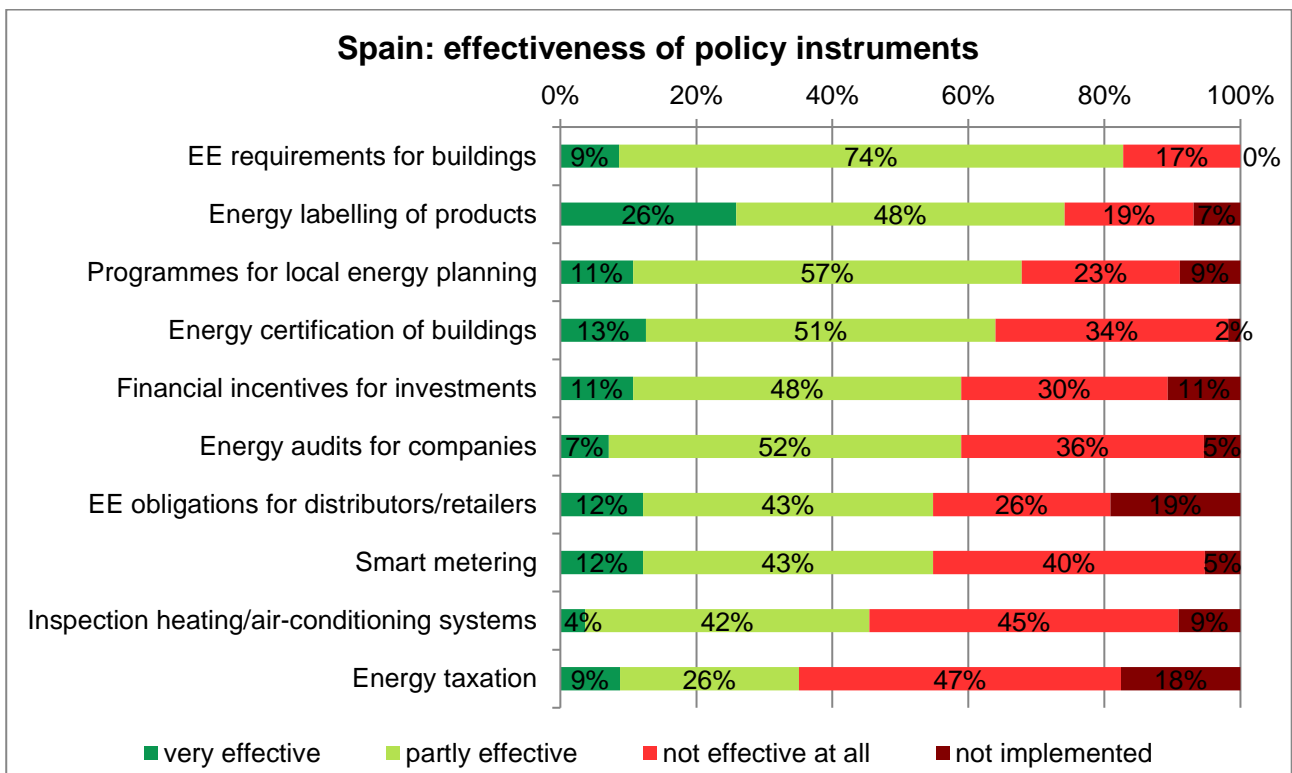
Most progress in the past 3 years was seen in energy efficiency in industry and building renovation: 81 % of experts saw some or good progress in these areas. Least progress was seen in decreasing fuel poverty: 54 % report no progress (a relative improvement compared to 2015 with 75 % no progress).



Regarding specific policy instruments, energy efficiency requirements for buildings and energy labelling of products are seen as the most effective in the Spanish context. They are rated partly or very effective by 83 % and 74 % of experts respectively.

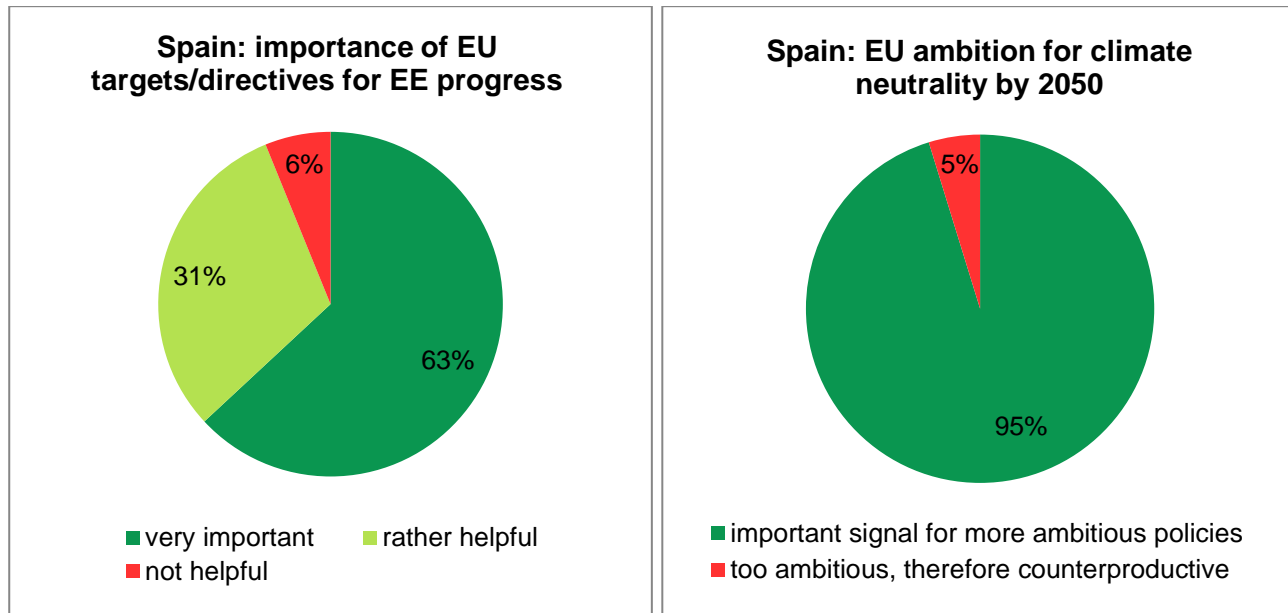
The highest ratings for "not effective at all" are given to energy taxation (47 %) and the inspection heating/air-conditioning systems (45 %). Despite energy efficiency requirements for buildings being the most effective in the Spanish context, it received one of the lowest overall effectiveness ratings among Member States.

In overall terms, Spanish experts report an increase in the impact of a range of instruments since 2015.



European targets and directives are viewed positively by 94 % of the Spanish expert. 63 % consider them "very important" and 31 % "rather helpful" for progressing energy efficiency in their country.

Compared to other Member States, experts in Spain are very supportive of the EU ambition for climate neutrality by 2050. 95 % consider it gives an important signal for more ambitious policies (EU27 average: 84 %).



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Spain (for more details on the content of this table and how to analyse it, see page 32):

Spain: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	5	83 %	17 %
Housing / living costs	2	4	48 %	52 %
Industrial competitiveness	3	3	69 %	31 %
Air quality	4	2		
Independence from other countries	5	6		
Rural development	6	7		
Modernisation / investments	7	1		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	48 %	14 %	38 %
Tabloid press	2	39 %	40 %	21 %
Trade Unions	3	49 %	32 %	19 %
Chambers of Commerce	4			
Churches	5			
Farmers organisations	6			
NGOs	7			

Similar to the large majority of EU countries, the topic of ‘loss and creation of jobs’ is the most important subject in the general public debate in Spain (with among the highest ratings of all Member States). The topic of ‘affordable/healthy housing and living costs’ ranks 2nd in importance (much higher than in many other countries, rank 4 in EU27) and ‘industrial competitiveness’ ranks 3rd.

When asked about which subjects are currently linked to energy efficiency in the public debate, experts report strongest links to ‘modernisation and investments’ (discussed to a similar extent positively and negatively), ‘air quality’ (discussed primarily positively), and ‘industrial competitiveness’ (discussed 69 % positively).

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in Spain (rank 2 in the EU for positive perception). However, Spain is among the Member States with the weakest alignment between arguments used in the energy efficiency debate and subjects of high interest for society. Energy efficiency is not being discussed in relation to the important topic of job creation – although when this link is being made, the debate is largely positive (83 %), making it a

strong argument in favour of the energy transition. It is also currently only somewhat linked to 'housing/living costs'.

As seen across almost the entire EU, associations of large industry have the strongest influence on politics in Spain (rated very influential by 100 % of experts). Tabloid press rank 2nd for their level of influence (higher than the EU average rank 4). Trade Unions are also quite influential (rank 3 in Portugal, rank 2 in the overall EU27).

Associations of large industry seem to have an ambivalent position: 48 % of experts see them as supportive, versus 38 % as opposed. Tabloid press and Trade Unions are reported as more supportive than opposed. However, it seems they have not yet positioned themselves clearly either in favour or against the energy transition (around a third of the experts did not know their position).

In conclusion, the development of new narratives for the energy transition in Spain could benefit from taking into account the importance of the topics of 'jobs' and 'housing/living costs' in the public debate. The positive effects of energy efficiency on job creation, in particular, are already recognised in society. Increasing the presence of such arguments in the energy transition debate could help heighten general interest and positive attitude towards the cause. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actors.

Due to their level of influence, associations of large industry and Trade Unions could be interesting allies for the energy transition debate, especially since their agendas seem to coincide with topics of high interest for society (i.e. jobs, industrial competitiveness).

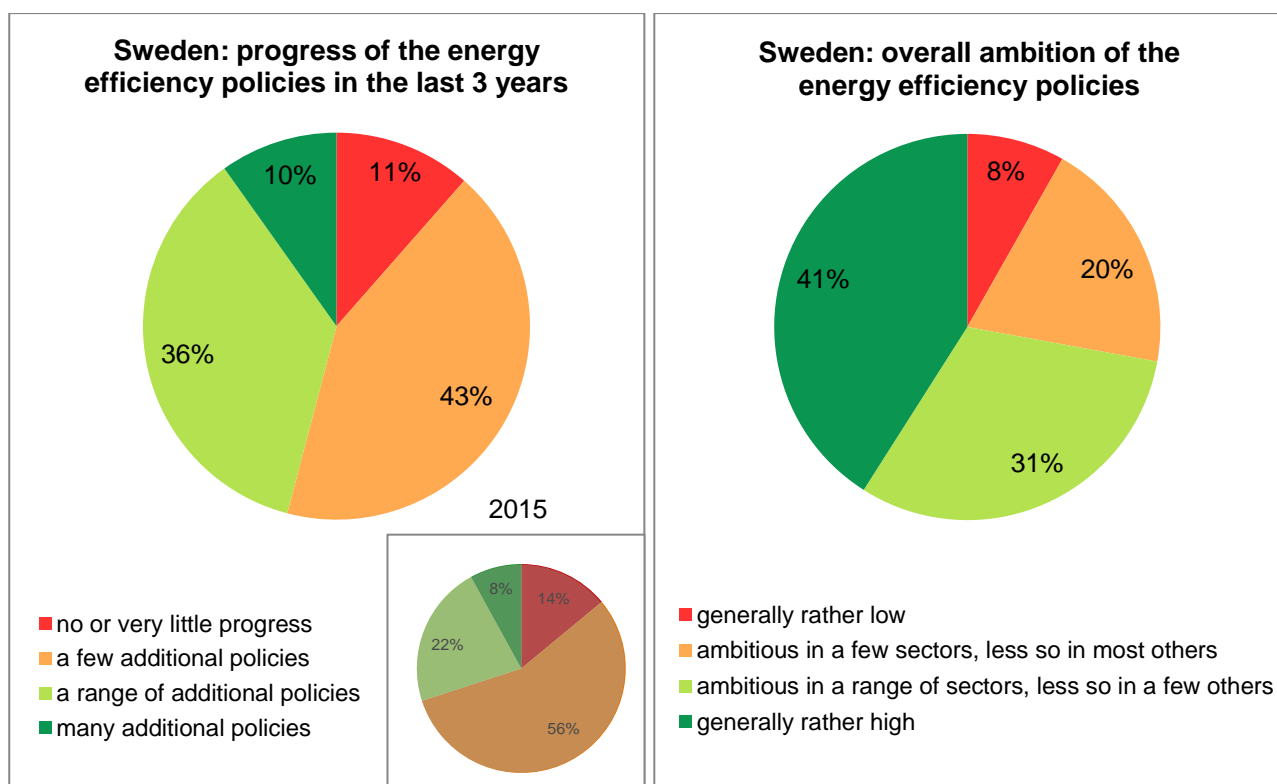
In general, working with influential actor groups and providing positive arguments in line with their ambitions could contribute to increasing their support of the energy transition and encourage them to express a clearer stand. Overall, creating narratives they can "buy into" could have significant positive effect on driving the energy transition in Spain.

Sweden



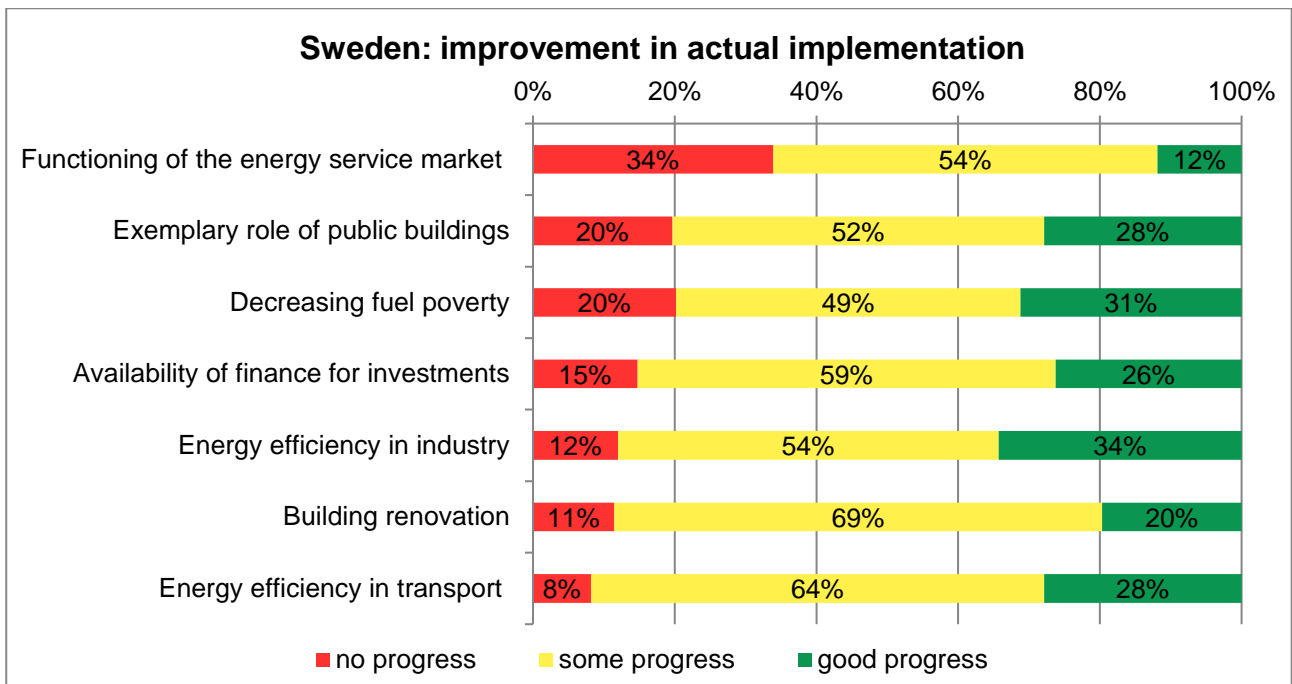
In the opinion of Swedish experts, Sweden is among the Member States that have made good progress in energy efficiency policies in the last 3 years (country progress indicator: 4 out of 27 – see page 14). The rate of progress has remained unchanged since the 2015 survey (country progress indicator: 4 out of 28) after having shown a slight improvement compared to 2012 results (9 out of 27).

Despite holding rank 4 among Member States for overall progress, 54 % of Swedish energy experts report having seen no or only a few additional policies put in place in the last 3 years. Nevertheless, this is a positive development since the 2015 results (which looked back on the period 2012-2015) when 70 % gave this answer. Experts perceive a high overall ambition of energy efficiency policies: 72 % consider it at least ambitious in a range of sectors or generally rather high (similar to 2015 results).



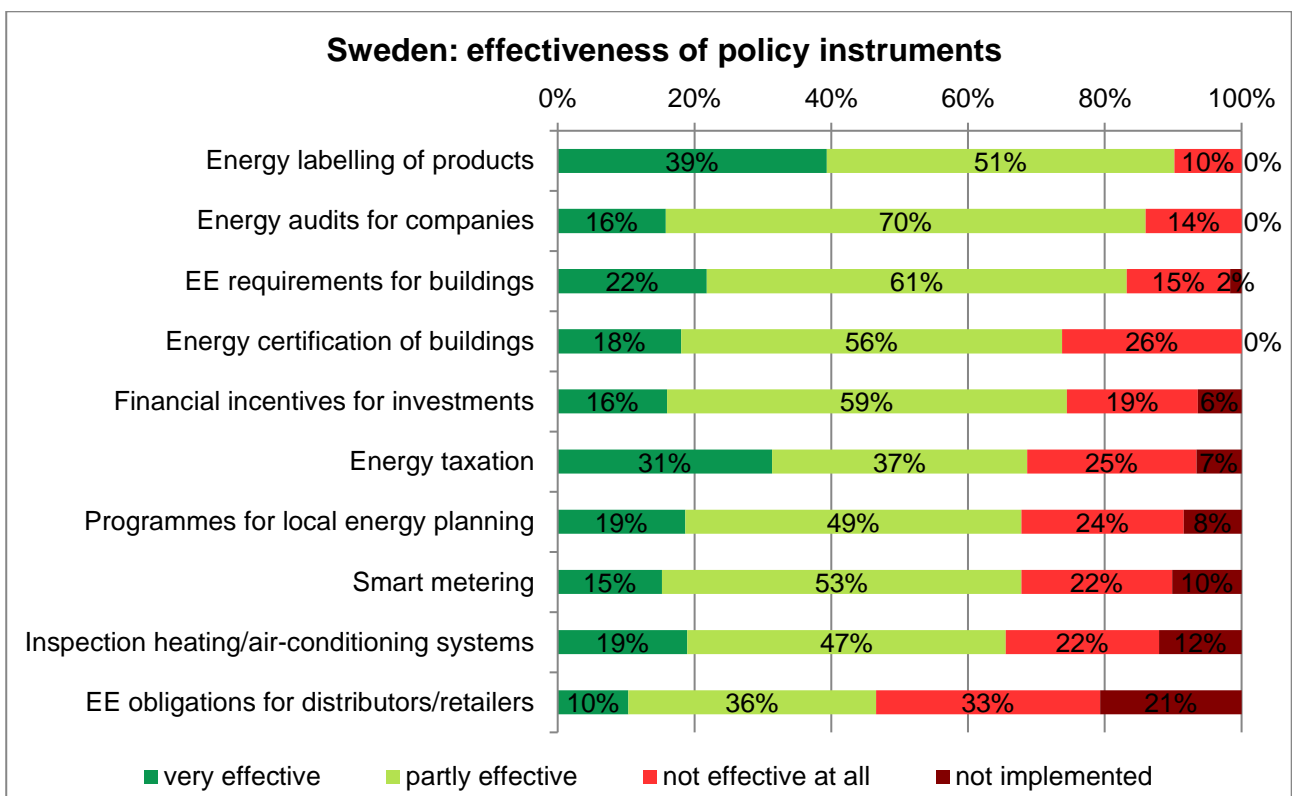
In regard to improvements in actual implementation, experts see the most progress over the past 3 years in the areas of energy efficiency in transport (most progress in the EU), building renovation and energy efficiency in industry (with one of the highest progress ratings among Member States). Respectively 92 %, 89 % and 88 % of experts report some or good progress in these fields. Experts also perceive progress in decreasing fuel poverty as the highest among EU countries.

Swedish experts see least improvement in the functioning of the energy service market: 34 % report no progress – even higher than in 2015 (24 %). In overall terms, the rate of progress in policy areas has not changed significantly compared to 2015 results.



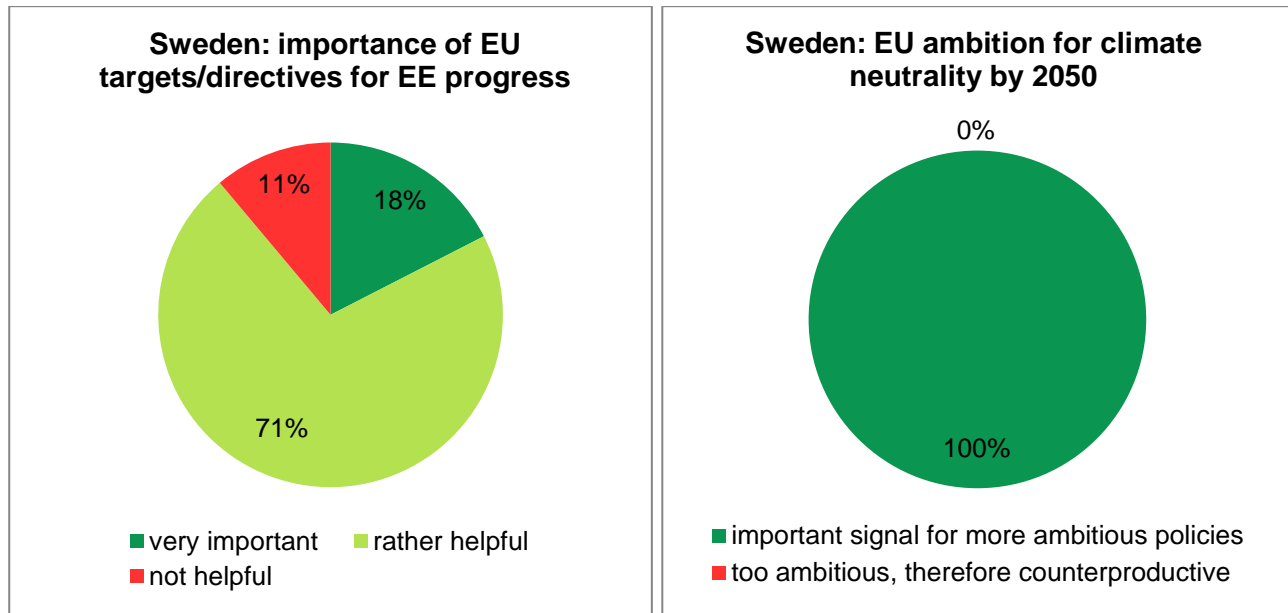
Among specific energy efficiency policy instruments, energy labelling of products and energy audits for companies are seen as the most effective in the Swedish context and received among the highest effectiveness ratings of all Member States. They are rated "partly or very effective" by 90 % and 86 % of experts respectively.

Energy efficiency obligations for distributors and retailers are seen as the least effective instrument in Sweden (33 % "not effective at all"). The inspection of heating/air-conditioning systems, despite being one of the least effective instruments in the Swedish context, received relatively the highest impact rating among Member States.



Although 89 % of the surveyed experts consider that EU targets and directives are "very important" or "rather helpful" for the progress of energy efficiency in Sweden, 11 % consider them "not helpful" – the second highest percentage among all countries.

However, Sweden is one of the two Member States (with Denmark) where 100 % (!) of the experts support the EU ambition for climate neutrality by 2050 and consider it an important signal for more ambitious policies.



Key input factors for narrative development

A key aspect of the EEW4 project is to create a better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and which actor groups are important in each country.

A series of questions focussed on gathering information on energy efficiency perceptions in politics, media and by important stakeholders. These questions asked about:

- the most important topics in the general public debate, independent of energy and climate;
- to which topics and arguments in the public debate is energy efficiency already linked;
- which actor groups are most influential on politics in general and their current stand in regard to the energy transition.

The following table offers an overview of the most relevant results for narrative development in Sweden (for more details on the content of this table and how to analyse it, see page 32):

Sweden: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Industrial competitiveness	1	1	69 %	31 %
Jobs	2	4	86 %	14 %
Modernisation / investments	3	2	43 %	57 %
Housing / living costs	4	3		
Rural development	5	7		
Air quality	6	6		
Independence from other countries	7	5		

Actor group	Influence on politics (ranking)	Supportive of the energy transition	Opinion not known	Opposed to the energy transition
Associations of large industry	1	65 %	10 %	25 %
Trade Unions	2	58 %	27 %	15 %
Chambers of Commerce	3	53 %	27 %	20 %
NGOs	4			
Farmers organisations	5			
Tabloid press	6			
Churches	7			

According to survey results, 'industrial competitiveness' is the most important topic in the general public debate in Sweden (with the highest rating of all Members States). It is followed by 'creation and loss of jobs' in rank 2 and 'modernisation and investments' in rank 3. These three topics are also in the top-3 ranking for overall EU27 (although jobs rank 1st and competitiveness ranks 2nd)

When asked about which subjects are currently most strongly linked to energy efficiency in the public debate, experts again report 'industrial competitiveness' at the top of the list (discussed 69 % positively). 'Modernisation/investments' rank 2nd (discussed 43 % positively, 57 % negatively) and 'housing and livings costs' rank 3rd (discussed largely positively).

In overall terms and compared to other countries, energy efficiency seems to be discussed rather positively in the public debate in Sweden (rank 2 in the EU for positive perception). It is also being discussed in relation to some of the most important subjects for society. This provides a good basis for positive narrative development and roll-out.

Looking at which actor groups are most influential on Swedish politics, economic actor groups are in clear dominance. Associations of large industry and Trade Unions come out at the top of the list (with the highest influence ratings among Member States). Chambers of Commerce rank 3rd. This is the same top 3 ranking as for the EU27.

Generally, the energy transition seems to already find good support among a number of actor groups. In comparison to other EU countries, it ranks first in regard to actor groups' support of the energy transition. All actor groups are perceived as more supportive of the energy transition than opposed. In terms of the most influential groups, 65 % of experts consider associations of large industry as supportive versus 25 % as opposed. Trade Unions are considered supportive by 58 % (strongest support in the EU) and Chambers of Commerce by 53 %. For both these groups, 20 % of experts or less see them as opposed to the energy transition.

In conclusion, in Sweden, energy efficiency is already being discussed in relation to some of the key topics for society (i.e. industrial competitiveness, modernisation/investments) and backed by influential actor groups that express their support to the energy transition. This provides a good basis for positive narrative development and roll-out. There also already seems to be a good positive narrative for the energy transition around the topic of (industrial) competitiveness.

Further development of new narratives for the energy transition in Sweden could perhaps benefit from taking into account the importance of 'jobs' in the public debate, especially since the positive effect of energy efficiency on job creation is already recognised in the debate – making it a strong positive argument. Current arguments relating to the costs of investments might be counteracted with clear communication about the benefits of investments as well as highlighting existing funding and financing solutions. Strong numbers and communication efforts could help in this regard as well as collaborating with influential actor groups.

Considering their level of influence, economic actors could be stronger allies for the energy transition debate in Sweden, especially since their agendas seem to coincide with topics of high interest for society (industrial competitiveness, jobs, modernisation/investments). In general terms, creating narratives that economic actor groups can "buy into" could have positive effect on triggering change.

Annex: EEW4 survey questionnaire



ENERGY EFFICIENCY WATCH SURVEY



Your opinion counts! This survey aims to collect opinions about the progress of energy efficiency policies in the EU member states in the last 3 years.

It is carried out in the framework of the H2020 Energy Efficiency Watch project. Learn more about Energy Efficiency Watch: www.energy-efficiency-watch.org

All answers will be treated confidentially. E-mail addresses are collected at the end of the questionnaire to avoid misuse. Thank you very much for your time and inputs!

Ambition and progress

1. In general, how do you personally rate the **overall ambition** of the energy efficiency policies in your country? (one answer only)

- generally rather low
- ambitious in a few sectors, less so in most others
- ambitious in a range of sectors, less so in a few others
- generally rather high
- others/comment: _____

2. How do you rank **the progress** in energy efficiency policies **in the last 3 years** in your country (new policies introduced, existing ones strengthened)? (one answer only)

- no or very little progress
- a few additional policies
- a range of additional policies
- many additional policies
- others/comment: _____

3. How do you see the **improvements in actual implementation** in the last 3 years in the following fields?

	no progress	some progress	good progress
building renovation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
exemplary role of public buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
availability of finance for energy efficiency investments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
functioning of the energy service market (e.g. energy performance contracting)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
decreasing fuel poverty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
energy efficiency in industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
energy efficiency in transport (including modal shift)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



The sole responsibility for the content of this questionnaire lies with the authors. It does not necessarily reflect the opinion of the European Union. Neither the EASME nor the European Commission are responsible for any use that may be made of the information contained therein.

4. How **effective** are the following policy instruments in your country?

	not implemented	not effective at all	partly effective	very effective
Energy efficiency requirements for buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy certification of buildings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inspection of heating and air-conditioning systems	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial incentives for energy efficiency investments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy audits for companies	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy efficiency obligations for energy distributors/retailers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Smart metering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy taxation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy labelling of products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policies/programmes for local energy planning (e.g. Covenant of Mayors)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Energy efficiency perceptions in politics, media and by important stakeholders

5. Independent of energy and climate, **in the general public debate in your country (media, politicians)**, how important are the following topics (not your personal opinion)? Please select the two most and the two least important topics.

	2 most important topics	2 least important topics
Loss or creation of jobs	<input type="radio"/>	<input type="radio"/>
Independence from other countries	<input type="radio"/>	<input type="radio"/>
Industrial competitiveness and innovation	<input type="radio"/>	<input type="radio"/>
Air quality	<input type="radio"/>	<input type="radio"/>
Affordable and healthy housing, cost of living	<input type="radio"/>	<input type="radio"/>
Rural development	<input type="radio"/>	<input type="radio"/>
Modernisation and infrastructure investments	<input type="radio"/>	<input type="radio"/>
International image of your country	<input type="radio"/>	<input type="radio"/>
Others:	<input type="radio"/>	<input type="radio"/>

6. In the **public debate in your country** (media, politicians), is energy efficiency linked to the following arguments?

	not / sometimes linked	Very often / often linked
Loss of jobs	<input type="radio"/>	<input type="radio"/>
Creation of jobs	<input type="radio"/>	<input type="radio"/>

	not / sometimes linked	Very often / often linked
Dependence on other countries	<input type="radio"/>	<input type="radio"/>
Independence from other countries	<input type="radio"/>	<input type="radio"/>
Increase of industrial competitiveness	<input type="radio"/>	<input type="radio"/>
Loss of industrial competitiveness	<input type="radio"/>	<input type="radio"/>
Improved air quality	<input type="radio"/>	<input type="radio"/>
Decreased air quality	<input type="radio"/>	<input type="radio"/>
Higher costs of housing and living	<input type="radio"/>	<input type="radio"/>
Lower costs of housing and living	<input type="radio"/>	<input type="radio"/>
Good for rural development	<input type="radio"/>	<input type="radio"/>
Creates disadvantage for rural areas	<input type="radio"/>	<input type="radio"/>
Generates local investments	<input type="radio"/>	<input type="radio"/>
Needs costly investments	<input type="radio"/>	<input type="radio"/>
Increases social inequality	<input type="radio"/>	<input type="radio"/>
Reduces social inequality	<input type="radio"/>	<input type="radio"/>
Other aspects:	<input type="radio"/>	<input type="radio"/>

7. In general, **how influential** are the following actor groups on politics in your country? And are these groups rather **supportive or opposed** to the energy transition?

	in general, in your country		position on the energy transition		
	very influential on politics	less influential on politics	rather supportive	rather opposed	not known
Trade Unions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
NGOs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Churches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Associations of large industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chambers of Commerce	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Farmers Organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tabloid press	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other influential group:	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

European policy

8. In the past years, how important have EU targets and directives been for the progress in energy efficiency in your country?

- very important, without them, many policies would not exist
- rather helpful, they have triggered a few new policy activities
- not helpful, they have hindered more ambitious energy efficiency policies

9. How do you see the EU ambition for climate neutrality by 2050?

- gives an important signal for more ambitious policies also in my country
- too ambitious and therefore counterproductive in my country

10. In your opinion, should the following measures be introduced on European level?

	yes	no
European CO ₂ -tax	<input type="radio"/>	<input type="radio"/>
A large European energy efficiency fund (giving both grants and loans)	<input type="radio"/>	<input type="radio"/>
Stricter minimum standards for buildings and appliances	<input type="radio"/>	<input type="radio"/>
Mandatory implementation of cost-effective measures identified in energy audits in industry	<input type="radio"/>	<input type="radio"/>
Others: _____	<input type="radio"/>	<input type="radio"/>

11. At the end, we would kindly ask you to provide us with the following information about yourself:

For which of the following countries did you answer the questions?

- Austria
- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- The Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- other: _____

In which of the following sectors do you work?

- business sector
- public sector
- energy agency
- university/research organisation
- other: _____

Please provide us with your e-mail address* e-mail: _____

* e-mail addresses are only collected to avoid misuse, all answers will be treated confidentially

Would you like to receive a summary report of the survey?

- yes
- no

Thank you very much for your time and your inputs - you have made an important contribution to energy efficiency efforts in Europe!