



# ENERGY EFFICIENCY WATCH

## THE ENERGY EFFICIENCY WATCH SURVEY 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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[www.energy-efficiency-watch.org](http://www.energy-efficiency-watch.org)



# The Energy Efficiency Watch Project

## Overall objective

- **speed up energy efficiency** policy development and implementation on all levels (EU, national, regional, local)
- **EEW4 develops and tests narratives for the energy transition in Member States, regions and cities**

## Partners

Eufores, Navigant, OÖ Energiesparverband

3 networks: FEDARENE, Energy Cities, ECEEE (Borg & Co)

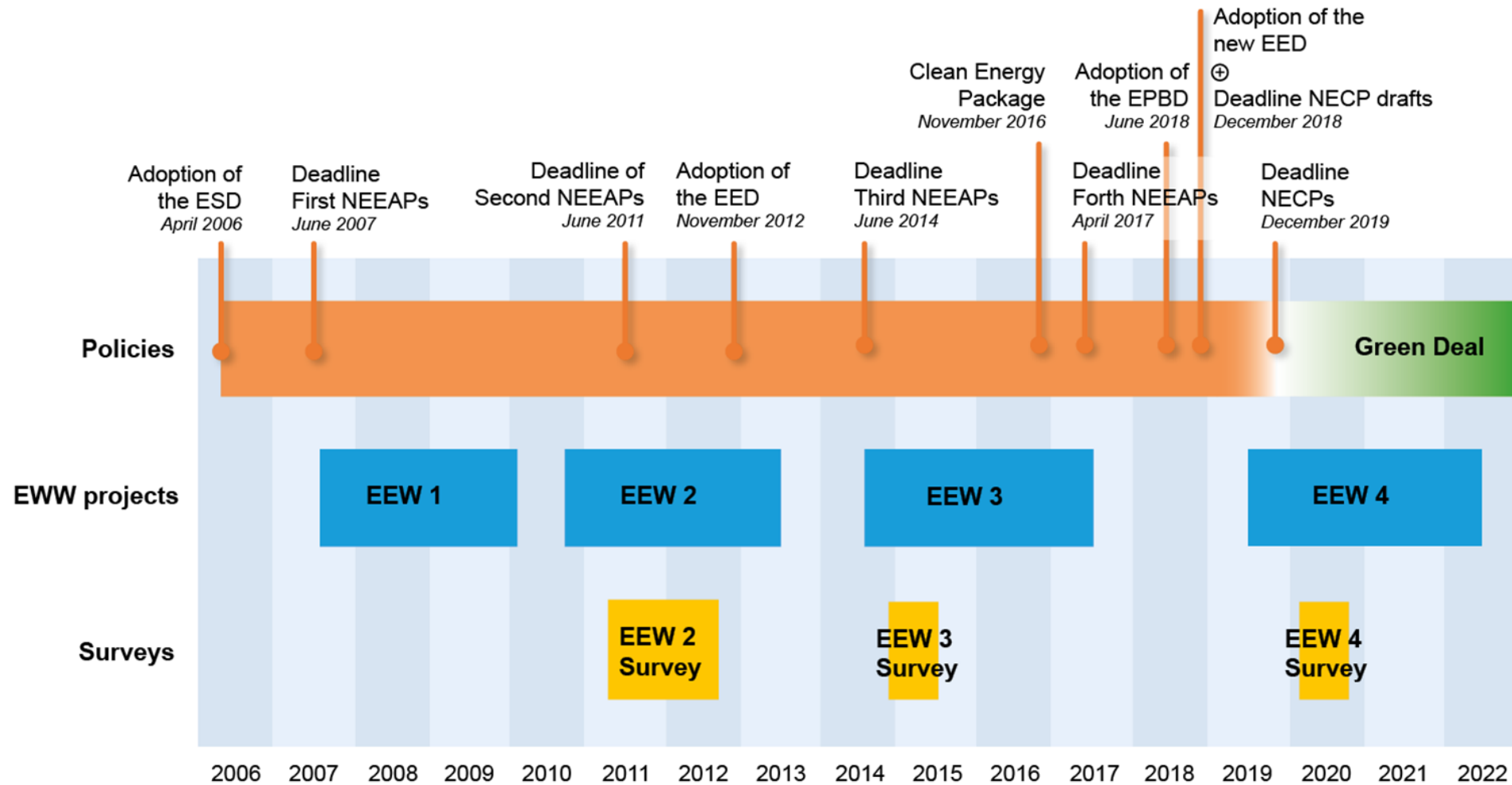
## Target groups

EU/national/regional parliamentarians, administrations on EU, national and regional levels, businesses, researchers and other stakeholders

## 4 phases

EEW1: 2006-2009, EEW2: 2009-2013, EEW3 2014-2017, **EEW4 2019-2022**

# The Energy Efficiency Watch Timeline



# 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

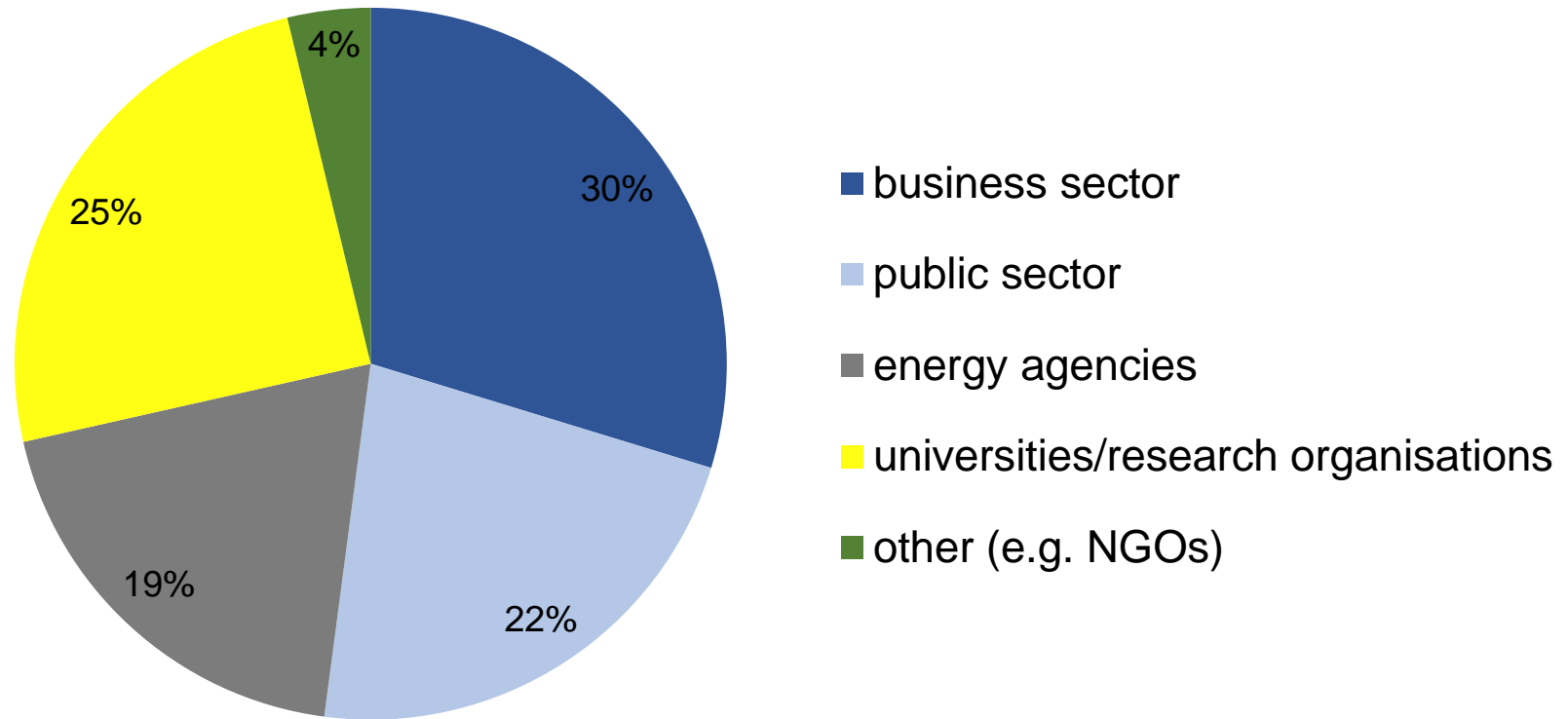
- 16 % more than in the 2015 survey with one Member State (UK) less
- questions partly retained for comparison, extensive pre-testing of new questions relating to the narratives
- survey carried out by the OÖ Energiesparverband, supported by project partners
- mostly online (April to June 2020) with extensive roll-out efforts

# 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		<b>Total</b>	<b>1270</b>



# EU27: Completed questionnaires by sector



# How should the results be seen?

- **Perceptions of experts** on the progress in energy efficiency policy implementation in their **own countries** since 2017
- snapshot picture of the situation
- and not: the absolute levels of energy efficiency and energy efficiency policies in each country
- and not: **what people think about other countries**
- and not: **the opinion of the authors of the study**

# Overall progress across countries: **Progress indicator**

- shows relative progress in each country
- allows comparison across countries (ranking among EU27)
- aggregates several questions dealing with different aspects of progress into one number



# Progress indicators: ranking of Member States

	Austria	13
	Belgium	22
	Bulgaria	13
	Croatia	11
	Cyprus	22
	Czech Rep.	17
	<b>Denmark</b>	<b>2</b>
	Estonia	5
	<b>Finland</b>	<b>1</b>
	France	19
	Germany	17
	Greece	11
	Hungary	27
	Ireland	19

	Italy	7
	Latvia	13
	Lithuania	6
	<b>Lux</b>	<b>3</b>
	Malta	26
	NL	13
	Poland	24
	Portugal	7
	Romania	24
	Slovak Rep.	10
	Slovenia	9
	Spain	21
	Sweden	4

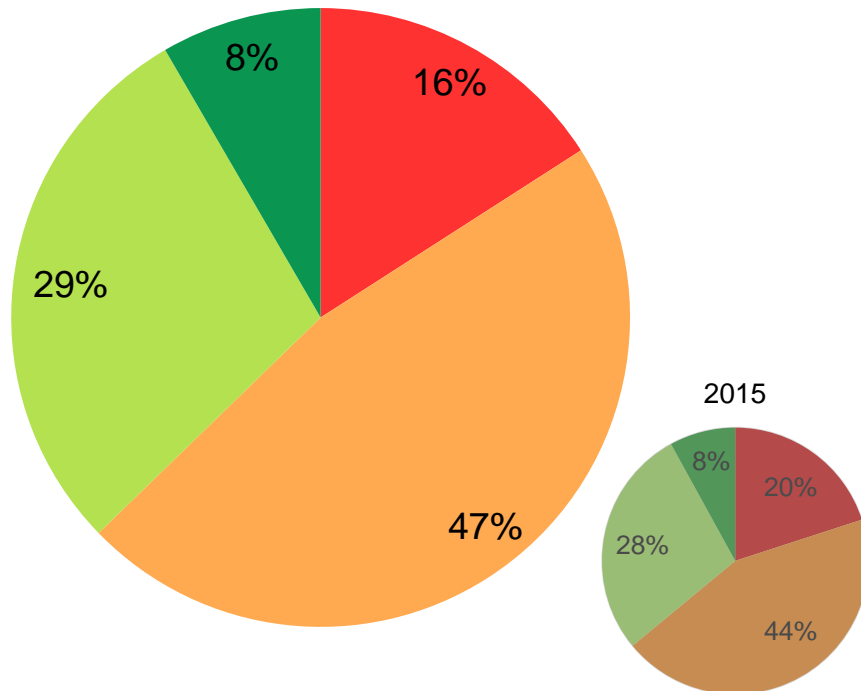
# Progress indicators 2020 ranking – comparison to 2015

		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			<b>Lux</b>	<b>3</b>	10	↑
	Cyprus	22	5	↓		Malta	26	25	
	Czech Rep.	17	15			NL	13	19	↗
	<b>Denmark</b>	<b>2</b>	<b>1</b>			Poland	24	22	
	Estonia	5	<b>3</b>			Portugal	7	21	↑
	<b>Finland</b>	<b>1</b>	<b>2</b>			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	↘					



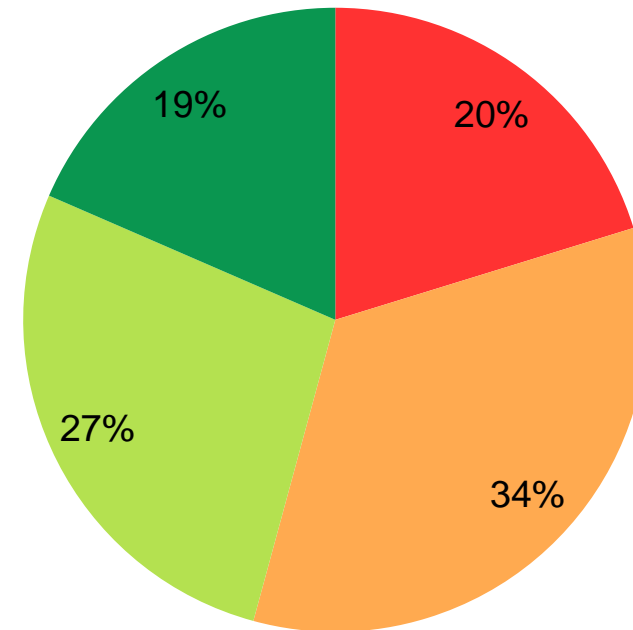
# EU27: Progress and ambition levels

## EU27: progress of the energy efficiency policies in the last 3 years



- no or very little progress
- a few additional policies
- a range of additional policies
- many additional policies

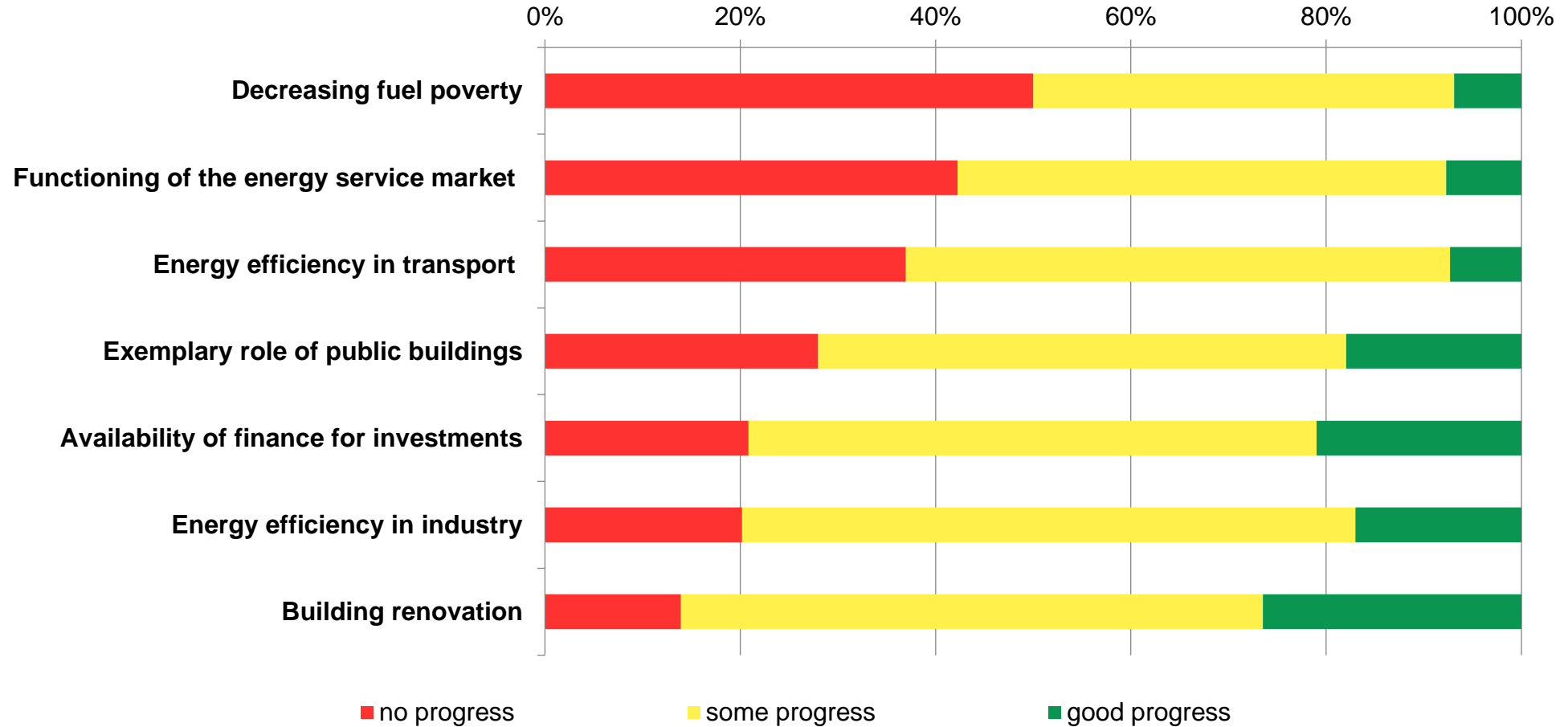
## EU27: overall ambition of the energy efficiency policies



- 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

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

## EU27 Average

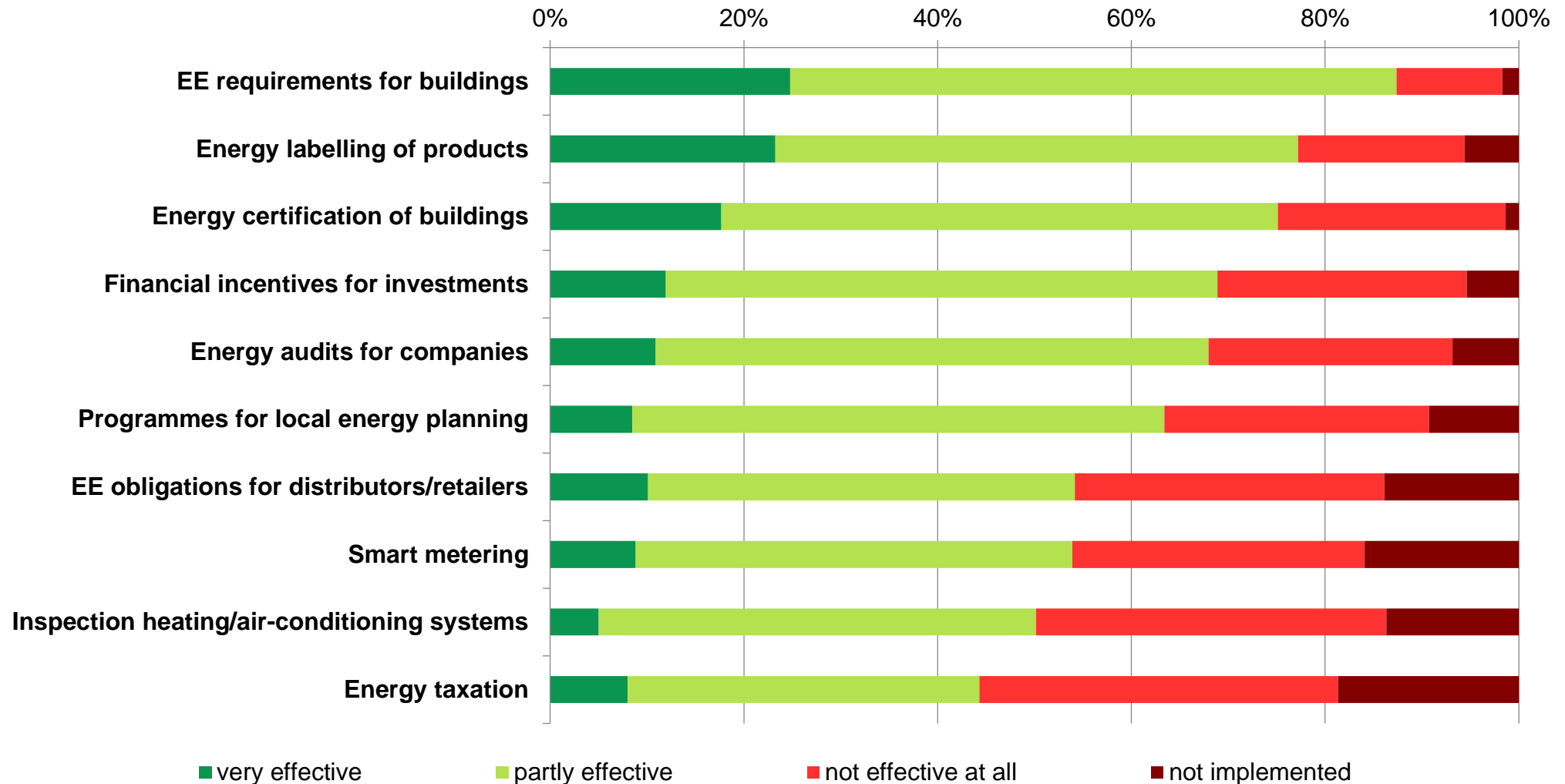


# How do you see the improvements in actual implementation in the last 3 years in the following fields?

	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	



# How effective are the following policy instruments in your country

## EU27 Average



# How effective are the following policy instruments in your country

## Number of countries

	 Over 70 % see them as <b>partly/very effective</b>	 Over 30 % see them as <b>not effective</b>
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

# Conclusions: energy efficiency policy progress

- **More of the same**

Overall, disappointing levels of improvement across policy fields: We remain too slow, way too slow – new new dynamics lacking!

- **Ups and downs continue**

Levels of ambition in policy development and implementation keep fluctuating in many Member States

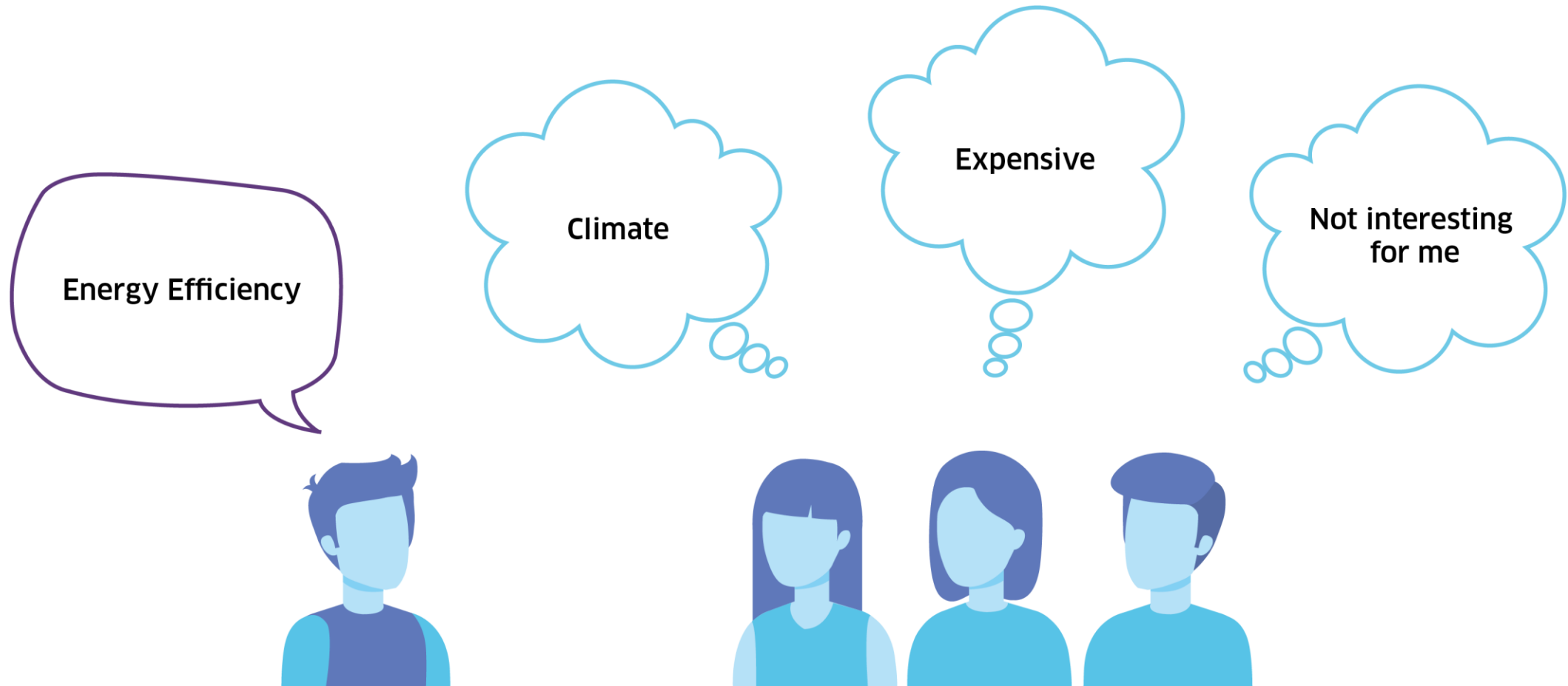
- **The WHY is often missing: lack of strong narratives**

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")

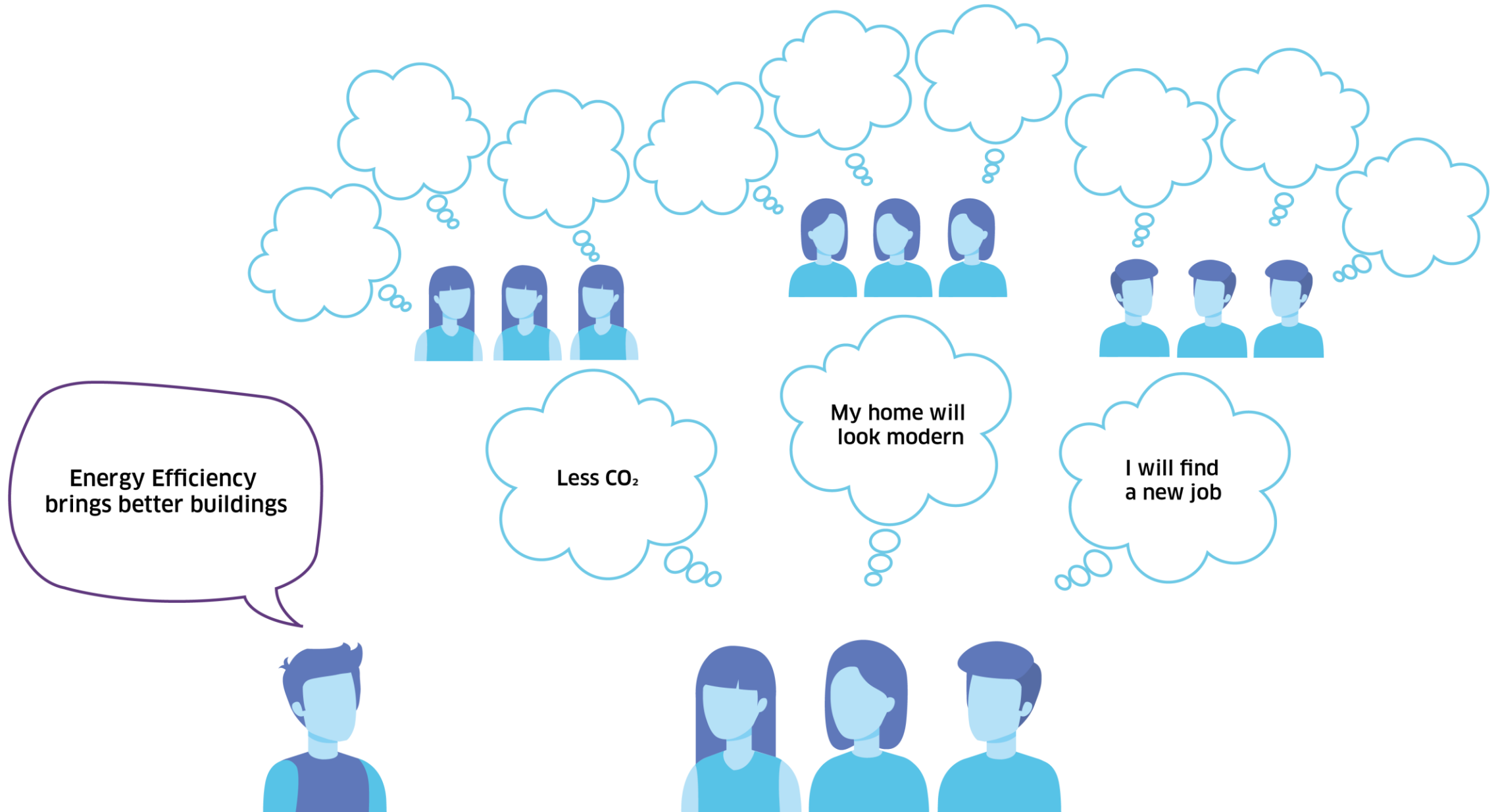


# THE WHY: NARRATIVES

# The images in people's minds



# Narratives: Gaining buy-in from wider groups in society



# Gathering input for narrative development

## Objective

A better understanding of which topics are most likely to constitute effective and strong narratives for the energy transition and who could be supporters of new narratives

## Survey - answers to the following questions:

1. which subjects are important in the general debate in each country and thus most likely to resonate with decision makers and citizens and trigger reactions
2. is energy efficiency already linked to topics of high interest
3. which actor groups are influential in each country and what is their position on the energy transition since effective narratives need a wider support among stakeholders.

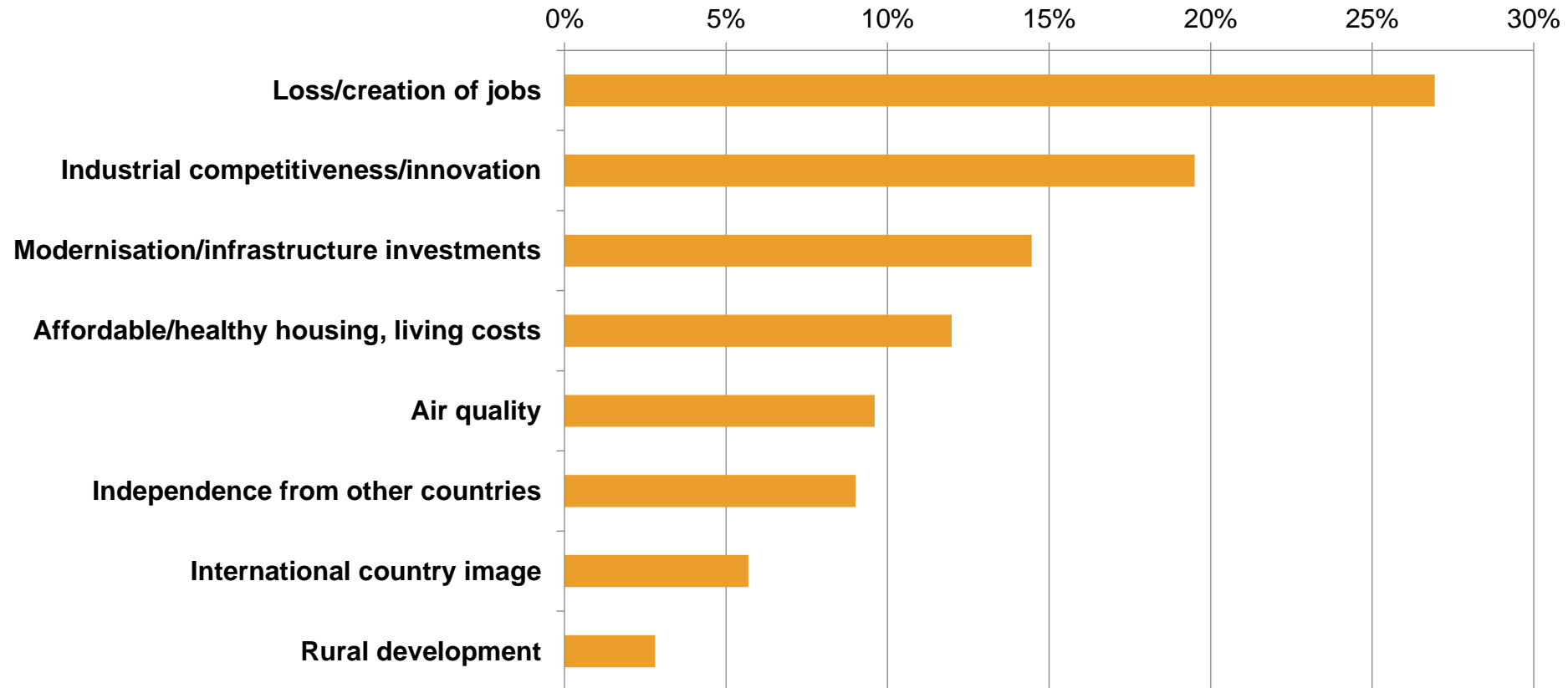
# Survey questionnaire: general importance of topics

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="checkbox"/>	<input type="checkbox"/>
Independence from other countries	<input type="checkbox"/>	<input type="checkbox"/>
Industrial competitiveness and innovation	<input type="checkbox"/>	<input type="checkbox"/>
Air quality	<input type="checkbox"/>	<input type="checkbox"/>
Affordable and healthy housing, cost of living	<input type="checkbox"/>	<input type="checkbox"/>
Rural development	<input type="checkbox"/>	<input type="checkbox"/>
Modernisation and infrastructure investments	<input type="checkbox"/>	<input type="checkbox"/>
International image of your country	<input type="checkbox"/>	<input type="checkbox"/>
Others:	<input type="checkbox"/>	<input type="checkbox"/>

# Independent of energy and climate, in the general public debate in your country (media, politicians), how important are the following topics?

## EU27 Average

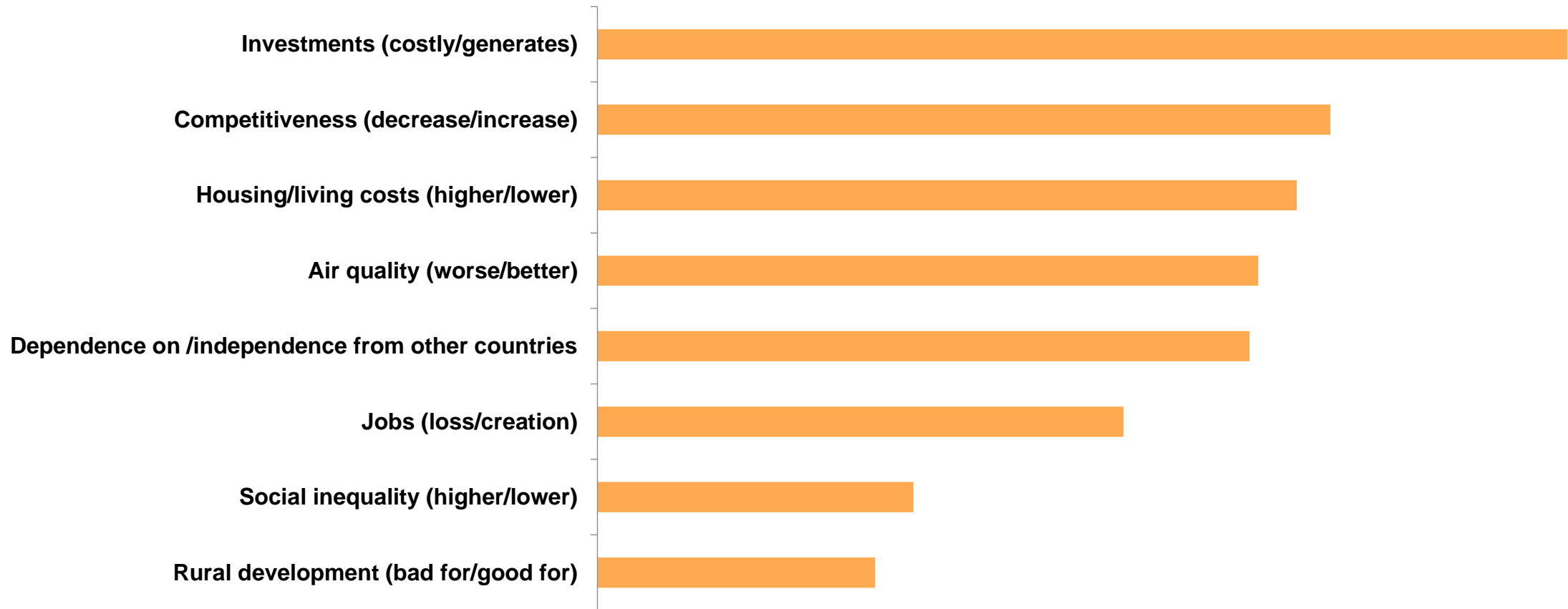


# Importance in the public debate: ranking in Member States

	Loss/creation of jobs	Industrial competitiveness	Modernisation/ investments	Housing and living costs	Air quality	Independence from other countries	International country image	Rural development
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

# EU27: In the public debate in your country (media, politicians), is energy efficiency linked to the following arguments?

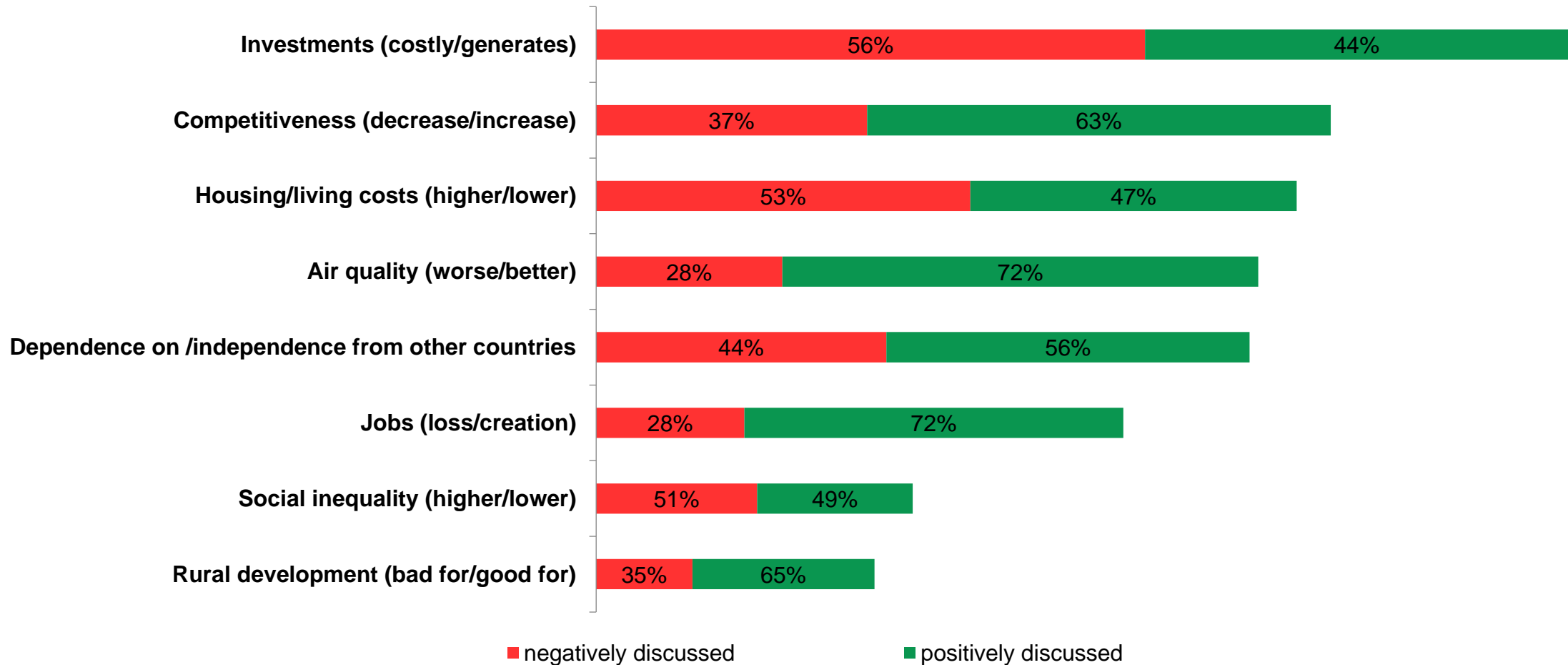
## EU27 Average





# EU27: In the public debate in your country (media, politicians), is energy efficiency linked to the following arguments?

## EU27 Average



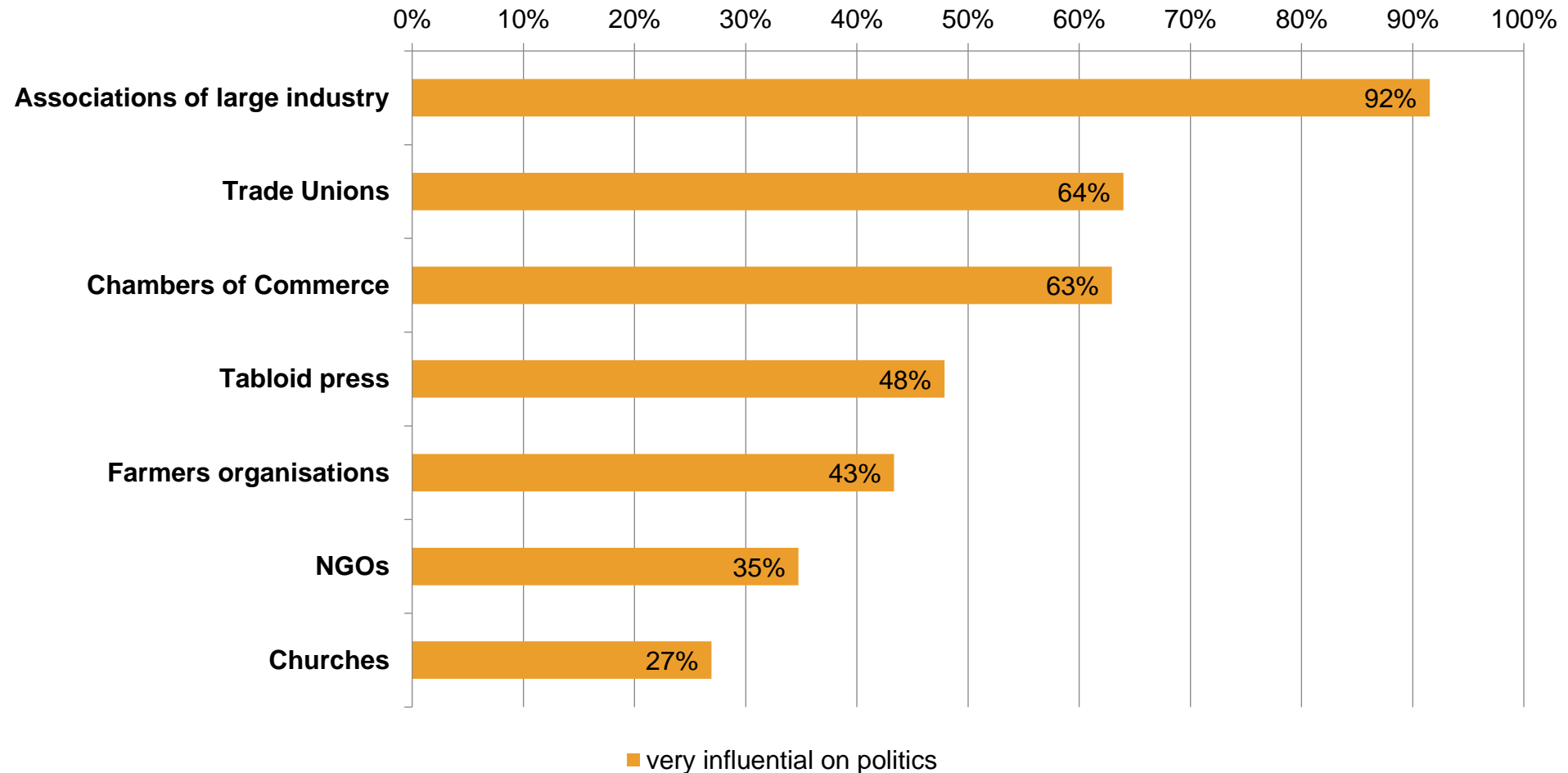
# Survey questionnaire: actor groups

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"/>

# EU27: In general, how influential are these actor groups on politics in your country?

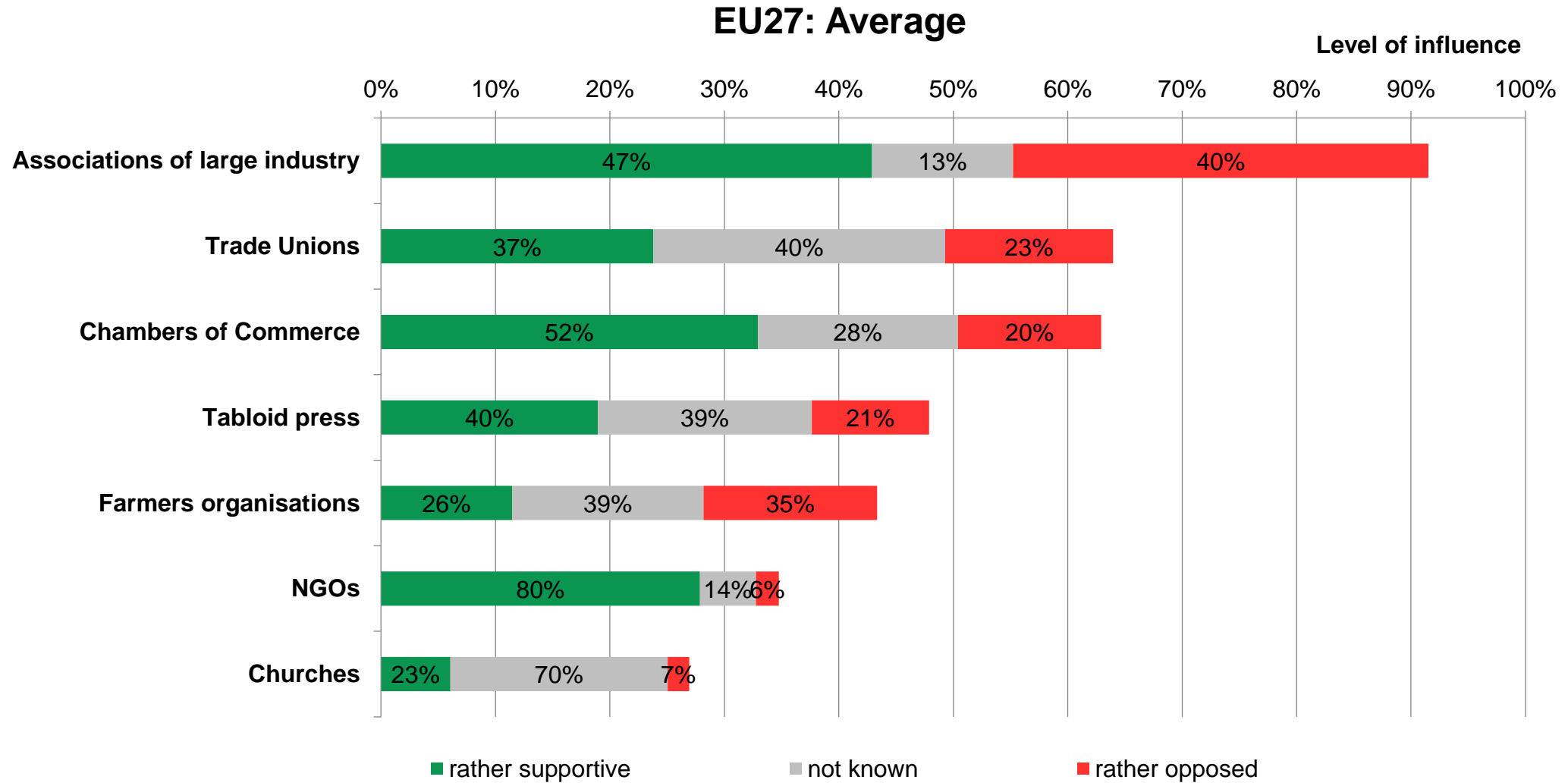
## EU27 Average



# Influence of actor groups on politic: Ranking in Member States

	Large industry associations	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

# EU27: In general, how influential are these actor groups on politics in your country? and are they rather supportive or opposed to the energy transition?



**Are we talking about the right things?**

**And to the right people?**

# EU27: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed	Actor group	Influence on politics (ranking)	Supportive of energy transition	Opinion not known	Opposed to energy transition
Jobs	1	6	72 %	28 %	Associations of large industry	1	47 %	13 %	40 %
Industrial competitiveness	2	2	63 %	37 %	Trade Unions	2	37 %	40 %	23 %
Modernisation / investments	3	1	44 %	56 %	Chambers of Commerce	3	52 %	28 %	20 %
Housing / living costs	4	3			Tabloid press	4			
Air quality	5	4			Farmers organisations	5			
Independence from other countries	6	5			NGOs	6			
Rural development	7	7			Churches	7			

# Conclusions: narratives - the missing WHY

- **"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!**