



D5.7 PPT presentation policy briefing 1-3

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2	GUIDEHOUSE GERMANY GMBH	GUIDEHOUSE	DE	Company
3	OÖ ENERGIESPARVERBAND	ESV	AT	Regional agency
4	BORG & CO AB	BORG & CO AB	SE	Company
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6	ENERGY CITIES ASSOCIATION	ENERGY CITIES	FR	NPA

Deliverable background

This set of PowerPoint presentation compiles the 3 presentations during high level policy briefings.



Powerpoint N 1 during first high level presentation EP

The Energy Efficiency Watch Survey

The missing WHY for energy efficiency: towards new narratives



ENERGY EFFICIENCY WATCH



Christiane Egger

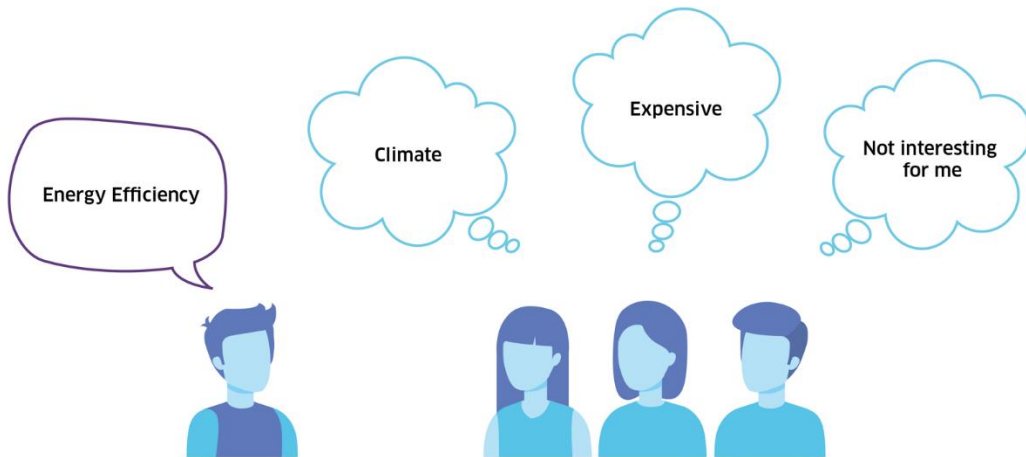
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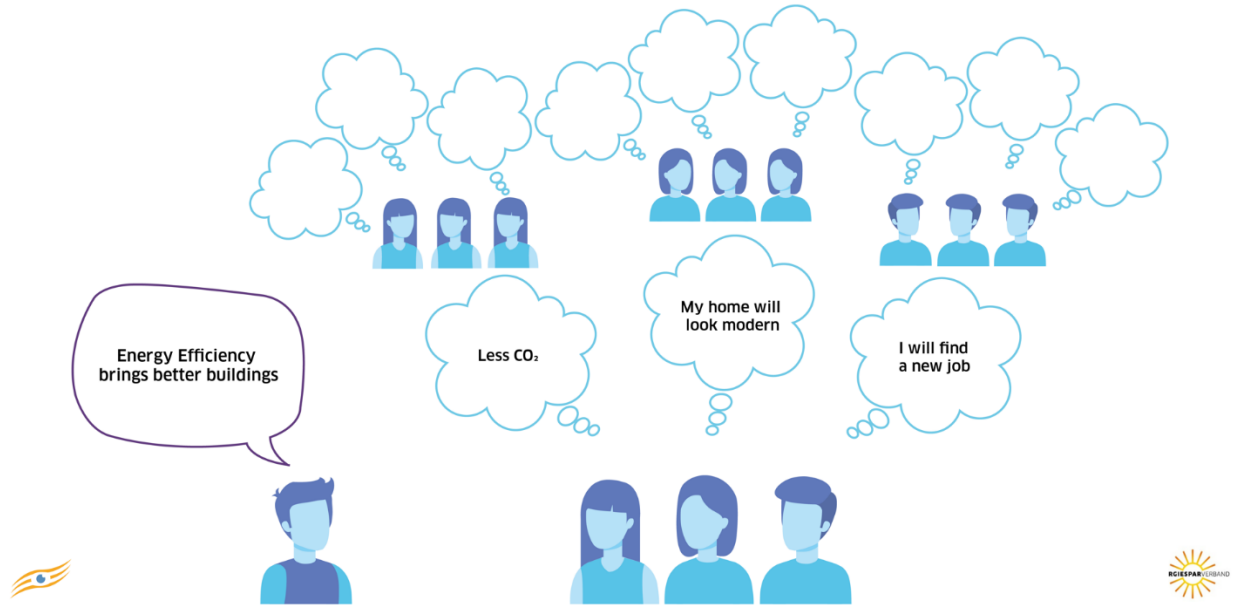


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The images in people's minds



Narratives: Gaining buy-in from wider groups in society



Narratives: We also need to overcome counter-narratives ("killer arguments")



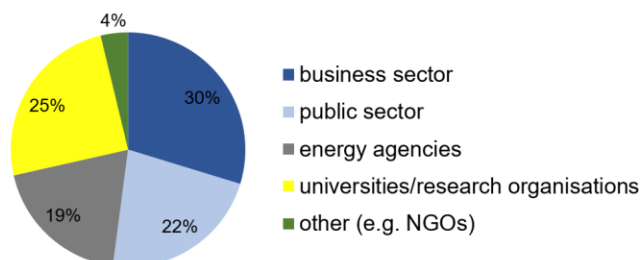
The Energy Efficiency Watch Survey

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

EU27: Completed questionnaires by sector

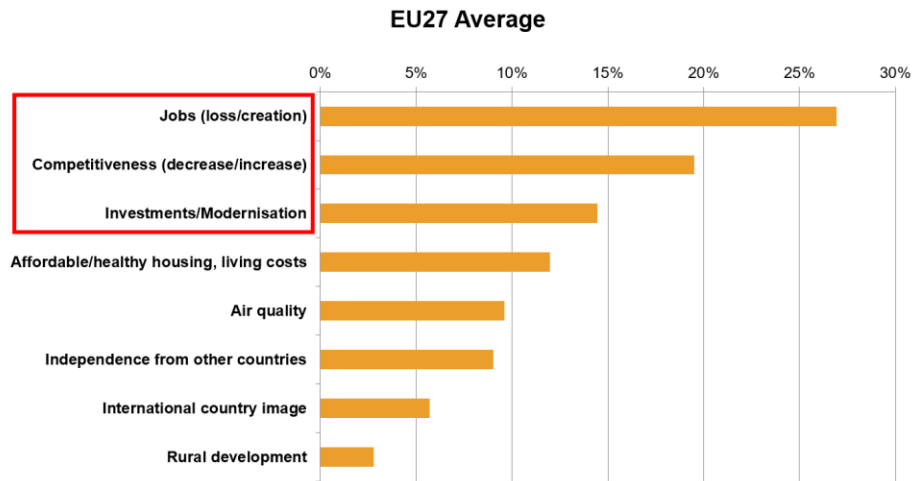


Conclusions Energy Policy Progress

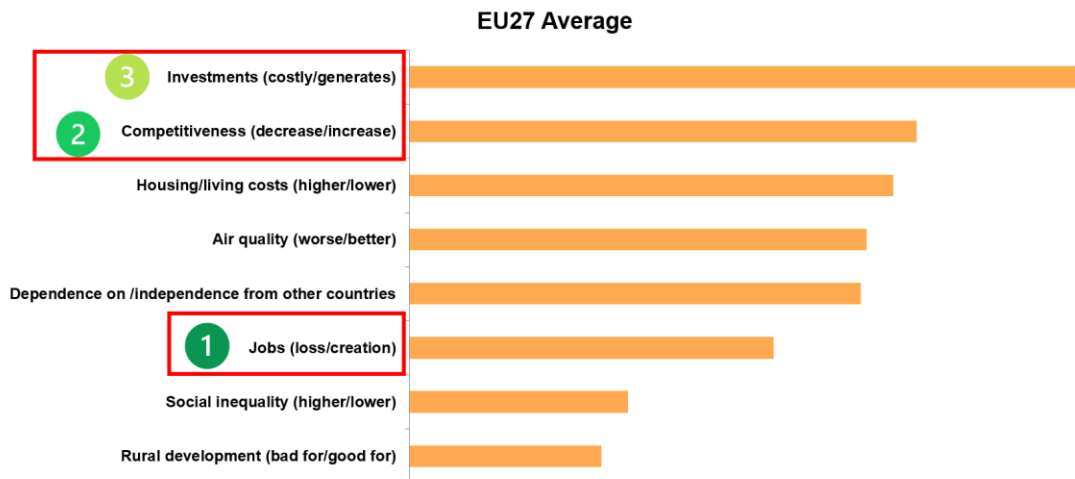
- **More of the same**
Overall, disappointing levels of improvement across policy fields: We remain too slow, way too slow - new dynamics lacking!
- **Ups and downs continue**
Levels of ambition in policy development and implementation keep fluctuating in many Member States
- **The WHY is often missing: 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**

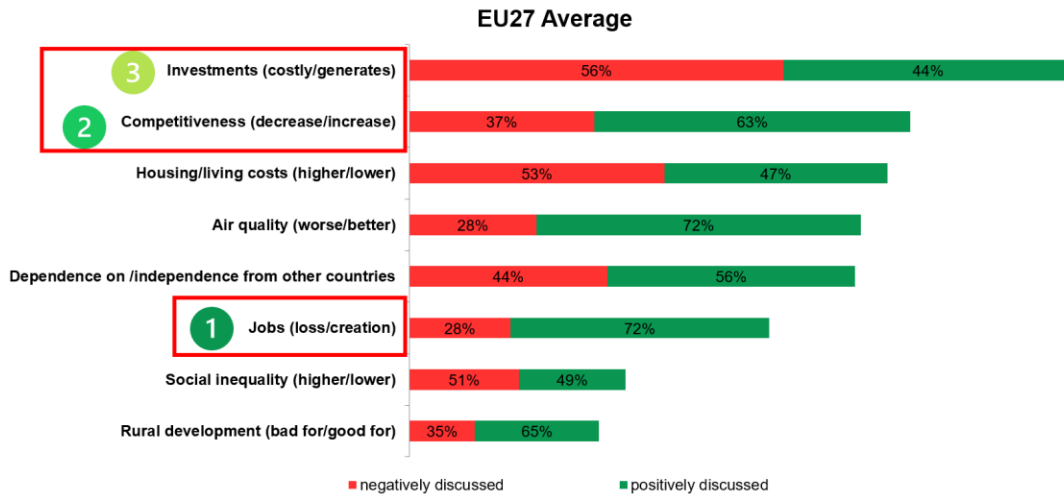
EU27: Independent of energy and climate, in the general public debate in your country (media, politicians), how important are the following topics?



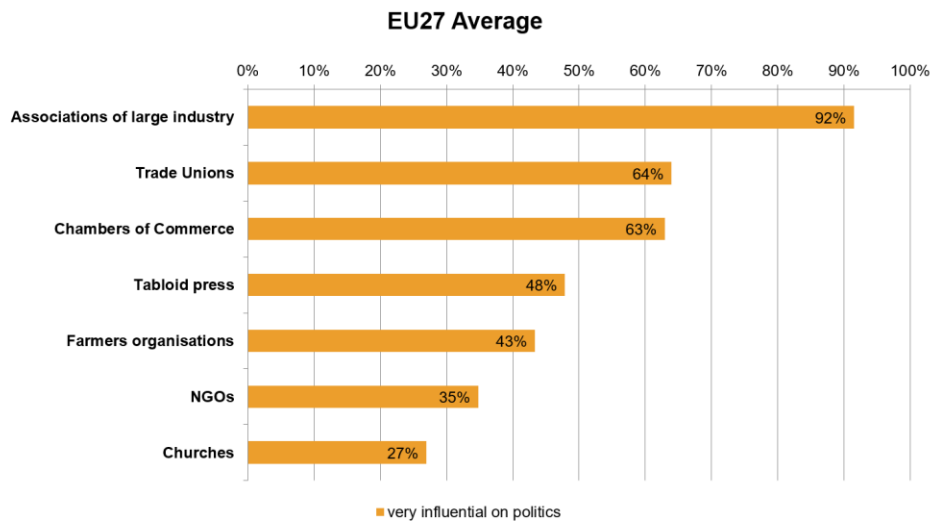
EU27: In the public debate in your country (media, politicians), is energy efficiency linked to the following arguments?



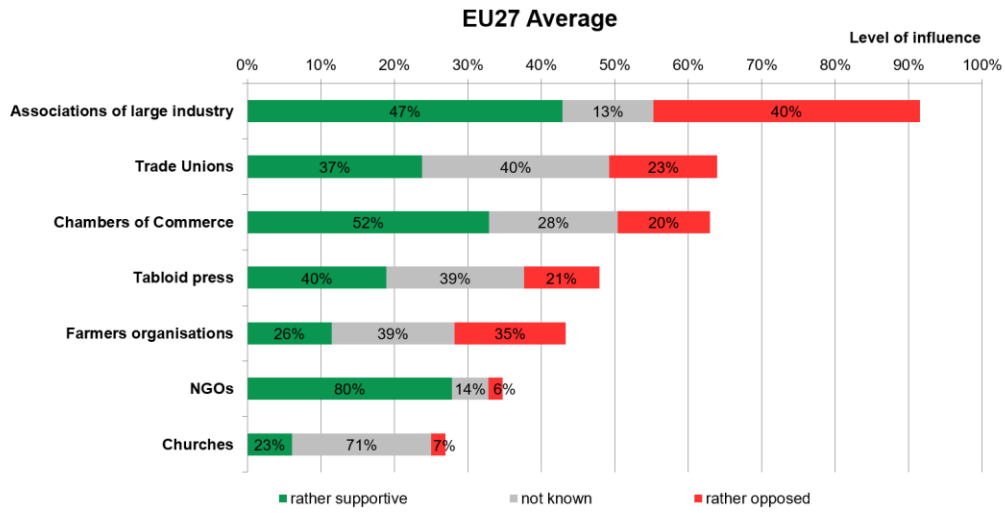
EU27: In the public debate in your country (media, politicians), is energy efficiency linked to the following arguments?



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



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?



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			



Are we talking about the right things?

And to the right people?



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 - and now energy security**
- **Buy-in from important stakeholder groups**
Lack of Member State ambition is often due to **opposition of key stakeholder groups**
- **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**
- **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
- **Never waste an opportunity!**
Reposition energy efficiency (to REPowerEU) - but this requires much better **NARRATIVES!**



Communicating energy efficiency 😊 😊

Energy efficiency and the EED reduce our dependency on Russian gas

More secure energy supply for our factories, they will remain profitable

There will be many new jobs

We will sell more energy efficiency products

Industry
Pierre Gallaz, President, BusinessEurope

Trade Union
Laurent Berger, President, EU Trade Union

Commerce
Luc Frieden, President, Eurochambre



The Energy Efficiency Watch Survey 2020

Thank you!



ENERGY EFFICIENCY WATCH



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Powerpoint N2: during second high-level meeting EP



EEW 4

Starting points:

- Insufficient implementation requires an understanding of *‘why are things not happening?’*
- Key role: perception & connotation of policy instruments / energy transition
- For success of Green Deal, policy makers need broader understanding of economic EE potential than just *saving*



Narrative cases

Participation and Transparency

Case 1: Communication, Dialogue and Participation

Case 2: Independent and transparent data base

Economic Aspects

Case 3: What makes a real business case?

Case 4: The image of technologies

Connotation of Change

Case 5: Good to be a front-runner

Case 6: Energy Efficiency as integral improvement of the production cycle

Case 7: Empowering Research and Innovation for Energy Efficiency

Case 8: Education, training and upskilling

Societal Acceptance

Case 9: Communicate on price effects and social compensation

Case 10: Just transition

Conclusions from narrative cases (1)

Participation and Transparency

An engaged and well-informed public is more inclined to actively support ambitious policies

Narrative case 1: Communication, Dialogue and Participation

- Policy implementation will work better if dialogue and participation formats for relevant stakeholders and target groups exist
- Dialogue and participation facilitates level of information among stakeholders, helps manage expectations, create potential buy-in, form alliances, and allows to use the (potentially supportive) momentum of civil society

Narrative case 2: Independent and transparent data base

- Availability of transparently generated and meaningful data (well established on EU level) is a crucial foundation for policies, for setting targets & functioning principles, measure effectiveness and positive impact of policy instruments
- Continuous attention should be paid that this applies to all policies in all member states
- More focus is required on the collection of meaningful data on non-energy benefits (jobs, innovative momentum etc.)
- Option to generate specific data from existing / planned policies (e.g. on impact / efficiency) not used sufficiently => make a standard in new policies

Conclusions from narrative cases (2)

Economic Aspects

When highlighting the multiple benefits of energy efficiency and the energy transition, economic arguments need to be in the focus. Here, a wider and forward-looking perspective on what *economic* means (beyond just accounting for energy savings) is required.

Narrative case 3: What makes a real business case?

- ensure that real business cases (economically sustainable and expandable) can evolve
- level playing field for EE (conventional technologies: price signals; RE: synergies with EE)
- create favourable environment for specialized firms => develop / amplify business cases => cost degression through upscaling
- Accompany by convincing narrative that EE, despite comparatively higher complexity, is new mainstream

Narrative case 4: The image of technologies

- target groups of EE policies are often fragmented and accordingly have different motivations to act
- Analyse what will determine economic behaviour and willingness to adopt new technologies of different target groups
- consider where (and which level of) financial support leads to envisaged consumer behaviour, and where broader set of image factors (e.g. convenience, modernity, general value of a property, etc.) will trigger action
- incorporate when setting up new policies / evaluate success of existing ones, accompany by appealing narratives

Conclusions from narrative cases (3)

Connotation of Change

Economic and technological change => skepticism and fear => can delay or obstruct political reforms. For success of energy transition / decarbonization => generate positive connotation of change => show comprehensive economic chances, balance expected gains and losses

Narrative case 5: Good to be a front-runner

- identify why / in which area / by which concrete measures a country wants to be front-runner => build supportive narratives around this

Narrative case 6: Energy Efficiency as integral improvement of the production cycle

- Communication on benefits of EE must focus not only on (energy and thus cost-) saving aspect of EE measures
- Show overarching potential for optimizing production processes, reducing input of resources and optimizing financial performance
- strengthen role of energy audits => management attention => key performance indicators of business => energy management systems

Narrative case 7: Empowering Research and Innovation for Energy Efficiency

- technological research and innovation = agent and promotor of change => create supportive narratives

Narrative case 8: Education, training and upskilling

- alliances with educational / training institutions / branch associations => successful rollout => use momentum for narratives

Conclusions from narrative cases (4)

Societal Acceptance

Societal acceptance: key vector for political climate supportive of transition

Narrative case 9: Communicate on price effects and social compensation

- Empirical insights show that monetary compensation under CO₂-tax regimes are often wrongfully perceived as insufficient, mainly due to the complexity of influencing factors on energy prices
- If instruments are planned that – such as a CO₂-tax – structurally increase price levels => flank from earliest stage by communication campaign
- compensation for vulnerable societal groups must be well communicated: what is related price increase and level of support provided

Narrative case 10: Just transition

- 'just transition' easily misinterpreted => (too) large parts of society claim to be on losing side => 'race for highest compensation'
- Expected positive welfare effects often not sufficiently communicated
- Analyse vulnerabilities and strengths of societal spheres and stakeholder groups => define which financial compensation needed for whom / who supposedly will be on winning side of transition
- Narratives need to be developed, managing expectations on the meaning and the impact of a 'just' transition

Remark on implications of Ukraine crisis

- Ukraine crisis shows: potential of EE for energy security high but so far not taken serious
- expert survey stakeholder workshops: energy security ranked low
- belief in market forces outweighed specific energy security measures
- Recognition dominated by supply side ('this is the real stuff')
- Potential of EE downplayed - seen just as 'add on'
- Current process of strategic planning => EE is a pillar of diversification
- must get appropriate recognition / role / narrative!

Overarching policy recommendations

- ⇒ **Think and act beyond fragmented traditional policy areas**
 - connotation of change in public debate decides about success / failure of energy transition
 - communicative framing => cross-sectoral approach
 - comprehensive policy packages across sectors / policy areas => energy, education, research & innovation, etc.
 - concerted action between energy policy and key players such as educational institutions, branch associations etc. must be fostered by policy making
- ⇒ **Strategic planning of policy implementation is required from the very start**
 - supportive narratives => flank / frame all new and ongoing policy measures
 - participation and dialogue => increase understanding and potential buy-in
- ⇒ **Strengthen economic relevance of EE / energy transition in policy making**
 - overcome predominance of supply side => consistently strengthen synergies with EE
 - foster evolvement of new business models => create favourable market conditions
 - create / apply broader understanding of economic benefits / role of audits => incorporate results in financial key performance indicators of companies
 - analyse different target groups' patterns of economic behaviour => tailor policy instruments accordingly
 - Establish comprehensive definition of economic dimension of EE (e.g. increasing geo-political resilience!)



PowerPoint N3: during third high level meeting with DG ENER

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 847153.

Energy Efficiency Watch 4 - The impact of narratives on effective policy implementation

Daniel Becker, Guidehouse
5th April 2022

B • R • G • C • C

Background: Energy Efficiency Watch 1-4 From policy analysis to the role of narratives

2007	Today
<ul style="list-style-type: none">• Hardly any proven energy efficiency policies around when NEEAP process started• Initially, predominance of info campaigns• Many approaches still rather theoretical• Often doubted whether broad energy efficiency policies could address complex savings potentials	<ul style="list-style-type: none">• Impressive toolbox of energy efficiency policy instruments• Many of them are really good practice!• Decentral EU approach provides great variety <p>➔ Yes we can: EU-27 has succeeded in developing good energy efficiency policies!</p>

From EEW3 to EEW4 – Why is implementation lagging behind?

- Despite our ability to design good policies, our **weak part** is often **implementation**
 - An instrument is as good as you make it
 - If political will is missing, the best instrument will fail
 - Changes in the political landscape result in "ups and downs" in energy policy ambition and implementation
 - This does not happen in countries where a **"positive narrative"** was established, convincing to a majority of the public and the stakeholders involved
 - "This is why we want EE! Let's go for it!"**
- ⇒ Often heard: **"we have to - Brussels is telling us"** or : **"We can't afford EE-targets"**
- ⇒ National "narrative" is key, broad **consensus** independent of political majorities
- ⇒ countries, regions and cities needs to develop own story, comprising multiple benefits of EE: energy security, job creation, regional added value, health, poverty reduction, technological innovation & industrial competitiveness...



EEW4 – An approach for narratives

Develop, test and roll-out narratives for the energy transition in member states, regions and cities

Input formats :

- Workshops with MPs from the European Parliament and national parliaments
- Workshops with business stakeholders
- Online survey with energy experts
- Inputs from partner networks Energy Cities, FEDARENE, ECEEE (Borg & Co)



EEW4 – Methodology

Guiding question: Which narratives enable the effective adoption and implementation of energy efficiency policies in the EU?

Intervention logic / working hypotheses:

- **Enabling narrative** ► broad acceptance among stakeholders and society ► adoption of energy efficiency policy
- Adoption of energy efficiency policy ► **enabling narrative** ► broad acceptance among stakeholders and society ► effective policy implementation
- **Focus:** We will analyse the narratives/ discourses that enable an effective adoption/ implementation of energy efficiency policies. The focus is on the main/ structuring discourses/ narratives around energy efficiency policies.

Good practice example

(speaks for itself)

=> Story

(spreading info)

=> Narrative

(strategic combination of story and arguments from other areas, 'win over'-purpose, target group specific, big picture)

EU27: Key input factors for narrative development

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Narrative cases

Cluster Participation and Transparency

Case 1: Communication, Dialogue and Participation

Case 2: Independent and transparent data base

Cluster Economic Aspects

Case 3: Only talk about the real business case for energy efficiency

Case 4: The image of technologies

Cluster Connotation of Change

Case 5: Good to be a front-runner

Case 6: Energy Efficiency as integral improvement of the production cycle

Case 7: Empowering Research and Innovation for Energy Efficiency

Case 8: Education, training and upskilling

Cluster Societal Acceptance

Case 9: Communicate on price effects and social compensation

Case 10: Just transition

Overarching policy recommendations

- Insufficient implementation requires an understanding of *‘why are things not happening?’*
 - Key role: perception & connotation of policy instruments / energy transition
 - Gather full picture of influence factors of perception & connotation
 - Communicative strategies
 - Participation of relevant target groups / stakeholders
 - Broader understanding of economic EE potential than just *saving* => financial KPIs
 - Important links to other policy fields (e.g. education, research)
- ⇒ Comprehensive policy packages
- ⇒ strategic planning of implementation
- ⇒ break the predominance of the supply side
- ⇒ foster evolvement of business models

Cluster recommendations (1)

Participation and Transparency

- transparency of data: foundations for policies, targets & functioning principles, measure effectiveness and positive impact
- dialogue and participation formats for relevant stakeholders and target groups to ensure informedness, manage expectations, create potential buy-in, form alliances, use momentum of civil society

Economic Aspects

- Policies to ensure evolving business cases => level playing field => become mainstream, amplification, cost degression
- Communication to focus not only on the (energy and thus cost-) saving aspect of energy efficiency measures
- stress overarching potential for optimizing production processes, reduce resource input, optimize financial performance
- Beyond area of energy policy, role of education, training and upskilling is key factor for economic success, to be addressed in cross sectoral (e.g. energy AND education) policy packages.

Cluster recommendations (1)

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- transparency of data: foundations for policies, targets & functioning principles, measure effectiveness and positive impact
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- Beyond area of energy policy, role of education, training and upskilling is key factor for economic success, to be addressed in cross sectoral (e.g. energy AND education) policy packages.

Cluster recommendations(2)

Connotation of Change

- economic and technological changes in industrial societies typically come along with scepticism and fear
 - Will I be on the winning or losing side of change? => risk of delay or obstruction of political reforms
- ⇒ generate positive connotation of change, showcasing economic chances, balance expected gains and losses
- Analyze preferences and needs of end consumers regarding their willingness to adopt new technologies
- ⇒ find reasonable balance between required financial support and image factors of technologies / economic behaviour
- technological research and innovation is an agent and promotor of change
- ⇒ establish comprehensive policy packages (e.g. energy AND research policies) beyond traditional policy areas

Societal Acceptance

- analyzed vulnerabilities / strengths of target groups => which financial compensation is really needed?
 - avoid fatal 'race for the highest compensation' (everyone feels to be losing)
- ⇒ Thorough expectation management on meaning and impact of a 'just' transition
- ⇒ Where change triggered by price effects (e.g. CO2-tax), focus on communicating *related* price increase and level of compensation depending on the social status

Remarks on implications of Ukraine crisis

- Ukraine crisis shows: potential of EE for energy security high but not taken serious
- In the expert survey, energy security has been ranked low
- Same in the stakeholder workshops: belief in market forces outweighed specific energy security measures
- Recognition dominated by supply side (,this is the real stuff')
- EE seen as the ,little sister'
- Gas dependence so high due to lack of strategic planning for supply
- Also under market conditions unreasonable (too low diversification)
- If now strategic planning is taken up, EE must get an appropriate role

