

The Energy Efficiency Watch Survey 2020: The missing WHY for energy efficiency

Insights from 1,270 energy efficiency experts Summary

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 for energy efficiency 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. 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.

	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	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			