

Energy Efficiency Watch Survey Report 2023

Insights from over 1,370 energy efficiency experts

NARRATIVES for the GREEN DEAL in times of populism



Christiane Egger, OÖ Energiesparverband

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Author: Christiane Egger with the support of Andrea Zieher and Megan Gignac

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ZVR 171568947

Summary and main conclusions

Key conclusions

The ups and downs of policy progress: "fluctuators and one-day wonders"

- The ups and downs in policy progress continue in many countries. Compared to previous surveys, new countries appear among those with most progress (2023: Ireland, Lithuania, Romania, NL).
- "Traditional policies" (energy requirements and certification for buildings, public funding, labelling) have the strongest impacts. A key question for future policy making is whether strengthening these instruments is enough, or which new instruments are needed to meet the increased ambition levels. A central aspect will be an improved balance between impact and bureaucratic requirements.

Too much in too little time – how to overcome "policy fatigue"

- The Green Deal resulted in an intense policy making process on European level with a range of new and challenging policy requirements for Member States. The war in the Ukraine and the energy price crisis led to another wave of policy action. Such a fast process brings the risk that even individuals and governments with a positive attitude to energy efficiency are overwhelmed by "too much in too little time". This typically leads to either a standstill or low-quality policy making.
- A deep conviction of the overall positive impacts, based on effective narratives, can play a key role in overcoming the fatigue. It is therefore critical to use narrative-based communication also in the interaction with Member States.
- A lack of Member State ambition is often due to opposition of key stakeholder groups. The positions of such groups can change relatively quickly, both for the better and the worse. While the attitude of farmers associations towards the Green Deal deteriorated across practically all EU countries, the position of large industry associations improved in many countries and quite strongly in several, including NL and Germany.

Positive Green Deal narratives in times of populism

- The positive societal impacts of the Green Deal beyond energy and climate (e.g. less import dependence, industrial competitiveness, decreased housing costs, healthier buildings) are very weakly embedded in the public debate and in policy making. The "why" is often still missing. Previous EEW projects have shown that 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.
- Increasingly, the opposite can be observed with more "Anti-Green-Deal" narratives appearing, many of them claiming that the Green Deal is weakening our economies (loss of competitiveness through phase out of combustion engines, excessive bureaucracy for businesses and farmers, replacing the dependence on fossil fuel imports by the dependence on imports from China). This is not only driven by populists but also groups worried about losing votes to those or acceptance within their groups.
- Successful narratives appropriate for the current times demonstrate how Europe gains strength by transforming itself to a cleaner, more competitive and more social society.

Volatile geopolitical situations require agile narratives

- The relevance of narratives can change quickly. In the 2020 survey, the most important subject in the public debate were jobs. In 2023, this was replaced by "cost of housing and living" (which was number 4 in 2020), while jobs moved to number 4.
- Therefore, it is critically important that communication about the Green Deal as well as wider narratives be continuously adapted to the changing economic framework and the fluctuations in the public debate.
- For the situation in 2020, a strong focus of narratives on the positive economic impacts of energy efficiency on jobs, industry and competitiveness was most suitable. In 2024, topics like energy cost stability or decreased import dependence are more promising.

The EEW5 survey objectives and approach

Over the last 20 years, the importance of energy efficiency and the energy transition in European policy has steadily increased. With the adoption of the "Energy Efficiency First" principle and the Green Deal, a new policy era has started.

Since 2007, **Energy Efficiency Watch (EEW)** projects have accompanied the policy development and implementation process. The EEW creates feedback loops on the implementation of European and national energy efficiency policies, thus enabling mutual learning on effective policy making across the EU.

As a second key objective, the EEW supports the development, testing and roll-out of effective narratives. A narrative is a set of accepted societal benefits in a country or a region. For energy efficiency, in addition to climate impacts, these benefits can be economic (e.g. job creation, industrial competitiveness), political (e.g. decreased import dependence) or social (e.g. decreased housing costs, healthier buildings).

The EEW5 project is funded by the LIFE Energy programme and coordinated by EUFORES. It runs from November 2022 to October 2025. Further information: www.energy-efficiency-watch.org.

























One key activity of the EEW5 project was an **extensive survey in which 1,376 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 EEW surveys carried out in 2012, 2015 and 2020). Secondly, it aimed to contribute to a deeper understanding of what constitutes successful narratives. It enquired about the current positioning of energy efficiency in the public debate and the perception of key stakeholders' opinions on it.

The survey was carried out between March and July 2023, mainly using an online questionnaire. Participants were mostly from the business and public sectors, universities and research, and energy agencies. The very high-level of response was due to intensive roll-out activities.

The ups and downs of policy progress

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 in each of the four surveys. Results are shown in the table below (for details, see below under "progress indicator").

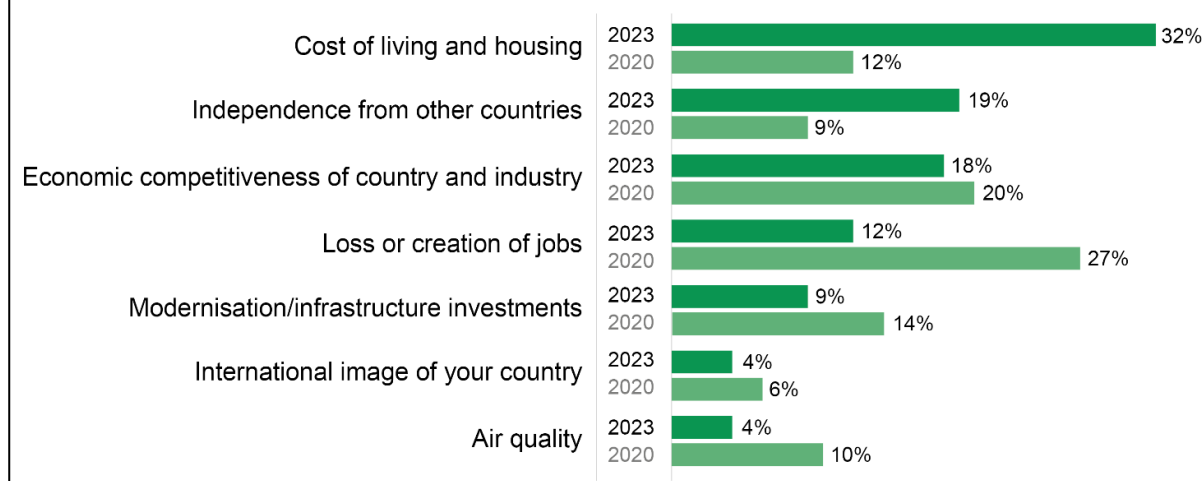
Compared to previous surveys, new countries appeared among those with most progress. Some countries maintained their policy ambition over the years, especially where the understanding of the positive economic, environmental and social impacts of energy efficiency has allowed it to become relatively independent of political changes. In most other countries, where significant fluctuations could be observed, this understanding needs to be further developed based on effective narratives.

Progress indicators 2023 Ranking – Comparison 2020					
		2023	2020		
	Austria	14	13		
	Belgium	21	22		
	Bulgaria	25	13	↓	
	Croatia	21	11	↓	
	Cyprus	18	22		
	Czech Rep.	7	17	↑	
	Denmark	9	2	↓	
	Estonia	8	5		
	Finland	1	1		
	France	24	19		
	Germany	11	17	↑	
	Greece	13	11		
	Hungary	26	27		
	Ireland	2	19	↑	
	Italy	14	7	↓	
	Latvia	21	13	↓	
	Lithuania	2	6		
	Lux	6	3		
	Malta	26	26		
	NL	4	13	↑	
	Poland	18	24	↑	
	Portugal	18	7	↓	
	Romania	4	24	↑	
	Slovak Rep.	14	10		
	Slovenia	12	9		
	Spain	9	21	↑	
	Sweden	14	4	↓	

Agile Green Deal narratives

For narratives to be successful, it is critical that they are linked to subjects of general importance in the public debate. The 2023 survey showed the cost of living and housing as the most important topic. This is a significant change compared to the 2020 survey, where it was ranked number 4. The issue of jobs, which was the most important topic in 2020, was moved to rank 4 in 2023.

EU27: Importance of topics in the general public debate Changes 2020 – 2023

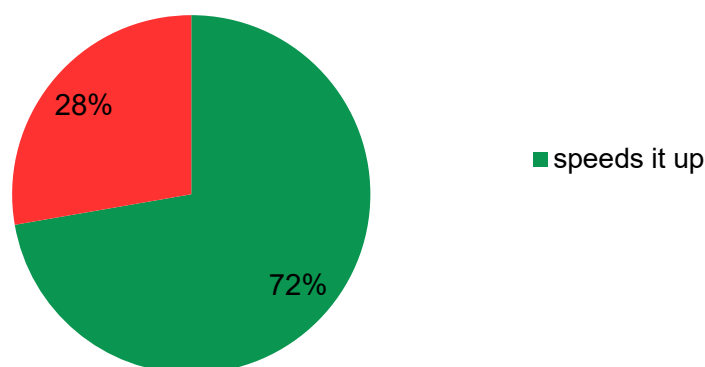


Since effective narratives need a wider support from important stakeholder groups, the survey looked at influential actor groups and their current position regarding the Green Deal. Compared to 2020, the most significant changes were observed in the industry and farming communities. While the position of the farmers associations towards the Green Deal changed for the negative in practically all Member States, the attitude of large industry associations improved somewhat across the EU, and even very significantly in some countries (including Germany and NL).

The survey showed that the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") are very insufficiently reflected in the public debate – an issue that needs to be addressed with some urgency.

The large majority of experts believe that the energy crisis will speed up the achievement of the climate neutrality target.

How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



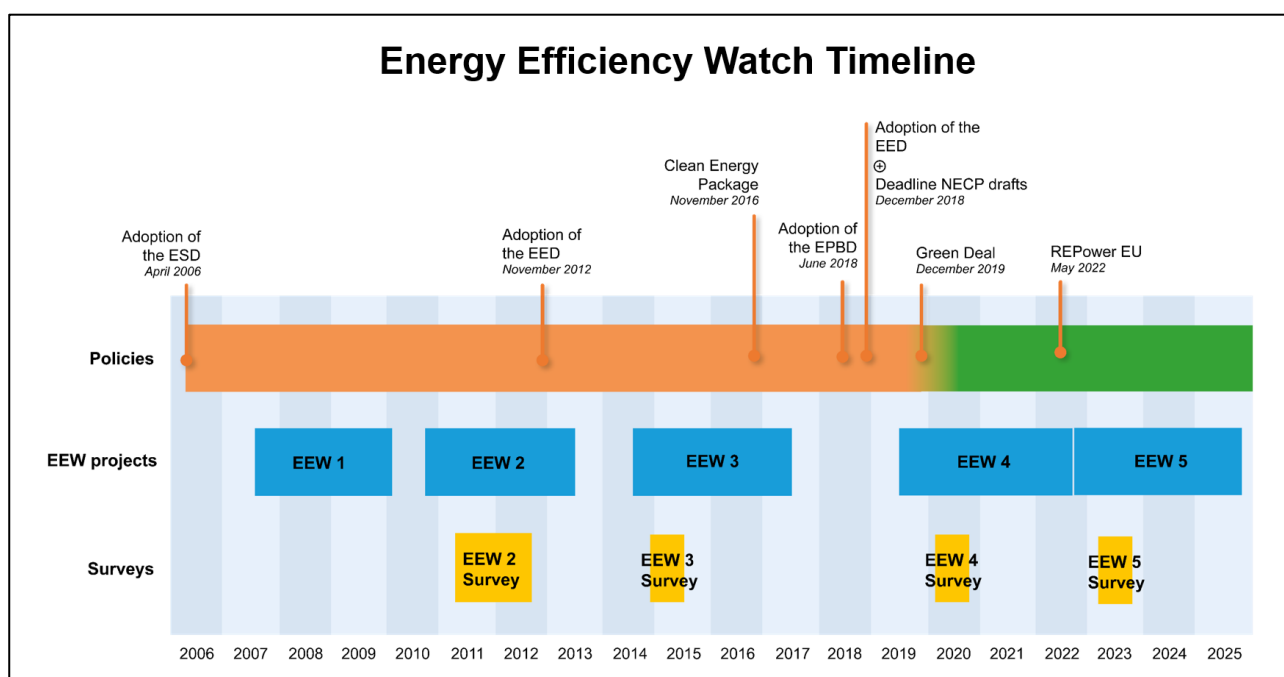
Objectives and methodology of the EEW5 survey

The Energy Efficiency Watch Project

Over the last 20 years, the importance of energy efficiency and the energy transition in European policy has steadily increased. This is reflected in a highly populated European policy landscape with a range of directives which are regularly updated. This includes the Energy Efficiency Directive (2023/1791, revised EED), the Energy Performance of Buildings Directive (2018/844 amending 2010/31/EU, revised version 2024/1275, EPBD), the Renewable Energy Directive (2023/2413, REDII) as well as the Energy Labelling and Ecodesign legislation.

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. In 2023, the revised EED raised the EU energy efficiency target, making it binding for EU countries to collectively ensure an additional 11.7 % reduction in energy consumption by 2030, compared to the 2020 reference scenario projections.

Since 2007, Energy Efficiency Watch (EEW) projects have accompanied the policy development and implementation process. The EEW project facilitates the implementation of EU energy efficiency and energy transition 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 to engage and support the public sector at all governance levels with the aim of more ambitious policies and improved implementation.



In the previous edition, the Energy Efficiency Watch 4 project (EEW4), a new element was introduced: 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 EEW5 continues the work on narratives, building upon the findings of EEW4. It focuses on how to develop effective and adaptable narratives for a quickly changing energy transition world, as seen in the recent energy price crisis.

The EEW5 puts the analysis, development and implementation of narratives for energy efficiency at the core of its activities, in addition to the feedback loop on policy progress. It aims to create a better understanding on national debates and bring these to the policy development processes.

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The EEW5 survey objectives and approach

One key activity of the EEW5 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 and energy transition policies and their implementation in different sectors in the last 3 years in their respective countries. The objective and content were similar to those of the three previous surveys: the first was carried out in 2011/2012 (EEW2), the second in 2015 (EEW3) and the third in 2020 (EEW4). This approach allows for a comparison of progress over time as some parts of the survey were retained in all 4 surveys.

The second part aimed to contribute to a deeper understanding of what constitutes a successful narrative in different countries. This also included questions which dealt with policy measures against the energy crisis and how these were perceived by the experts. 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 EEW5 (so-called "input phase"). Other core elements are narrative sessions in National Parliaments, stakeholder workshops and inputs from the two partner networks (FEDARENE and ECEEE).

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 and impacts of the energy crisis

More than **1,370 experts** from all Member States participated

- nearly 10 % more than in the 2020 survey
- questions partly retained for comparison, new questions relating to narratives and the energy price crisis
- survey carried out by the OÖ Energiesparverband, supported by project partners
- mostly online (March 2023 to July 2023) with extensive roll-out efforts

The survey was carried out using a questionnaire. 1,376 questionnaires were completed and used to draw conclusions (10 % more than in the 2020 survey which already had a very high participation). 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 in narrative elements.

The 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 EEW5 project partners.

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

The 2020 questionnaire was analysed to decide which questions should be retained, adapted, deleted or added to reflect the policy changes since then, both for questions that related to the progress in policy implementation as for those relating to the narratives.

As second step, some new questions were developed relating to the narratives and the perception of the impacts of the energy price crisis. Based on these hypotheses, a pre-testing process was implemented both within the consortium and with external experts.

The questions were grouped, among others, around the following main topics (a copy of the questionnaire can be found in the annex):

- overall ambition of the energy efficiency policy in each Member State and its progress in the last 3 years
- the improvements in actual implementation and impact of specific policy fields and measures
- the position of key stakeholder groups on politics regarding the Green Deal and its targets
- subjects of importance in the general public debate in each country, including the positive societal impacts of the Green Deal and strategies for industry
- several questions relating to the energy price crisis and its impacts on the energy transition and climate neutrality

Due to the significant changes between the 2020 and the 2023 surveys (Covid, energy price crisis, policy changes), only some questions were retained from the 2020 survey (and these were largely the same that had already been asked in the 2012 and the 2015 surveys). These included the questions on the overall ambition and progress of energy efficiency policies and on the progress in some specific policy fields (these policy fields were slightly adapted to the current context).

The questionnaire consisted of 13 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 41 sub-questions with a total of over 55,000 individual answers received.

The survey was carried out between March and July 2023. It was launched at the Energy Efficiency Watch conference held in the context of the World Sustainable Energy Days in Wels/Austria and a first batch of answers was collected at the event. Also, during the EUSEW in June, participants were invited to answer the questionnaire onsite.

The majority of the inputs were collected through an online questionnaire (using EUSurvey). In order to reach 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 and ECEEE. A timetable was developed for a staged mailing approach and reminders over the input collection phase.
- ESV partnered with relevant energy efficiency networks (such as 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.
- for countries with a low initial response rate, significant follow-up communication was done by ESV by e-mail and phone.
- small promotional cards were printed and distributed at a range of events to motivate experts to participate.

Is your country progressing in the energy transition?


YOUR OPINION COUNTS!



The **Energy Efficiency Watch Survey** is the largest EU-wide energy efficiency expert survey! Participate now!

PARTICIPATE HERE:



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ÖÖ Energieparverband, Landstrasse 45, A-4020 Linz, Austria, +43-732-7720-14386, office@esv.or.at, www.esv.or.at, ZVR 171568947

Compared to the previous surveys, significant additional efforts were needed as in the period of input collection, a very high number of energy transition activities were going on and most members of the sustainable energy community were extremely busy.

However, thanks to the intense efforts, a **total of 1,376 completed questionnaires** were collected. This is considered as a real success. It is 10 % more than in the 2020 survey (which had already exceeded expectations).

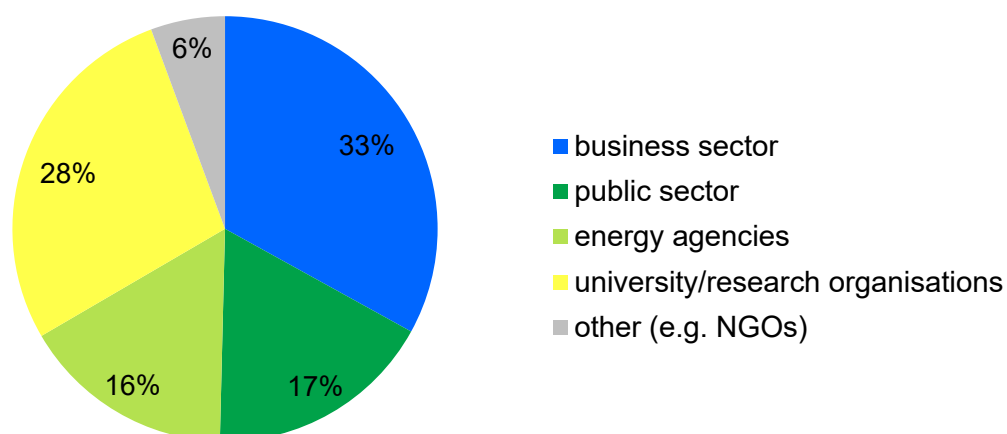
The following table shows the number of completed questionnaires in each Member State. The varying number of participants across Member States had to do with the presence of experts in the partner networks, language issues (the questionnaire was in English) and the size of the country.

Completed questionnaires by Member State

	Austria	68		Italy	62
	Belgium	53		Latvia	40
	Bulgaria	35		Lithuania	33
	Croatia	37		Lux	29
	Cyprus	27		Malta	29
	Czech Rep.	44		NL	42
	Denmark	43		Poland	99
	Estonia	39		Portugal	49
	Finland	43		Romania	92
	France	53		Slovak Rep.	37
	Germany	105		Slovenia	34
	Greece	38		Spain	53
	Hungary	40		Sweden	44
	Ireland	108		Total	1376

Participants in the survey came from the business sector (33 %), universities and research bodies (28 %), the public sector (17 %), energy agencies (16 %) and others (6 %, mostly NGOs). This can be considered as a good reflection of the energy efficiency landscape.

EU27: completed questionnaires by sector



Survey results across Member States

Progress indicator

In order to compare the progress across countries and policy fields, a "progress indicator" was calculated from five relevant survey questions (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), question 4 (positive impact of selected policy instruments) and question 7 (increase in investments). The answers were weighted (the most positive answer by 100 %, the least positive by 0 %).

The ranking resulting from this calculation shows Finland, Ireland and Lithuania as the three countries with the highest relative progress in energy efficiency policies in the last 3 years and Malta, Hungary and Bulgaria as the three countries where the least progress was made.

Progress indicators – Ranking of Member States

	Austria	14		Italy	14
	Belgium	21		Latvia	21
	Bulgaria	25		Lithuania	2
	Croatia	21		Lux	6
	Cyprus	18		Malta	26
	Czech Rep.	7		NL	4
	Denmark	9		Poland	18
	Estonia	8		Portugal	18
	Finland	1		Romania	4
	France	24		Slovak Rep.	14
	Germany	11		Slovenia	12
	Greece	13		Spain	9
	Hungary	26		Sweden	14
	Ireland	2			

In the 2020 survey, progress indicators were also calculated using the same methodology. It was based on the same questions (relating to the ambition and to the overall progress, except for the one relating to investments). Also in the 2012 and 2015 surveys a similar ranking was done.

Between 2023 and 2020, the largest upward changes were observed for Romania, Spain, Ireland and the Czech Republic, also for the Netherlands, Poland and Germany a positive trend was shown. The largest downward changes were seen for Bulgaria, Portugal, Croatia and Sweden, also Latvia, Denmark and Italy fell back in the ranking.

Progress indicators **2023** Ranking – Comparison **2020**

		2023	2020			2023	2020	
	Austria	14	13			Italy	14	7 ↓
	Belgium	21	22			Latvia	21	13 ↓
	Bulgaria	25	13	↓		Lithuania	2	6
	Croatia	21	11	↓		Lux	6	3
	Cyprus	18	22			Malta	26	26
	Czech Rep.	7	17	↑		NL	4	13 ↑
	Denmark	9	2	↓		Poland	18	24 ↑
	Estonia	8	5			Portugal	18	7 ↓
	Finland	1	1			Romania	4	24 ↑
	France	24	19			Slovak Rep.	14	10
	Germany	11	17	↑		Slovenia	12	9
	Greece	13	11			Spain	9	21 ↑
	Hungary	26	27			Sweden	14	4 ↓
	Ireland	2	19	↑				

In the 2012 and 2015 surveys, progress indicators were also calculated using the same methodology (partly the same questions relating to the ambition and the overall progress, and partly on other questions relating to policy progress of importance at the respective period). Despite these differences, it seems justified to compare these results as an indicator for overall policy progress.

Finland has maintained a leading position throughout the four surveys (3 times number 1, once number 2). For the first time in 2023, Denmark was not in the top group (rank 9, rank 2 twice and once rank 1). Also quite well ranked over the years were Estonia and Luxembourg. On the other end of the spectrum are Hungary, Poland and Malta.

Over the years, there were countries where a steady increase of progress was seen by the experts (Lithuania, the Netherlands and the Czech Republic) and others with a steady decrease (Croatia, Latvia and France). In several countries, significant fluctuations could be observed (Spain, Italy, Portugal and Bulgaria) which were stronger than the "ups-and-downs" in other countries. In a few countries, one edition of the four the survey showed outliers significantly more positive than its ranking in other surveys (Ireland, Romania, Cyprus and Malta). For Ireland and Romania, it is possible that this positive result in the 2023 survey is continued and becomes a trend instead of a "one-time wonder".

Progress indicator – survey results over time

Steady increase



	2012	2015	2020	2023
 Lithuania	18	9	6	2
 NL	24	19	13	4
 Czech Rep.	25	15	17	7

Steady decrease



	2012	2015	2020	2023
 Croatia	-	10	11	21
 Latvia	12	15	13	21
 France	10	12	19	24

Fluctuators



	2012	2015	2020	2023
 Spain	15	27	21	9
 Italy	27	13	7	14
 Portugal	6	21	7	18
 Bulgaria	16	23	13	25

"One day wonders?"



	2012	2015	2020	2023
 Ireland	11	15	19	2
 Romania	23	20	24	4
 Cyprus	22	5	22	18
 Malta	3	25	26	26

A key outcome of the previous surveys 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 and EEW4 projects 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.

These findings were 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 relatively independent of political fluctuation and an inherent part of energy and economic policies. That is why a key focus of the EEW5 is to continue the work on the analysis and the development of positive narratives for energy efficiency and the energy transition.

This is even more important in view of the climate crisis and the urgency to act. However, the ambition of the Green Deal with its target of climate neutrality by 2050 has resulted in an intense policy making process on European level with a range of new and challenging policy requirements for the Member States. Additionally, the war in the Ukraine and the resulting energy price crisis led to another increase in ambition with more policy action.

This very fast process brings the risk that even individuals and governments with a positive attitude to energy efficiency are overwhelmed by the "too much in too little time". This typically leads a loss of motivation, resulting either in a standstill or – possibly even worse – low quality policy making. Also, such a fast change opens the door to anti-EU publicity.

In this situation, it is even more important than before that convincing narratives are developed and spread that show how the energy transition and climate neutrality are the only pathway to a clean and competitive EU.

Overall ambition

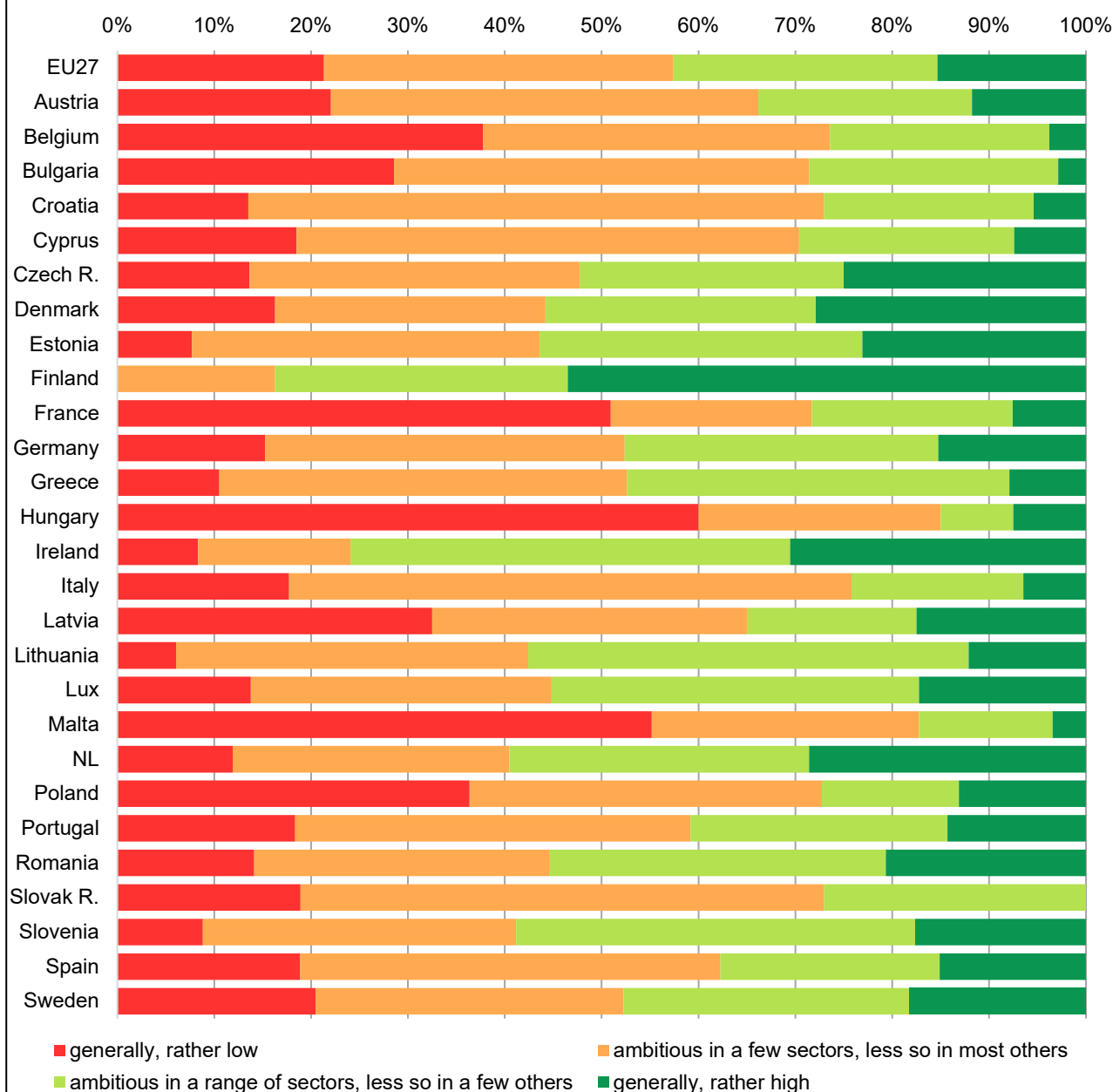
The first question of the survey aimed to get an impression of the "energy efficiency policy climate" in each country and a feeling for how the experts perceive the general aspirations of their country regarding energy efficiency policies.

Strong variation can be seen between countries. By weighing the answers within each country ("generally rather low" by 0 %, "ambitious in a few sectors, less so in most others" by 37 %, "ambitious in a range of sectors" by 75 % and "generally, rather high" by 100 %), the following picture presents itself:

Hungary and Malta are perceived as the least ambitious by the experts from those respective countries. At the other end of the spectrum, Finland is by far rated as most ambitious by its country experts, followed by Ireland and the Netherlands.

Compared to the 2020 survey, according to the respective country experts, the level of ambition has increased the most in Ireland, Romania and the Czech Republic. The most significant relative decreases in ambition are seen for Sweden, Denmark and Luxembourg.

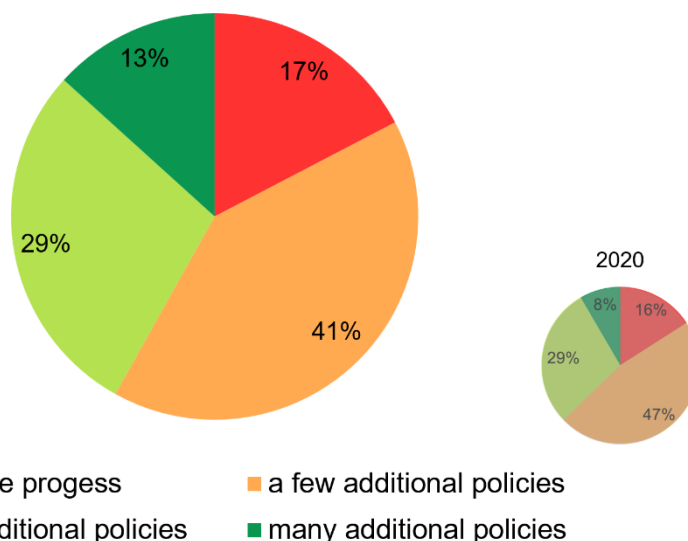
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



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 2020 survey, the EU27 average remains quite unchanged with a very slight upward trend.

How do you rank the progress in energy efficiency policies in the last 3 years in your country?

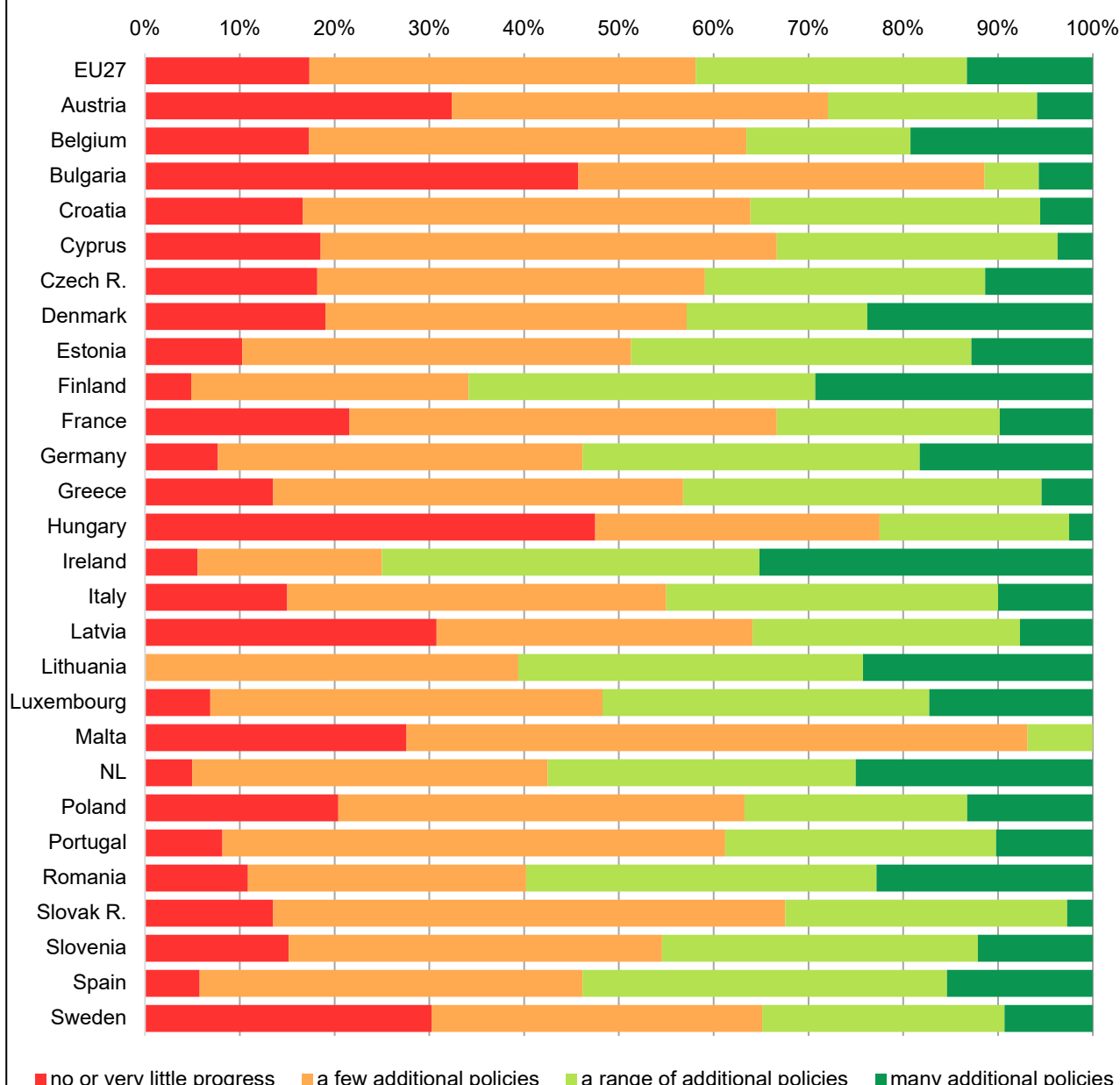


The countries where experts reported the highest progress in terms of the introduction of new policies and the strengthening of existing ones were Ireland, Finland, Lithuania and the Netherlands. Experts saw the least progress in new policies over the past 3 years in Bulgaria, Hungary, Malta and Austria.

In the 2020 survey, Luxembourg, Finland and Estonia were in the lead (Luxembourg and Estonia are now ranked number 8 and 9 respectively in the 2023 survey). Also, improvements were observed for Romania, which strongly improved its rank from 25 to 5 from 2020 to 2023.

At the other end of the ranking, there were fewer changes: Hungary and Malta were also among the countries reported with the lowest progress in 2020. Significantly less progress was also reported for Sweden, Latvia and Cyprus in 2023 than in 2020.

How do you rank the progress in energy efficiency policies in the last 3 years in your country?



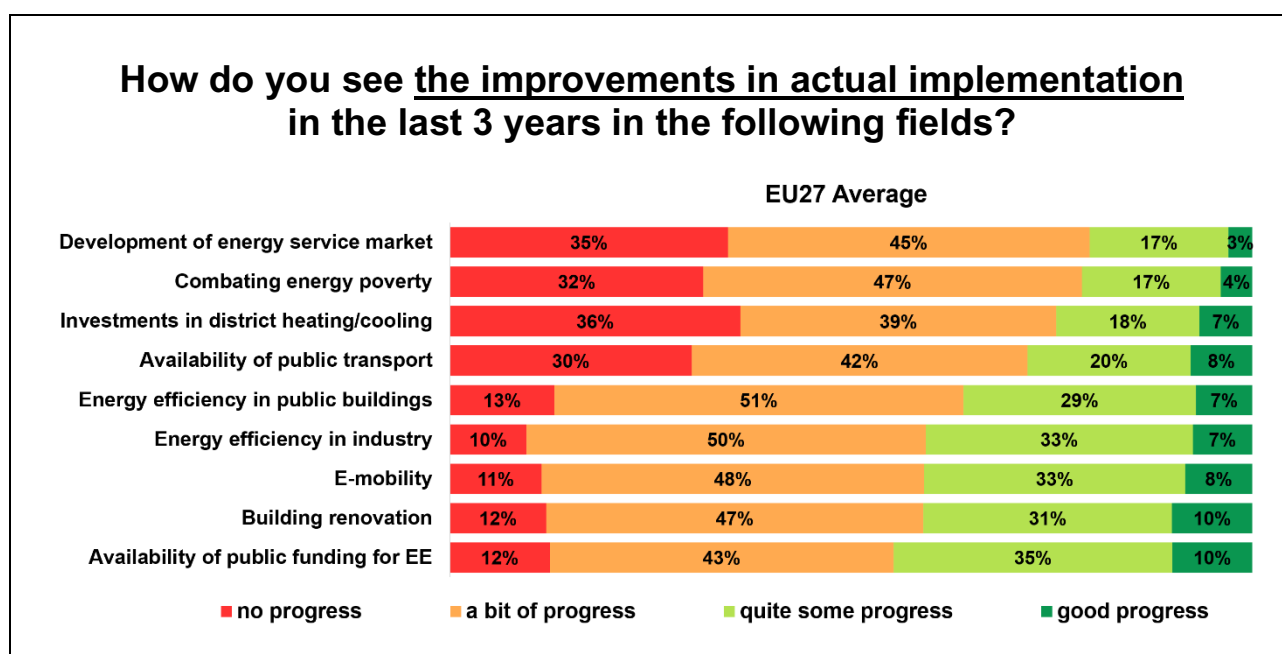
Improvements in policy implementation and impact

This section looks at the improvements in implementation and impact of a range of energy efficiency policies.

The first question in this context 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 the functioning of the energy service market, combating energy poverty, and investments in district heating and cooling. The fields where the most progress is being seen are the following four instruments: availability

of public funding for energy efficiency investments, building renovation, e-mobility and energy efficiency in industry.

Comparing the EU27 results to those of the 2020 survey, again (as also in 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, such as for energy poverty and the energy service market. Sectors that had seen somewhat better improvements (building renovation, energy efficiency in industry) kept up their levels of progress. A slight improvement can be reported in relation to public funding which – given the very high amounts of funding that should be available in Member States from different European funding sources – is nevertheless rather disappointing.



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 Finland, Italy and Slovenia, the lowest progress for Malta, Hungary and Germany. The countries with lowest progress remained unchanged since the 2020 survey.

Highest progress in energy efficiency in industry was seen in Finland, Lithuania and Romania, least progress in Greece, Cyprus and France.

The availability of public transport improved most in Luxembourg, Romania and Austria and least in Greece, Croatia and Belgium.

In e-mobility, Luxembourg, the Netherlands and Finland showed highest progress, Greece, Croatia and Cyprus the lowest.

In Finland, Lithuania and Croatia, the highest progress in energy efficiency in public buildings was reported, the lowest in Malta, France and Portugal.























































The availability of funding for energy efficiency improved most in Luxembourg, the Czech Republic and Spain, least in Sweden, Hungary and France.

The highest level of improvement in the energy service market was reported for Finland, the Czech Republic and Lithuania, the least for Bulgaria, Hungary and Malta.

The most progress in combating energy poverty was observed in the Czech Republic, Lithuania and Finland, the least in Bulgaria, Cyprus and Hungary.

Investments in district heating and cooling increased most in Denmark, Finland and Lithuania, and least in Portugal, Malta and Bulgaria.

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

	good progress		no progress	
Building renovation	1. Finland 		25. Germany 	
	2. Italy 		26. Hungary 	
	3. Slovenia 		27. Malta 	
Energy efficiency in industry	1. Finland 		25. France 	
	2. Lithuania 		26. Cyprus 	
	3. Romania 		27. Greece 	
Availability in public transport	1. Luxembourg 		25. Belgium 	
	2. Romania 		26. Croatia 	
	3. Austria 		27. Greece 	
E-mobility	1. Luxembourg 		25. Cyprus 	
	2. NL 		26. Croatia 	
	3. Finland 		27. Greece 	
Energy efficiency in public buildings	1. Finland 		25. Portugal 	
	2. Lithuania 		26. France 	
	3. Croatia 		27. Malta 	
Availability of funding for energy efficiency	1. Luxembourg 		25. France 	
	2. Czech R. 		26. Hungary 	
	3. Spain 		27. Sweden 	
Development of the energy service market	1. Finland 		25. Malta 	
	2. Czech R. 		26. Hungary 	
	3. Lithuania 		27. Bulgaria 	
Combating energy poverty	1. Czech R. 		25. Hungary 	
	2. Lithuania 		26. Cyprus 	
	3. Finland 		27. Bulgaria 	
Investments in district heating/cooling	1. Denmark 		25. Bulgaria 	
	2. Finland 		26. Malta 	
	3. Lithuania 		27. Portugal 	

Looking at weighted indicators (the most positive answer by 100 %, the least positive by 0 %), the highest values across countries and fields can be found in e-mobility (Luxembourg, Netherlands), the availability of public transport (Luxembourg), energy efficiency in industry (Finland) and investments in district heating/cooling (Denmark). The lowest values

can be found for district heating and cooling (Portugal, Malta, Cyprus and Bulgaria). Very low values are also seen for combating energy poverty (Bulgaria) and public transport (Greece and Croatia).

The largest difference between positive and negative answers can be found for district heating and cooling (not surprisingly as EU countries cover a wide spread of climates and heating traditions), followed by the improvements in public transport. The lowest spread is observed for improvements relating to energy poverty and energy services.

When ranking the progress in the different fields within each Member State, the following picture emerges: the functioning of energy service markets and combating energy poverty saw very low progress across Member States. The situation is similar for investments in district heating and cooling with the exception of Denmark (where it is ranked first), Finland and Sweden. Also, in most countries, there was no or low progress in the availability of public transport with the exception of Austria (where it is ranked first), Luxembourg, Malta and Sweden. All other fields show a more mixed picture.

For energy efficiency in public buildings, there are 11 countries where it is among the first three fields of progress. For energy efficiency in industry this is 13 countries, for e-mobility 14 countries, for building renovation 15 countries, and for the availability of public funding 20 countries.

Improvements in actual implementation: progress ranking in the different fields within each Member State

	Avail-ability of fundings	EE in industry	Building reno-vation	E-mobility	EE in public buildings	Avail-ability in public transport	Investm. in district heating / cooling	Com-bating energy poverty	Develop. of energy service markets
EU27	1	2	3	4	5	6	7	8	9
Austria	2	4	6	3	8	1	5	7	9
Belgium	3	4	1	2	5	9	8	7	6
Bulgaria	4	2	1	6	3	5	9	8	7
Croatia	3	4	2	5	1	9	8	6	7
Cyprus	1	4	2	5	3	8	9	7	6
Czech R.	1	4	2	6	3	8	9	7	5
Denmark	6	4	3	2	5	9	1	7	8
Estonia	5	6	1	3	2	7	4	8	9
Finland	6	1	4	2	3	7	5	9	8
France	6	4	2	1	5	8	3	9	7
Germany	2	3	6	1	5	8	4	9	7
Greece	2	4	1	6	3	9	8	5	7
Hungary	5	2	6	1	3	4	7	8	9
Ireland	1	3	4	5	2	8	9	6	7
Italy	2	3	1	5	4	6	9	8	7
Latvia	4	1	6	3	2	7	5	8	9
Lithuania	3	1	6	5	2	7	4	8	9
Lux	3	6	5	1	4	2	9	7	8
Malta	3	4	7	1	6	2	9	5	8
NL	2	4	3	1	5	9	7	6	8
Poland	1	4	3	6	2	5	7	9	8
Portugal	2	3	4	1	5	6	9	7	8

Romania	1	2	3	6	5	4	7	9	8
Slovak R.	2	3	1	5	4	6	8	9	7
Slovenia	3	2	1	5	4	9	8	6	7
Spain	1	4	3	5	6	2	9	8	7
Sweden	9	2	5	1	4	6	3	8	7

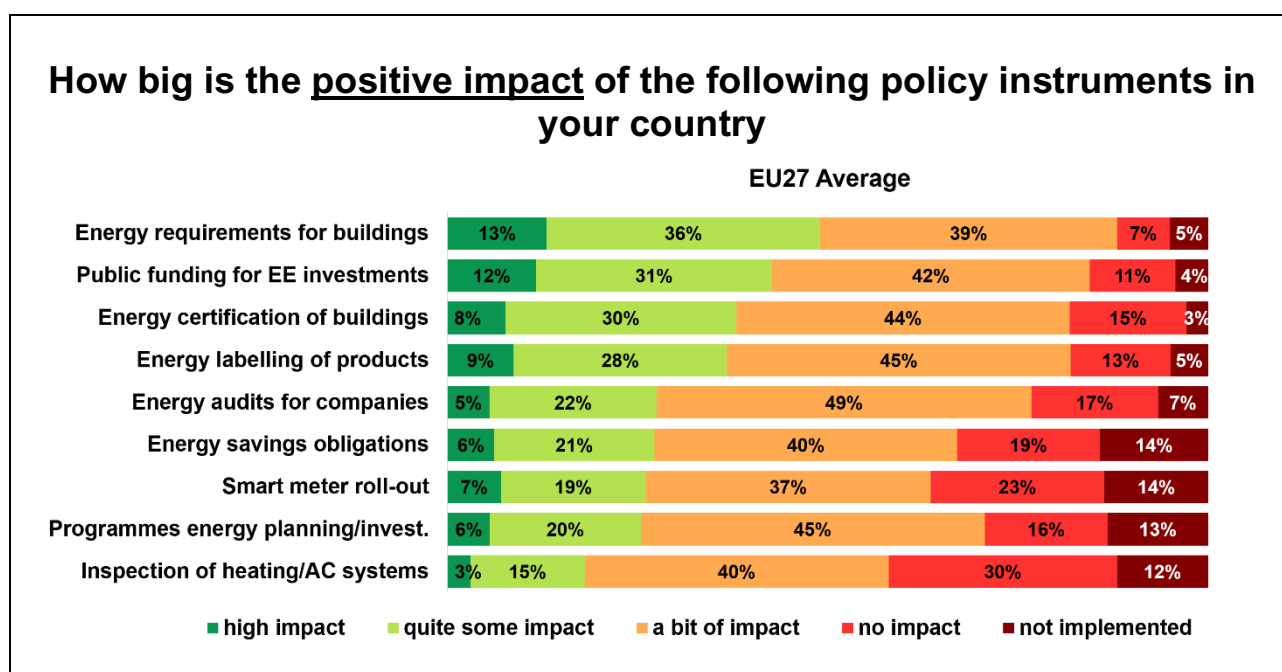
The next question in this section relates to a range of specific energy efficiency policy instruments mentioned in the EED or the EPBD and their positive impact in the Member States.

In regard to overall EU averages, again, more established instruments are seen to have the highest impact: energy requirements of buildings (nearly 50 % of all participants see a significant impact), public funding for energy efficiency investments (43 %), energy certification of buildings (38 %) and energy labelling of products (37 %).

On the other end of the spectrum, only 18 % see a significant impact of the inspection of heating and air-conditioning systems, followed by programmes for energy planning and investments (26 %).

Compared to the 2020 results, only a slight overall improvement is observed.

A key question for the coming years will be whether it is enough to strengthen these instruments or which new instruments needed to meet the increased ambition levels. A central aspect of these instruments will be a good balance between impact and bureaucratic requirements.



The countries where energy efficiency requirements have the highest impact include Finland, Luxembourg and Denmark, the lowest is in Malta, Bulgaria and Hungary.

Public funding for energy efficiency investments has most impact in Cyprus, the Czech Republic and Lithuania, the least in Hungary, Sweden and Belgium.

Lithuania, Luxembourg and Belgium are the countries where energy certification of buildings have the highest impact. In Malta, Bulgaria and Germany it has the lowest.

Energy labelling of products makes the most positive contribution in Finland, Denmark and Sweden. On the opposite end of the spectrum are Poland, Bulgaria and Croatia.

The countries where energy audits for companies have the highest impact include Finland, Latvia and Romania, the lowest impact in Bulgaria, Belgium and Hungary.























































Programmes for local energy planning and investments have their highest impact in Romania, Lithuania and Finland, and their lowest in Malta, Hungary and Portugal.

Romania, Ireland and Spain are the countries where energy savings obligations have the highest impact; Cyprus, Bulgaria and Estonia are among the lowest.

The countries where the smart meter roll-out has the highest impact include Finland, Estonia and Lithuania, the lowest in Cyprus, Croatia and Bulgaria.

The inspection of heating and air conditioning has comparatively the highest impact in Finland, the Czech Republic and Romania, the lowest in Malta, Italy and Croatia.

How big is the positive impact of the following policy instruments in your country

	high impact		low impact	
Energy requirements for buildings	1. Finland		25. Hungary	
	2. Lux		26. Bulgaria	
	3. Denmark		27. Malta	
Energy certification of buildings	1. Lithuania		25. Germany	
	2. Lux		26. Bulgaria	
	3. Belgium		27. Malta	
Inspection of heating and air-conditioning systems	1. Finland		25. Croatia	
	2. Czech R.		26. Italy	
	3. Romania		27. Malta	
Public funding for energy efficiency investments	1. Cyprus		25. Belgium	
	2. Czech R.		26. Sweden	
	3. Lithuania		27. Hungary	
Energy audits for companies	1. Finland		25. Hungary	
	2. Latvia		26. Belgium	
	3. Romania		27. Bulgaria	
Energy savings obligations (e.g. for energy companies)	1. Romania		25. Estonia	
	2. Ireland		26. Bulgaria	
	3. Spain		27. Cyprus	
Smart meter roll-out	1. Finland		25. Bulgaria	
	2. Estonia		26. Croatia	
	3. Lithuania		27. Cyprus	
Energy labelling of products	1. Finland		25. Croatia	
	2. Denmark		26. Bulgaria	
	3. Sweden		27. Poland	
Programmes for local energy planning and investments	1. Romania		25. Portugal	
	2. Lithuania		26. Hungary	
	3. Finland		27. Malta	

Looking at weighted indicators (the most positive answer by 100 %, the least positive by 0 %), the highest values across countries and instruments can be found for energy requirements for buildings (Finland and Luxembourg) and for public funding (Cyprus).

The lowest values are reported for the inspection of heating and air conditioning (Malta and Italy), smart meter roll-out (Cyprus and Bulgaria) and energy savings obligations (Cyprus).

The highest difference between positive and negative answers can be seen for energy requirements for buildings, followed by the smart meter roll-out. The lowest spread can be observed for energy labelling of products and the inspection of heating and cooling systems.

When comparing the results to the 2020 survey, the highest relative positive changes happened for public funding for energy efficiency, especially for Romania, Spain and Cyprus. Positive developments for the smart meter roll-out are seen in several countries, including Austria, Ireland and Romania. The impact of energy savings obligation improved most in Romania and the Czech Republic. Programmes for local energy planning and investments saw the highest positive developments in Lithuania, Romania and Belgium.

When ranking the progress in the different fields within each Member State, the following picture emerges: Inspection of heating and air conditioning has very little positive impact across Member States. The situation is similar for programmes for local planning and investments (with the exception of Romania), energy savings obligations (except for France) and smart meter roll-out (except for Denmark and Estonia).

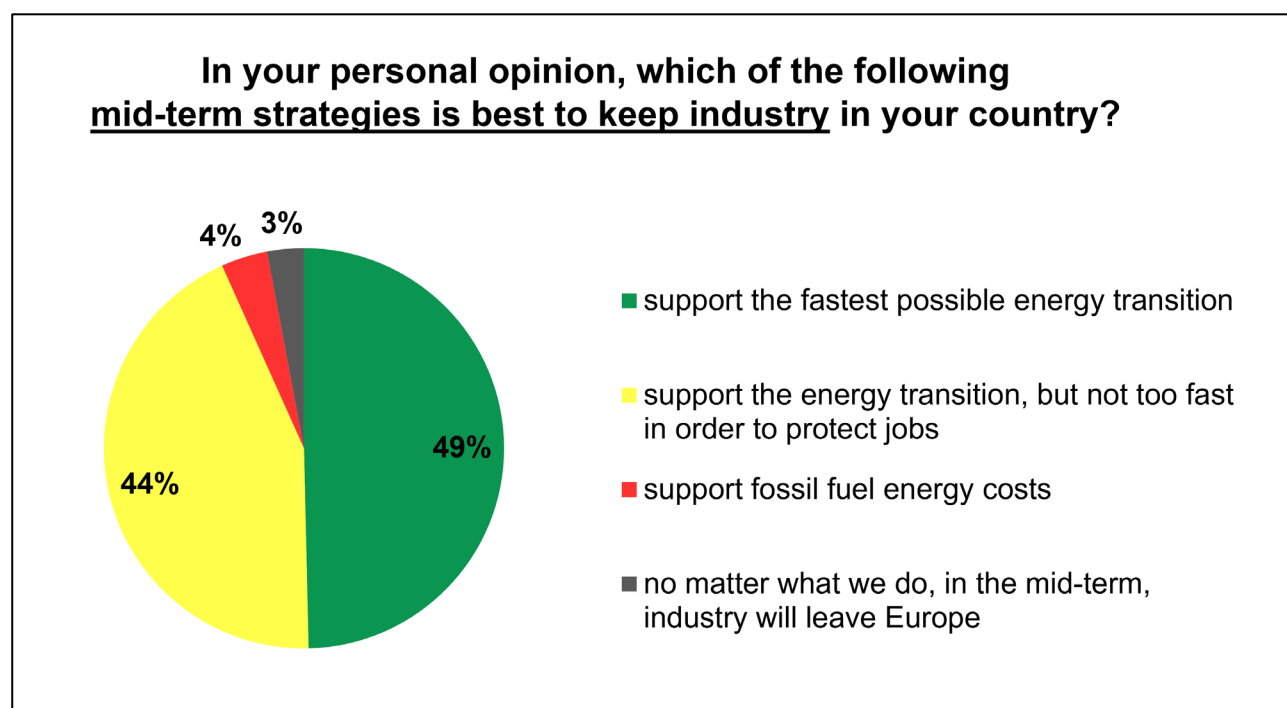
On the other side of the spectrum, energy efficiency requirements for buildings are ranked very highly in all Member States with the exception of Malta.

Impacts of policies: ranking within each Member State

	Energy requirements for buildings	Public funding for energy efficiency investm.	Energy certification of buildings	Energy labelling of products	Energy audits for companies	Pro-programmes for local energy planning / investm.	Energy savings obligations	Smart meter roll-out	Inspection of heating and airconditioning systems
EU27	1	2	3	4	5	6	7	8	9
Austria	2	1	3	4	7	5	8	6	9
Belgium	1	4	2	3	8	7	6	5	9
Bulgaria	2	1	4	3	5	6	7	9	8
Croatia	2	1	3	4	6	5	7	9	8
Cyprus	2	1	3	4	5	7	8	9	6
Czech R.	2	1	3	4	7	8	5	9	6
Denmark	1	5	4	2	6	7	9	3	8
Estonia	1	2	4	6	7	5	9	3	8
Finland	1	3	6	4	2	8	7	5	9
France	1	3	5	4	7	6	2	9	8
Germany	1	2	7	4	3	5	6	9	8
Greece	2	1	3	4	5	7	6	9	8
Hungary	2	6	3	1	5	7	4	9	8
Ireland	1	3	2	4	6	8	5	7	9
Italy	2	1	4	3	5	7	6	8	9
Latvia	3	2	4	6	1	5	7	8	9
Lithuania	1	2	3	5	8	6	7	4	9
Lux	1	3	2	5	8	6	7	4	9

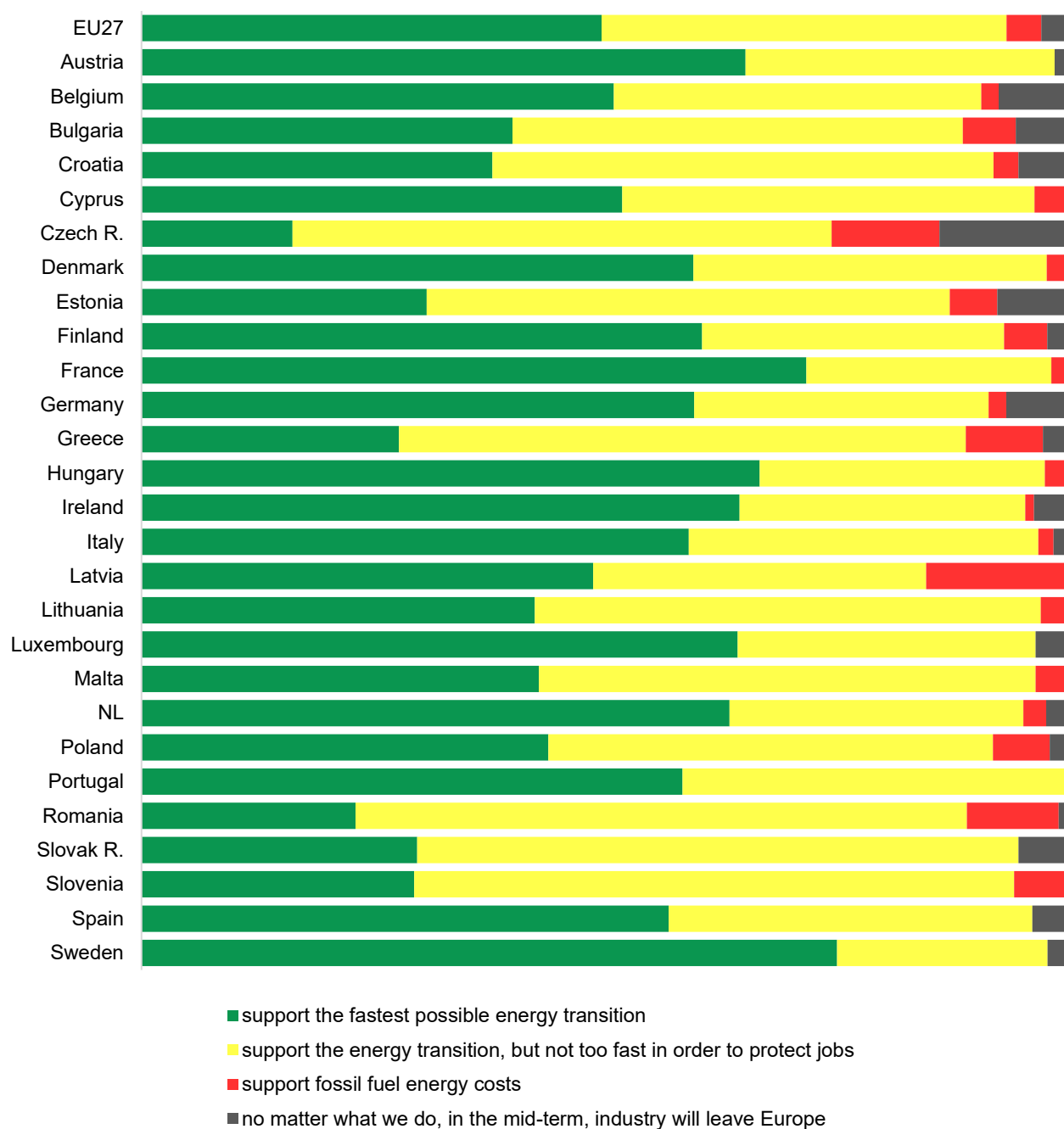
Malta	7	2	6	1	3	8	5	4	9
NL	1	2	4	3	8	5	7	6	9
Poland	1	2	3	5	4	7	6	9	8
Portugal	2	4	1	3	5	8	6	7	9
Romania	2	1	5	6	4	3	7	8	9
Slovak R.	1	4	2	3	5	7	6	8	9
Slovenia	1	2	5	3	4	8	6	7	9
Spain	2	1	7	3	8	6	4	5	9
Sweden	2	7	3	1	4	6	9	5	8

One question related specifically to the industrial sector. It aimed to contribute to the debate regarding the risk of a de-industrialisation of Europe due to an enforced energy transition. 49 % of the experts were in favour of a fastest possible energy transition whereas 44 % supported a more cautious approach – support the energy transition, but not too fast, in order to protect jobs. 4 % were in favour of supporting fossil fuel energy costs. 3 % believe that no matter what we do, industry will leave Europe.



However, the picture looks quite different across Member States: In Sweden, France Hungary, Austria, Ireland and Luxemburg, 64 % of experts or more are in favour of the fastest possible energy transition. In Romania, the Slovak Republic, Slovenia and Greece, more than 60 % prefer a slower pace as they consider this would protect jobs. The highest percentage of experts in favour of supporting fossil fuel costs can be found in Latvia and the Czech Republic (where also the number of those who believe that industry will leave no matter which measures are taken is highest).

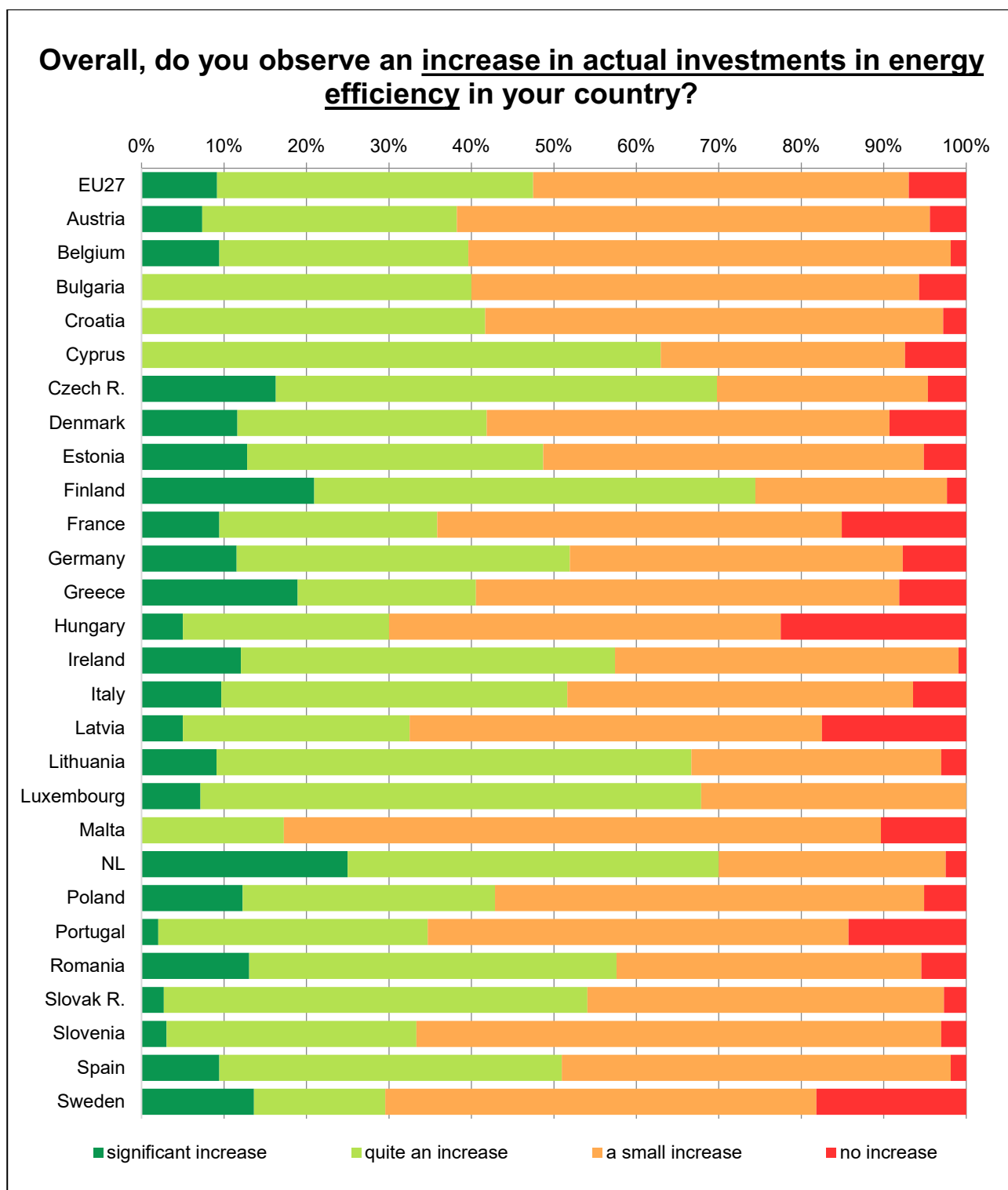
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



The final question in this context related to the investments in energy efficiency and whether the experts had observed an actual increase of these. In the EU average, more than half (53 %) see no or only a small increase – this is rather sobering in view of the large financial instruments available from the European level, e.g. through the Recovery Fund of which 30 % must be dedicated to climate measure.

As can be seen from the chart below, there are significant differences between Member States: Looking at weighted indicators (the most positive answer by 100 %, the least positive by 0 %), the most positive situation is observed in Finland, the Netherlands, the

Czech Republic and Luxembourg. The least positive is in Malta, Hungary, Latvia, Sweden, Portugal and France.

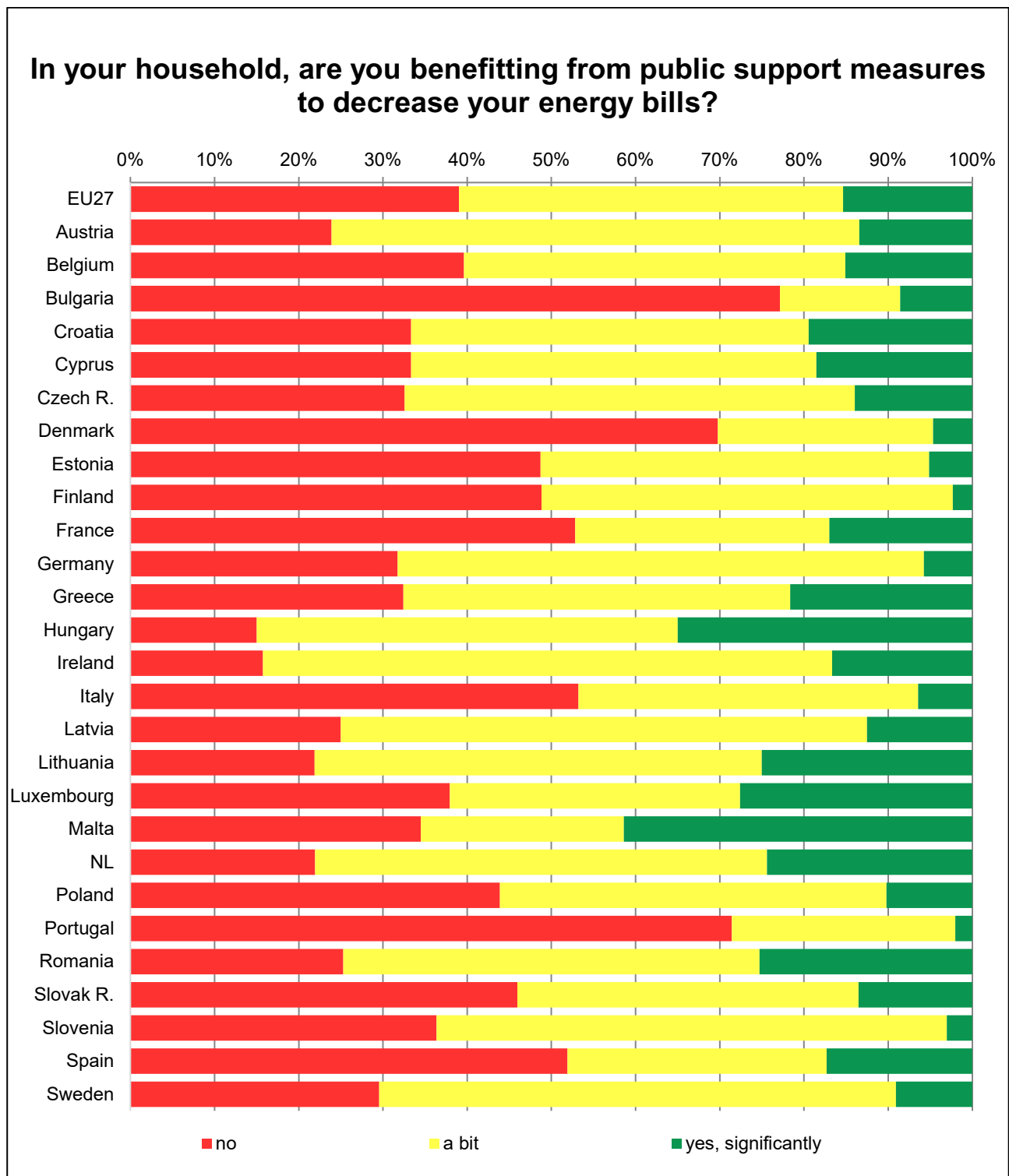


Measures against the energy price crisis

The timing of the survey coincided with a period in which many Member States had reacted to the very high energy prices with a range of different initiatives and programmes. Therefore, the survey enquired about these measures and their impacts.

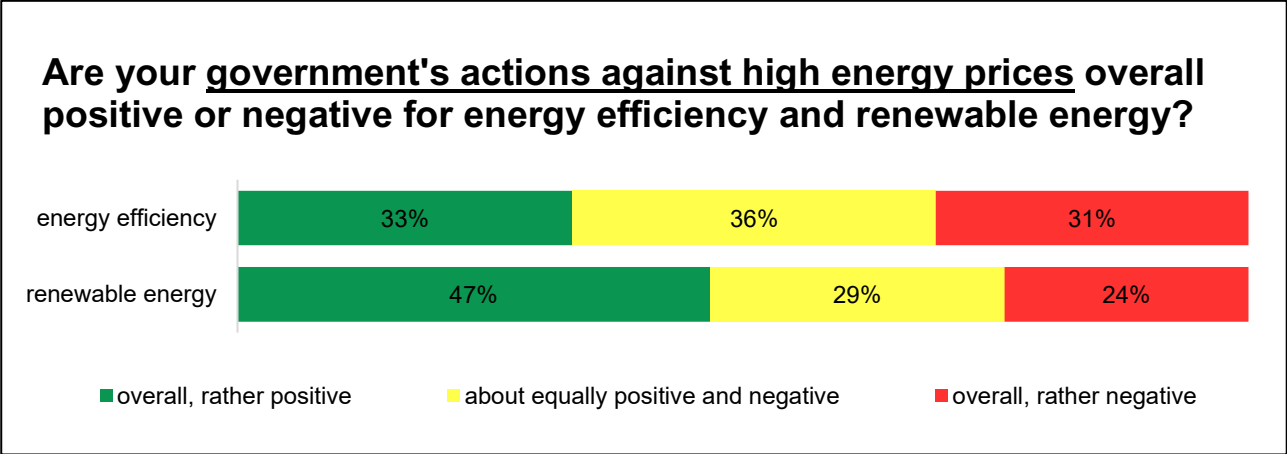
The first question enquired about whether the experts themselves were benefitting from public support measures to decrease their energy bills (e.g. price caps, support payments, subsidies). In the EU average, the majority were benefitting, however, 46 % only "a bit", and 15 % "significantly". 39 % of the experts were not benefitting from support.

The countries with the highest percentage of experts without benefits included Bulgaria, Portugal and Denmark. On the other end of the spectrum, Malta, Hungary and Luxembourg were the countries with the highest percentage of significant benefits.



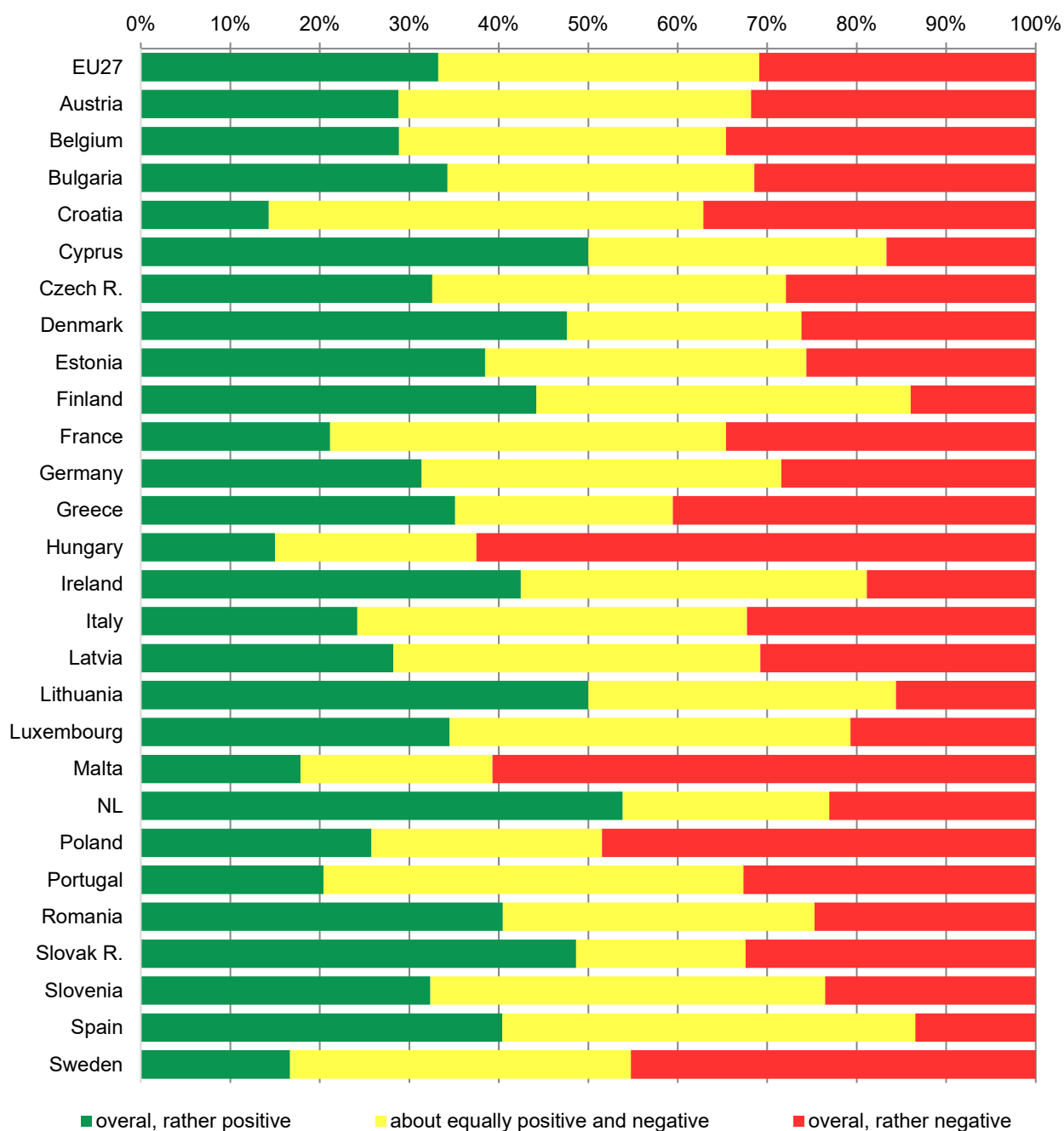
The second question related to the impacts of the governments' actions against high energy prices on energy efficiency and renewable energy. Instruments like price caps make investments in energy efficiency or renewable installations economically less attractive, whereas increased investment subsidies have the opposite effect.

For energy efficiency, about a third saw the impact as each "overall rather positive", "equally positive and negative" and "overall negative". For renewable energy, the result is more positive: 47 % saw overall positive impacts and only 24 % negative ones.



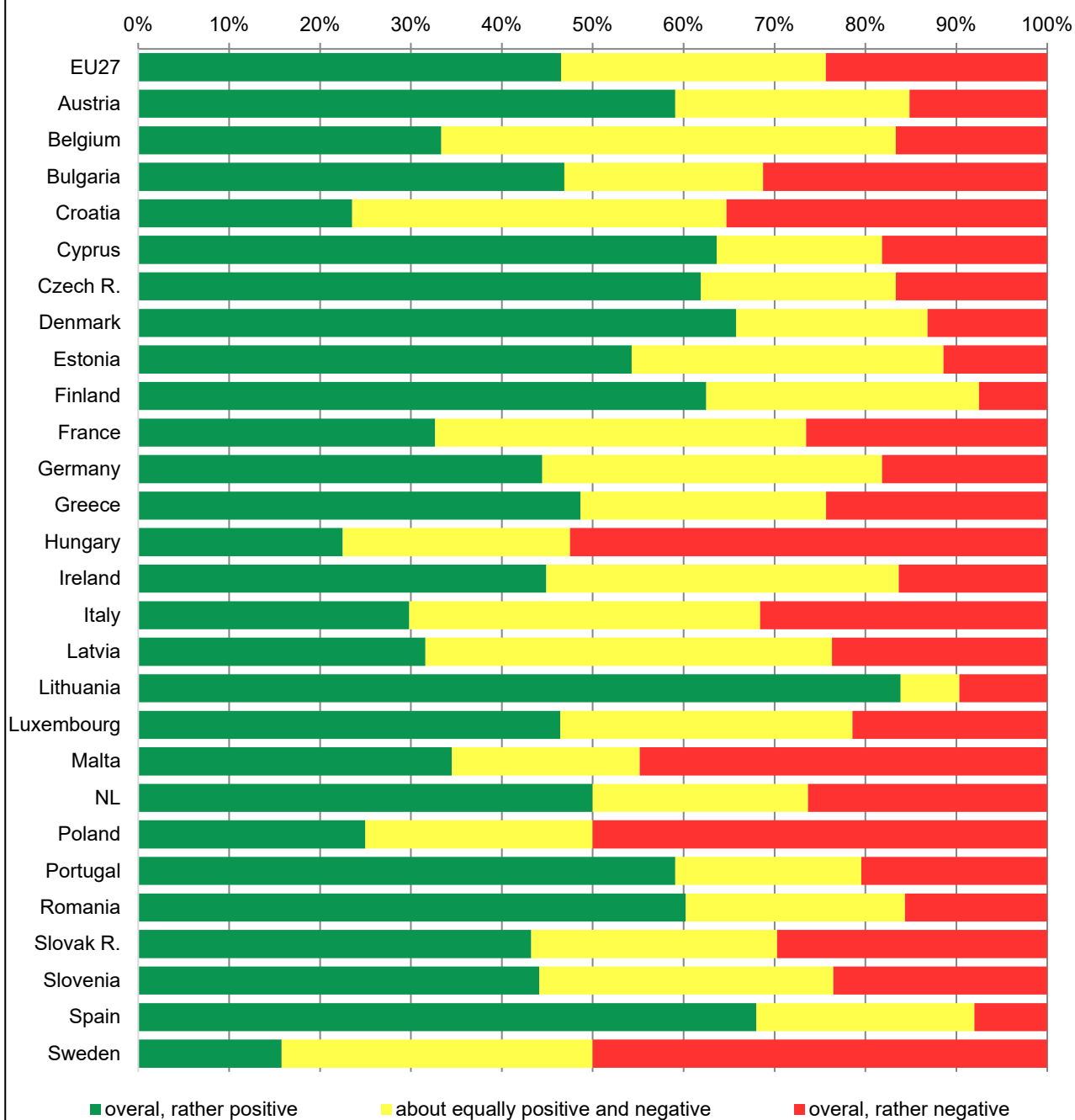
Among the Member States, the most negative impact on energy efficiency was seen in Hungary and Malta, the most positive in the Netherlands, Lithuania, Cyprus and the Slovak Republic.

Are your government's actions against high energy prices overall positive or negative for energy efficiency?



In the field of renewable energy, the by far most positive impact was reported for Lithuania, followed by Spain and Denmark. The most negative impacts were seen in Hungary, Sweden and Poland.

Are your government's actions against high energy prices overall positive or negative for renewable energy?



Inputs for positive narratives: The Green Deal in the public debate

A key aspect of the EEW project is better understanding which topics are most likely to constitute effective and strong narratives for energy efficiency and the energy transition in general as a key component of the Green Deal.

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

To achieve this understanding, the survey aimed to pinpoint subjects that are important in the general debate in each country, and thus most likely to resonate with decision makers and citizens and trigger reactions. It also looked at influential actor groups in each country and their current position regarding the Green Deal, since effective narratives need a wider support among stakeholders. The next two questions in this context addressed how the Green Deal and sustainable energy investments are dealt with in the general debate. And finally, the survey looked at the overall impact of the energy price crisis on achieving the climate neutrality targets.

Actor groups

The survey looked at influential actor groups in each country and their current position regarding the Green Deal, since effective narratives need a wider support from important stakeholder groups.

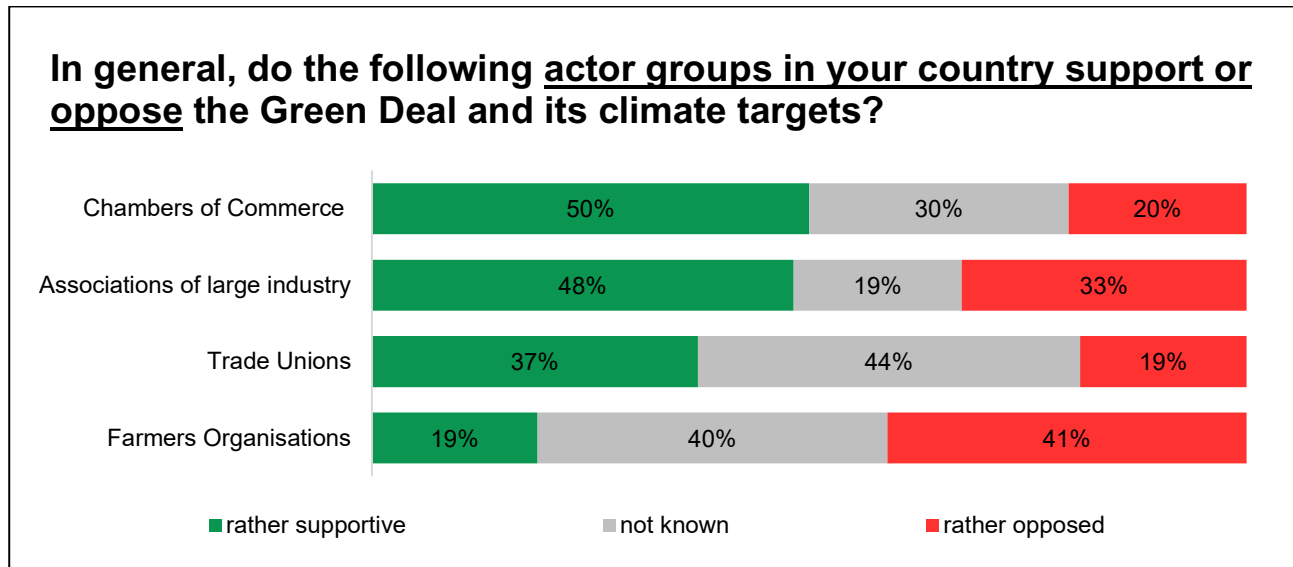
The 2020 survey showed, across countries, that the actor groups most influence on policy development and public debate include the associations of large industry (92 % of all experts rated them as very influential), Trade Unions (64 % very influential) and Chambers of Commerce (63 %). Having three actor groups that relate to the economy at the top of the ranking for influence shows the primacy of these topics in politics and society.

The 2023 survey assumed that these were still very influential actor groups and therefore included them in the survey. With the Green Deal, the importance of the farming sector and its role in climate protection has significantly increased in the public debate. Therefore, this group was also included in the current survey (in 2020, its importance was ranked in fifth place).

When looking at the attitude of these actor groups towards the Green Deal, a mixed picture emerges: Of the four groups, the Chambers of Commerce and the associations of large industry are seen as the most supportive (50 % and 48 % respectively). However, while only 20 % see the Chambers of Commerce as opposed to the Green Deal, the percentage is 33 % for the associations of large industry. Trade Unions are the group with the highest percentage of unknown position (44 %), 37 % see a positive attitude, 19 % a

negative one. In the perception of the experts, the most negative group are the farmers organisations with 41 % opposed and only 19 % in favour.

Compared to 2020, the perception of the positive and negative attitudes of the Chambers of Commerce remained quite stable. For the large industry, the positive values were quite similar while the negative percentages decreased from 40 to 33 %, for the Trade Unions from the negative percentages decreased from 23 to 19 %. The most significant change can be observed for the farmers organisations where the positive attitudes decreased from 26 to 19 % and negative ones increases from 35 to 41 %.



Looking at the Member States, a wide range of results emerges: The variation is most significant for the position of large industry and the Chambers of Commerce: In Finland, 90 % of experts see industry as supportive, followed by Sweden (83 %), Denmark (74 %) and Lithuania (72 %). On the other end, in Austria, 62 % see industry as opposed, followed by the Czech Republic (58 %). For the Chambers of Commerce, Finland (83 %), Malta (78 %) and Greece (71 %) see the highest positive attitude; Austria (68 %) sees by far the most negative one. In Sweden (50 %), Italy (37 %) and Romania (37%), farmers organisations have the highest values for a positive attitude; the Dutch experts see the highest negative attitude (87 %), followed by Ireland (79 %).

When weighting the results, according to the experts, the associations of large industry are seen as most supportive in Finland, Sweden and Denmark, and most opposed in Austria, the Czech Republic and Bulgaria. In Finland, Malta and Denmark, the attitude of the Chambers of Commerce is most positive, whereas it is most negative in Austria, Hungary and the Czech Republic. The most positive attitude for the Trade Unions can be observed for Denmark, Spain and Luxembourg, and the most negative one in Bulgaria, Austria and Poland. The experts in Sweden, Italy and Romania see the role of the farmers organisation as the most positive, the experts in the Netherlands, Ireland and Belgium see the most negative one.

In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets?

	most positive		most negative	
Association of large Industry	1. Finland		25. Bulgaria	
	2. Sweden		26. Czech R.	
	3. Denmark		27. Austria	
Chambers of Commerce	1. Finland		25. Czech R.	
	2. Malta		26. Hungary	
	3. Greece		27. Austria	
Trade Unions	1. Denmark		25. Poland	
	2. Spain		26. Austria	
	3. Lux		27. Bulgaria	
Farmers Organisations	1. Sweden		25. Belgium	
	2. Italy		26. Ireland	
	3. Romania		27. NL	

Looking at total results, 39 % of all actor groups are seen as having a positive attitude towards the energy transition and 28 % a negative one. The percentage of positive attitudes is highest in Finland (67 %), Sweden (61 %) and Denmark (56 %). The negative attitudes are by far lowest in Austria (59 %), followed by France (42 %) and the Czech Republic (41 %).

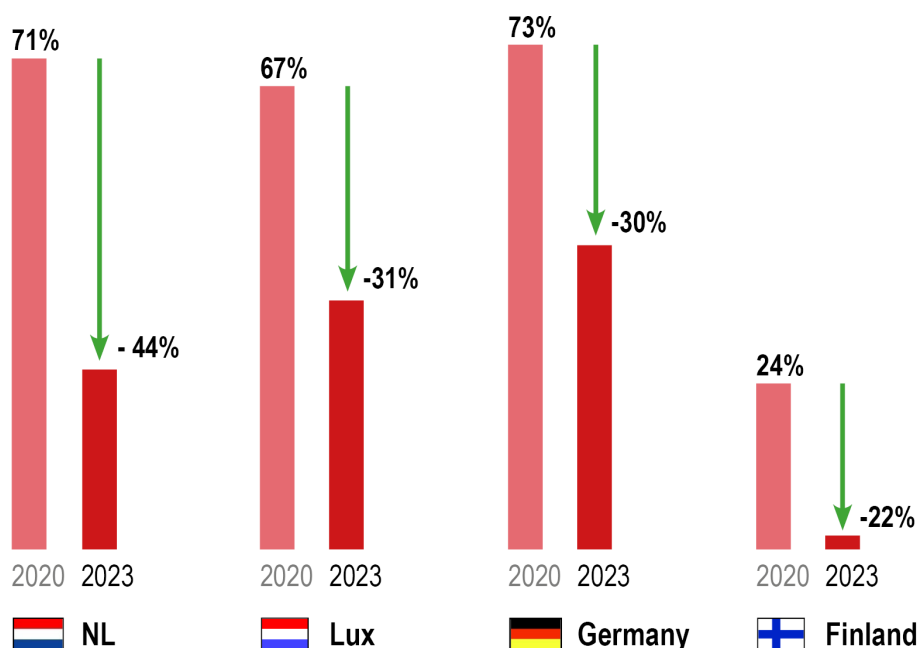
Comparing these results to the 2020 survey, some interesting results can be observed: In the overall average (across countries and actor groups), practically no change occurred. Looking across actors, the most positive changes occurred for the Netherlands, Finland and Germany, the most negative ones for Bulgaria, Portugal, Cyprus and Latvia.

In terms of actor groups, the largest change can be observed in industry and farming.

For the farmers associations, it is interesting to observe that there was negative change in attitudes practically in all Member States, the highest in Slovenia, Croatia and Austria.

While the average value for large industry associations only improved somewhat, the change is very significant in some countries: In the Netherlands, the percentage of opposing attitudes decreased by 44 % (!), in Luxembourg by 31 % and in Germany by 30 %. Also in several other countries positive developments were observed (Hungary, Sweden and Belgium).

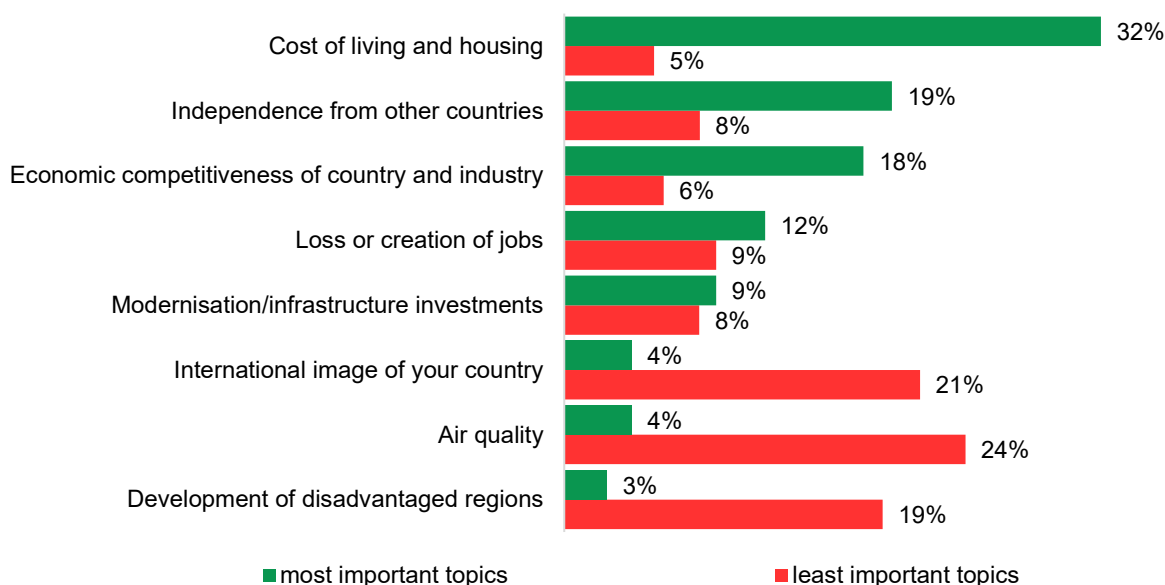
Associations of large industry: decrease in opposition



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 the EU, the most important topics are the cost of living and housing, mentioned by a third of the experts as one of two key topics in the public debate, followed by independence from other countries and economic competitiveness of the own country and its industry. As least important subjects in the public debate, the experts saw air quality, the international image of the own country and the development of disadvantaged regions.

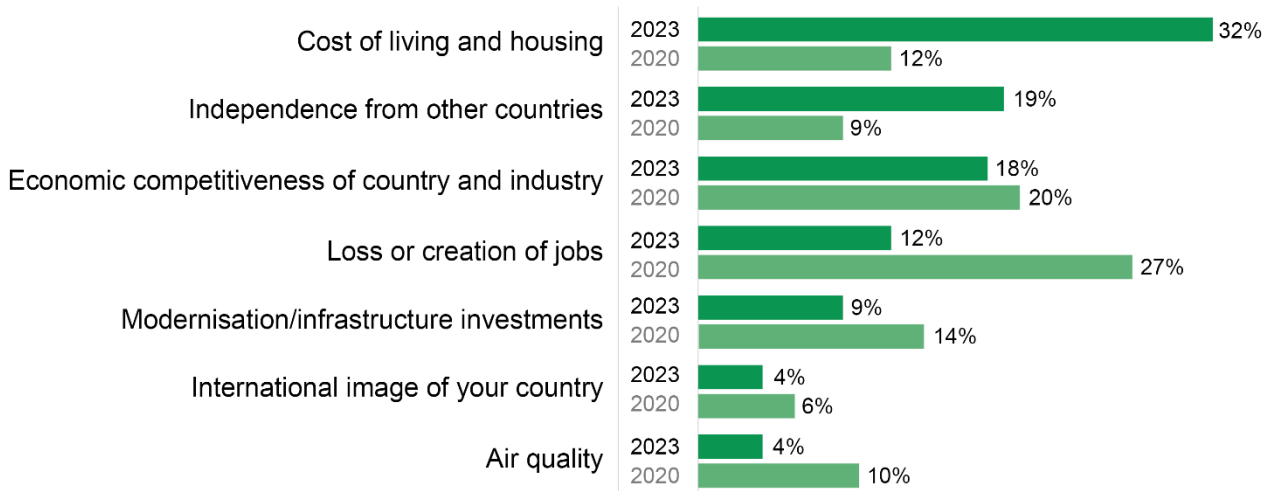
Independent of energy and climate, how important are the following topics in the general public debate in your country (media, politicians)?



This question was also included in the 2020 survey. Not surprisingly, given the changes in the economic and political framework (the Ukraine war and the resulting price crisis but also the price increases in many areas following the supply chain problems after Covid), there were some significant changes. The issue of jobs, which was the most important topic in 2020, was now only placed in fourth rank, whereas the cost of living and housing, which was number four in 2020, is now number one. The second change – also not surprisingly – was that the importance of independence from other countries increased, although not as much as one might have expected given the geopolitical situation.

This means that the relevance of specific narratives can change very quickly. Therefore, it is critically important that communication about the Green Deal as well as wider narratives are continuously adapted to the changing economic framework conditions and the fluctuations in the public debate. For the situation in 2020, a strong focus of narratives on the positive economic impacts of energy efficiency on jobs, industry and competitiveness was most suitable. In 2024, topics like energy cost stability or decreased import dependence are highly promising.

EU27: Importance of topics in the general public debate Changes 2020 – 2023



Looking at the Member States, it is evident how important the cost issue is across all countries: In 20 countries, it was seen as the dominant topic in the public debate. With one exception (Malta), independence from other countries is ranked highly (rank 1 or 2) in 12 countries, similar to the economic competitiveness of the own country and its industry.

For the loss or creation of jobs, a rather mixed picture emerges: While it is ranked second in Bulgaria, Croatia, Greece, Italy and Spain, it is only on rank 6 or 7 in the Czech Republic, Latvia, Lithuania, the Netherlands, Poland and the Slovak Republic.

The other subjects are of lower importance with some exceptions: Modernisation of infrastructure is of highest importance in the public debate in Romania. Air quality and the development of disadvantaged regions are not very present in the public debates with the exceptions of Malta, Poland and the Czech Republic.

These differences show clearly that narratives – other than the cost topic – need to vary significantly between Member States.

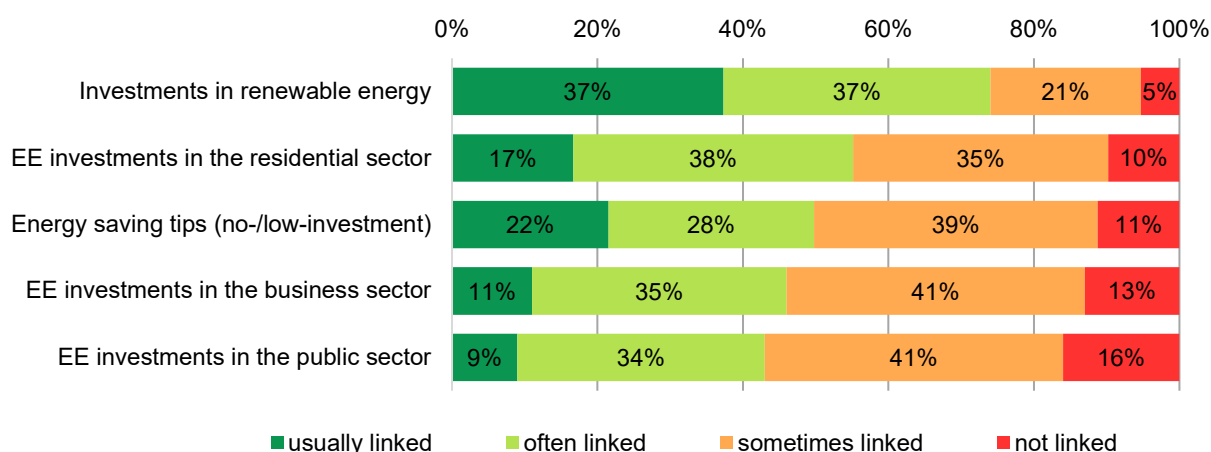
Importance of topics in the public debate: ranking within each Member State

	Costs of living and housing	Independence from other countries	Economic competitiveness	Loss or creation of jobs	Modernisation/infrastructure	International image of country	Air quality	Development of disadvantaged regions
EU27	1	2	3	4	5	6	7	8
Austria	1	2	2	4	5	6	7	7
Belgium	1	4	2	3	5	8	6	7
Bulgaria	1	3	5	2	4	8	6	7
Croatia	1	3	5	2	3	6	8	7
Cyprus	1	3	2	5	4	5	8	7
Czech R.	1	2	3	6	8	5	7	3
Denmark	2	1	3	5	4	6	8	7
Estonia	1	3	2	4	5	6	7	8
Finland	1	2	3	4	5	7	7	6

France	1	3	2	4	6	7	5	7
Germany	1	3	2	5	4	6	7	8
Greece	1	3	5	2	4	6	8	7
Hungary	2	1	3	4	6	5	7	8
Ireland	1	4	2	3	5	6	8	7
Italy	3	1	4	2	5	7	6	8
Latvia	1	2	3	7	4	4	8	4
Lithuania	2	1	4	7	3	5	5	7
Lux	1	4	2	3	5	6	7	8
Malta	1	6	2	4	5	7	3	7
NL	1	2	3	6	4	8	5	7
Poland	2	1	5	7	4	6	3	8
Portugal	1	3	2	5	5	4	7	7
Romania	2	3	5	4	1	8	6	7
Slovak R.	1	2	4	6	3	7	8	5
Slovenia	2	3	1	4	4	7	6	7
Spain	1	3	4	2	5	6	6	8
Sweden	1	3	2	4	4	6	8	6

Another question dealt with the energy price crisis and whether it is being connected to energy cost reduction measures in the public debate (media, politicians) in each country. Clearly, investments in renewable energy were being mentioned most often across EU countries (74 % usually or often linked). This was followed by energy efficiency investments in the residential sector (55 %), energy saving tips – actions that require no or low costs – (50%), and energy efficiency investments in the business sector (46 %) and the public sector (43 %).































In the general public debate in your country (media, politicians), is a connection being made between the energy price crisis and the following energy cost reduction measures?



Looking at weighted indicators (the most positive answer by 100 %, the least positive by 0 %), the highest values for renewable energy investments were reported from Lithuania, Germany and Cyprus. Energy efficiency investments in the residential sector were most often mentioned in the Netherlands, Belgium and Estonia, and energy saving tips most often in Sweden, the Netherlands and Finland. Investments in the business sector were

most often discussed in the Netherlands, Lithuania and Sweden, and in the public sector most often in Romania, Lithuania and the Slovak Republic.

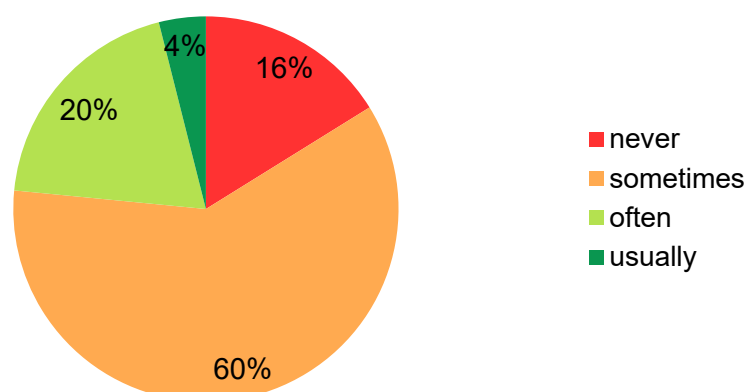
In the general public debate in your country (media, politicians), is a connection being made between the energy price crisis and the following energy cost reduction measures?

	most often linked		most seldom linked	
Investments in renewable energy	1. Lithuania		25. Hungary	
	2. Germany		26. Malta	
	3. Cyprus		27. France	
Investments in energy efficiency in the residential sector	1. NL		25. Portugal	
	2. Belgium		26. Malta	
	3. Estonia		27. Hungary	
Energy saving "tips" (no- or low investment measures)	1. Sweden		25. Poland	
	2. NL		26. Bulgaria	
	3. Finland		27. Malta	
Investments in energy efficiency in the business sector	1. NL		25. Poland	
	2. Lithuania		26. Latvia	
	3. Sweden		27. Malta	
Investments in energy efficiency in the public sector	1. Romania		25. Hungary	
	2. Lithuania		26. Malta	
	3. Slovak R.		27. Italy	

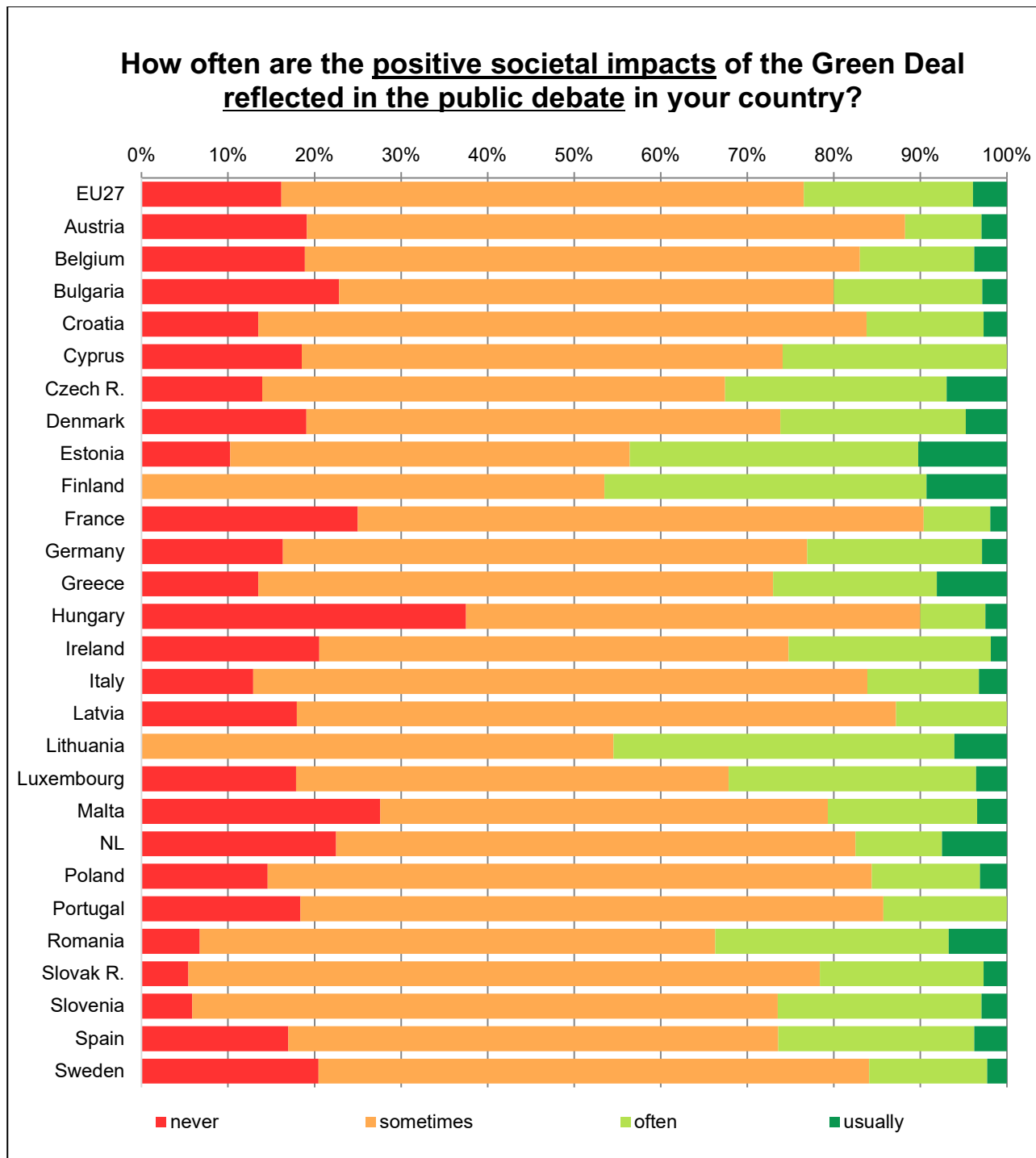
The third question relating to the public debate aimed at finding out how often the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") are reflected in the public debate in each country.

The results are very sobering and show how little positive narratives have yet been embedded in the general debate across the EU. Only 24 % of experts state that the positive impacts are mentioned often or usually.

How often are the positive societal impacts of the Green Deal reflected in the public debate in your country?

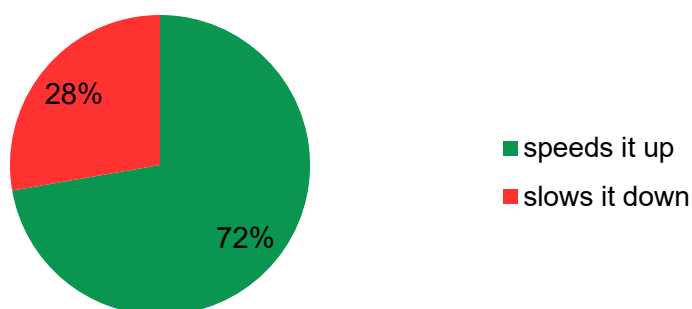


Looking at the Member States, there are some differences. However, these are significantly smaller than in many other questions in the survey. Using a weighted indicator (the most positive answer by 100 %, the least positive by 0 %), the least positive situation was observed in Hungary, France and Austria. The countries where the link to the benefits of the Green Deal is made most often include Finland, Lithuania and Estonia.



The final question looked at the overall impact of the energy crisis on the achievement of the climate neutrality target. More than 70 % of the experts believe that the crisis will speed up the transformation process, 28 % think it will slow it down.

How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



The highest positive values can be found in Luxembourg (93 %), the Netherlands (88 %), Lithuania (88 %), Finland (86 %), Bulgaria (84 %) and France (83%). The most negative impact is seen in Greece (53 %), the Czech Republic (48 %), Croatia (40 %) and Spain (40 %).

How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



Annex 1: Survey results by Member State

The following chapter shows the results of the survey in each Member State (countries in alphabetical order).

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.

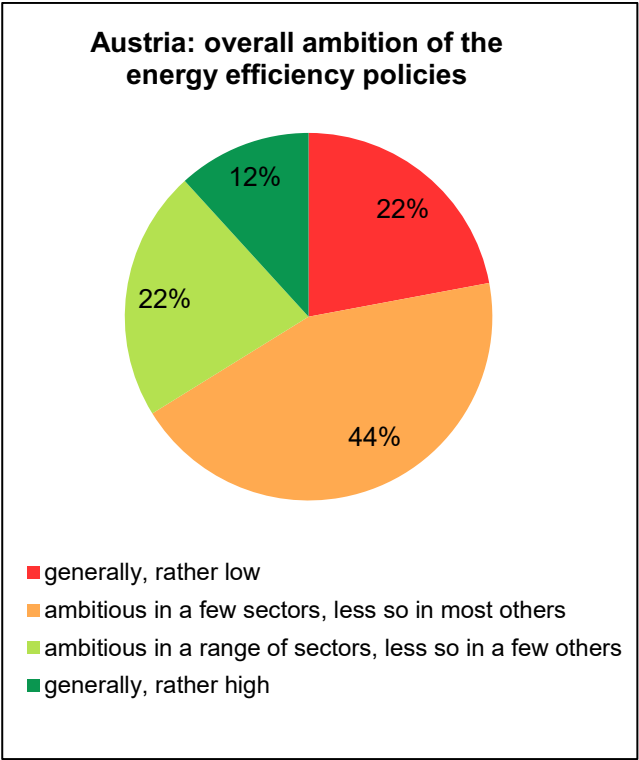
The focus of the survey was to get an impression on the progress of energy efficiency policies in the last years and not to establish a ranking of absolute levels of energy policy developments. Additionally, it gathered inputs for narrative development.

Surveys are always "snapshot pictures" that are influenced by current events. The survey was carried out between March and July 2023. Country specific and overall results should be seen in this timing context.

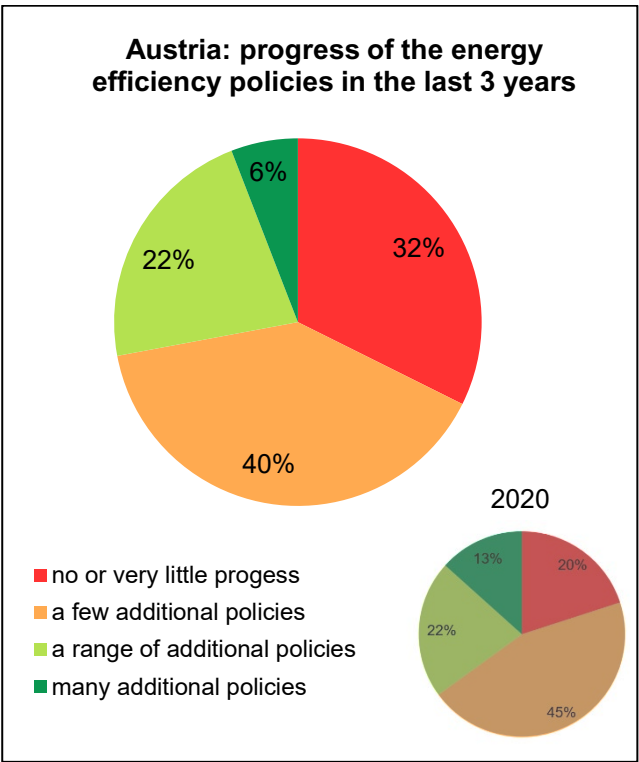
Austria



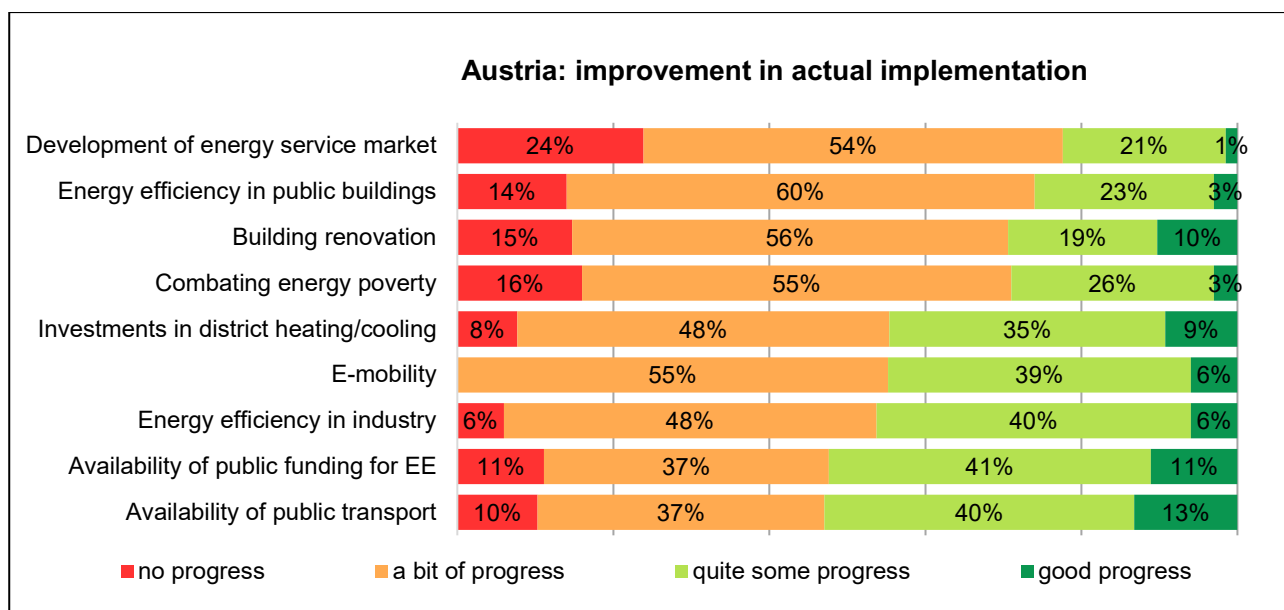
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



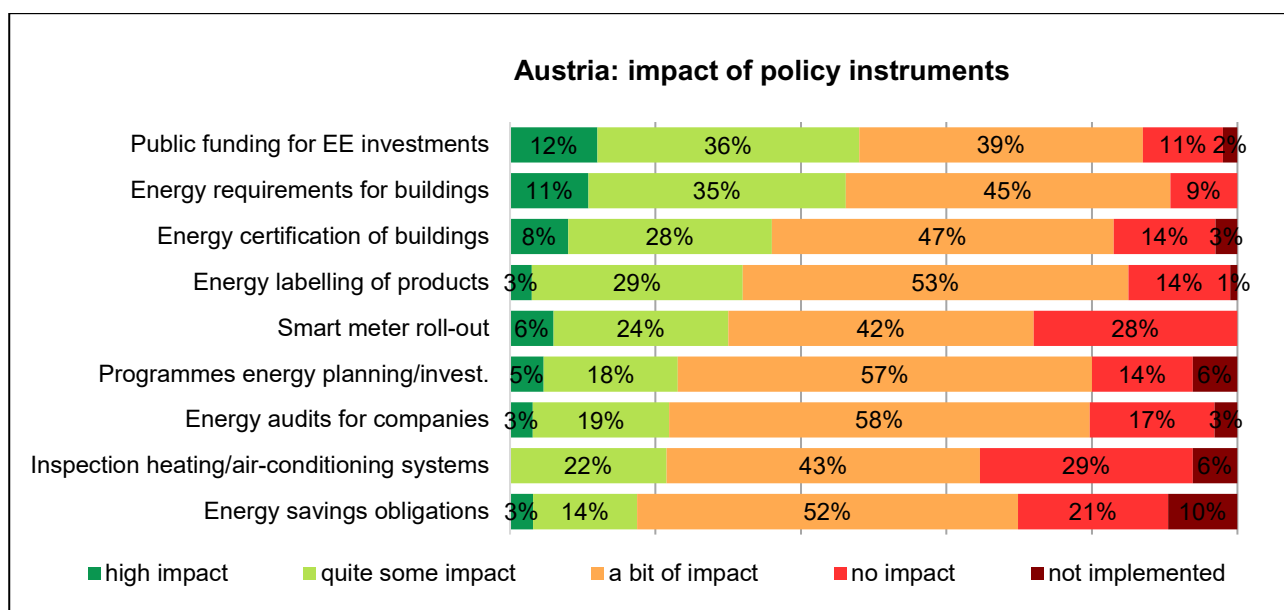
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



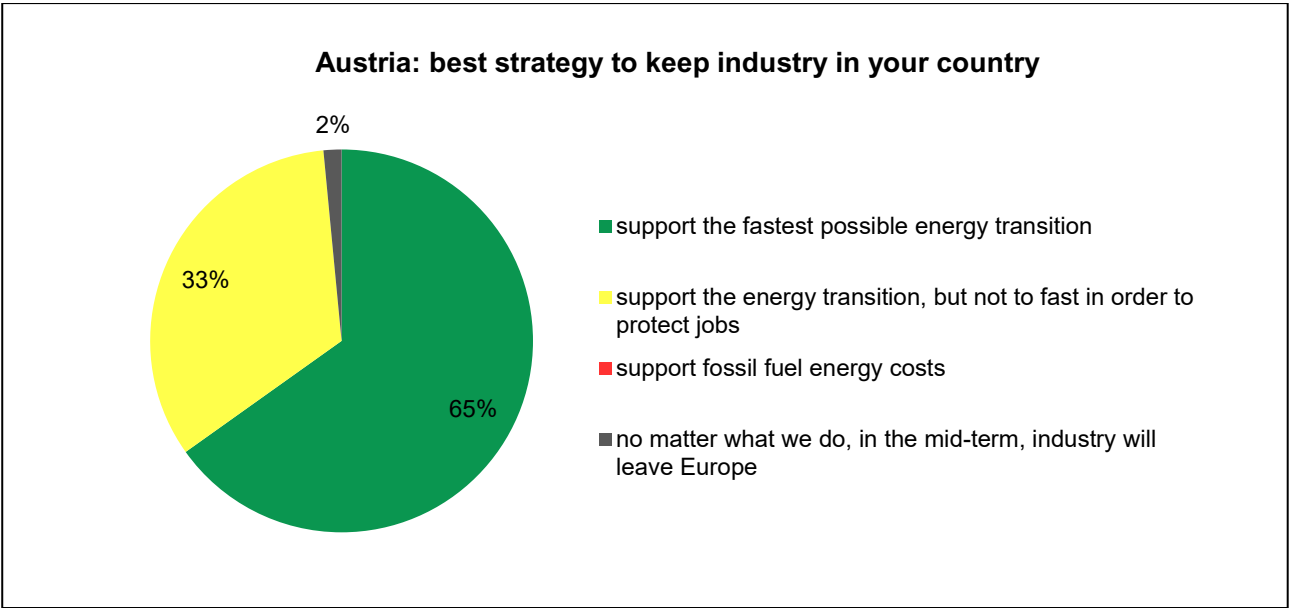
How do you see the improvements in the actual implementation (scale/rate) in your country in the last 3 years in the following fields?



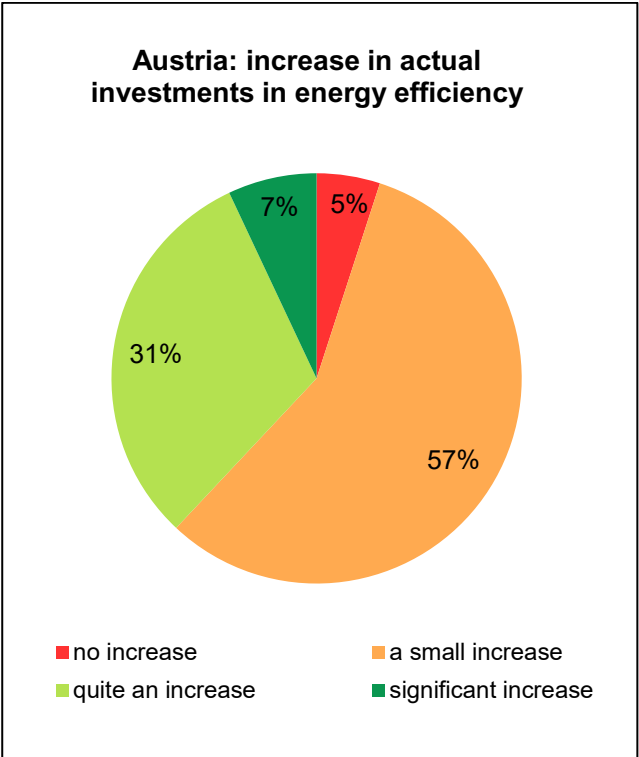
How big is the positive impact of the following policy instruments in your country?



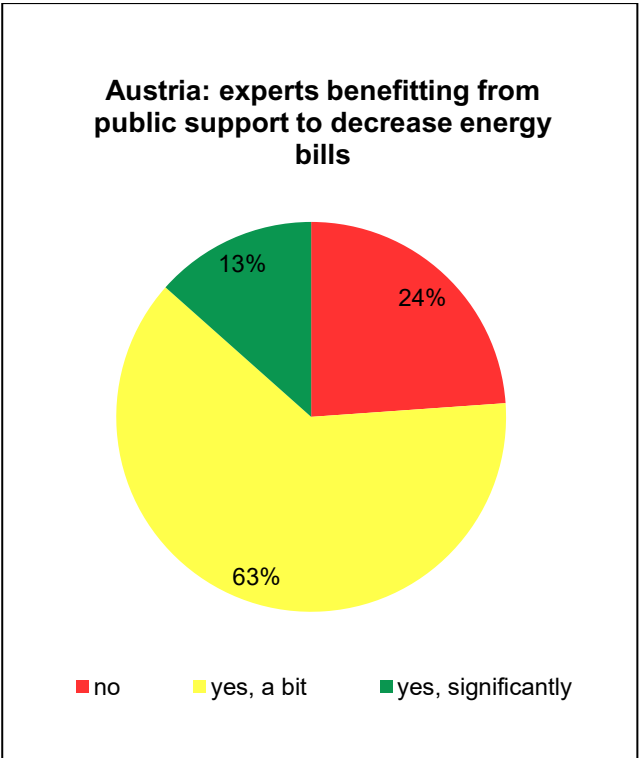
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



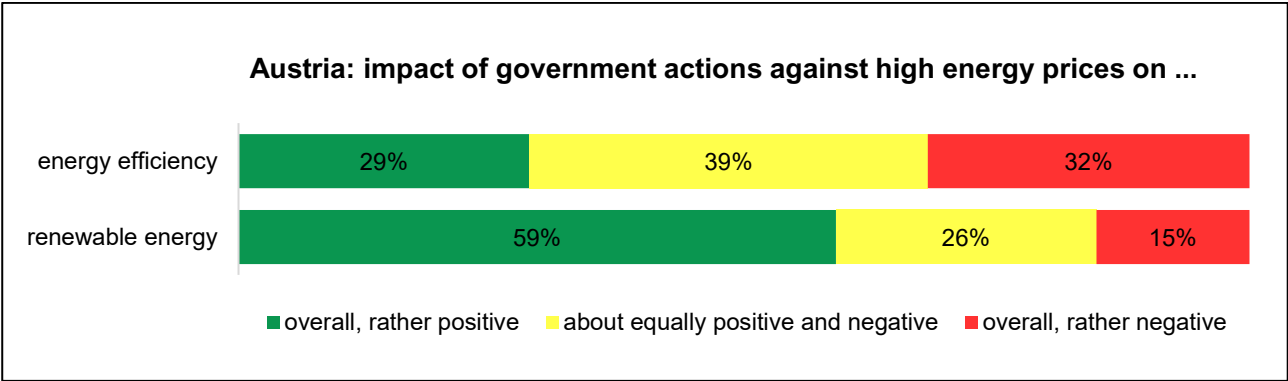
Overall, do you observe an increase in actual investments in energy efficiency (or at least the preparation of such investments) in your country?



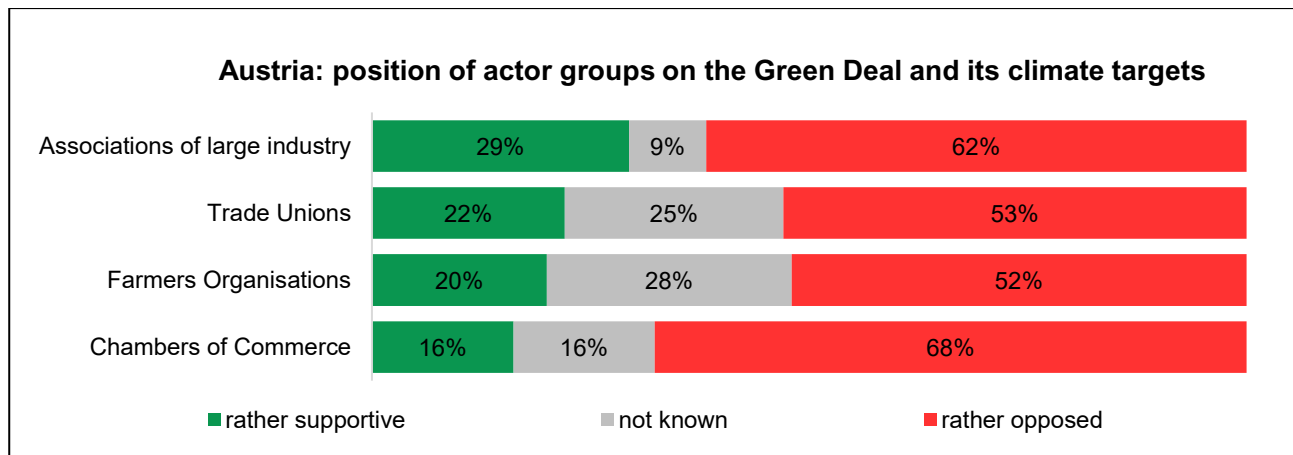
In your household, are you benefitting from public support measures to decrease your energy bills (e.g. price caps, support payments, subsidies)?



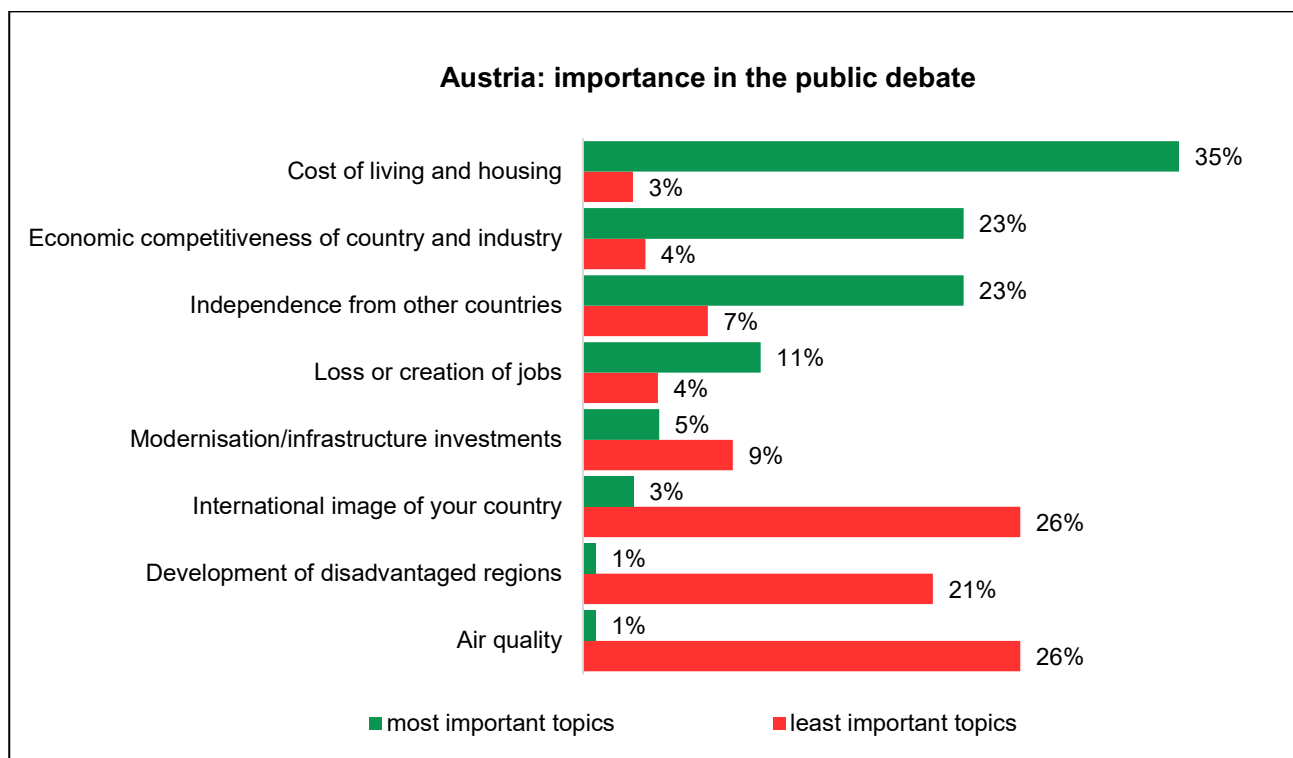
In your opinion, are your government's actions against high energy prices overall positive or negative for energy efficiency and renewable energy?



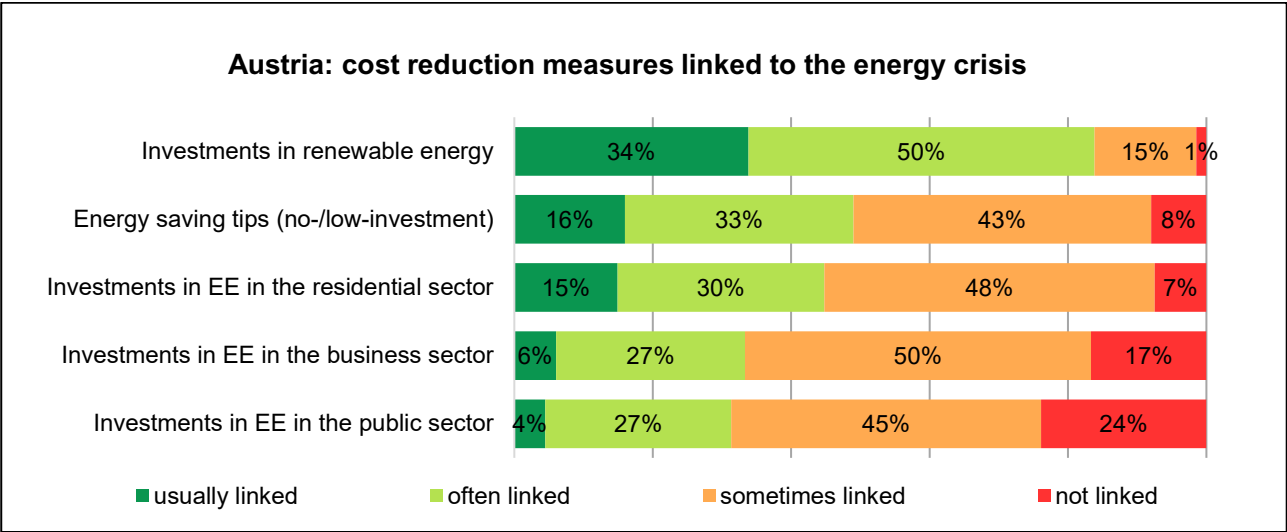
In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets? What is their position?



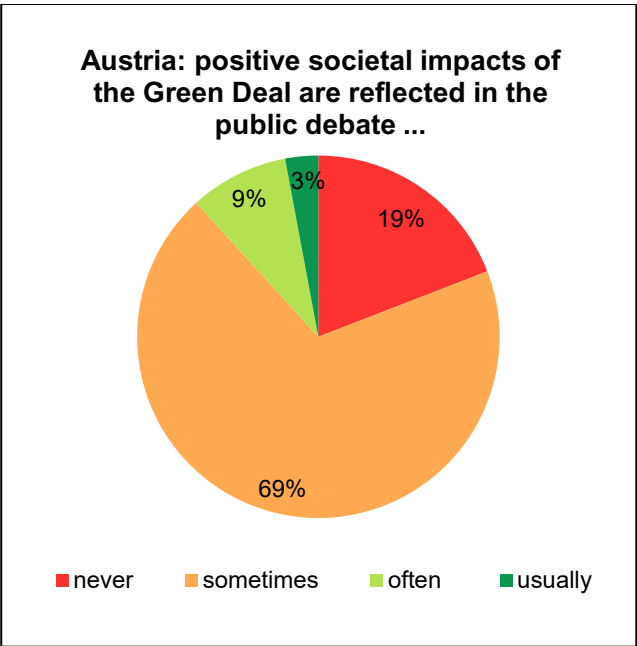
Independent of energy and climate, how important are the following topics in the general public debate in your country (media, politicians - not your personal opinion)? Please select the two most and the two least important topics.



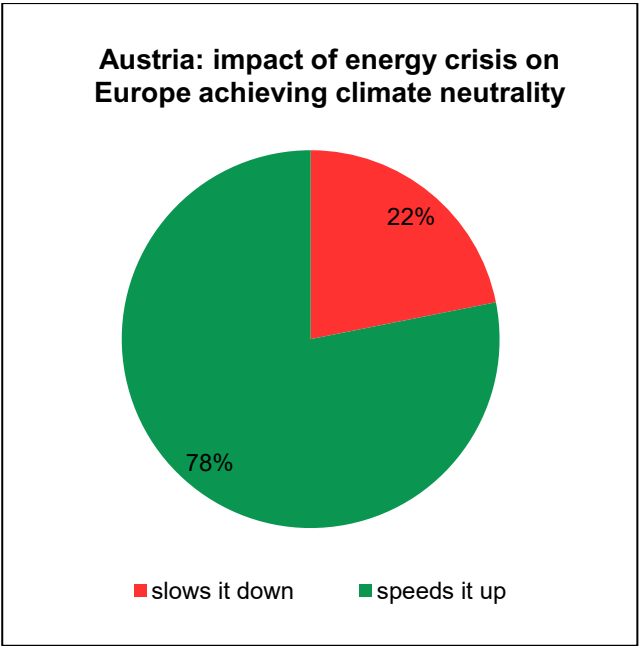
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How often are the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") reflected in the public debate in your country?



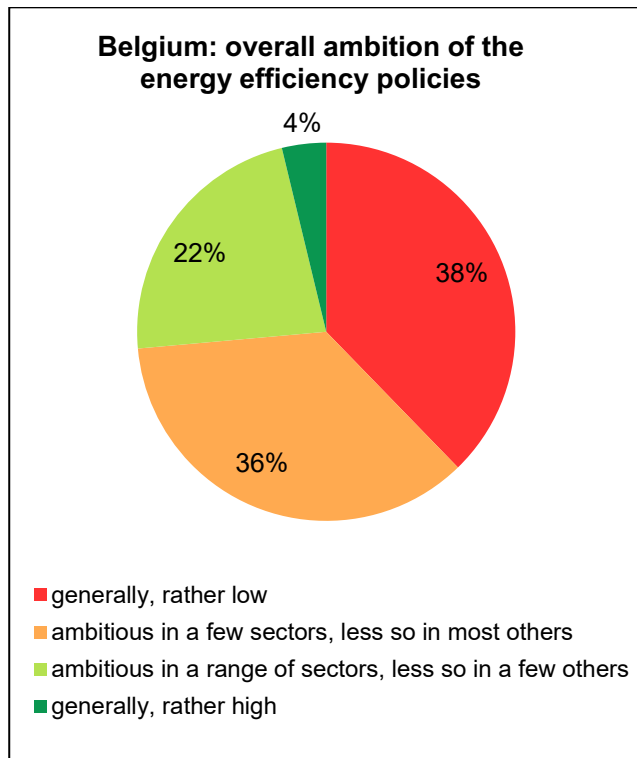
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



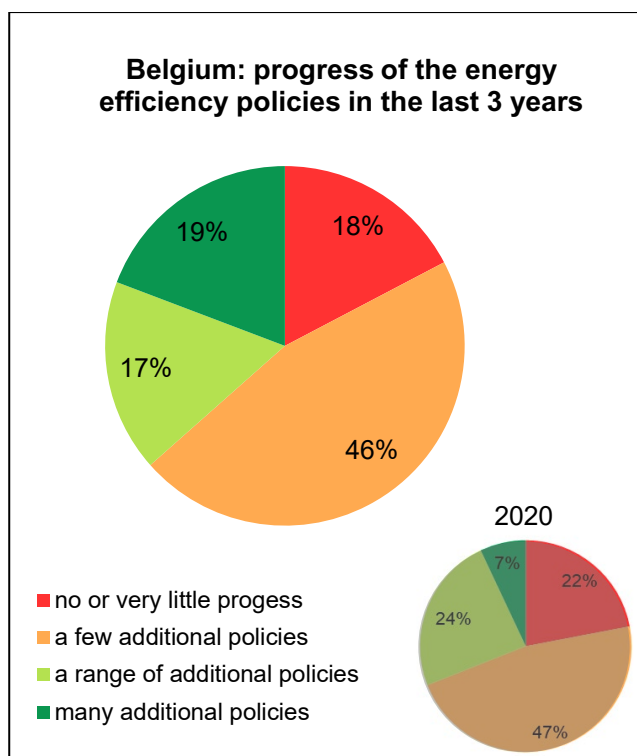
Belgium



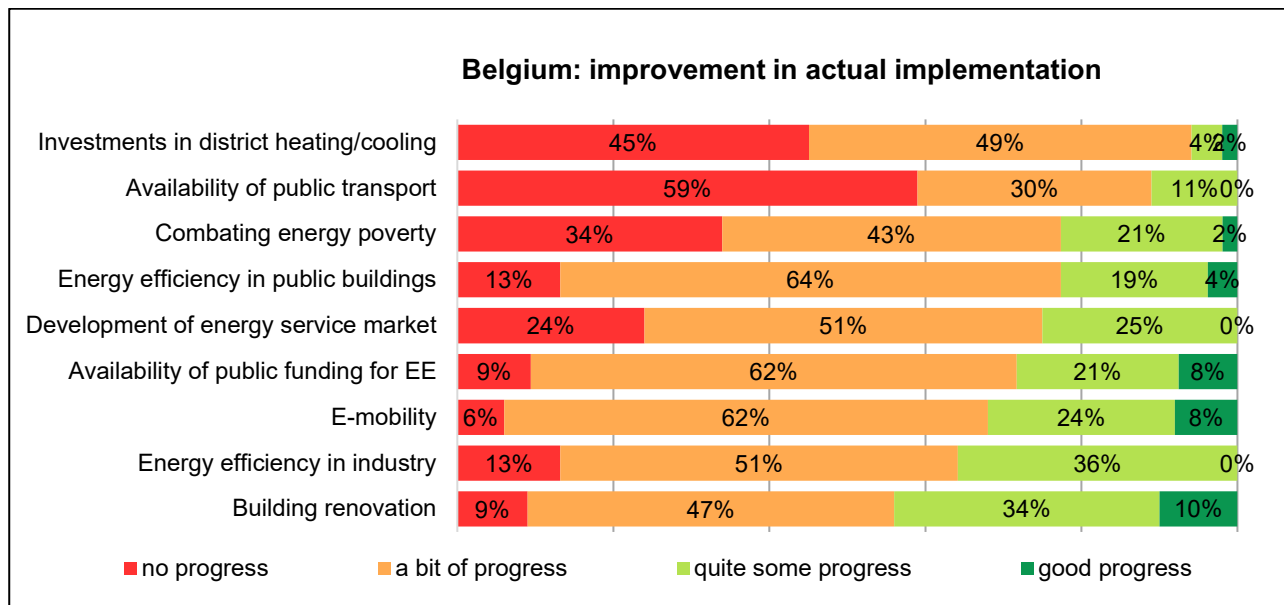
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



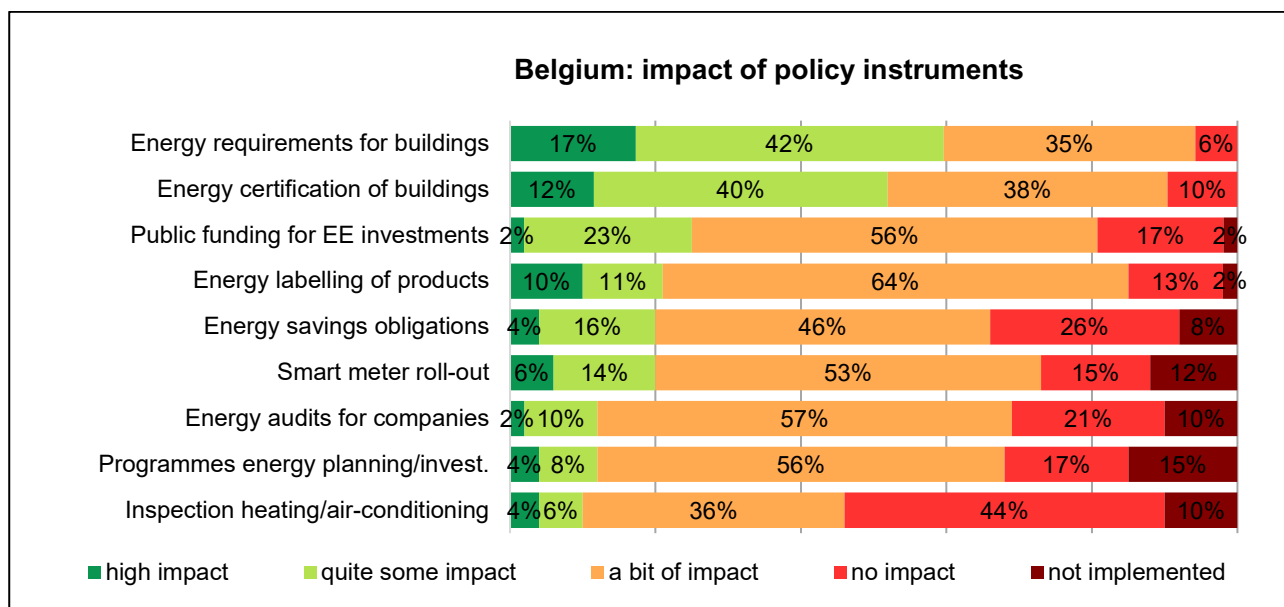
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



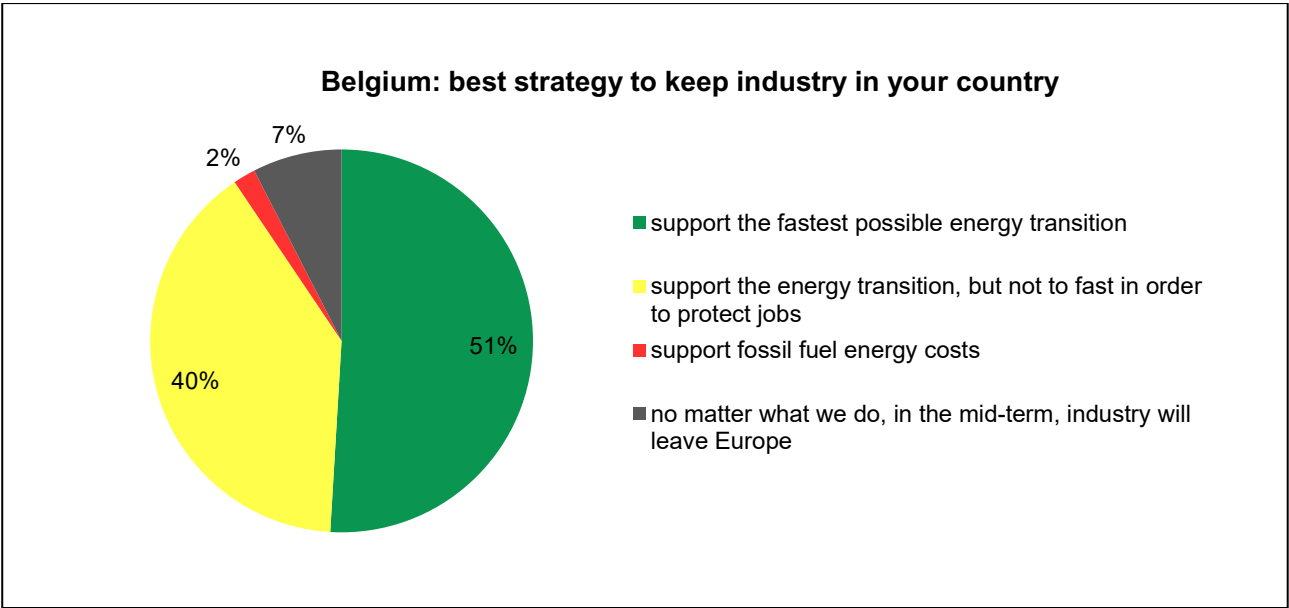
How do you see the improvements in the actual implementation (scale/rate) in your country in the last 3 years in the following fields?



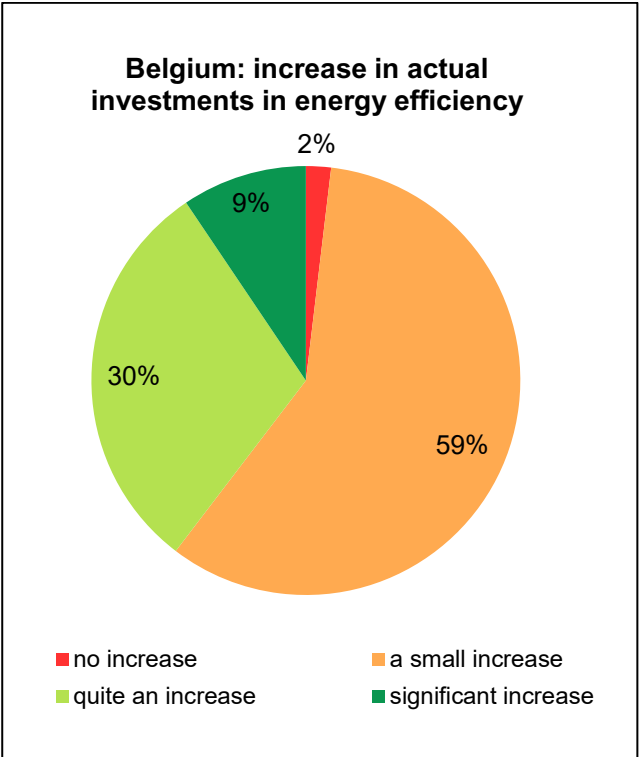
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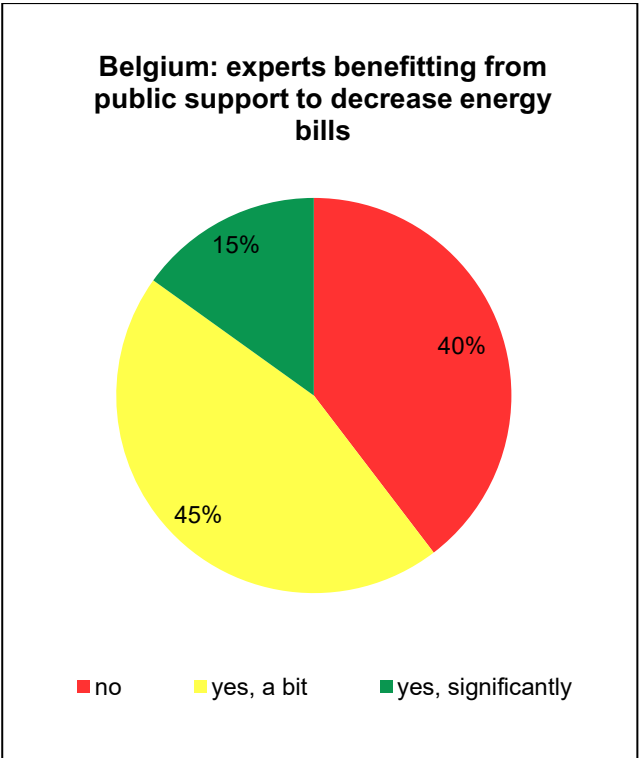
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



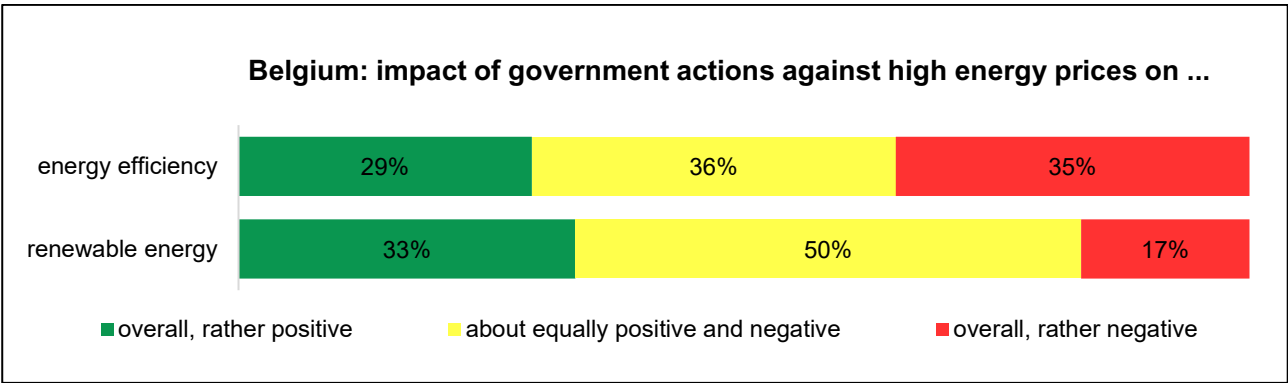
Overall, do you observe an increase in actual investments in energy efficiency (or at least the preparation of such investments) in your country?



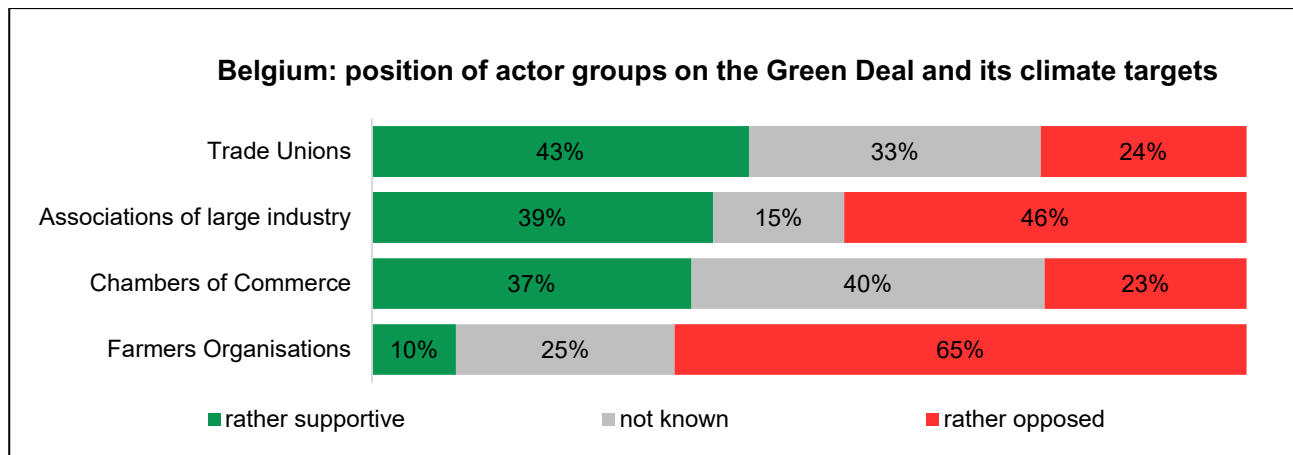
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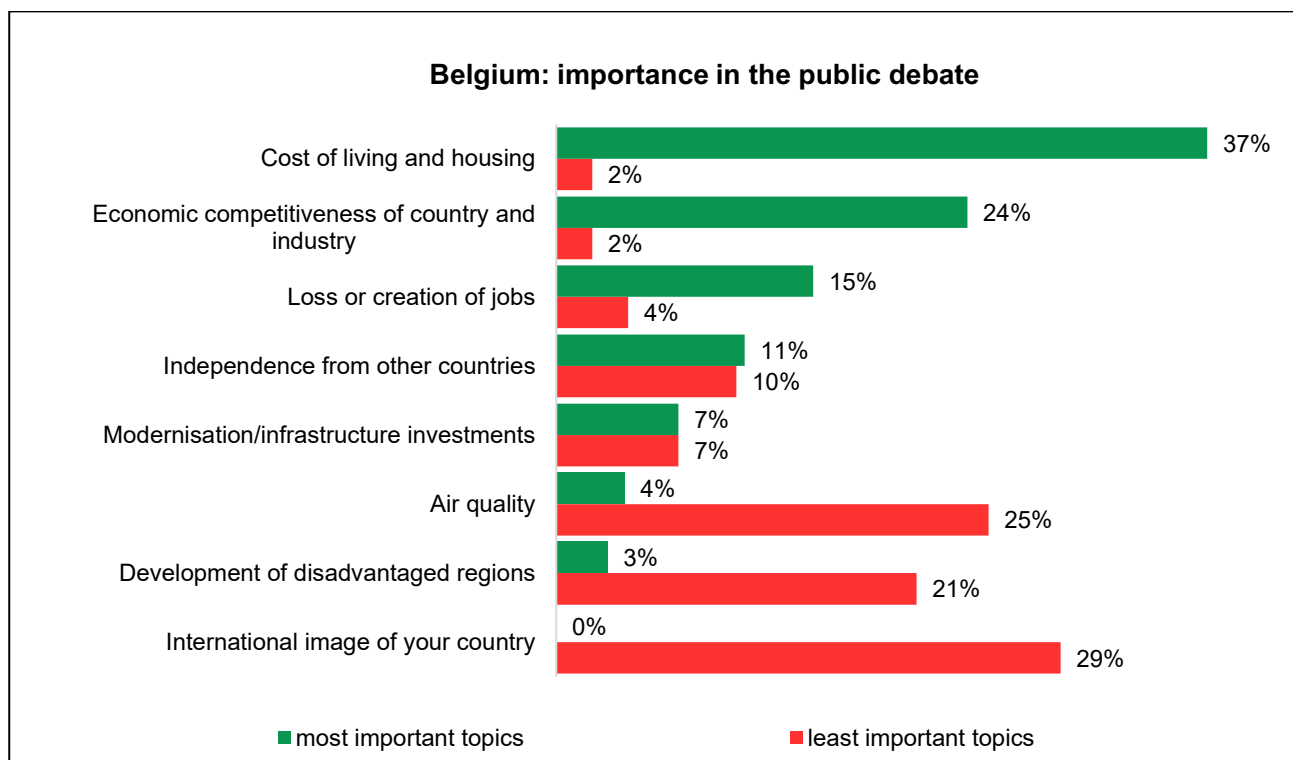
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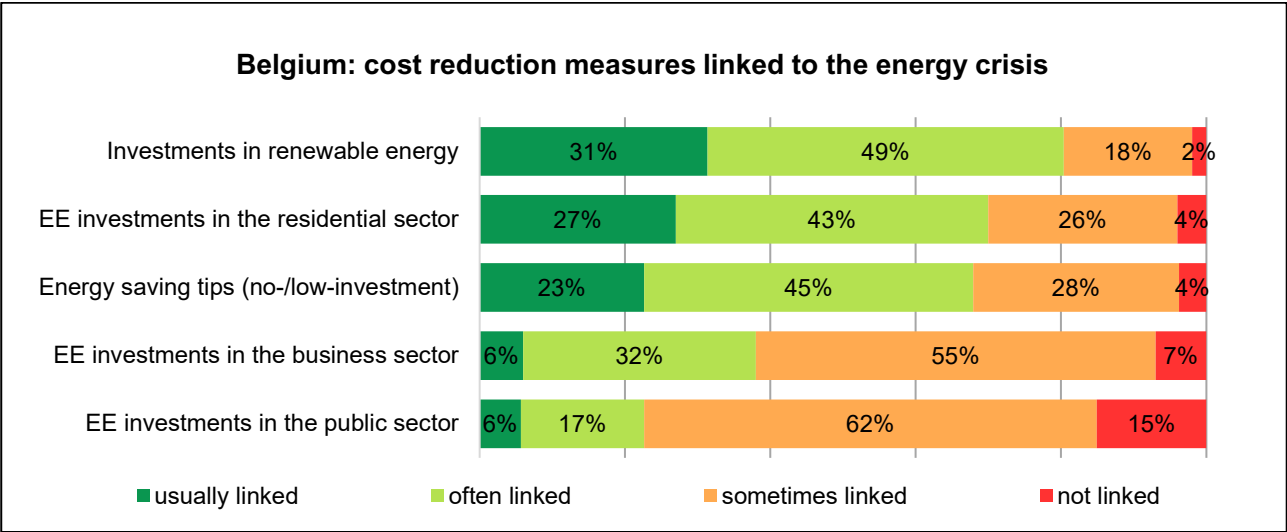
In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets? What is their position?



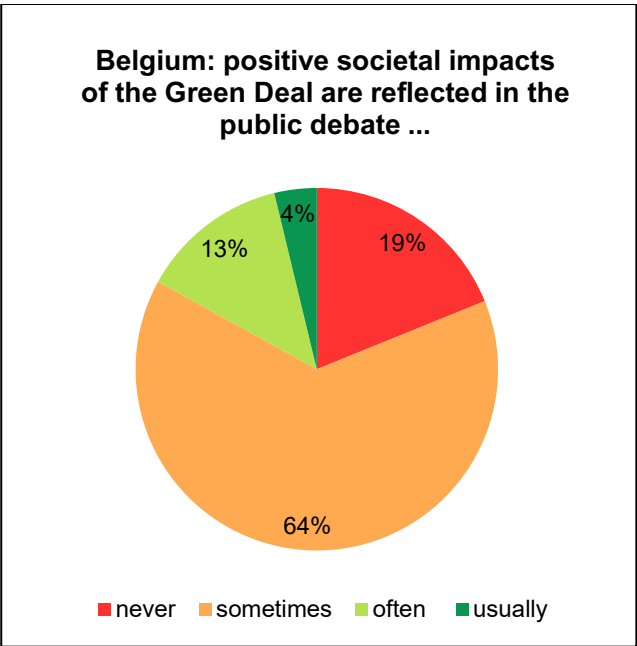
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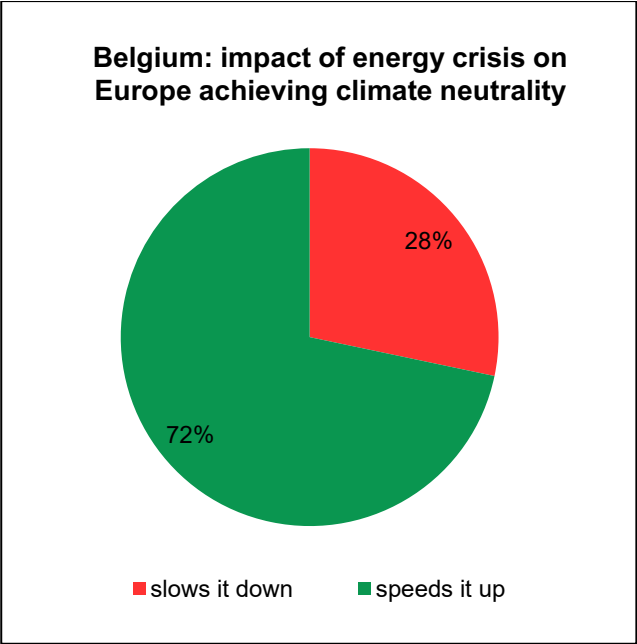
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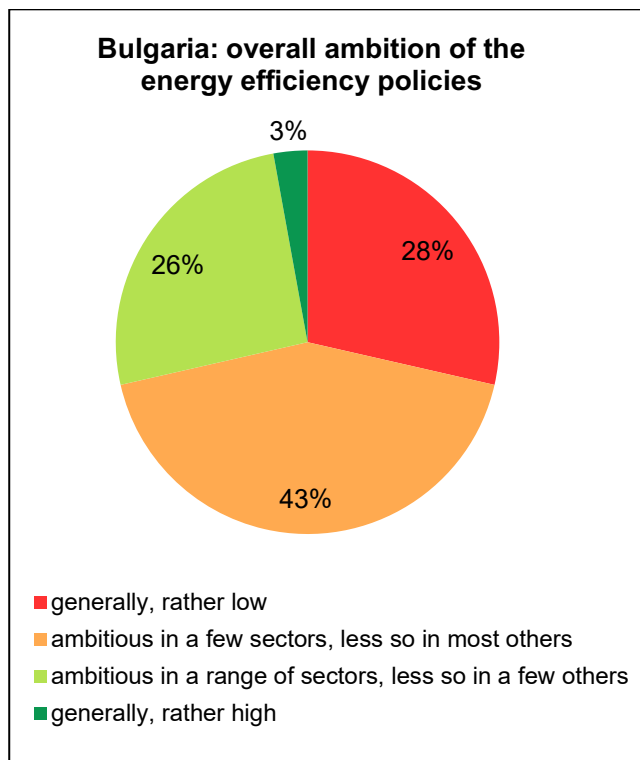
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



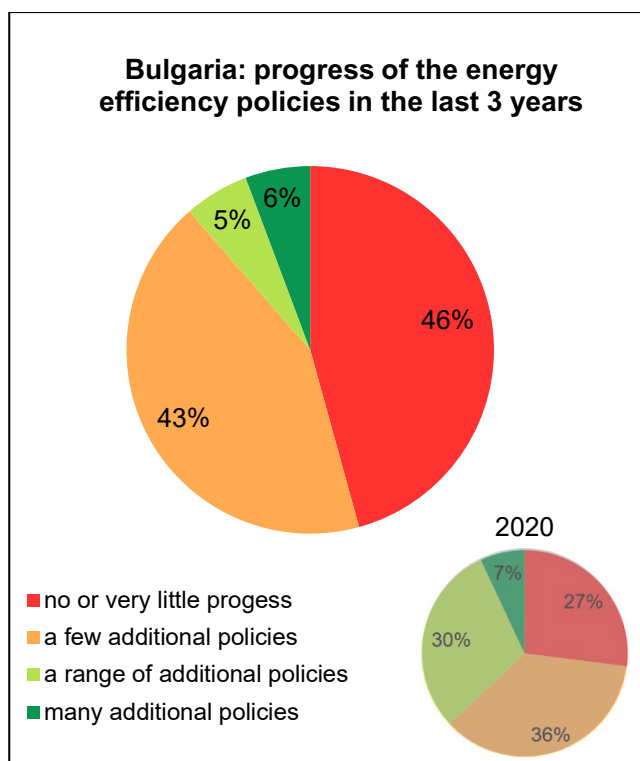
Bulgaria



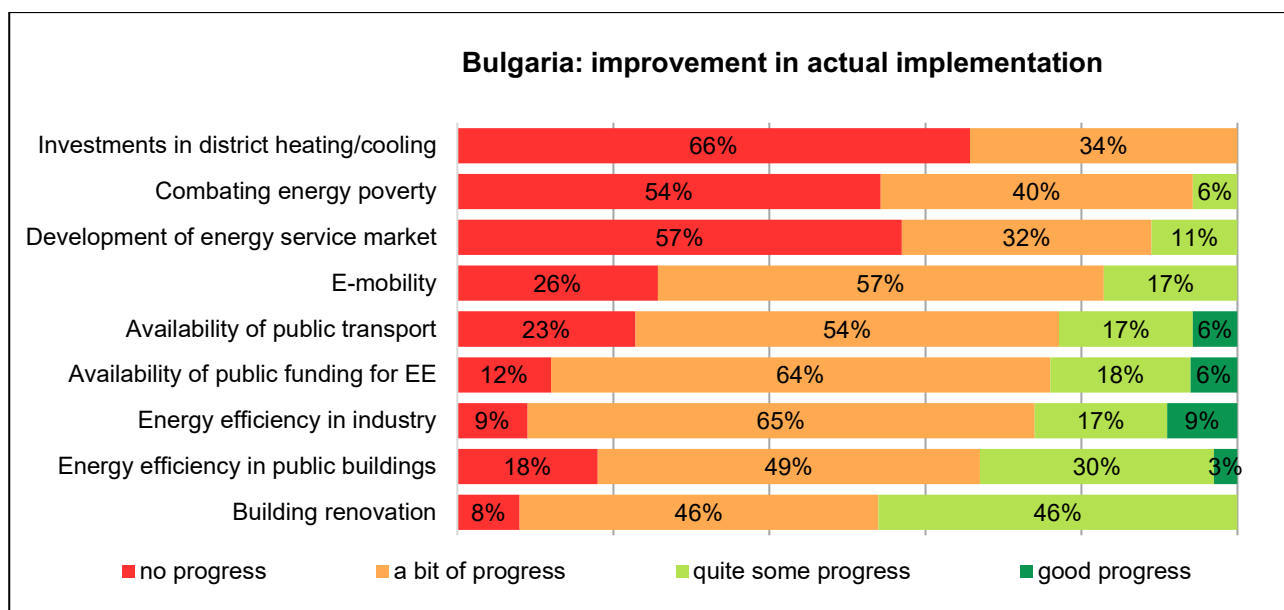
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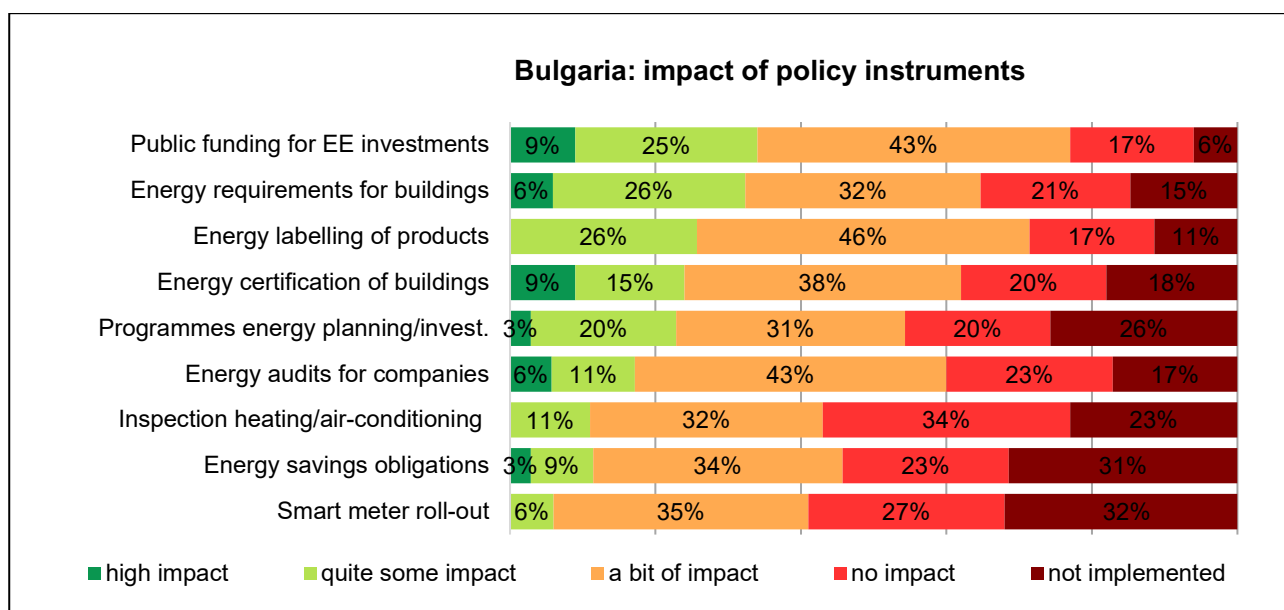
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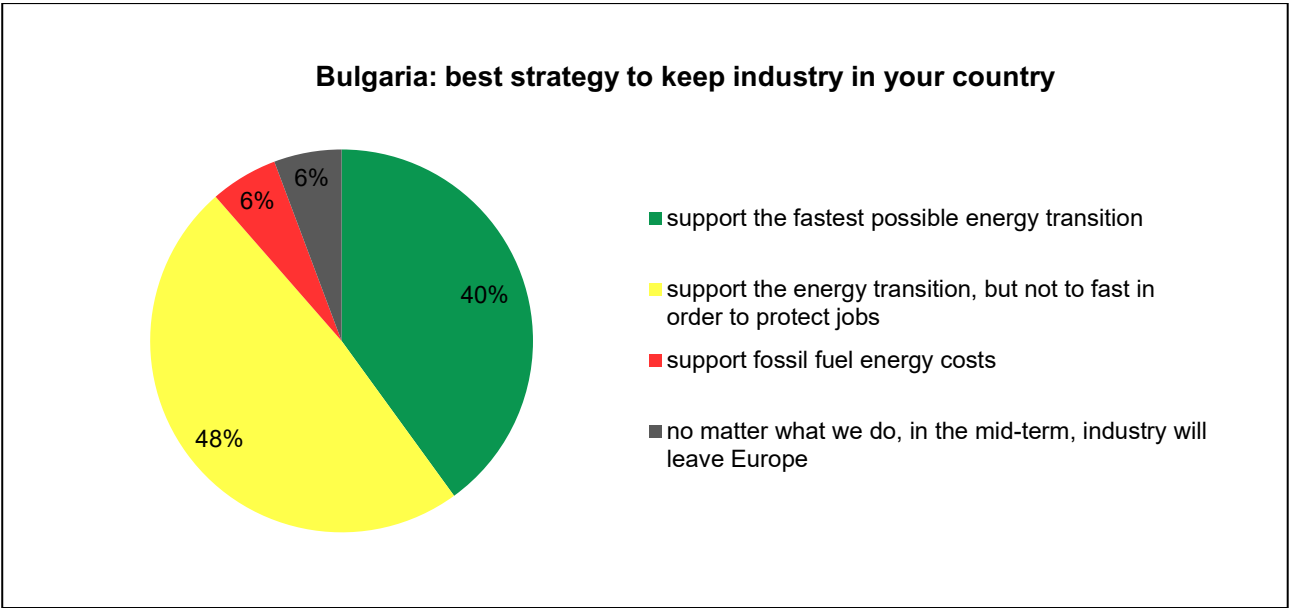
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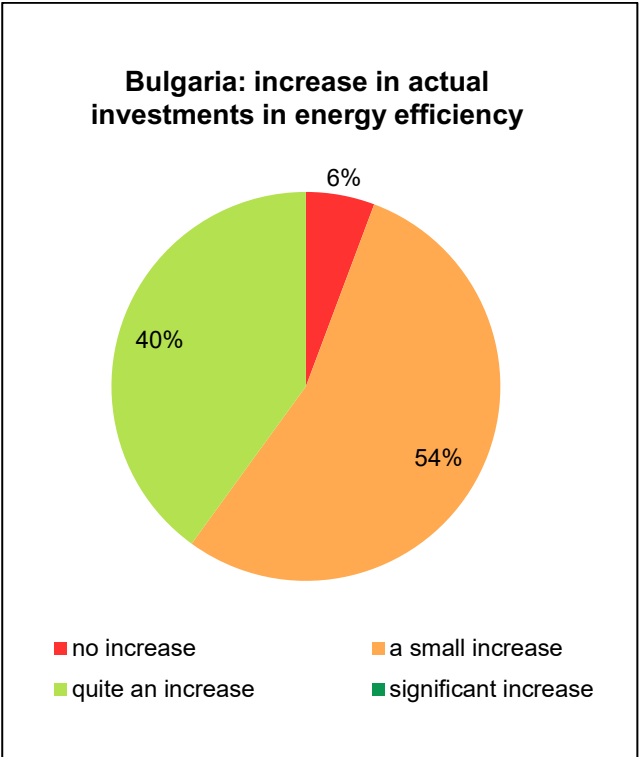
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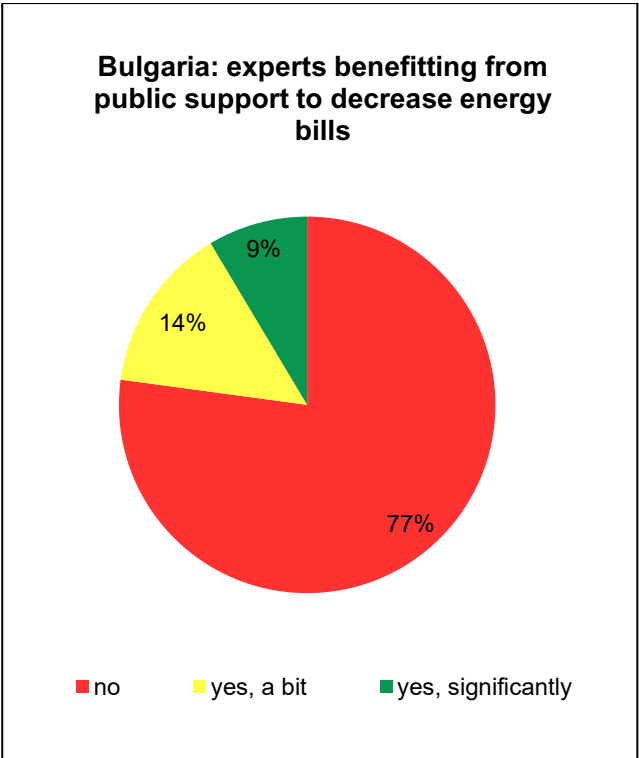
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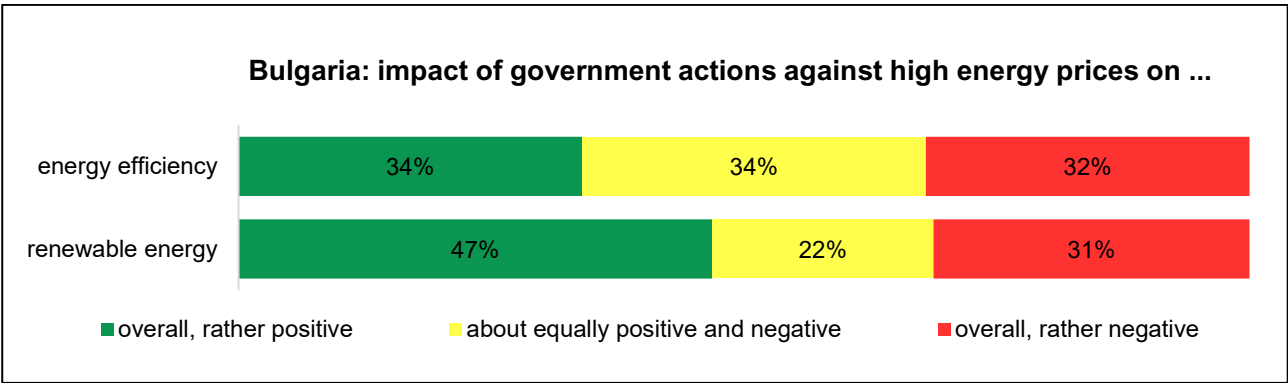
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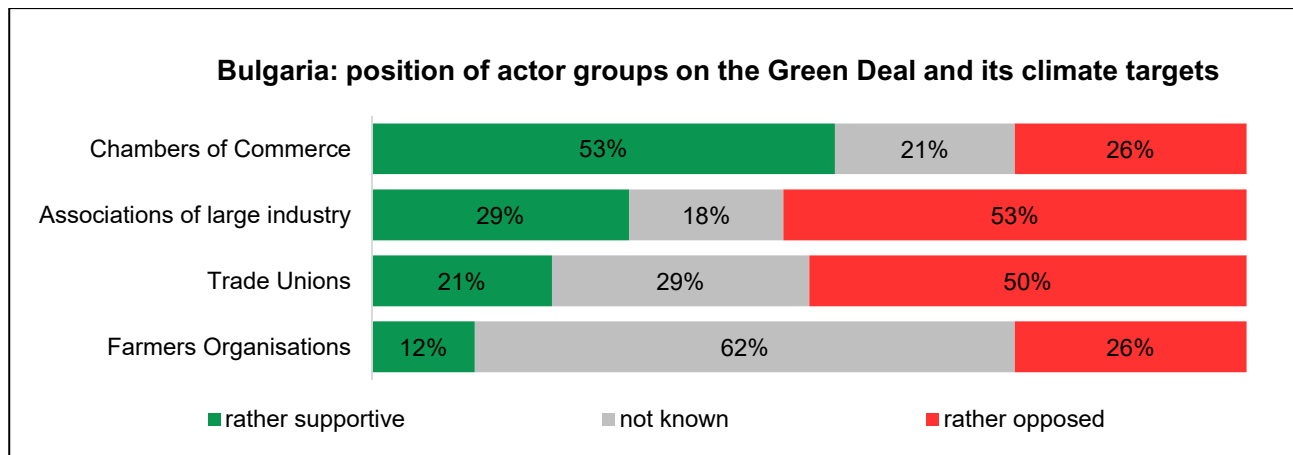
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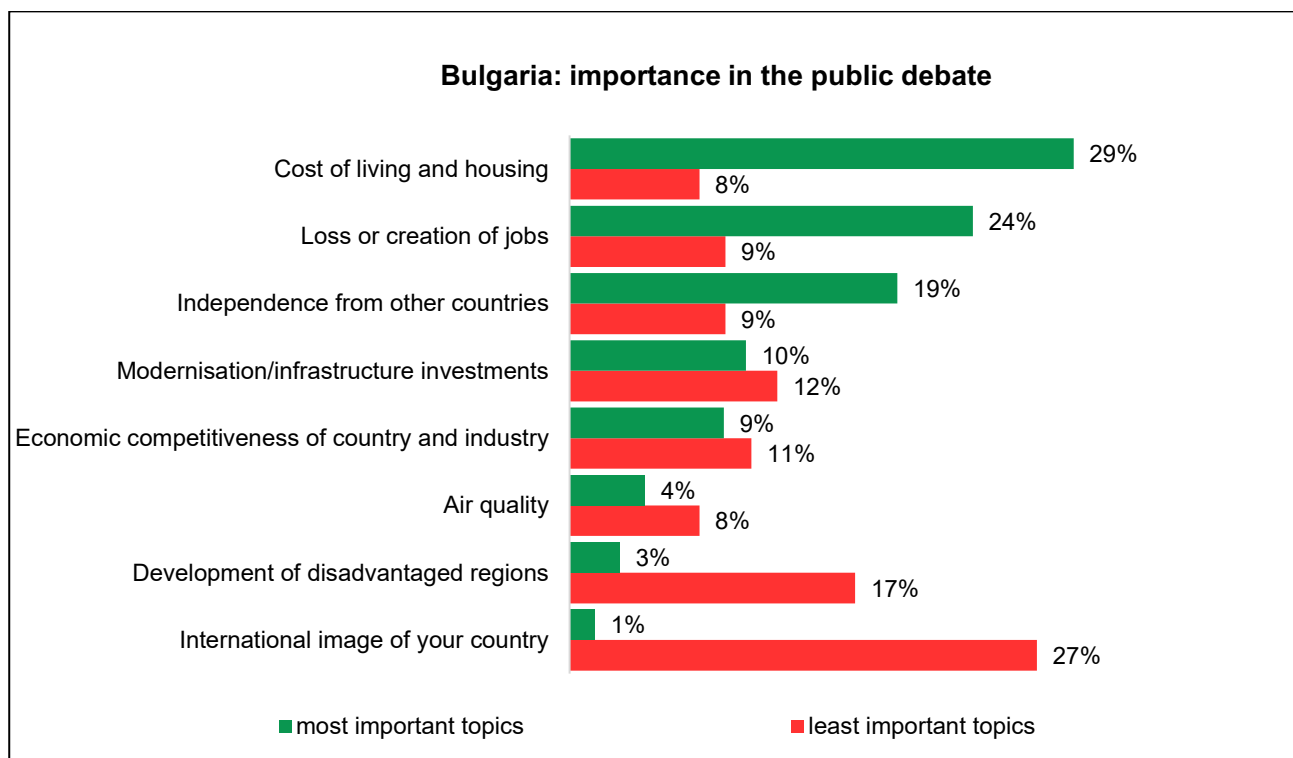
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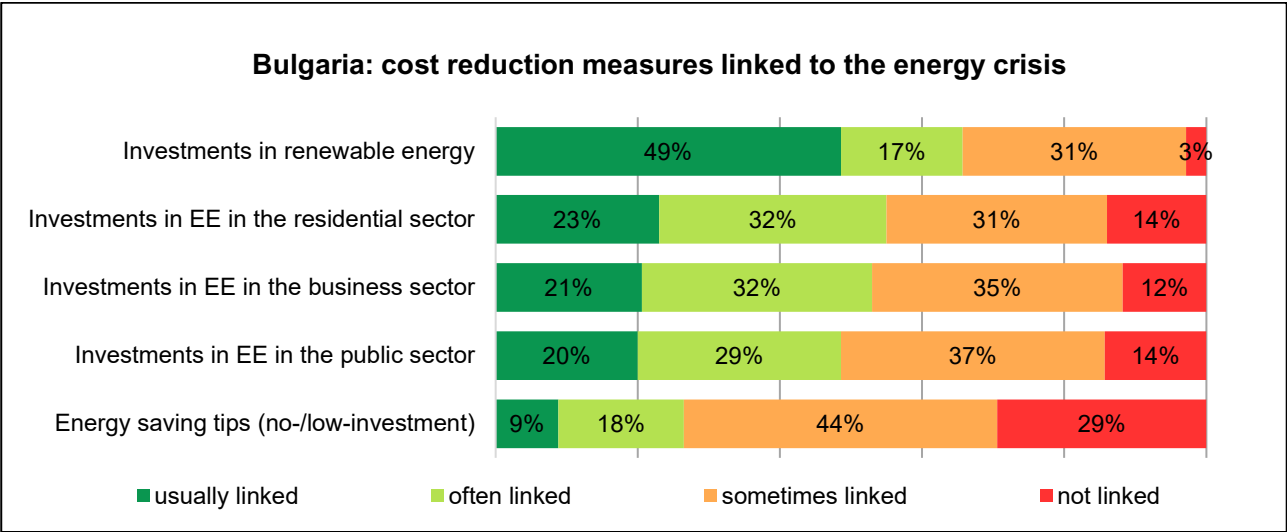
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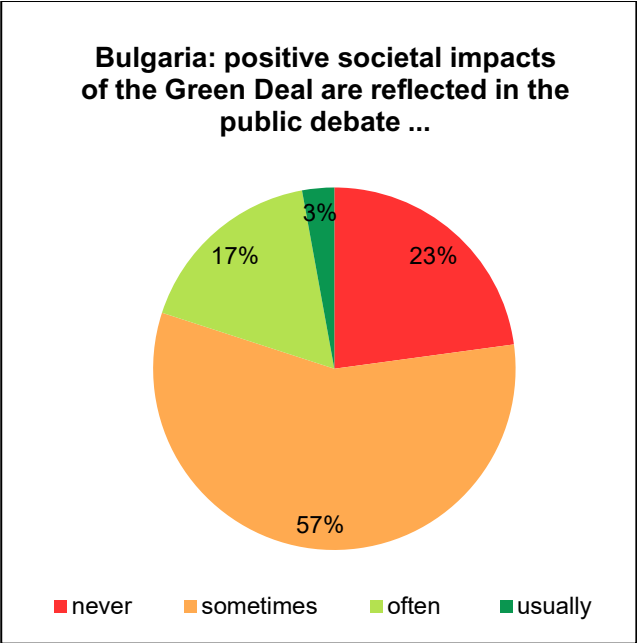
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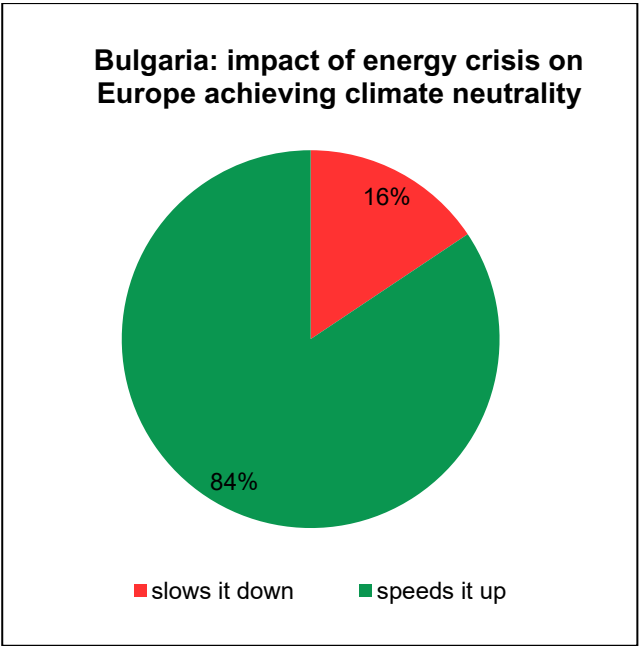
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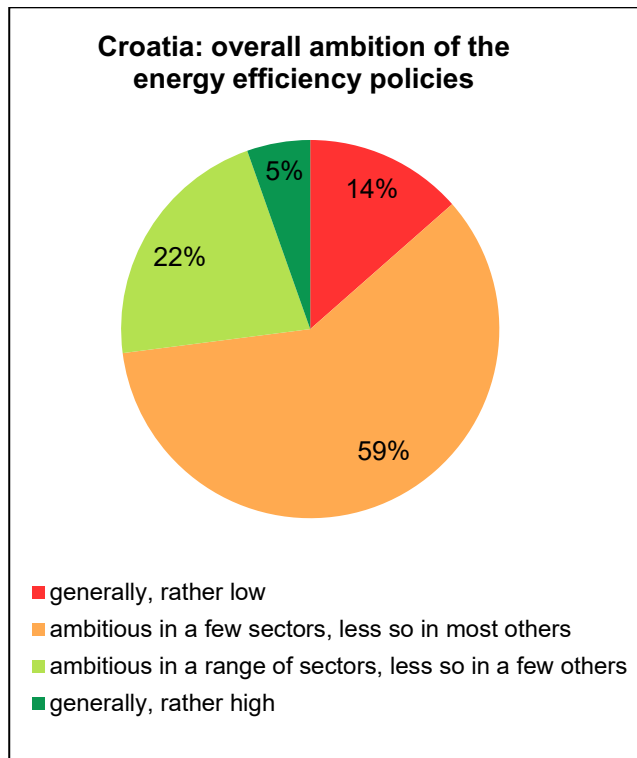
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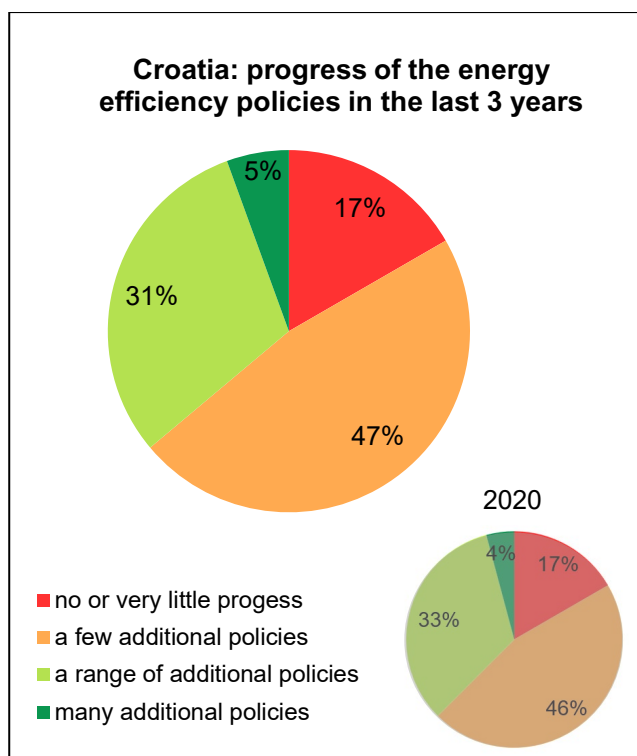
Croatia



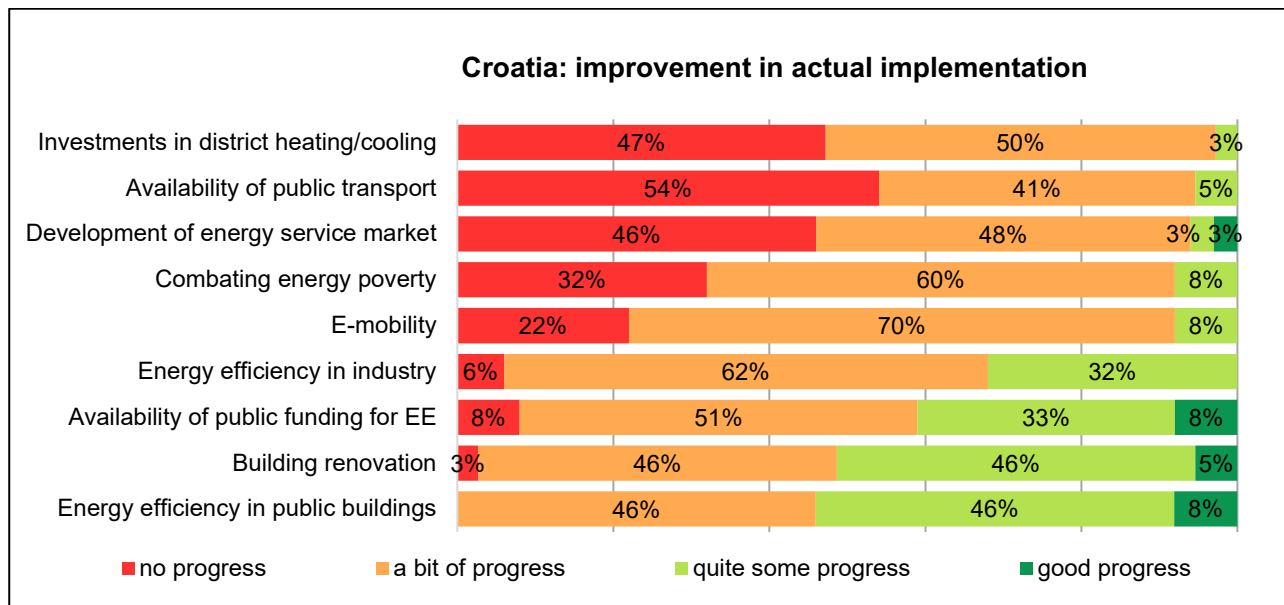
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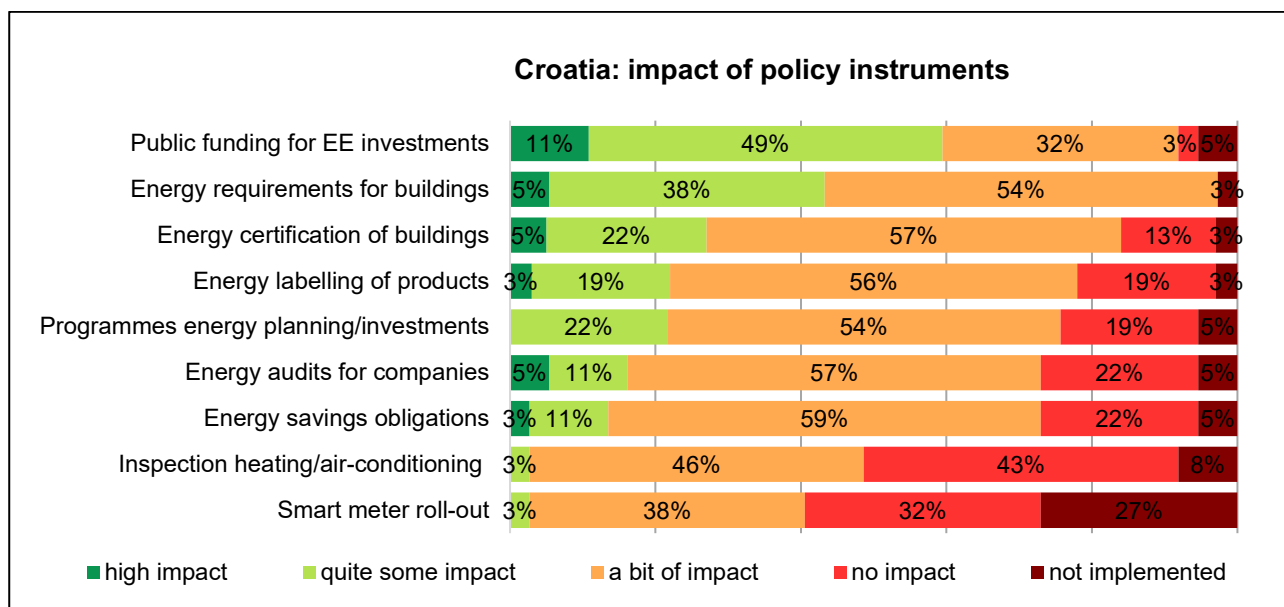
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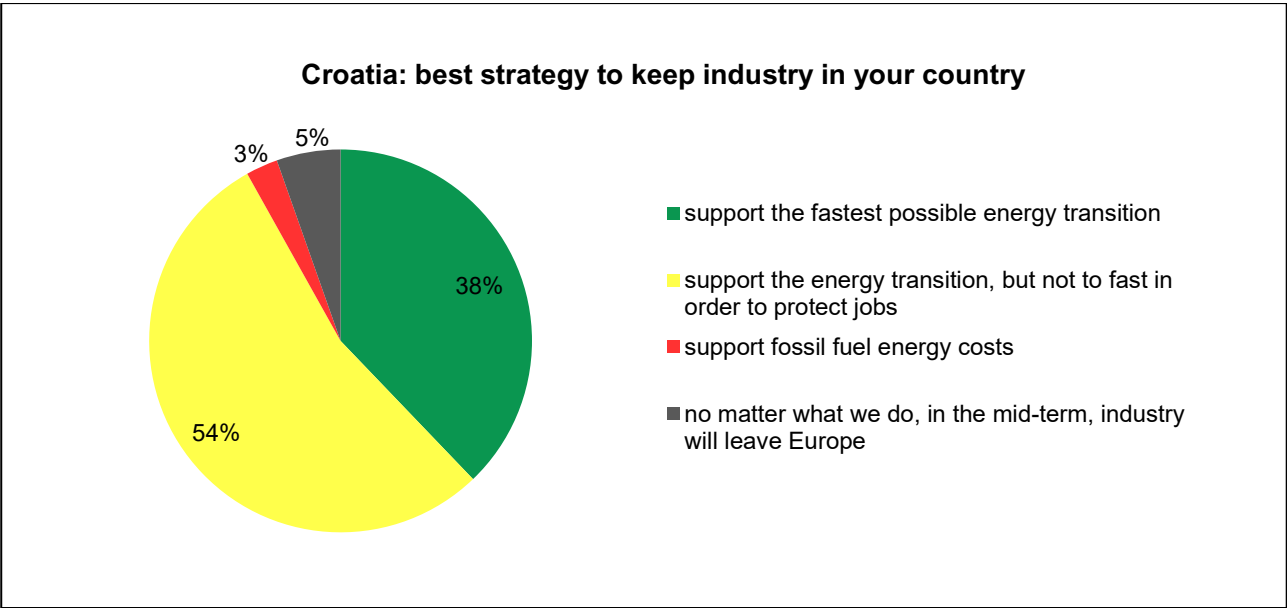
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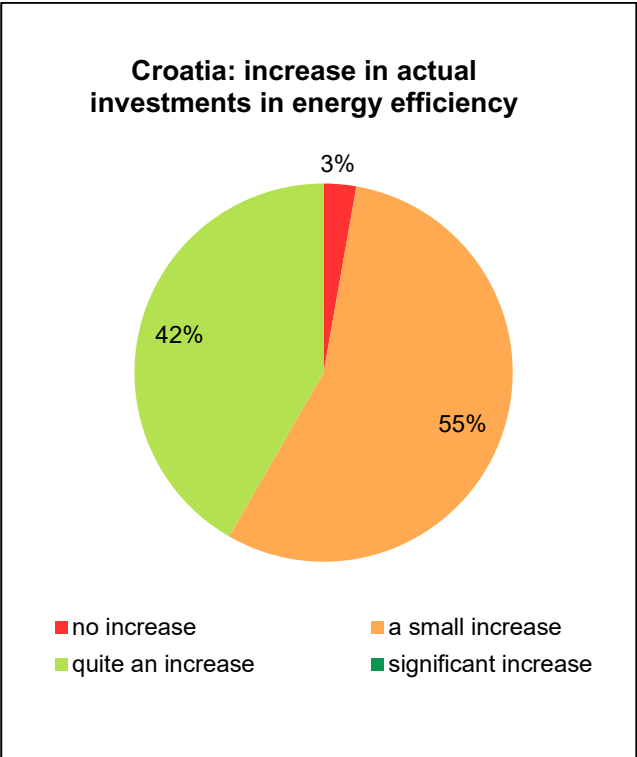
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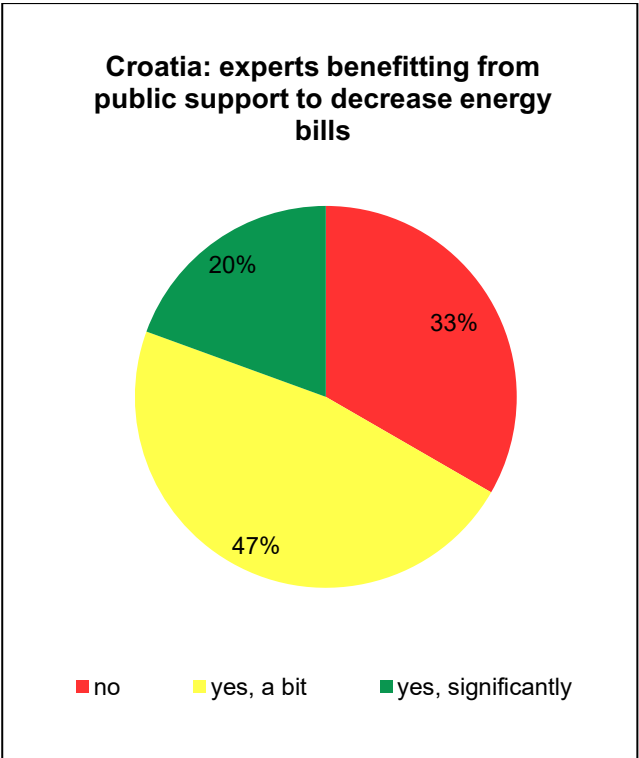
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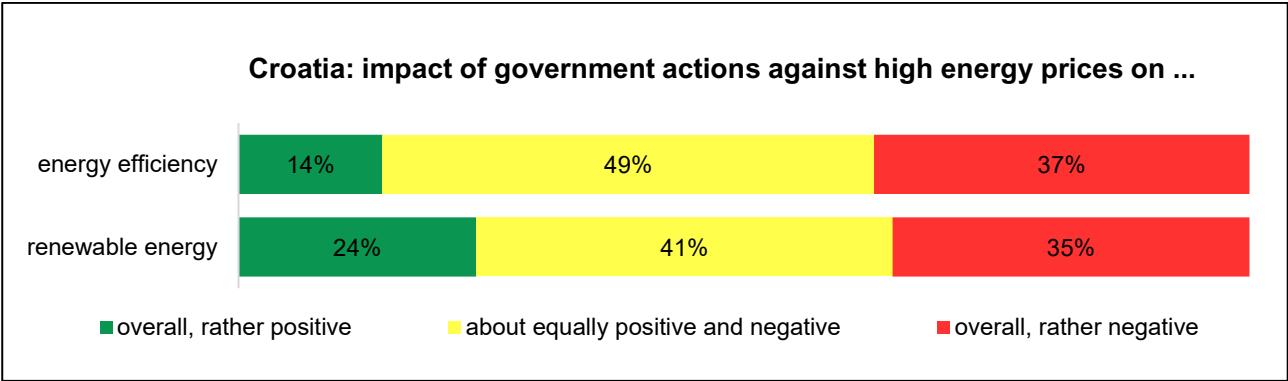
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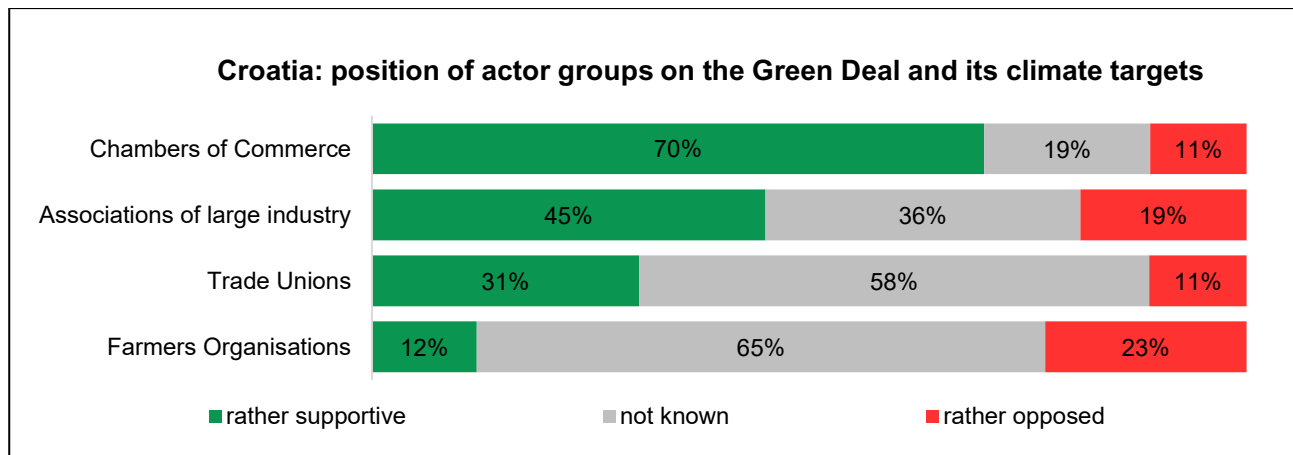
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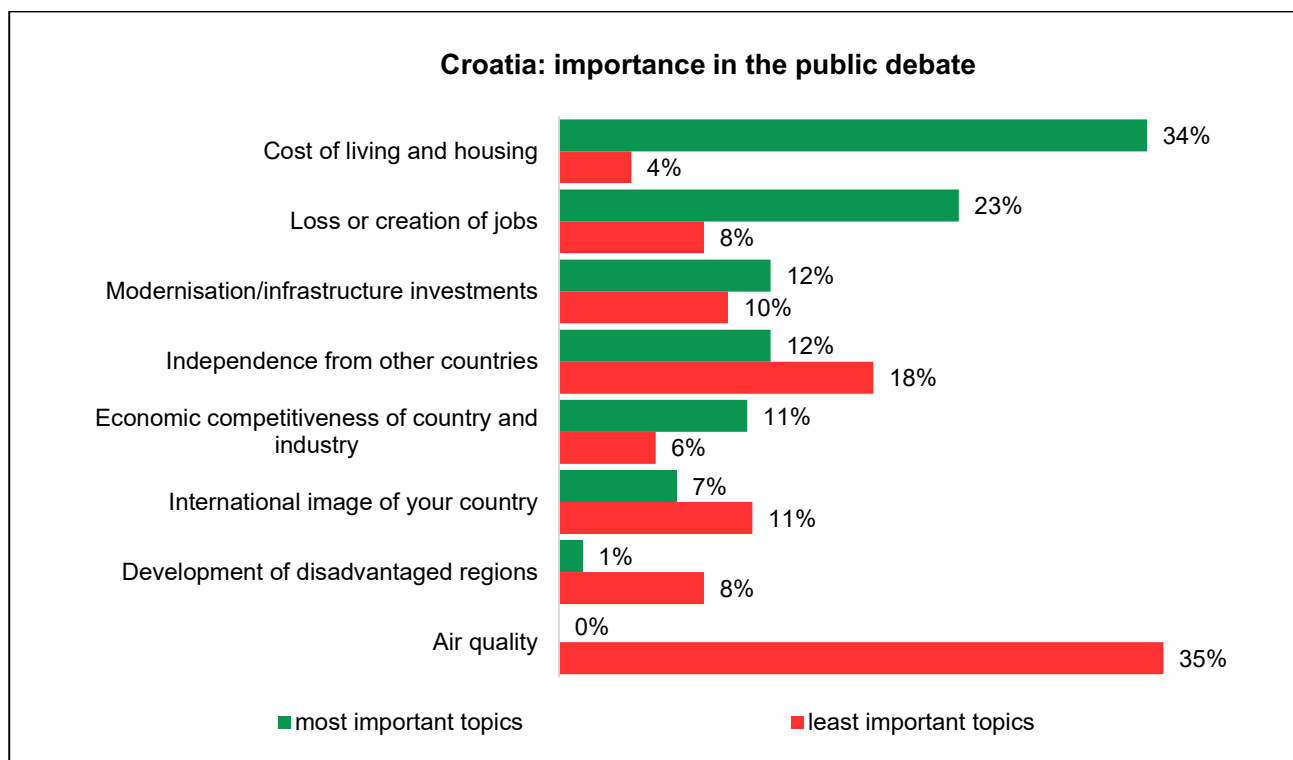
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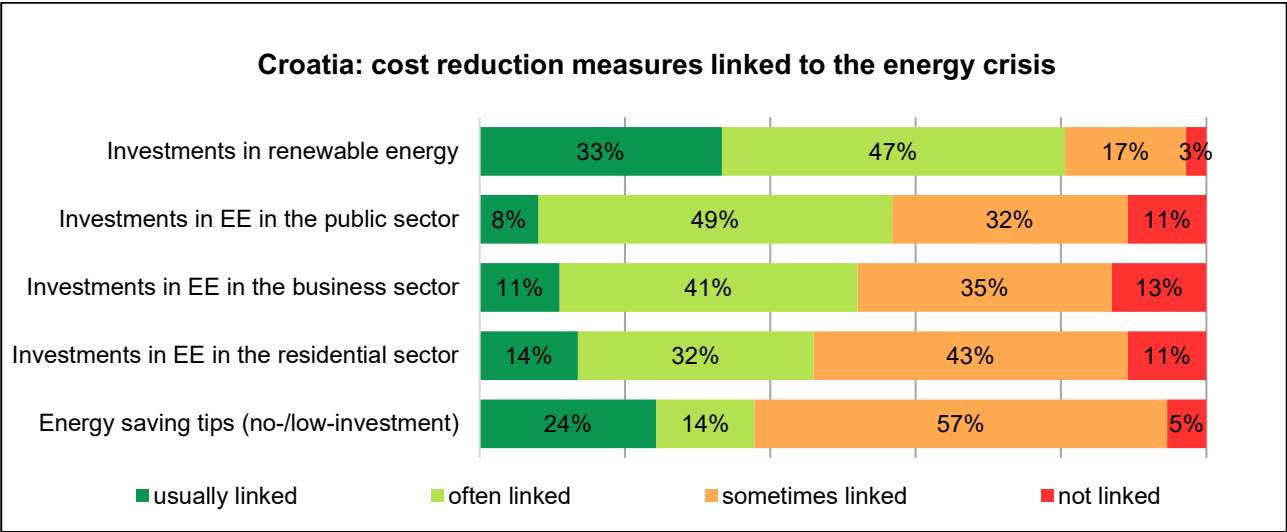
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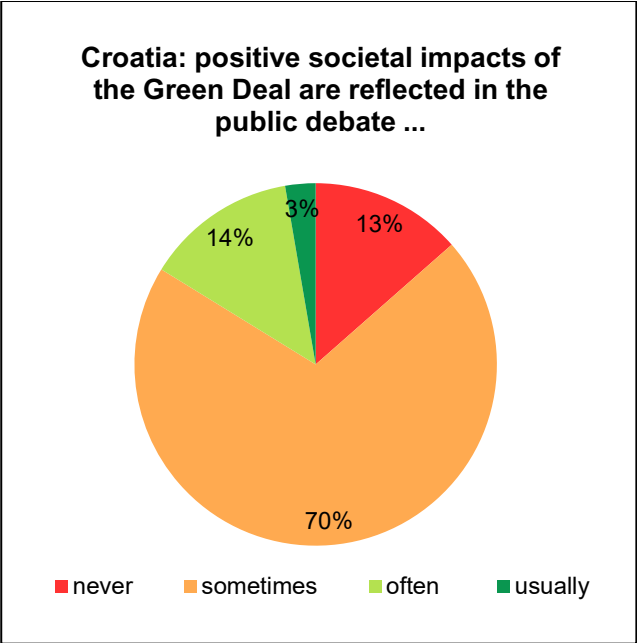
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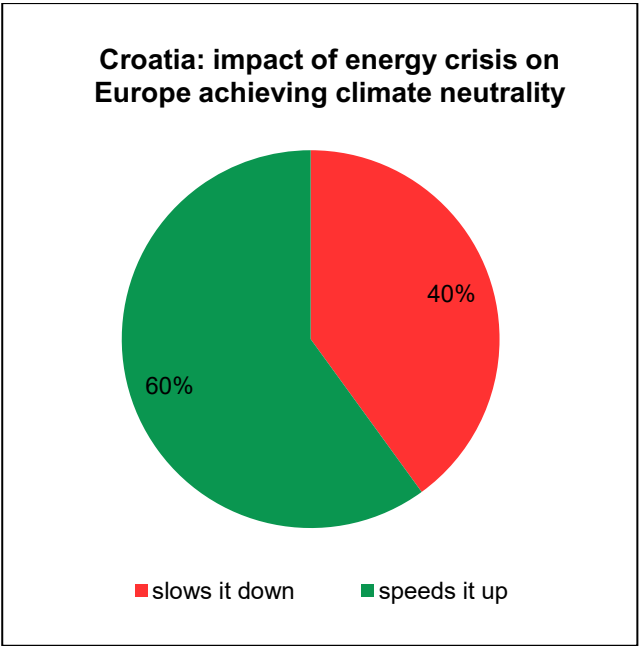
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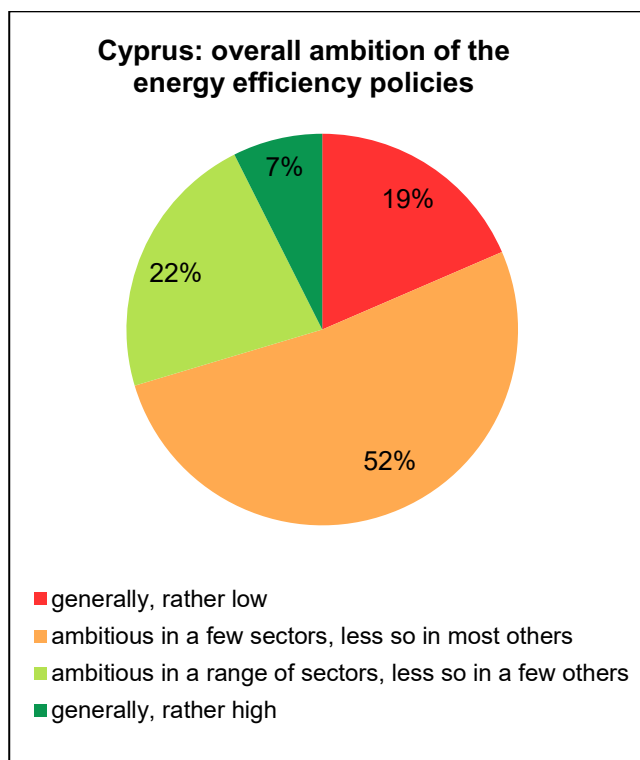
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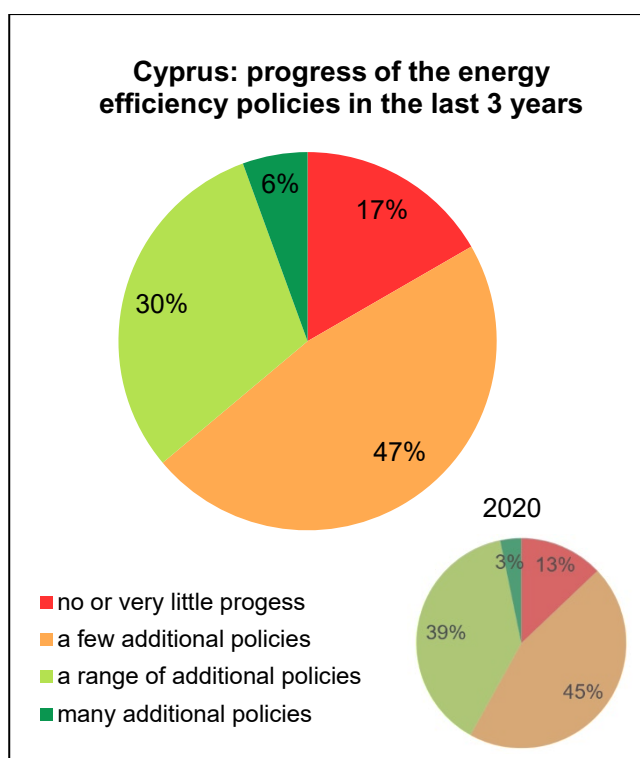
Cyprus



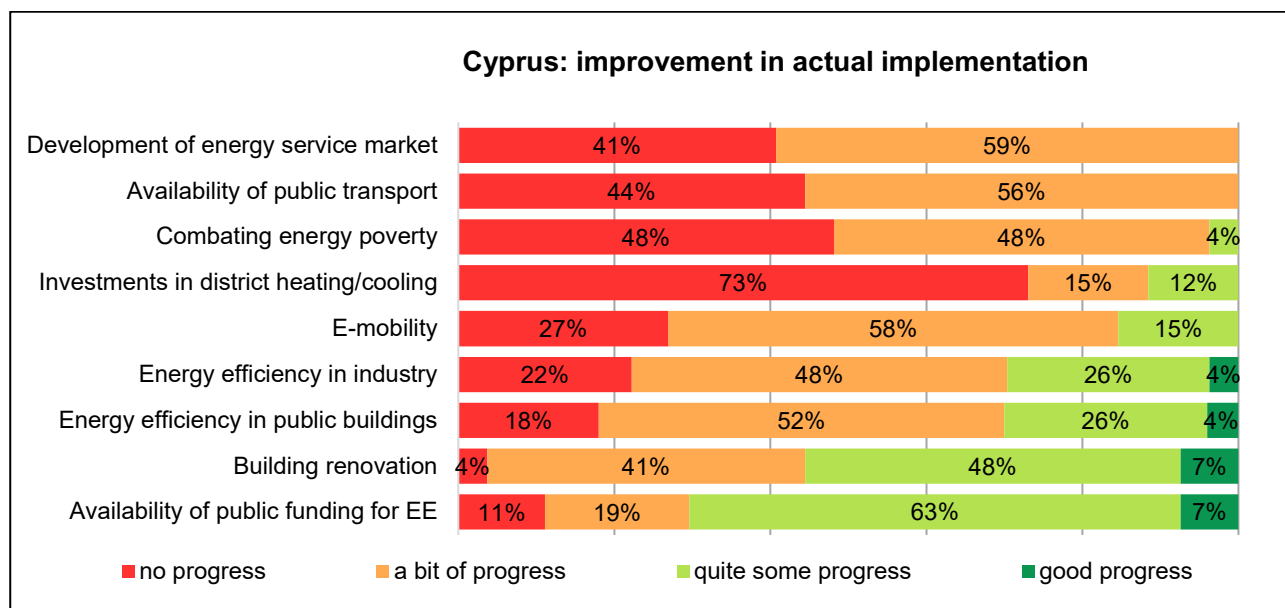
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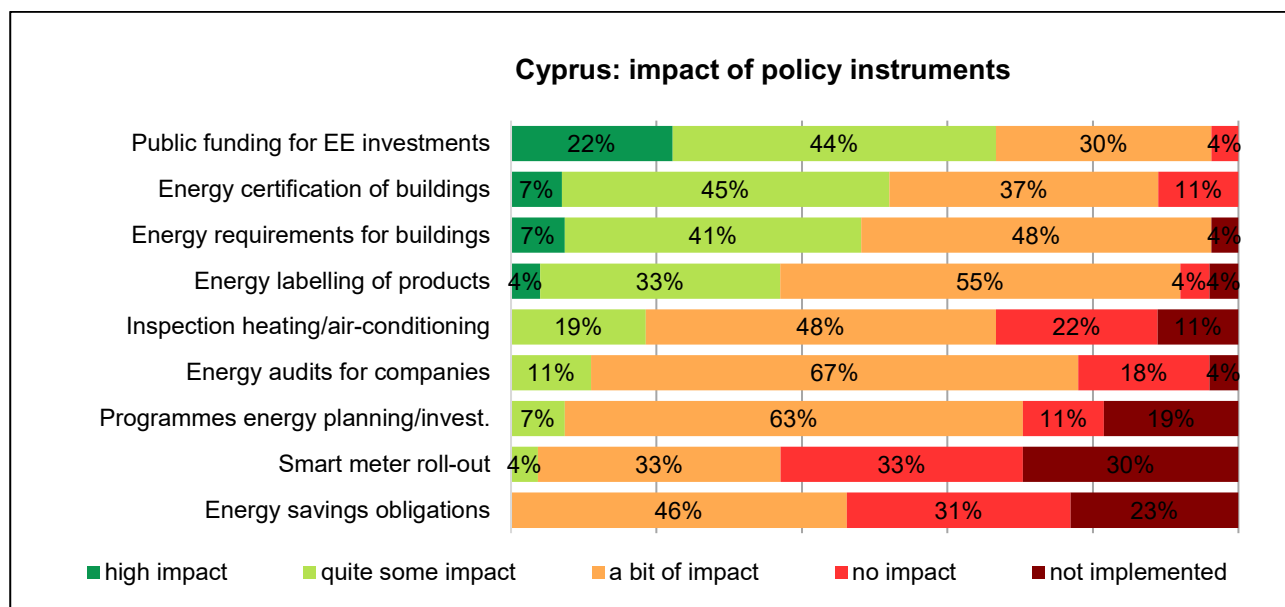
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



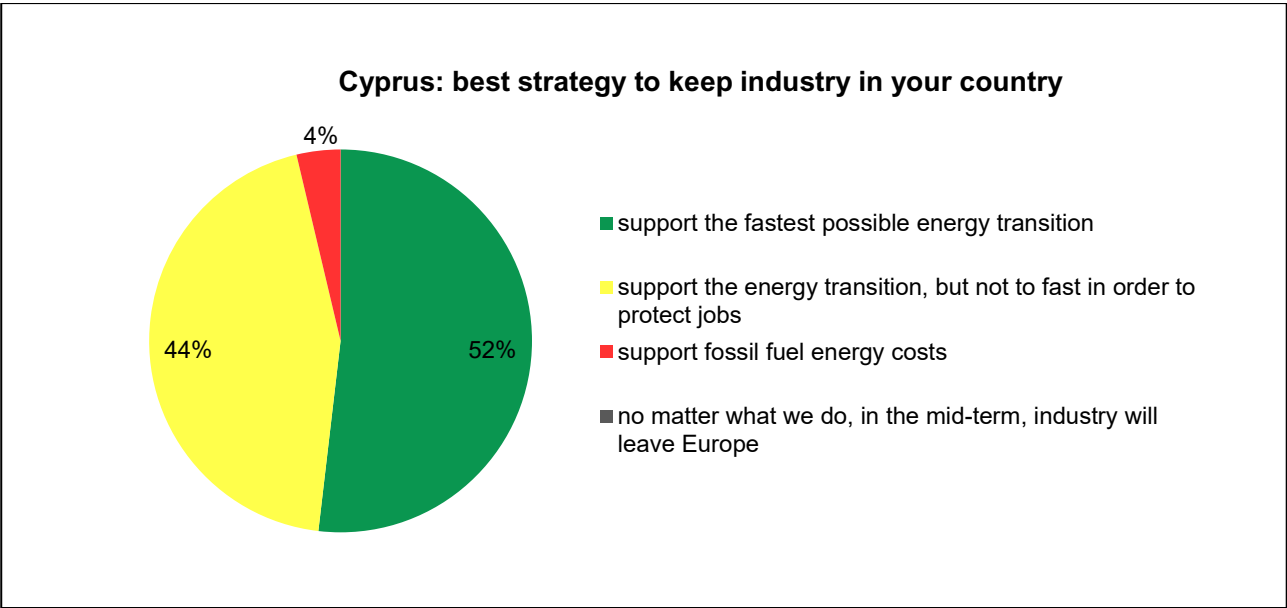
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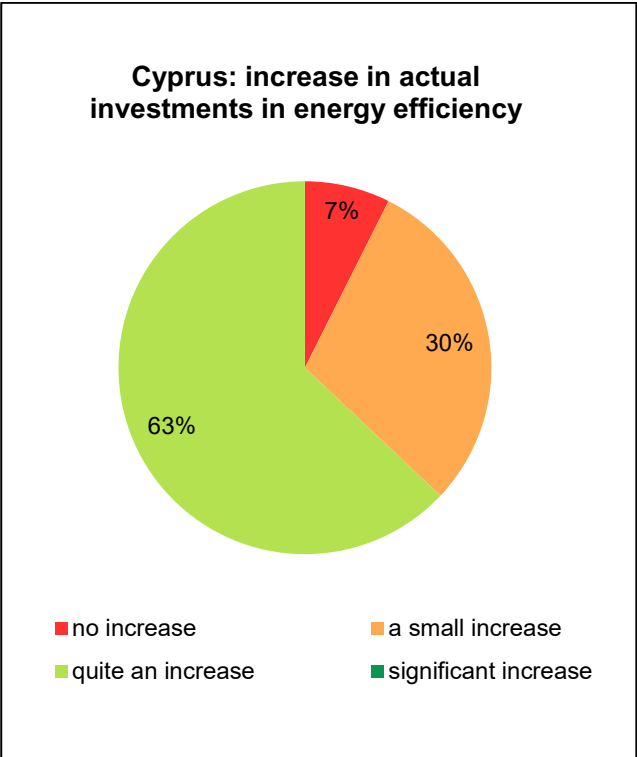
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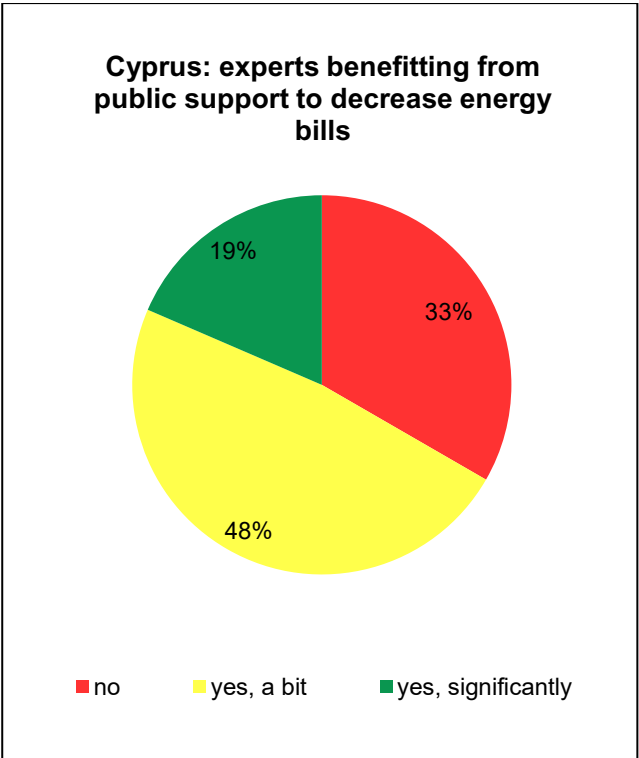
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



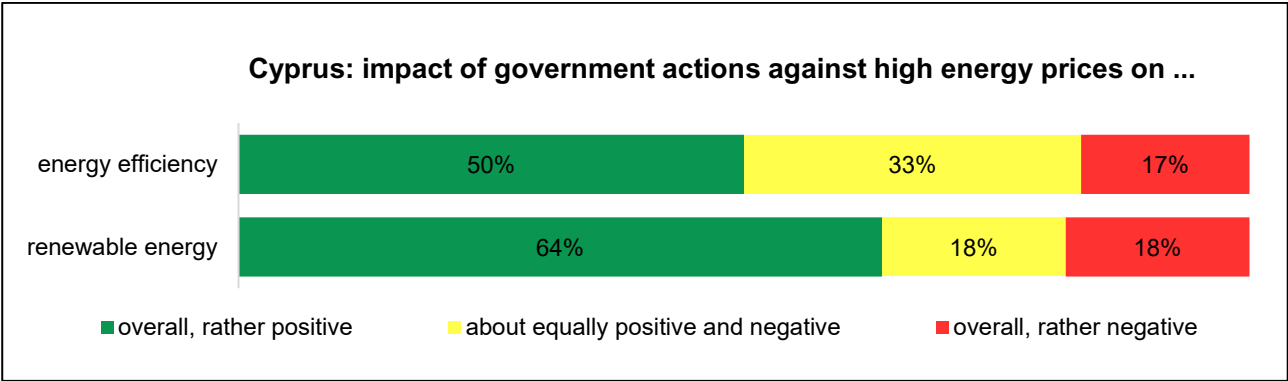
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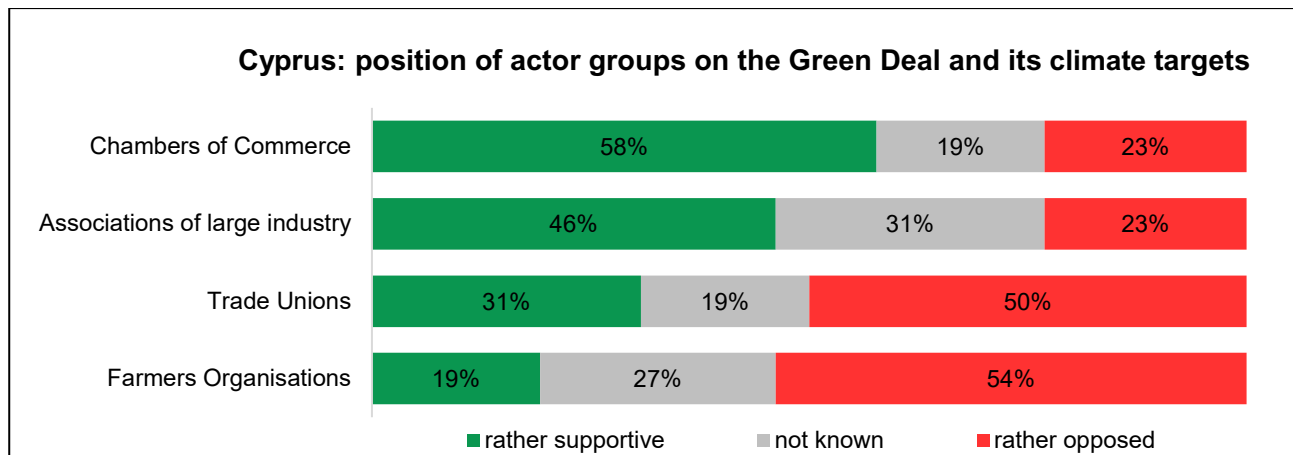
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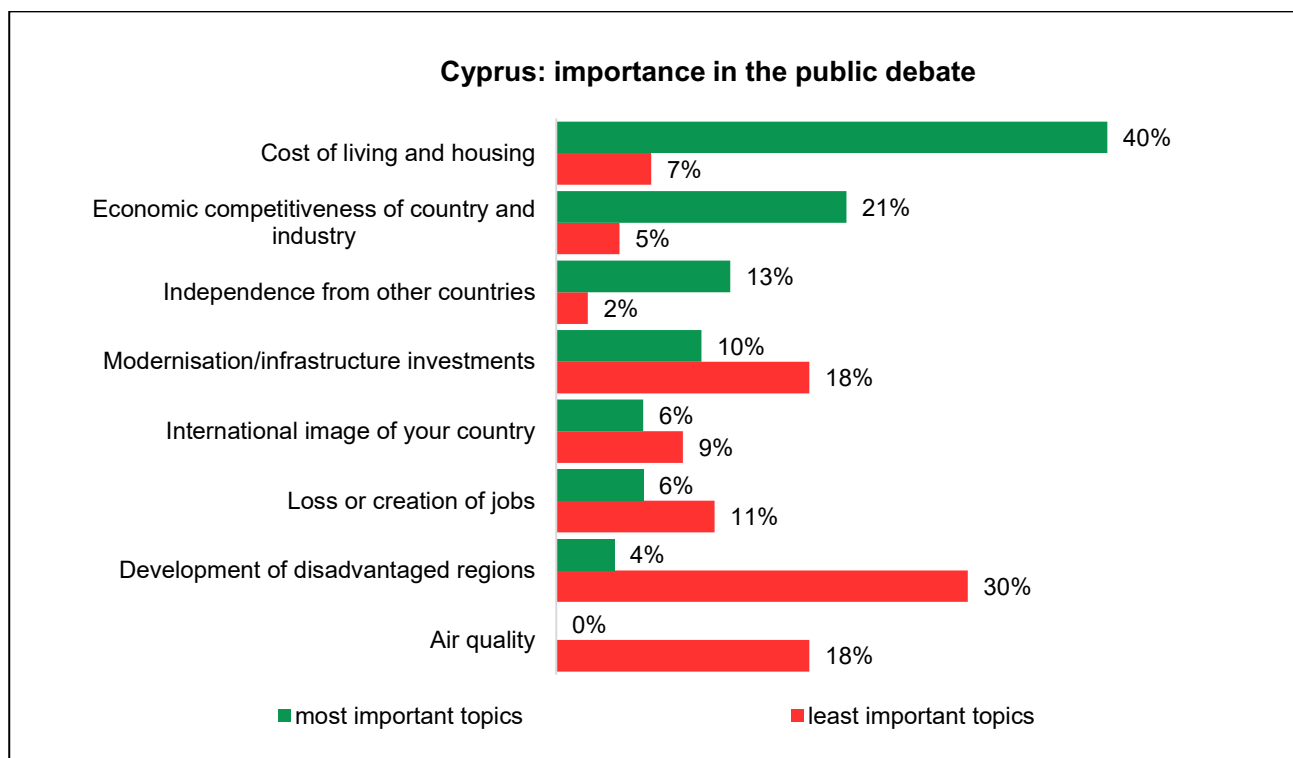
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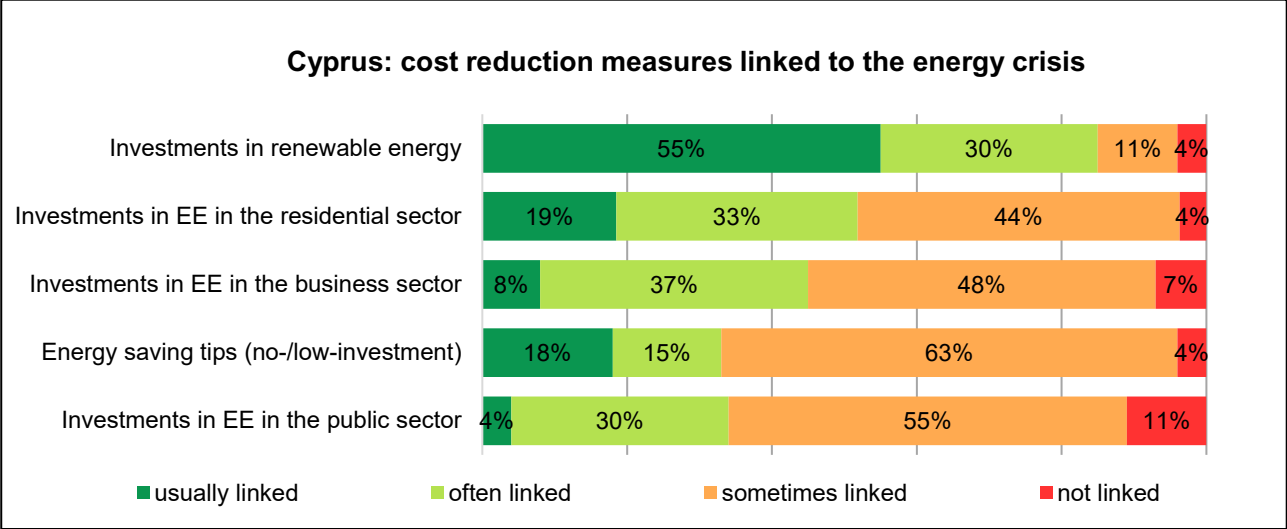
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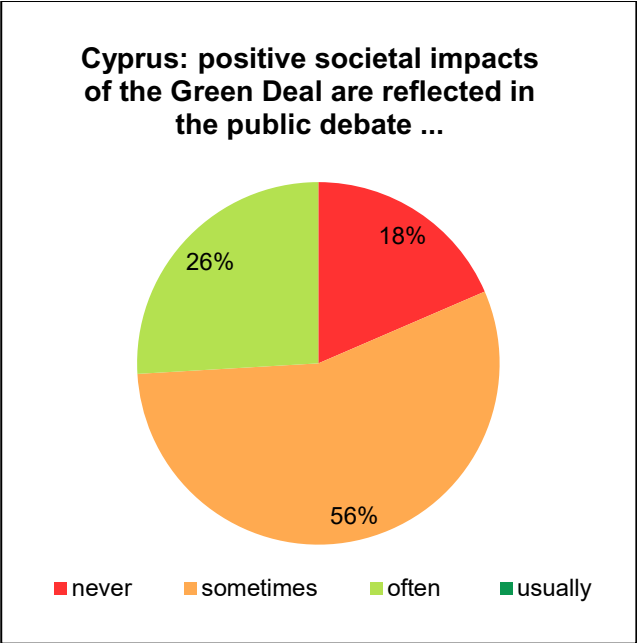
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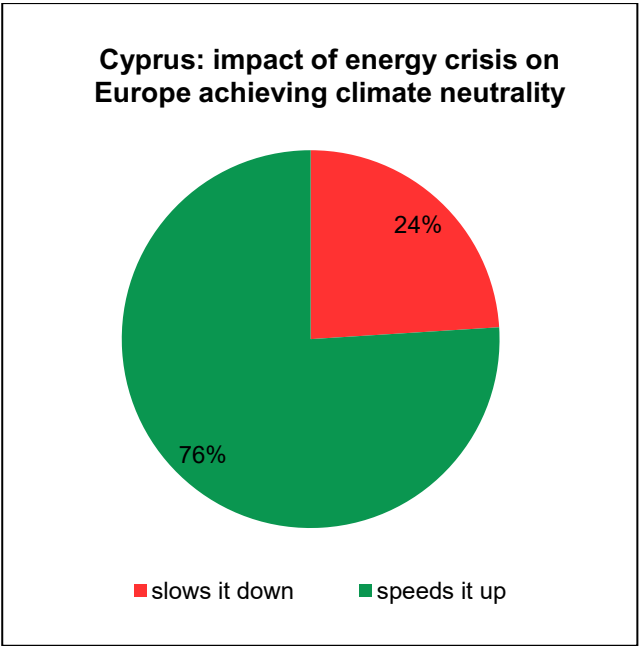
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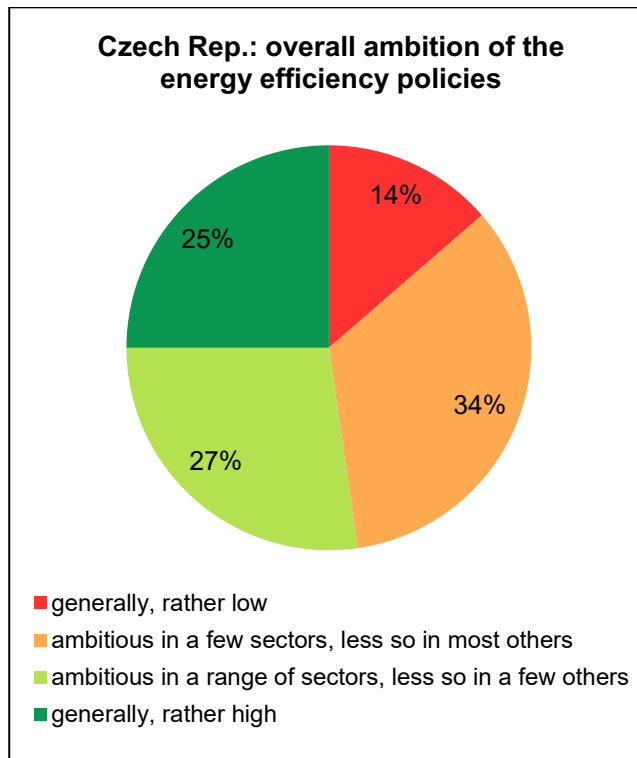
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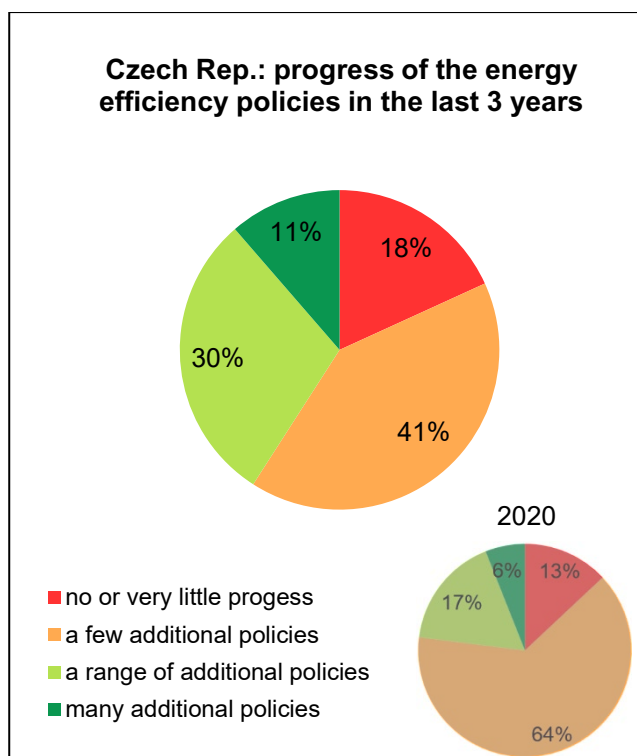
Czech Republic



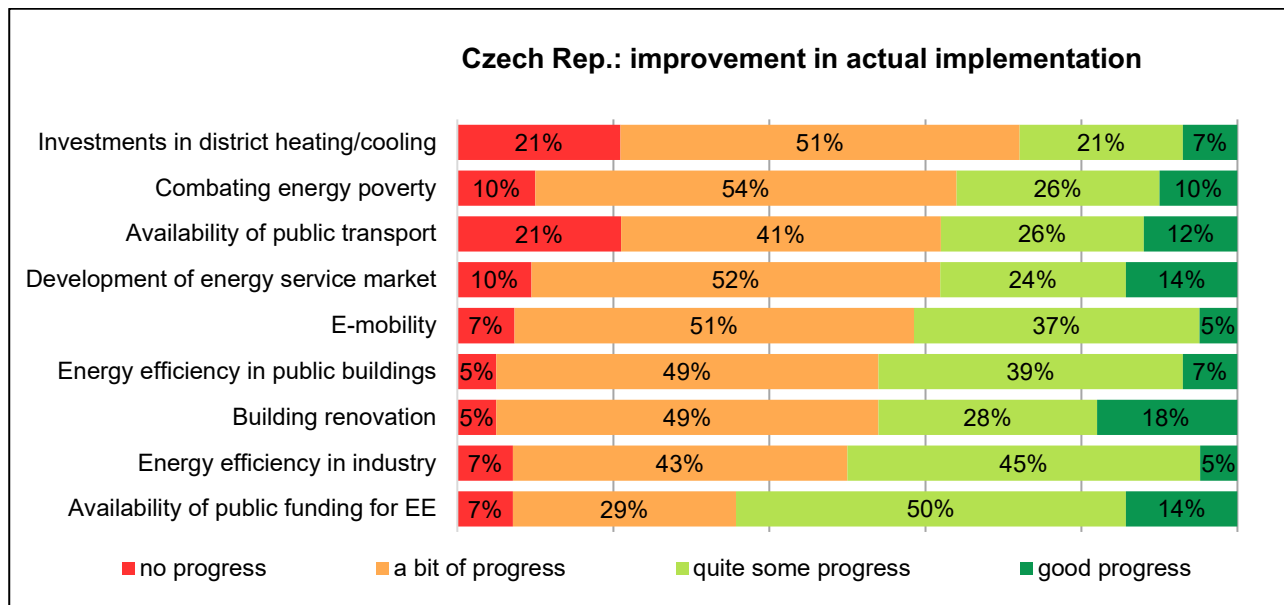
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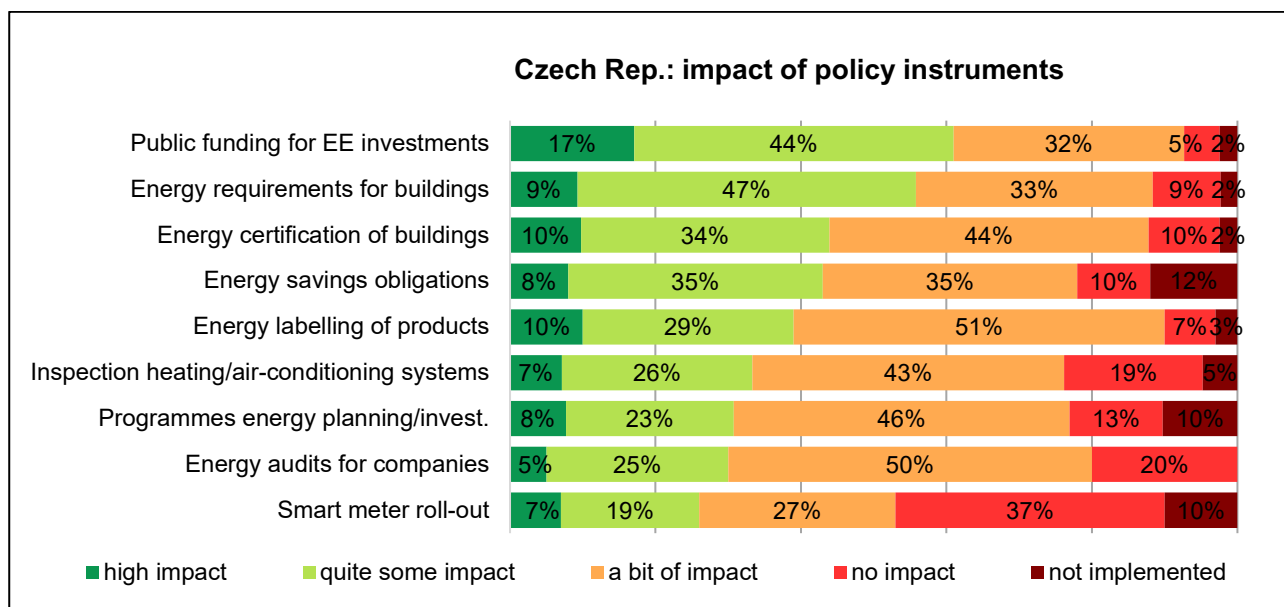
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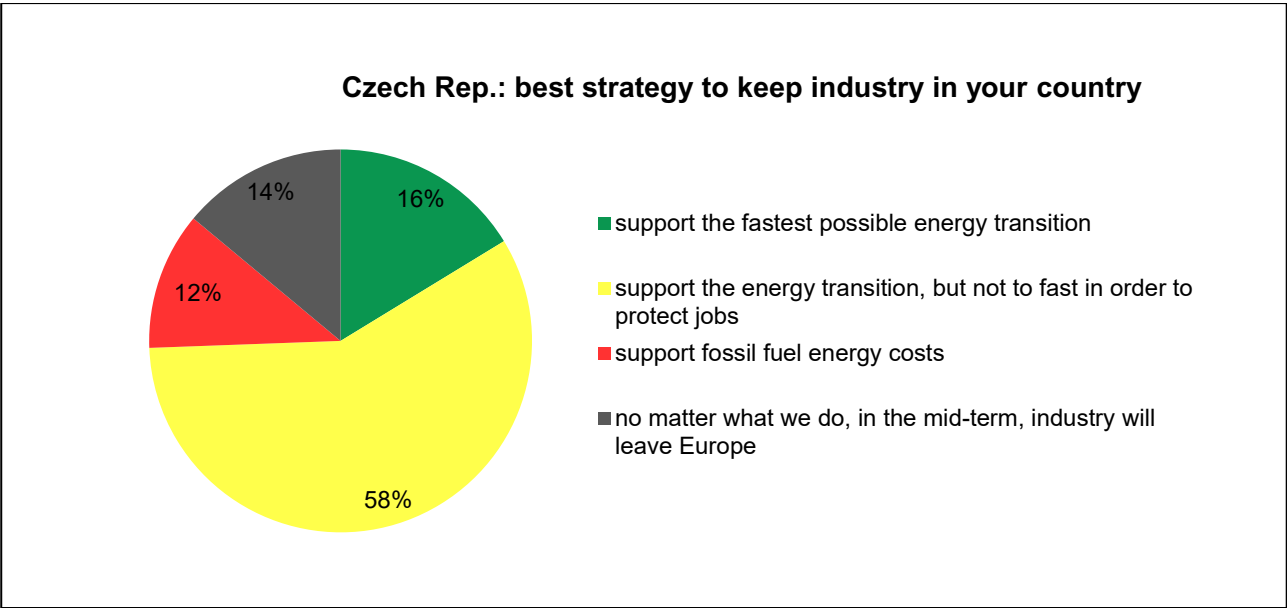
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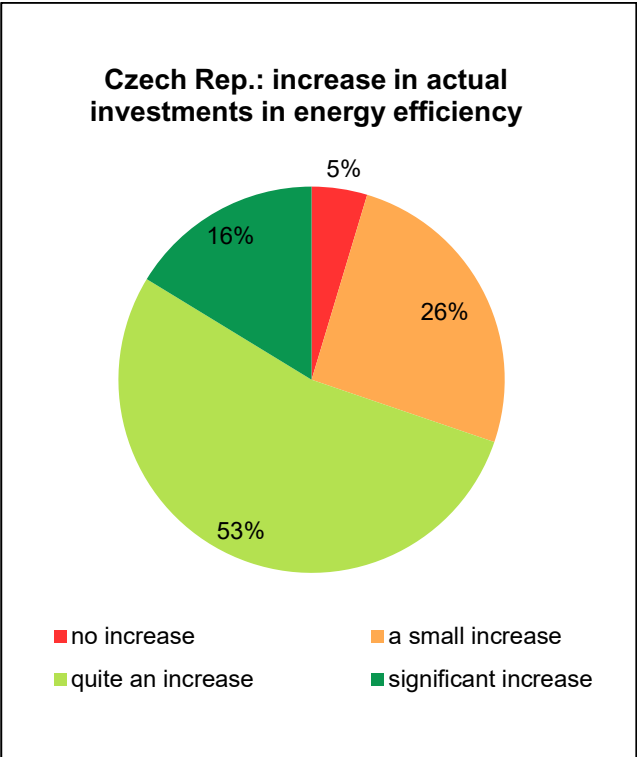
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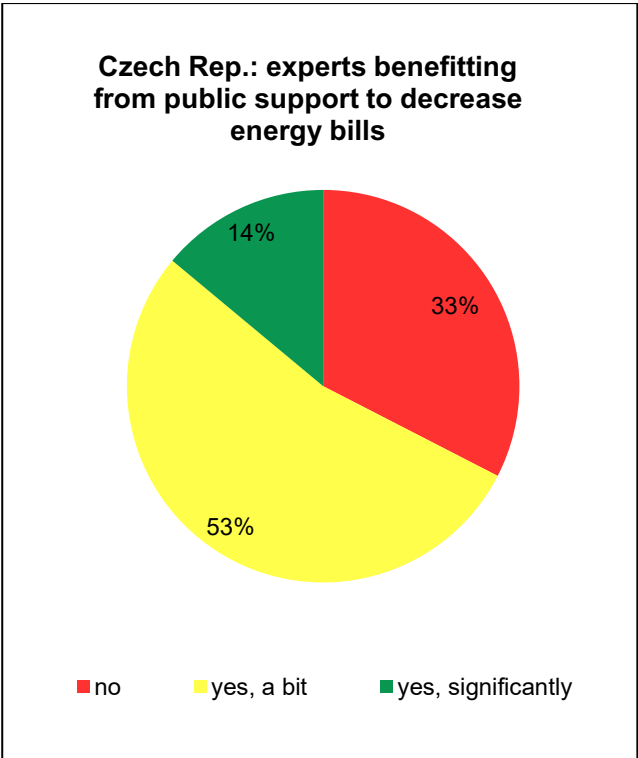
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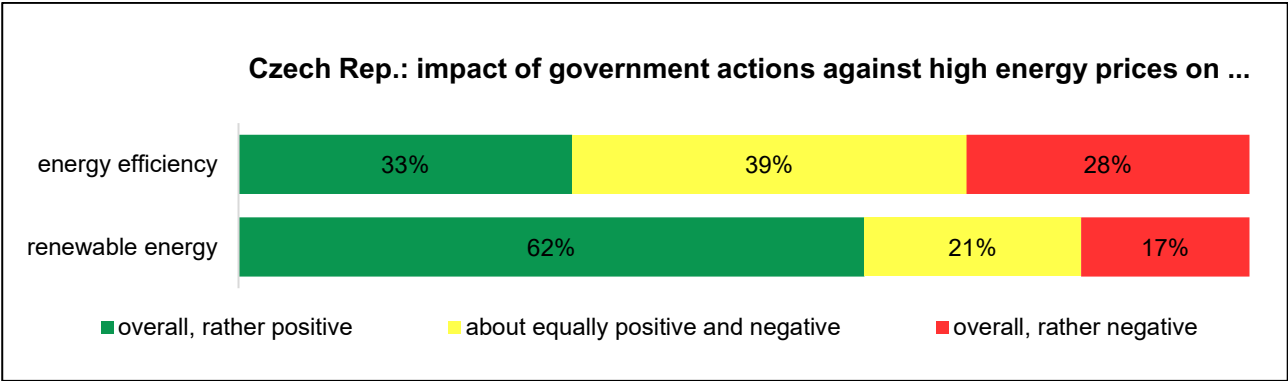
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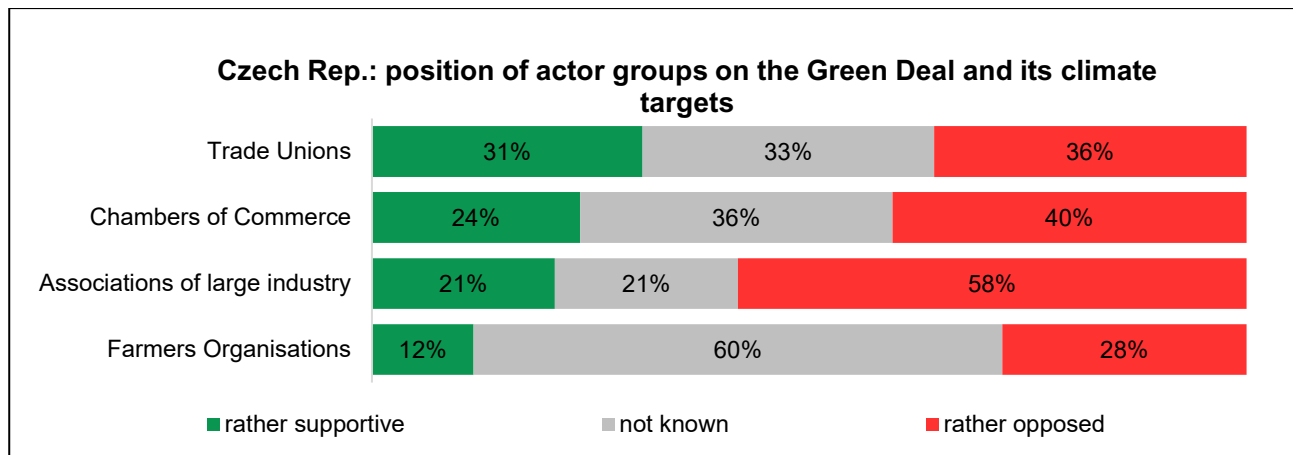
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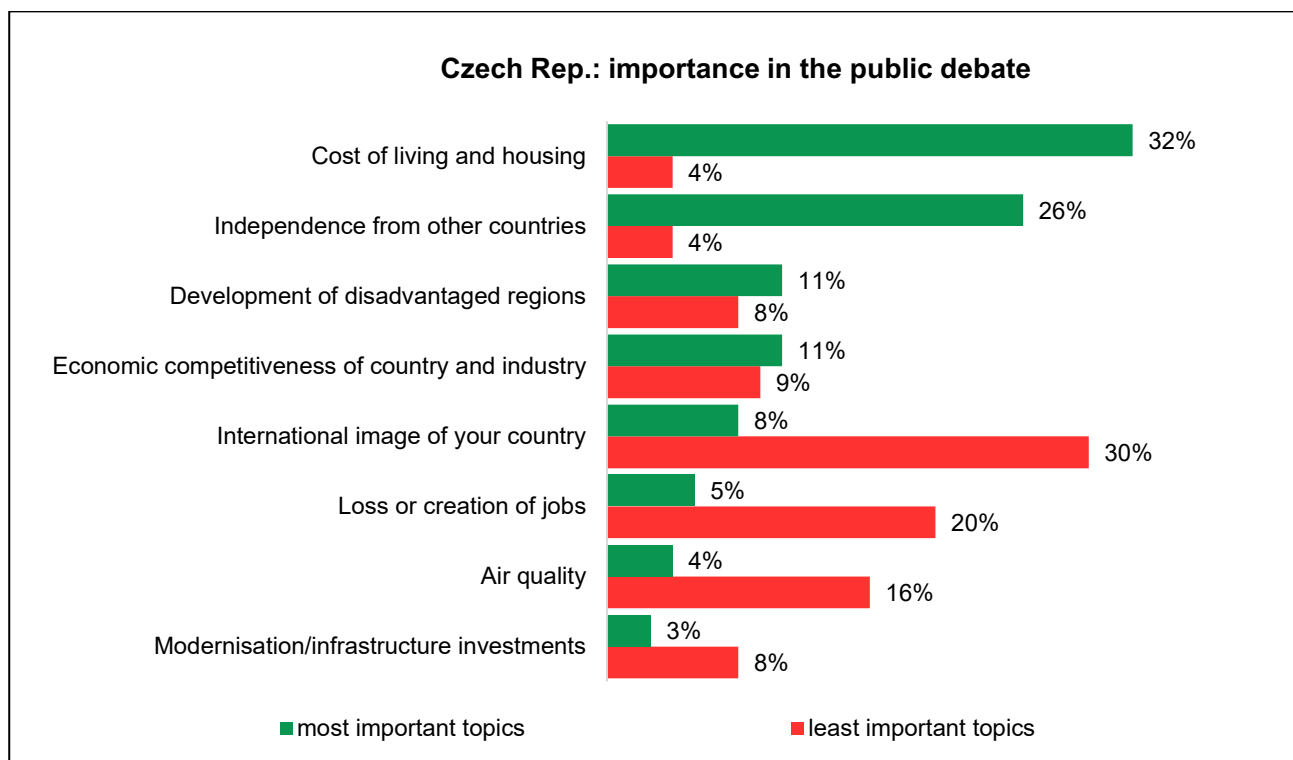
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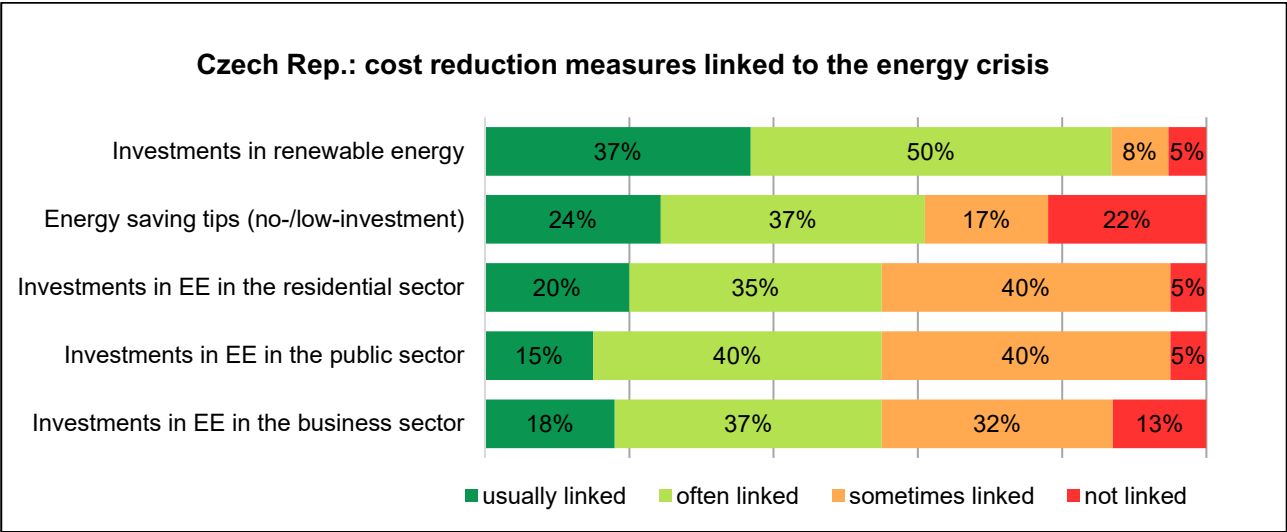
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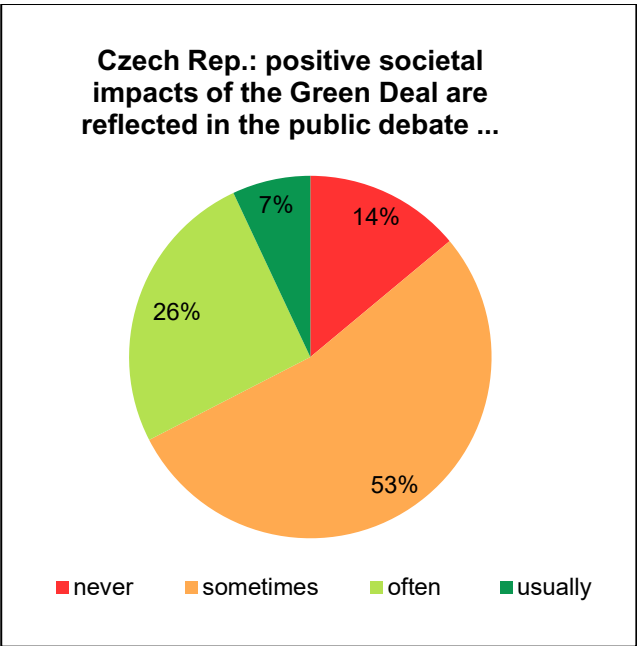
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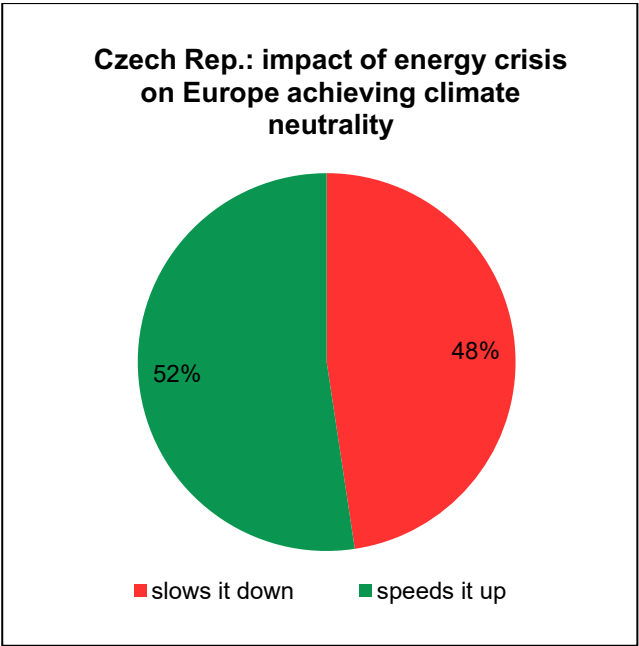
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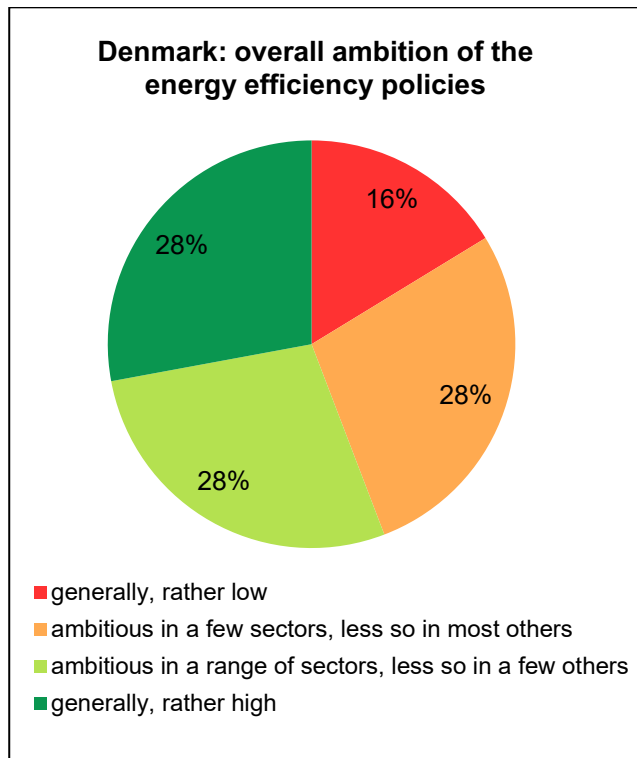
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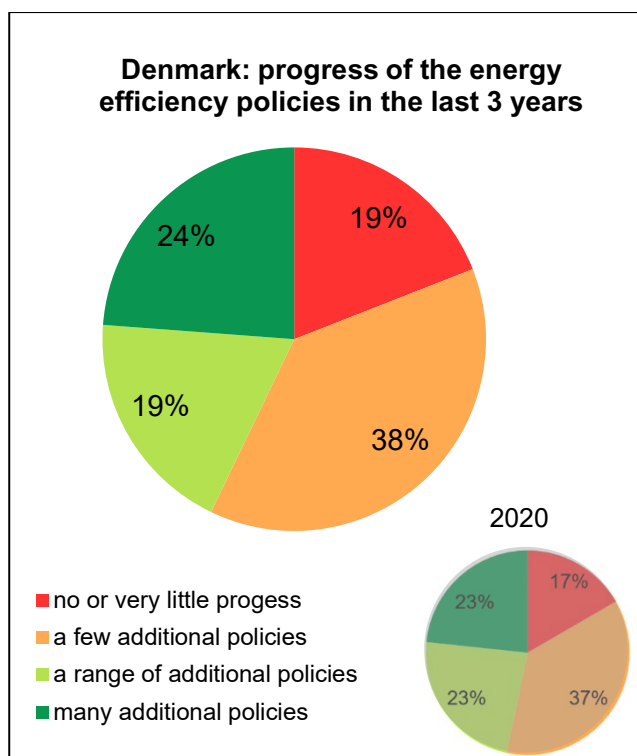
Denmark



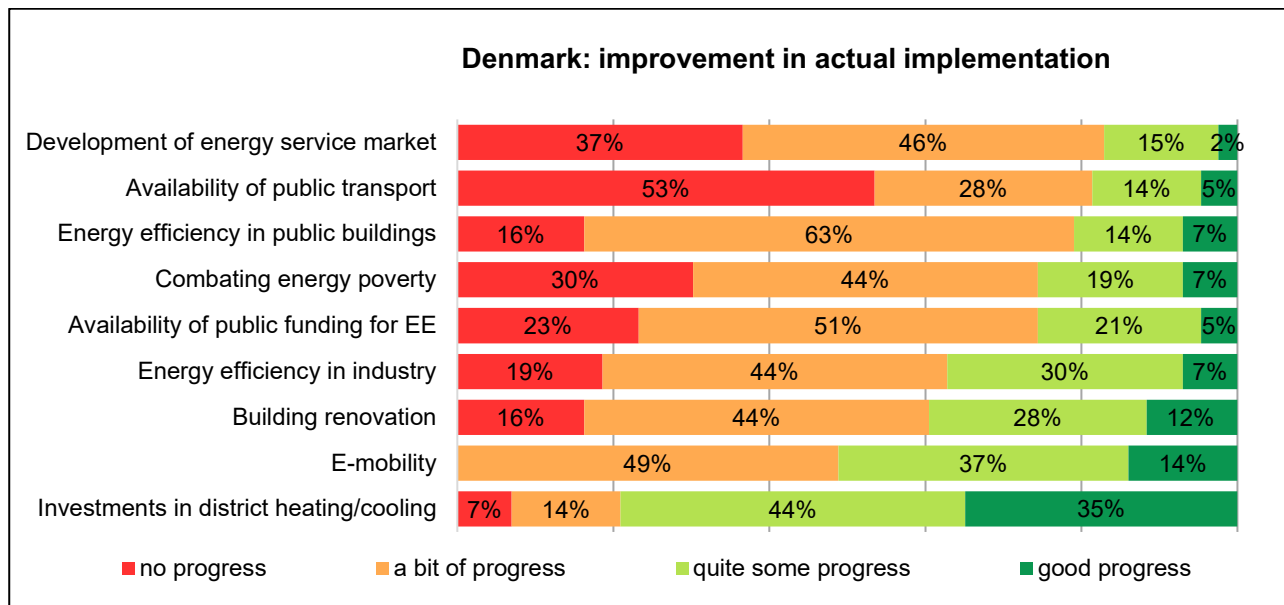
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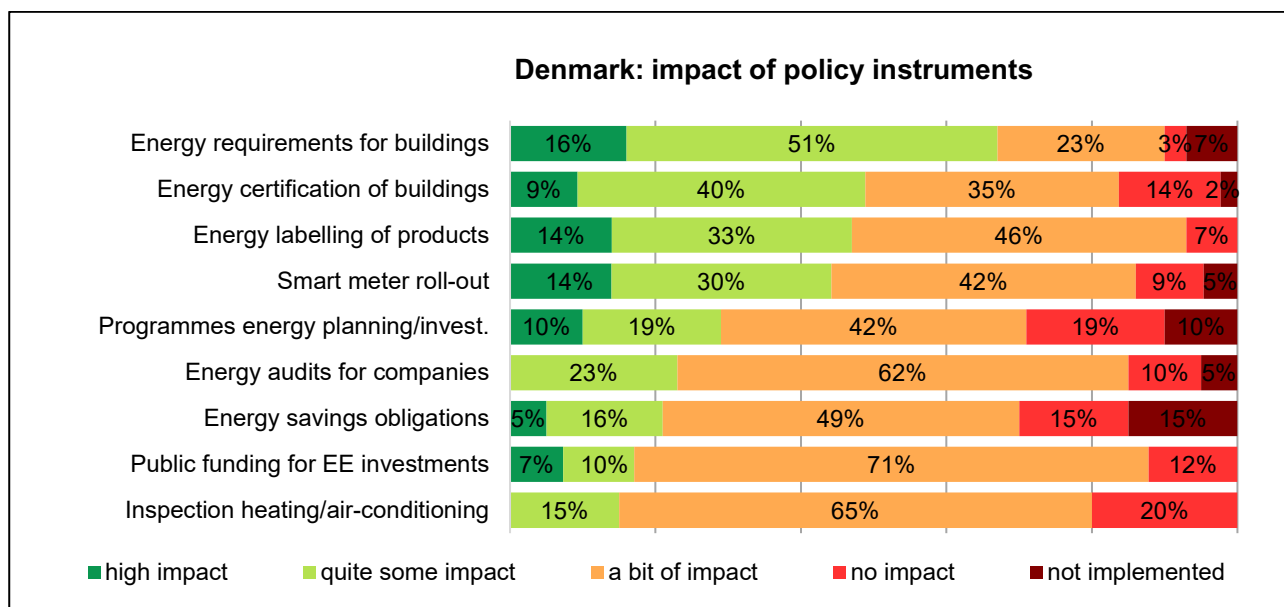
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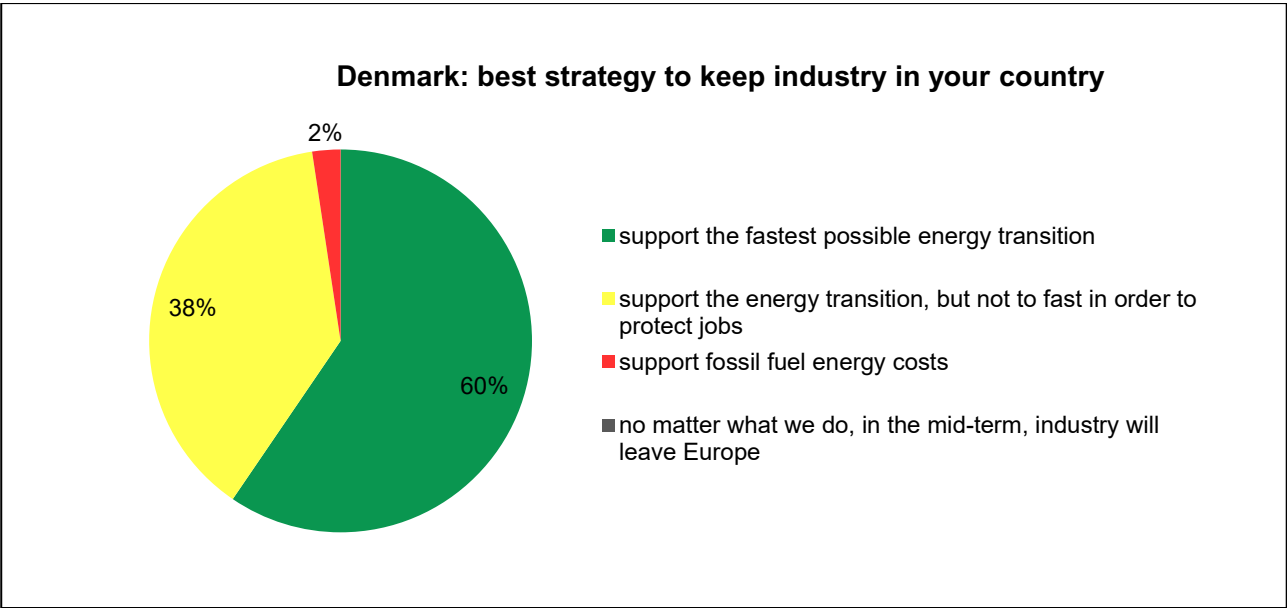
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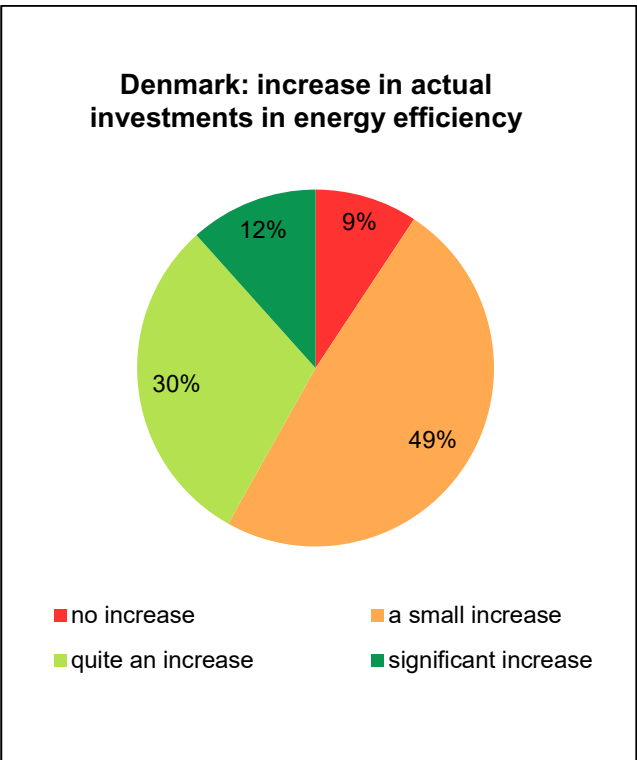
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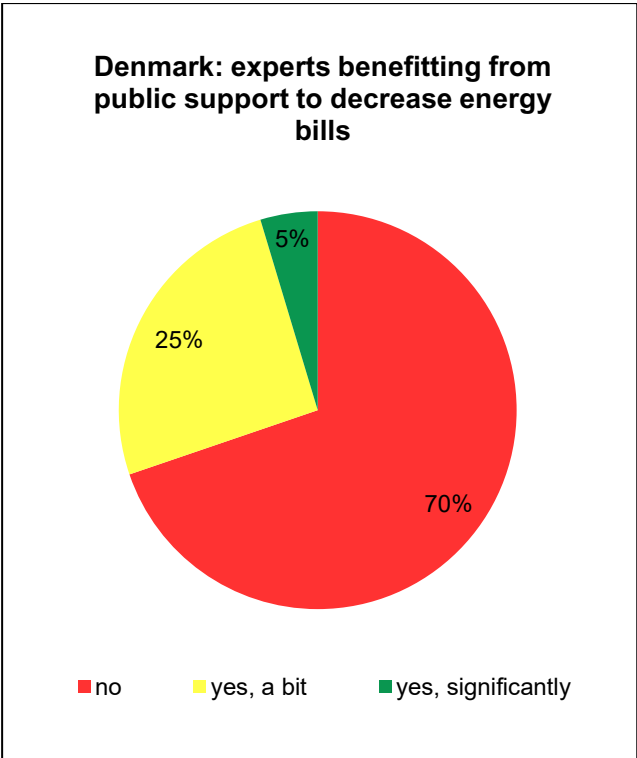
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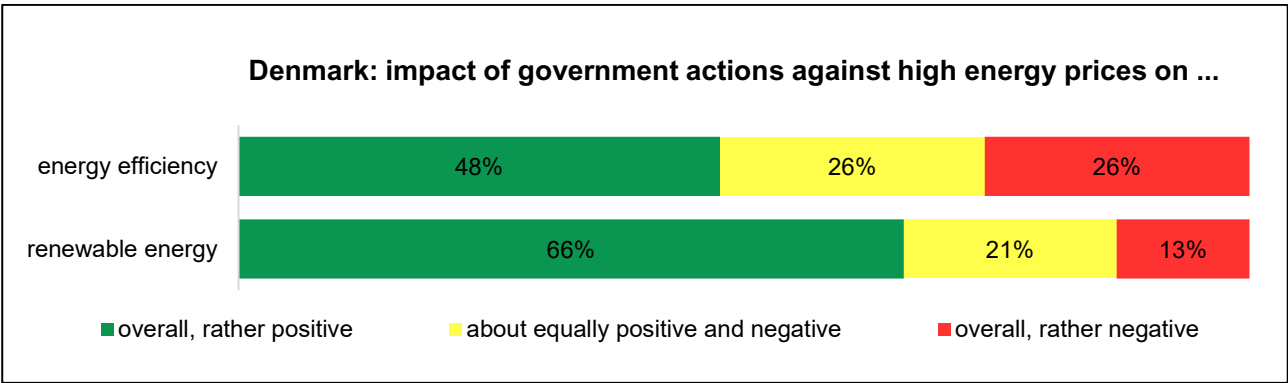
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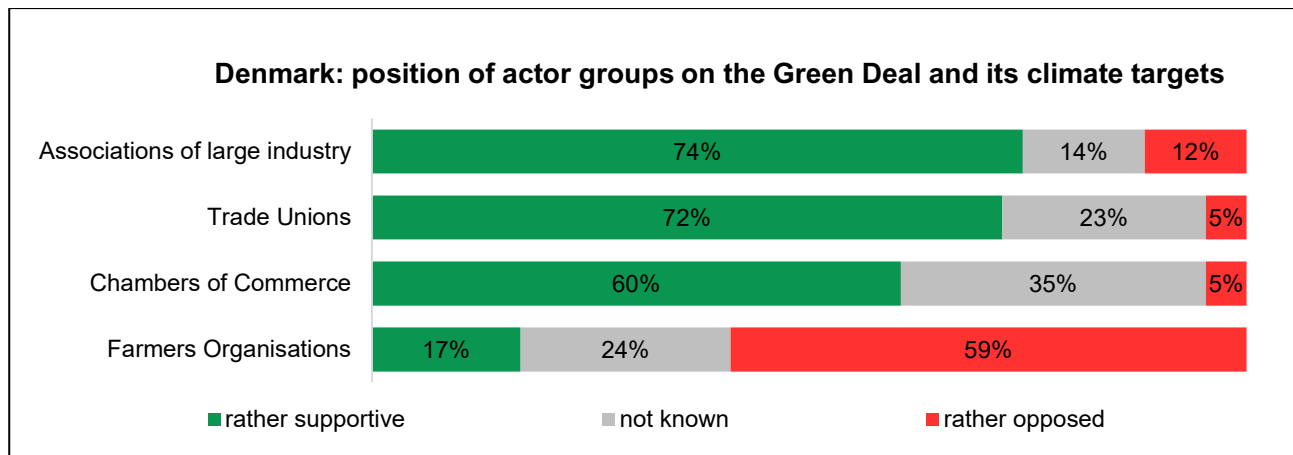
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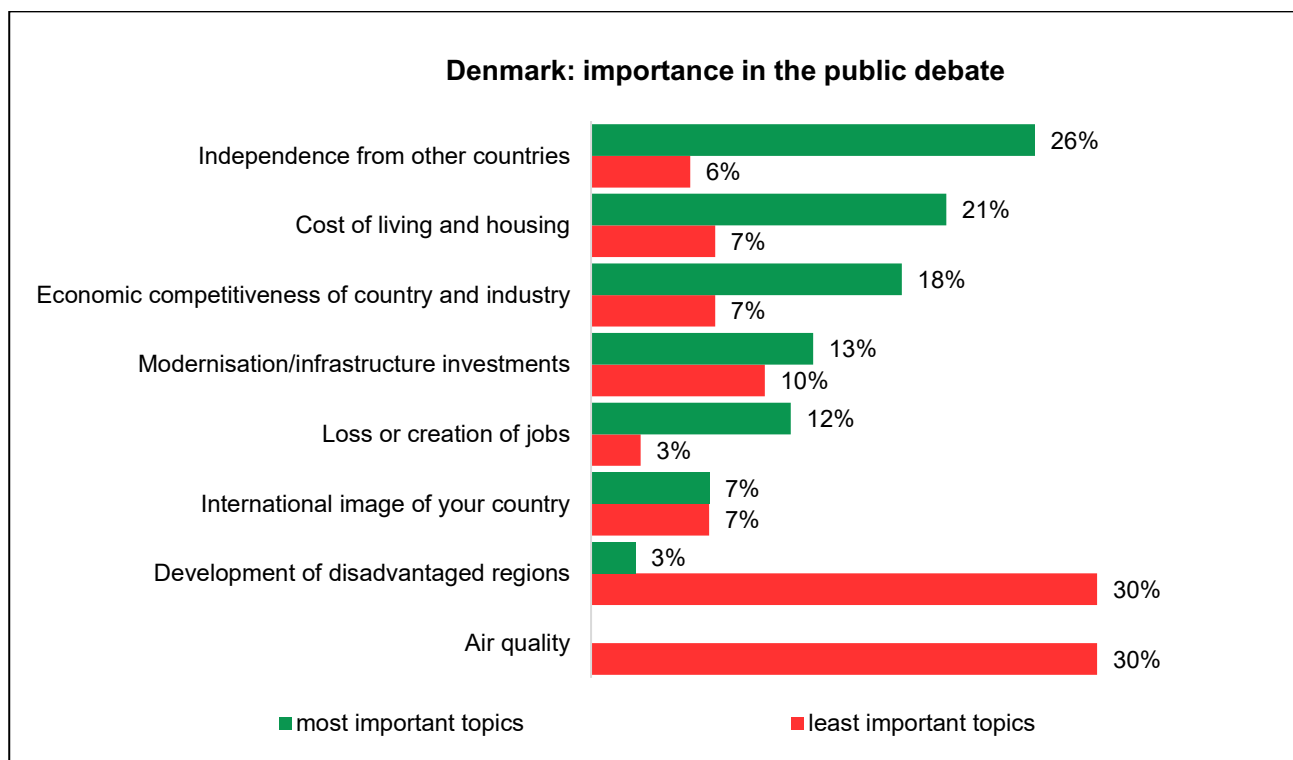
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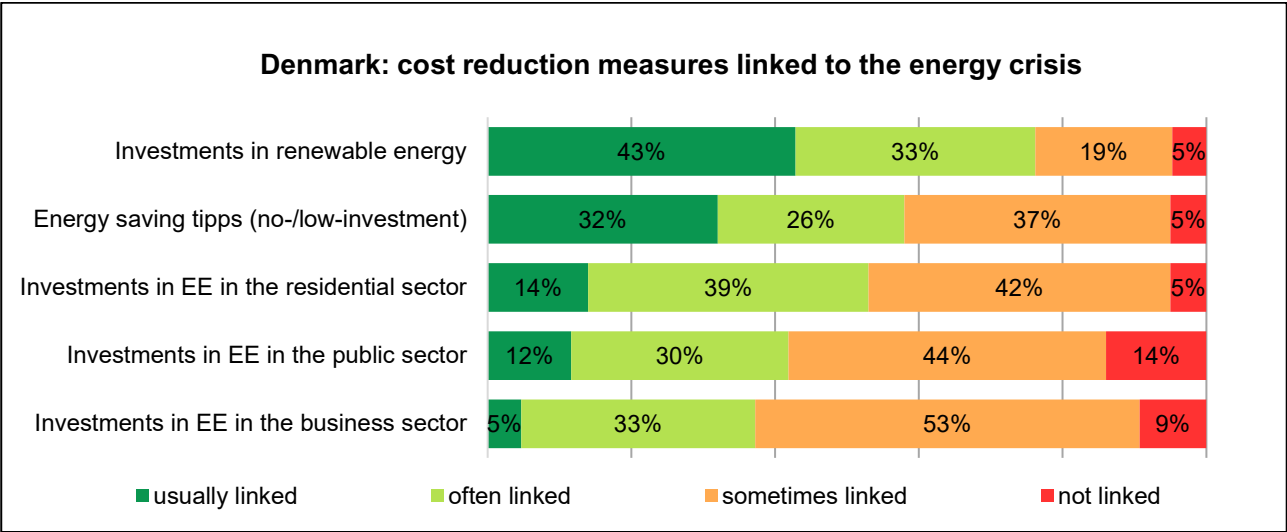
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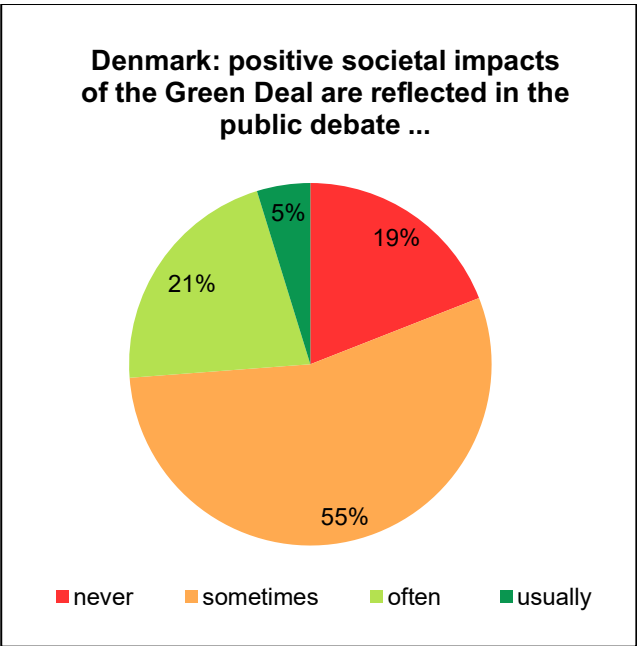
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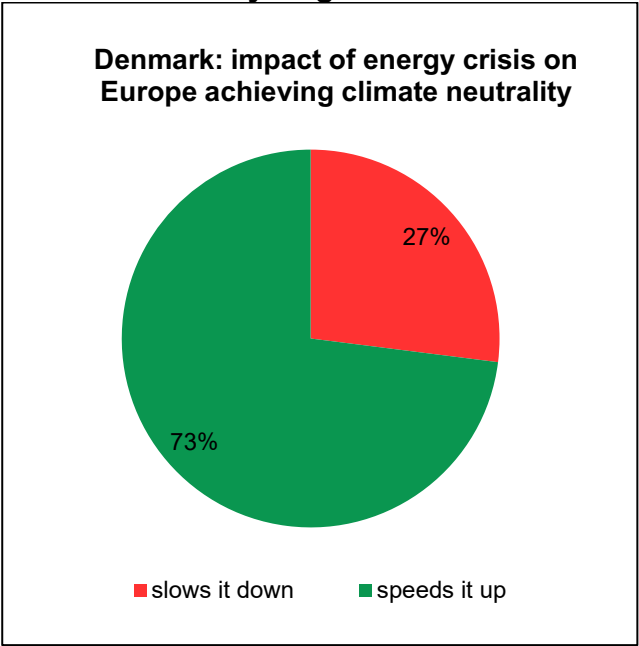
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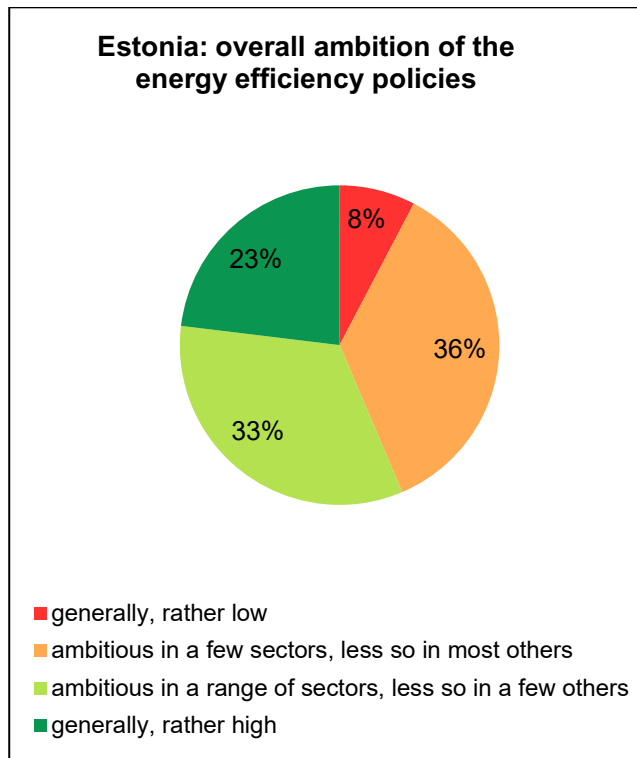
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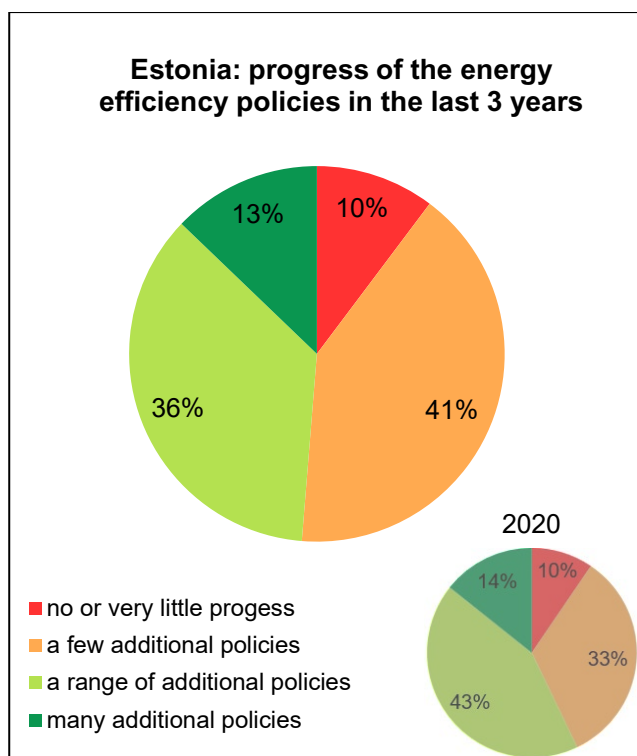
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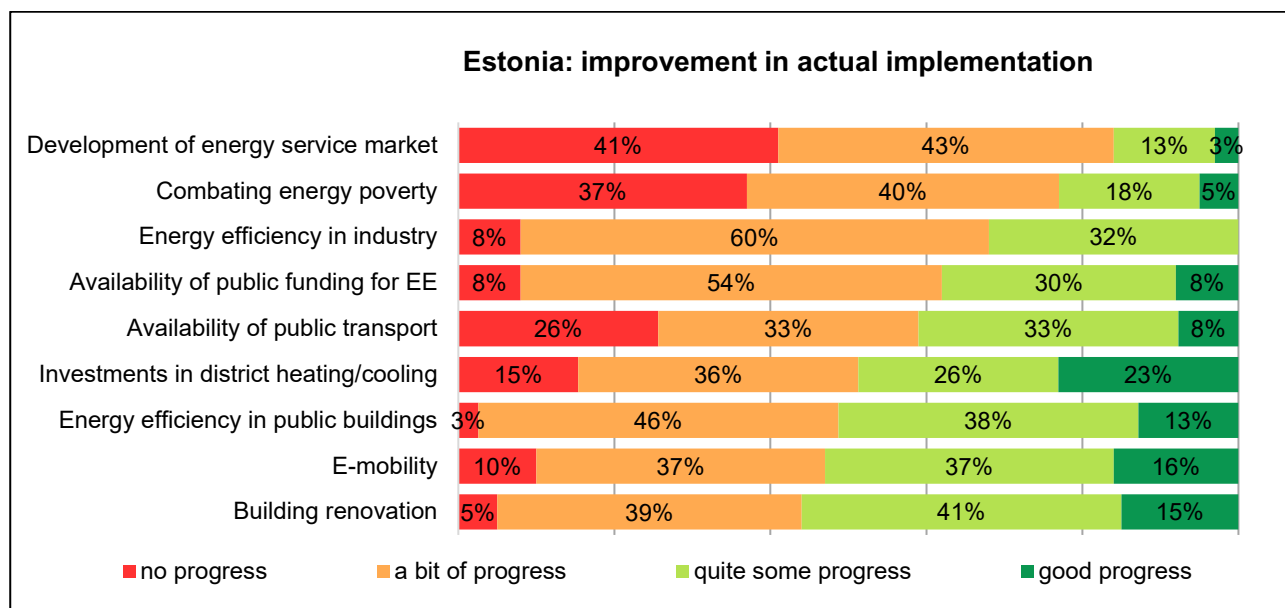
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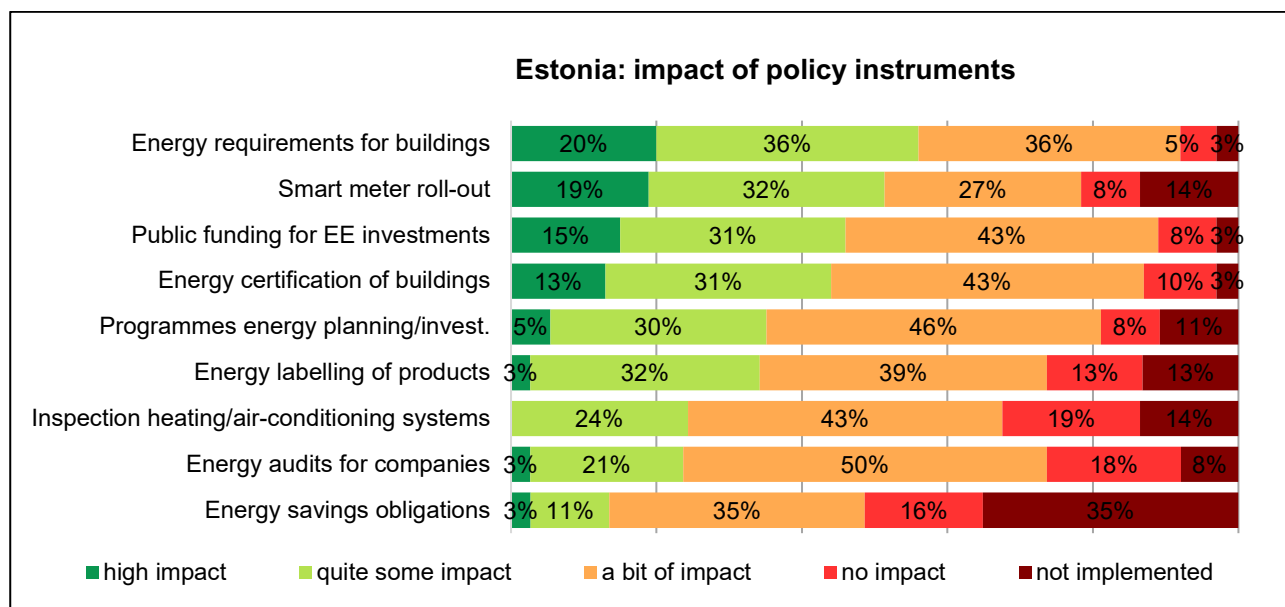
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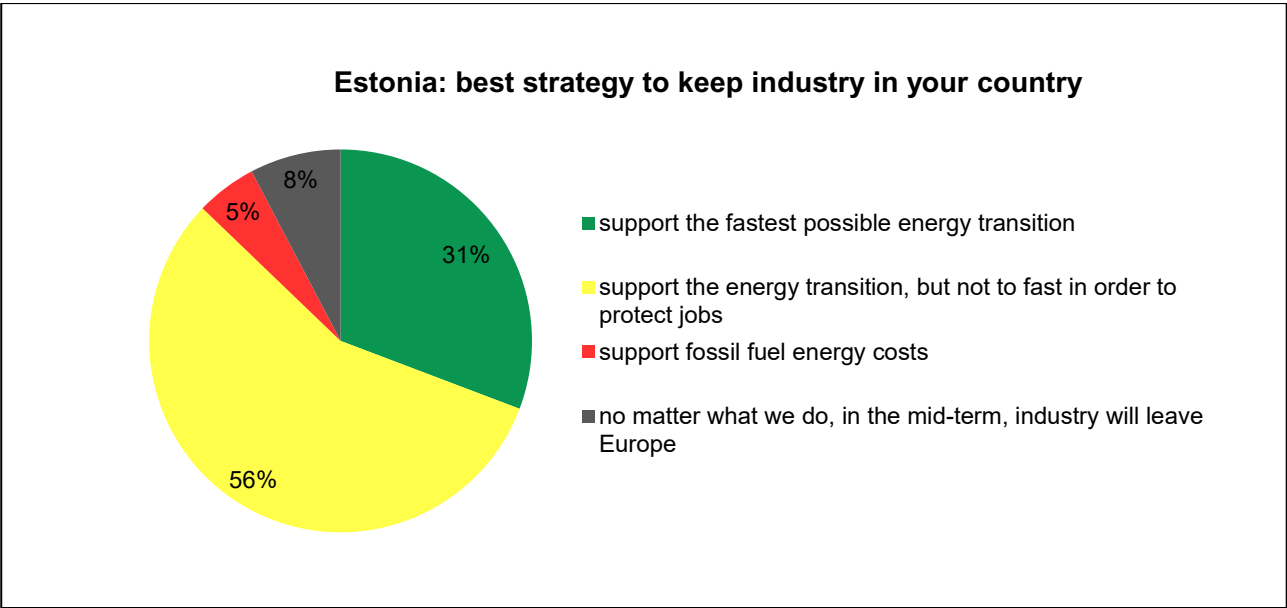
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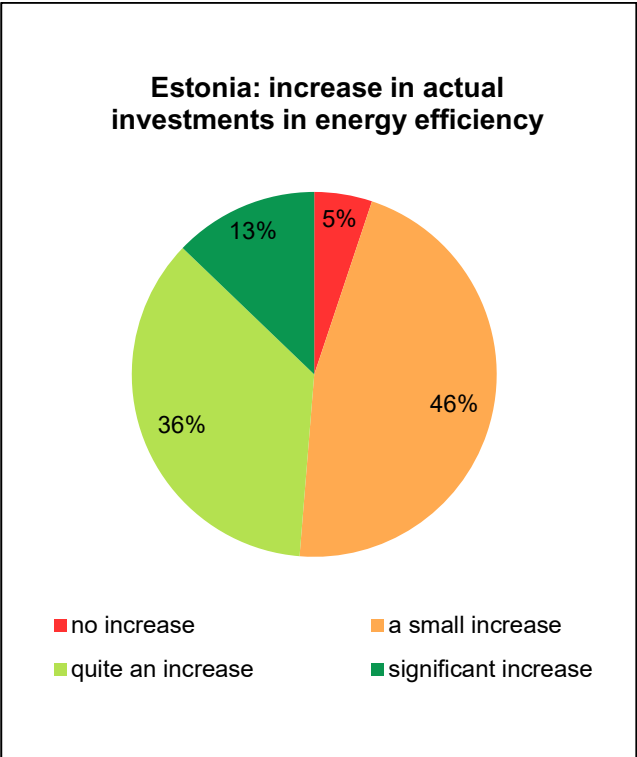
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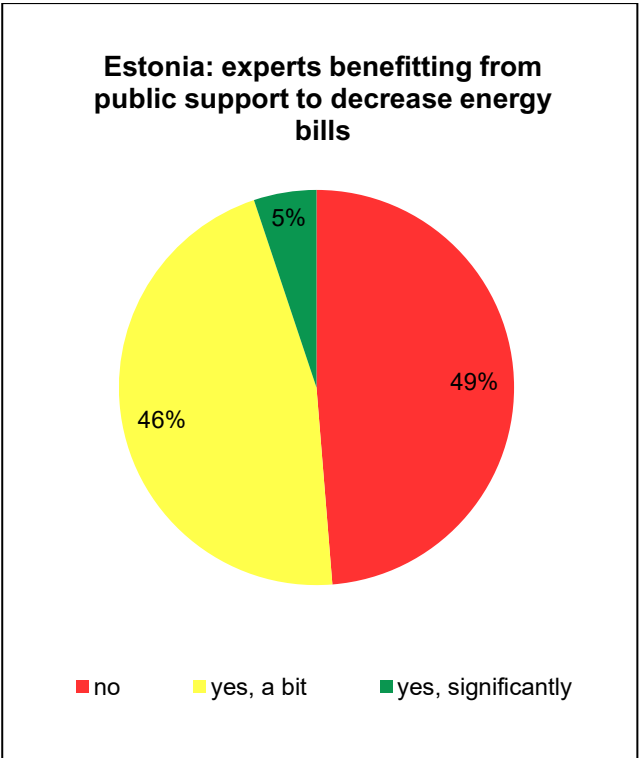
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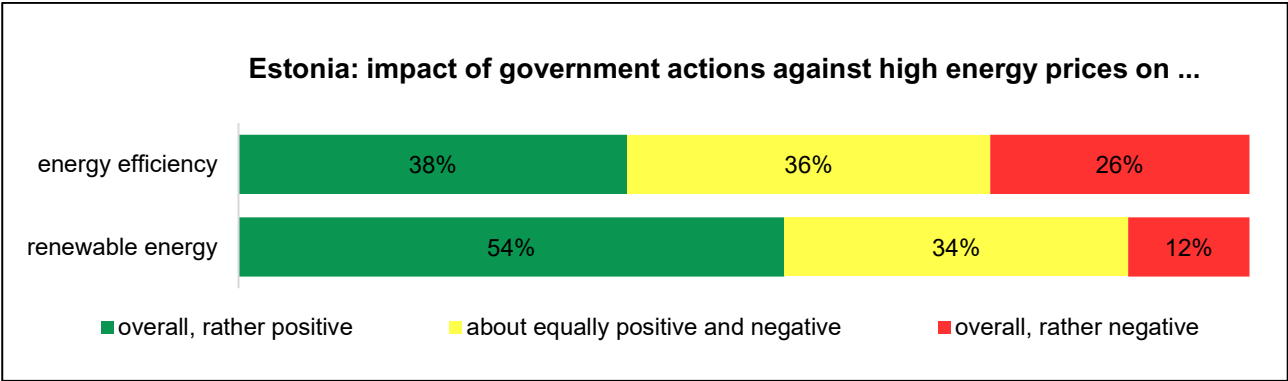
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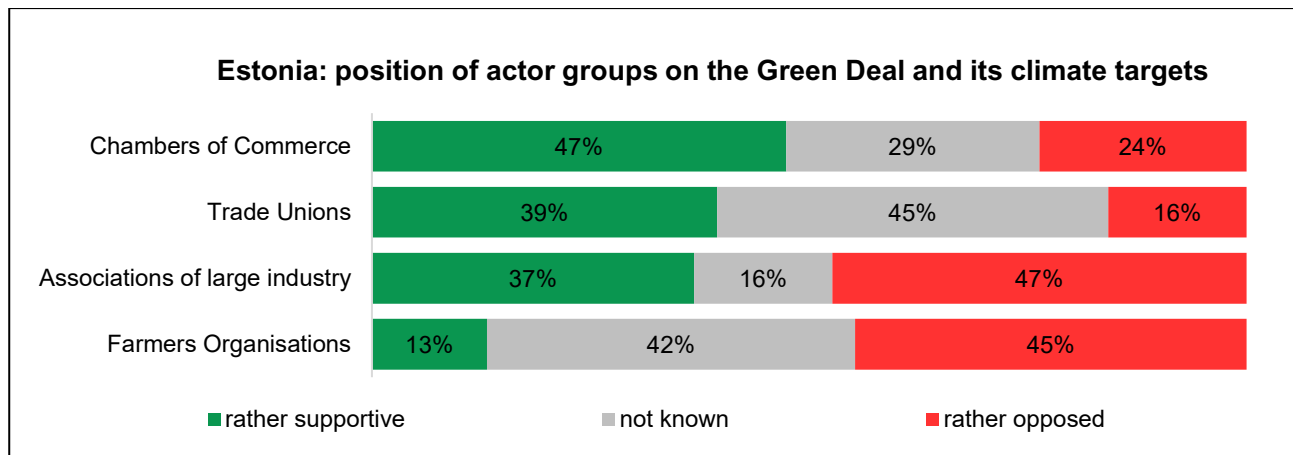
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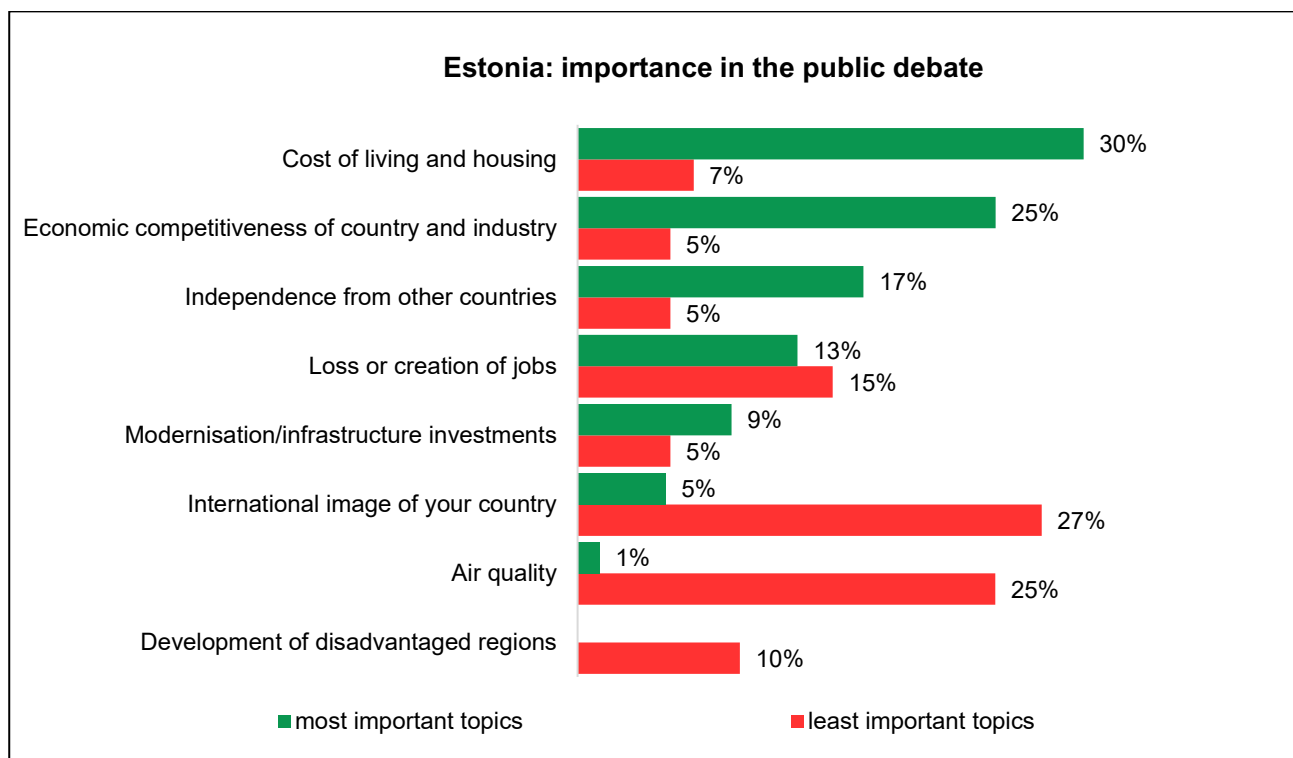
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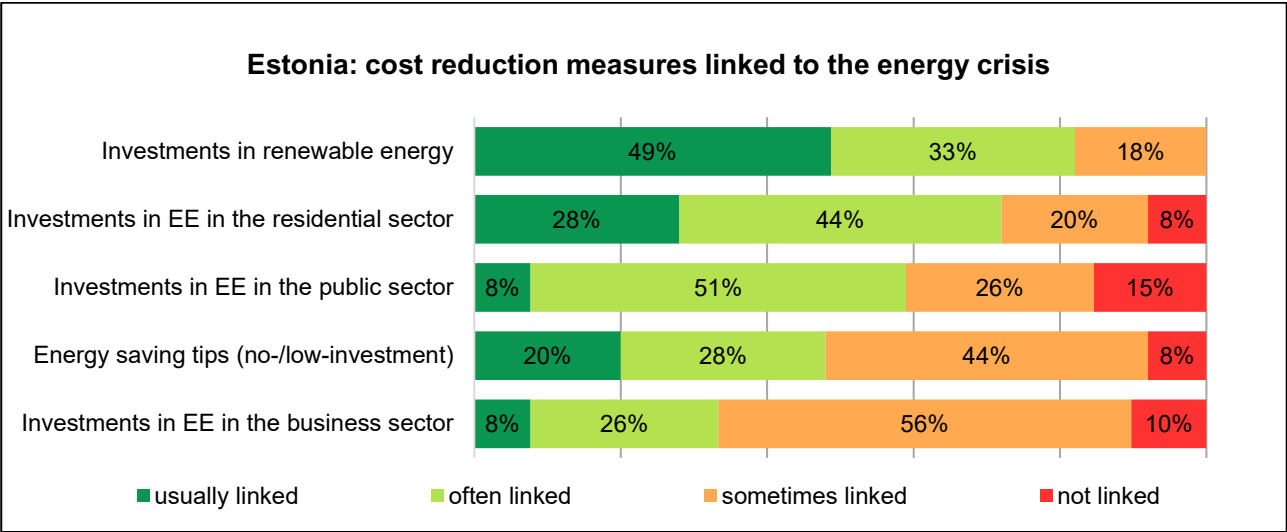
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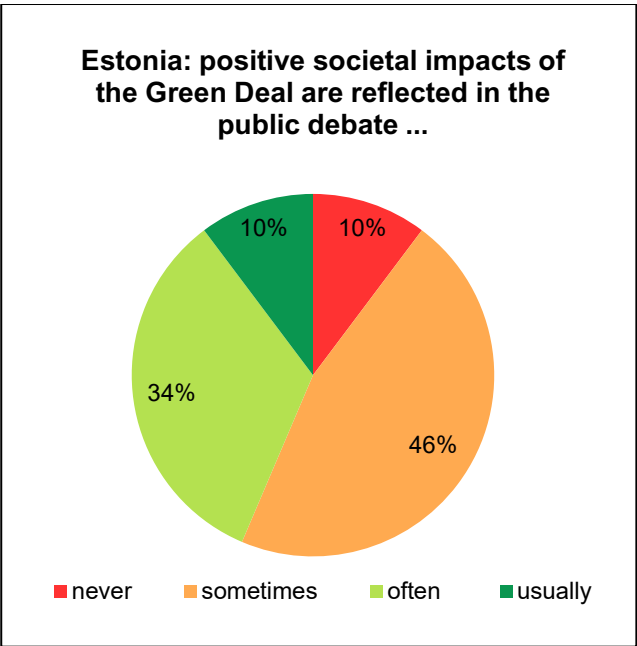
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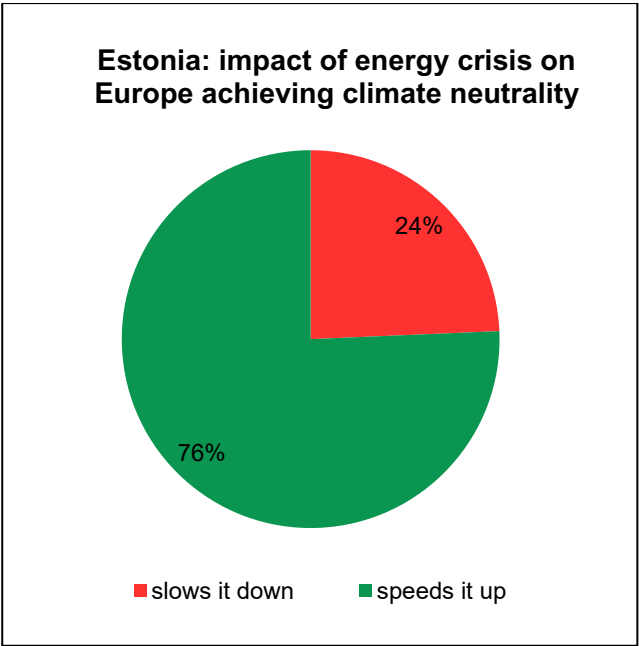
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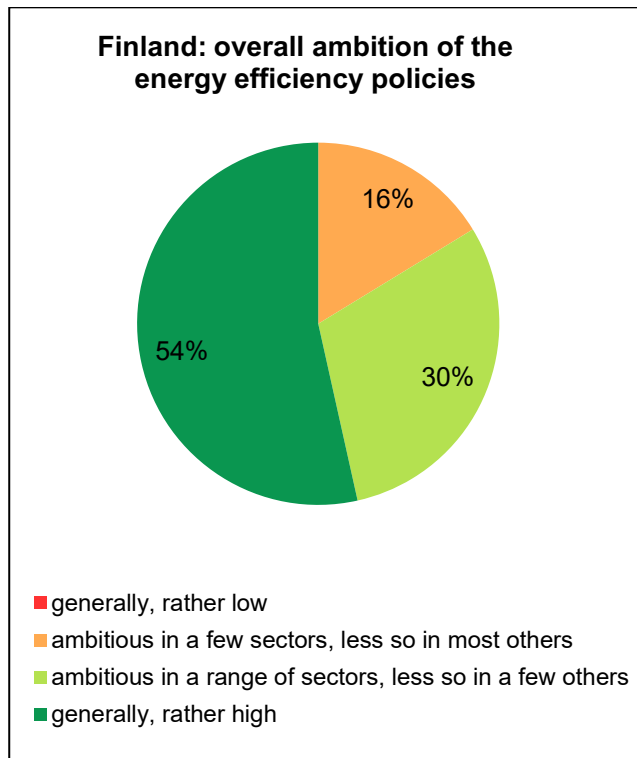
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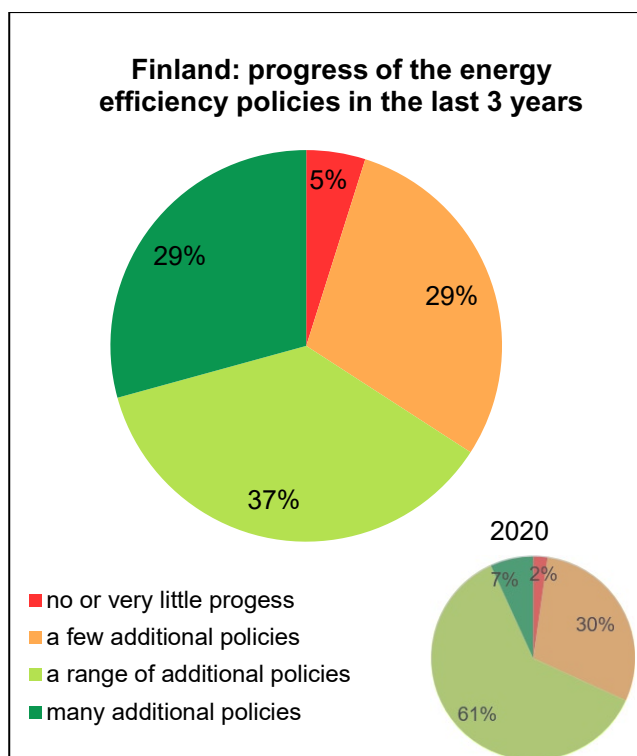
Finland



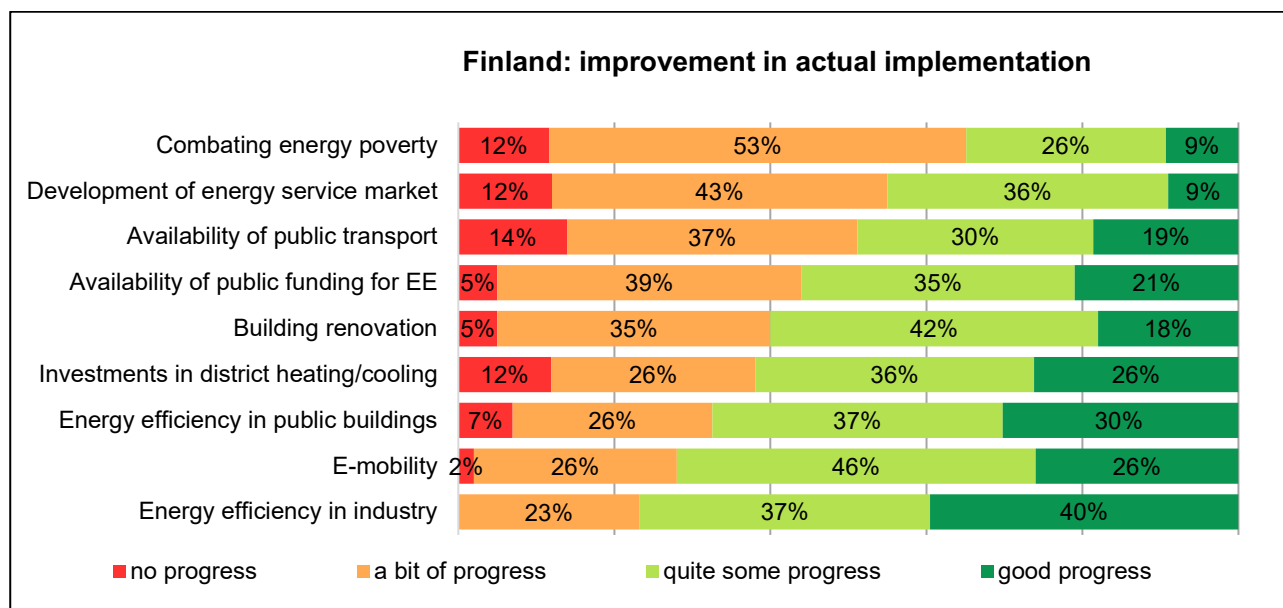
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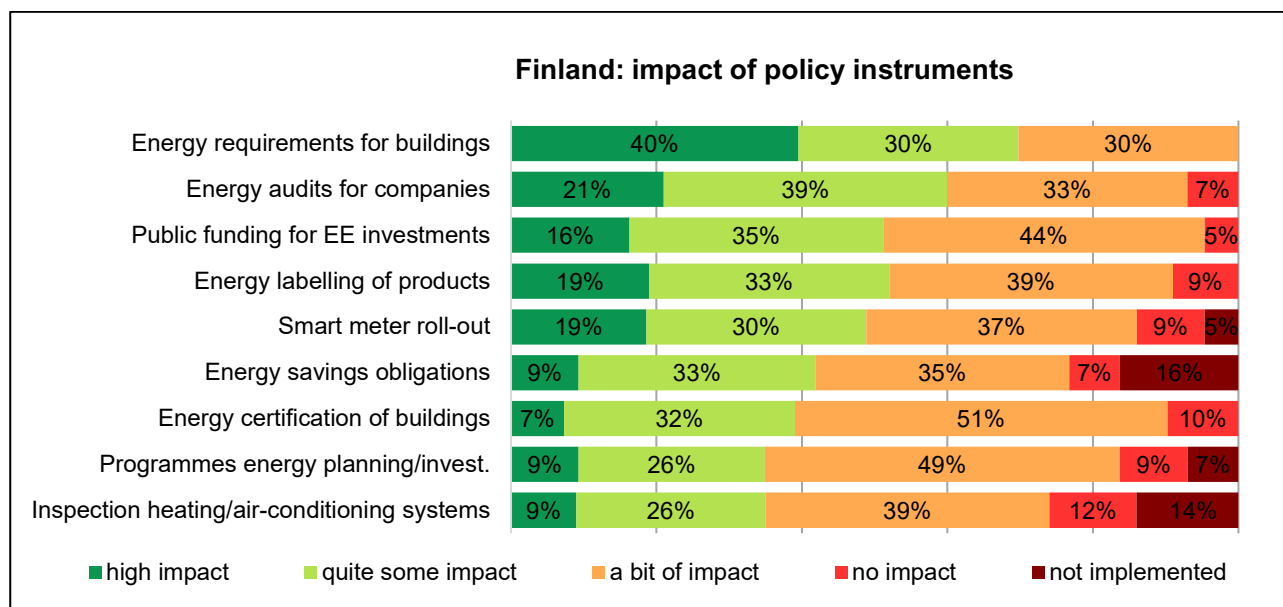
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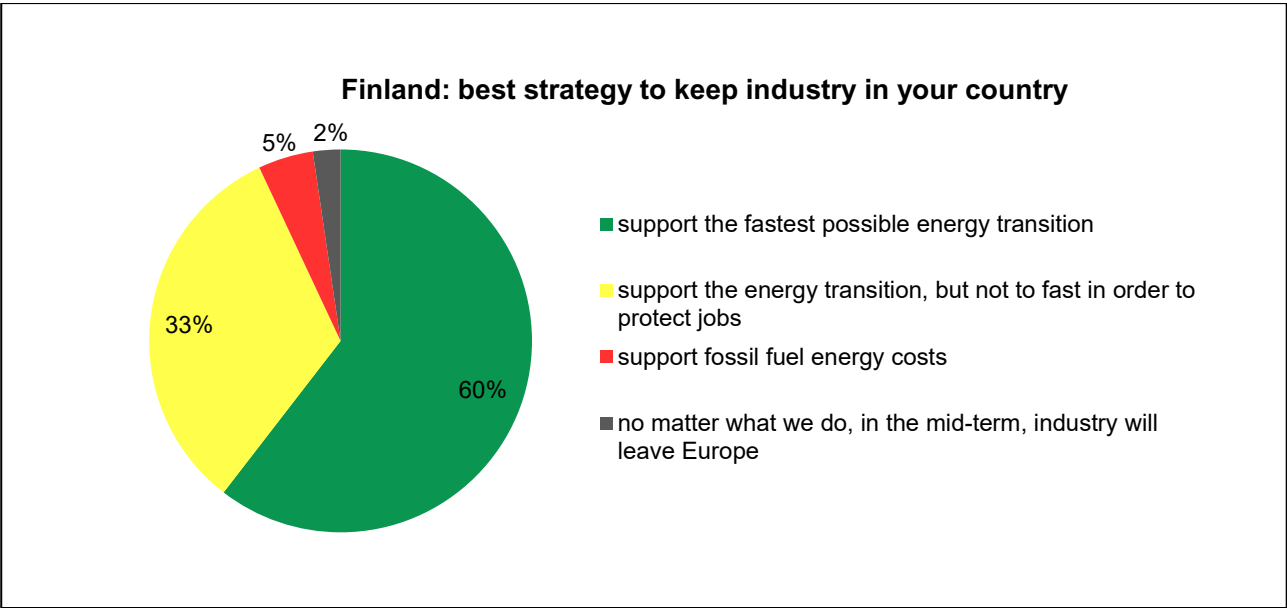
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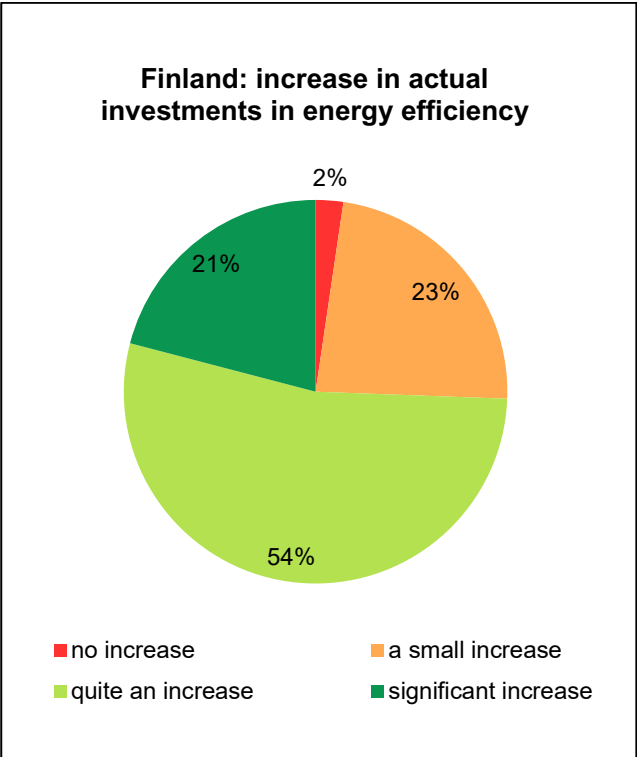
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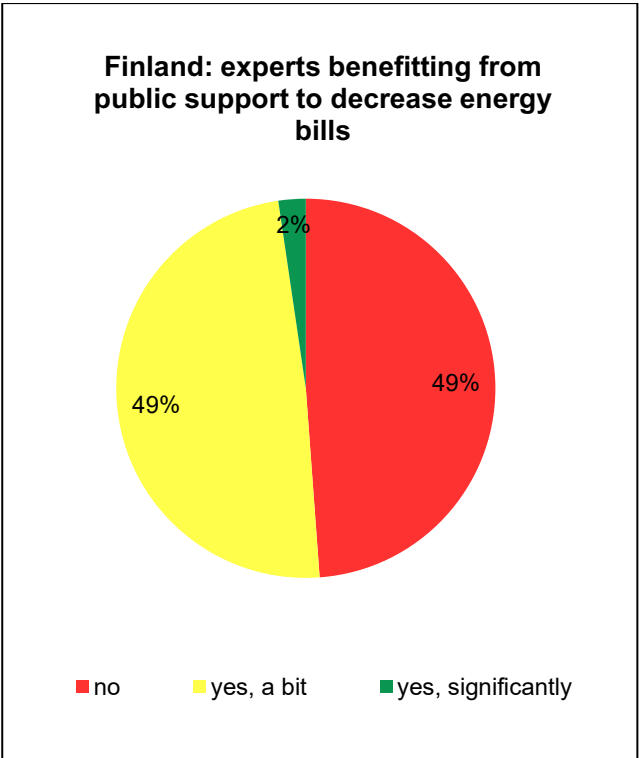
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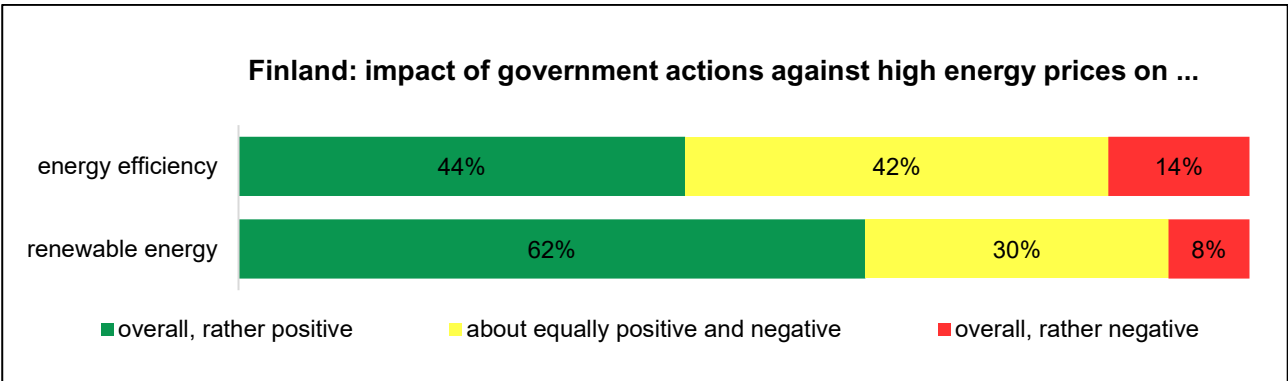
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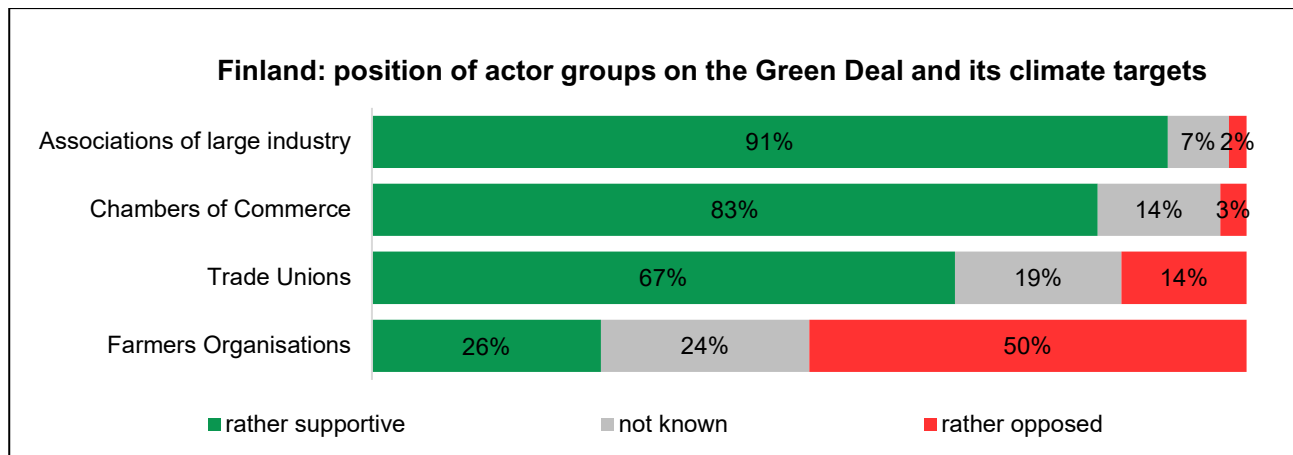
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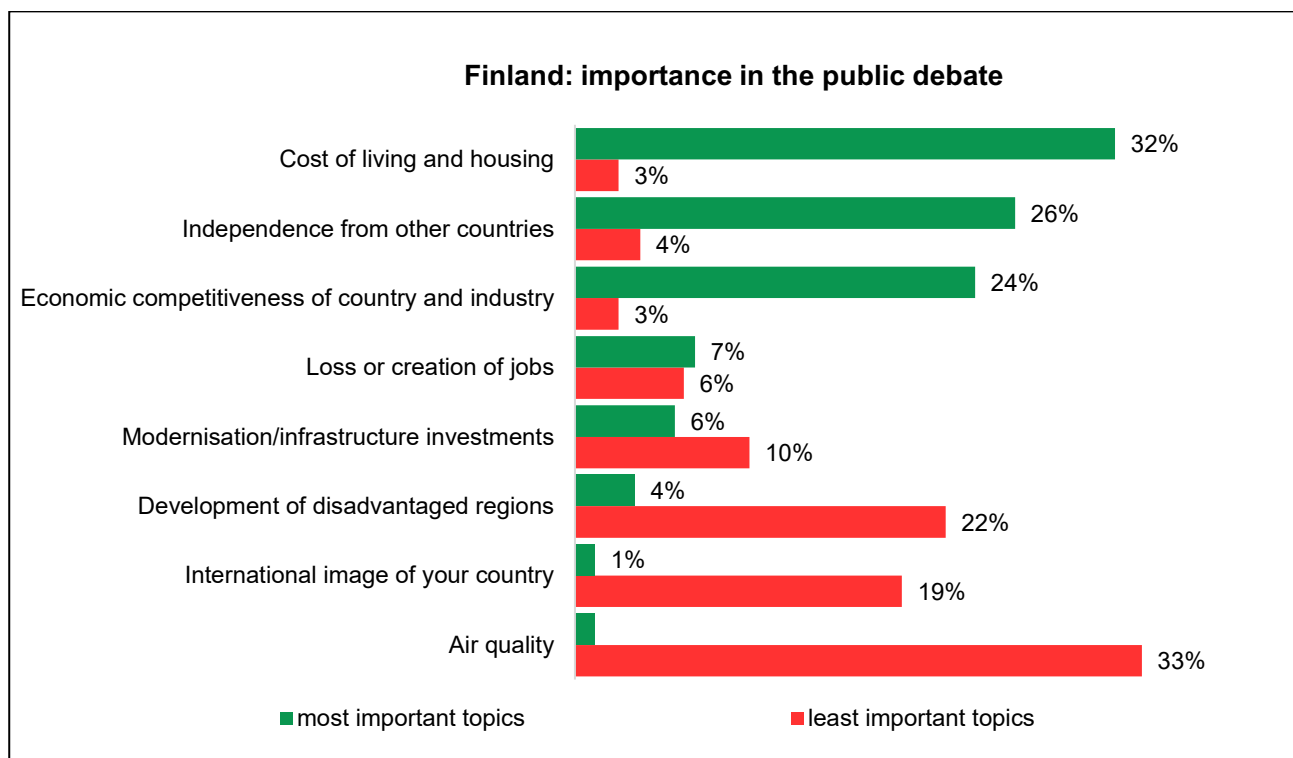
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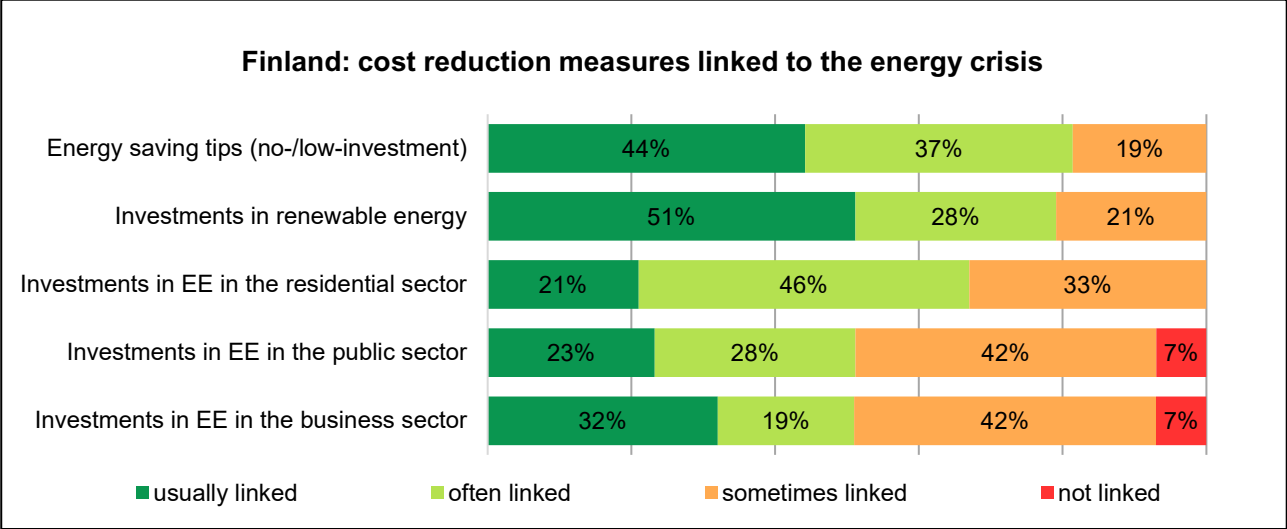
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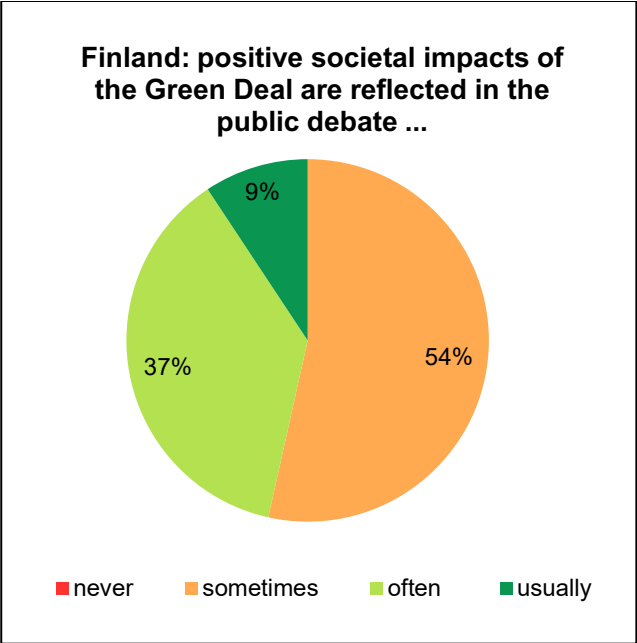
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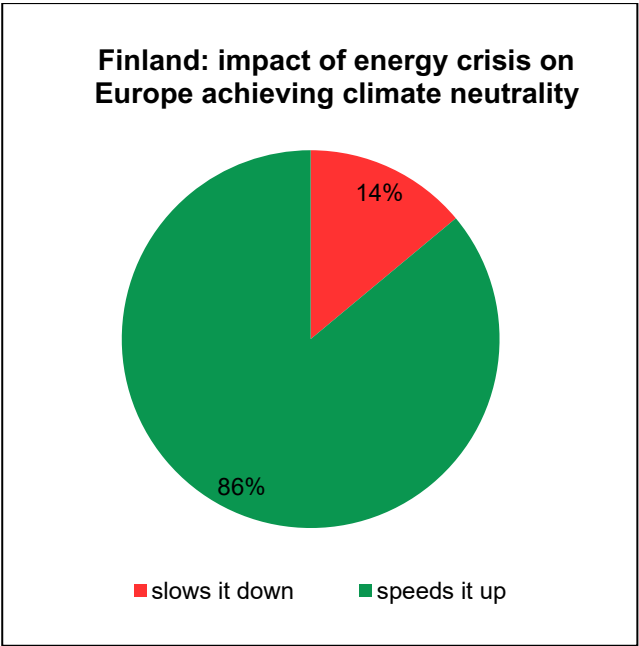
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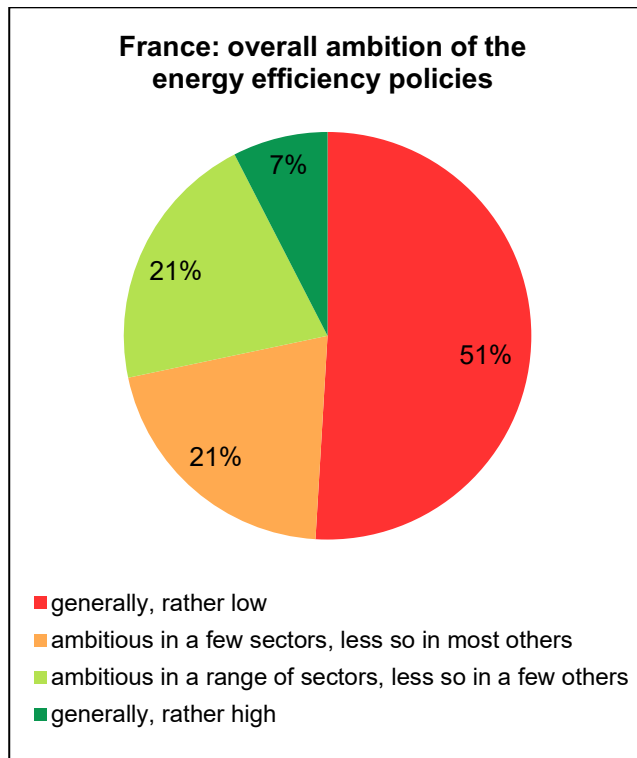
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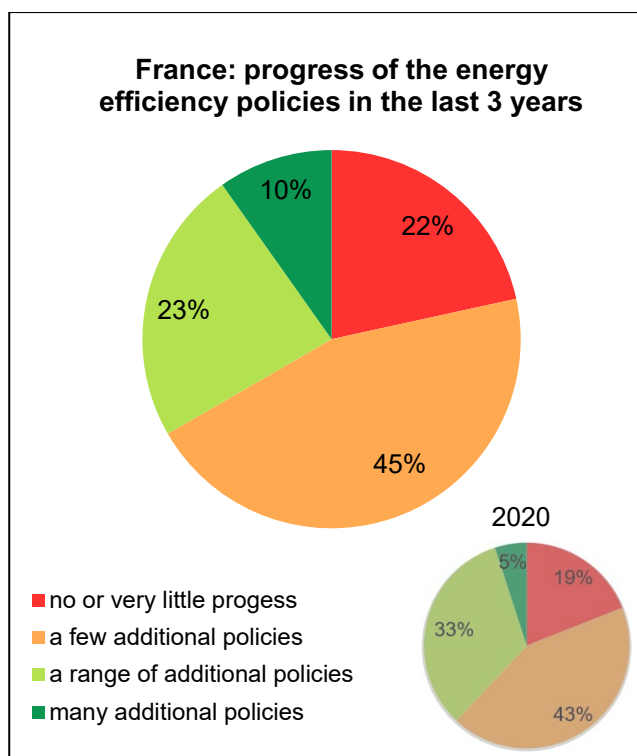
France



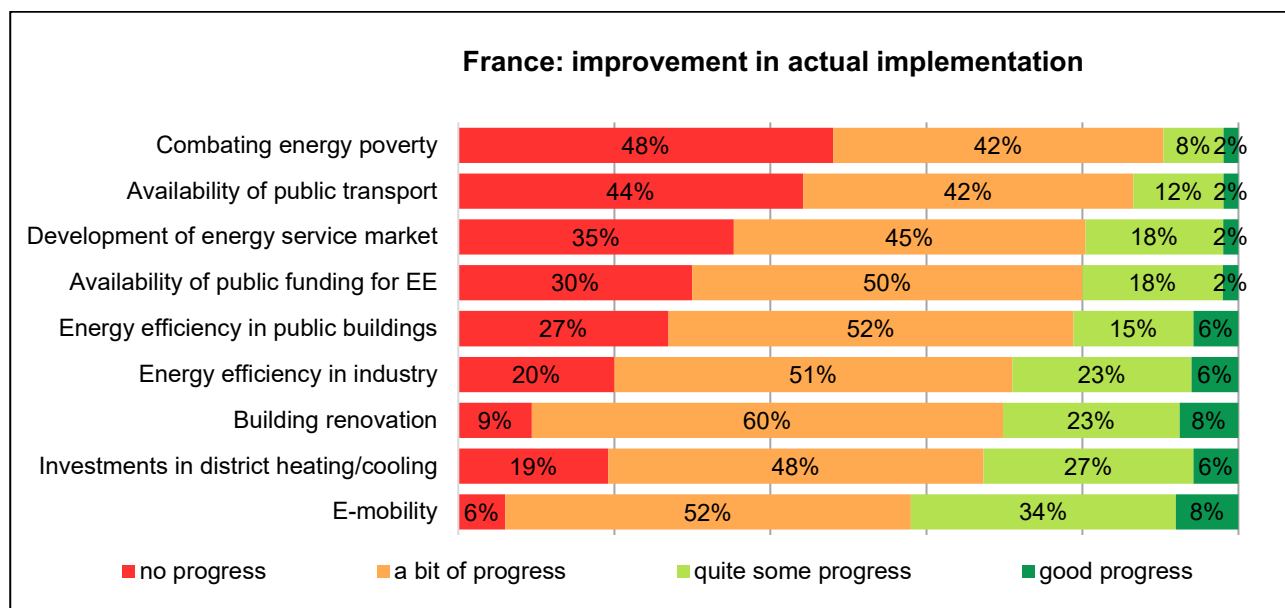
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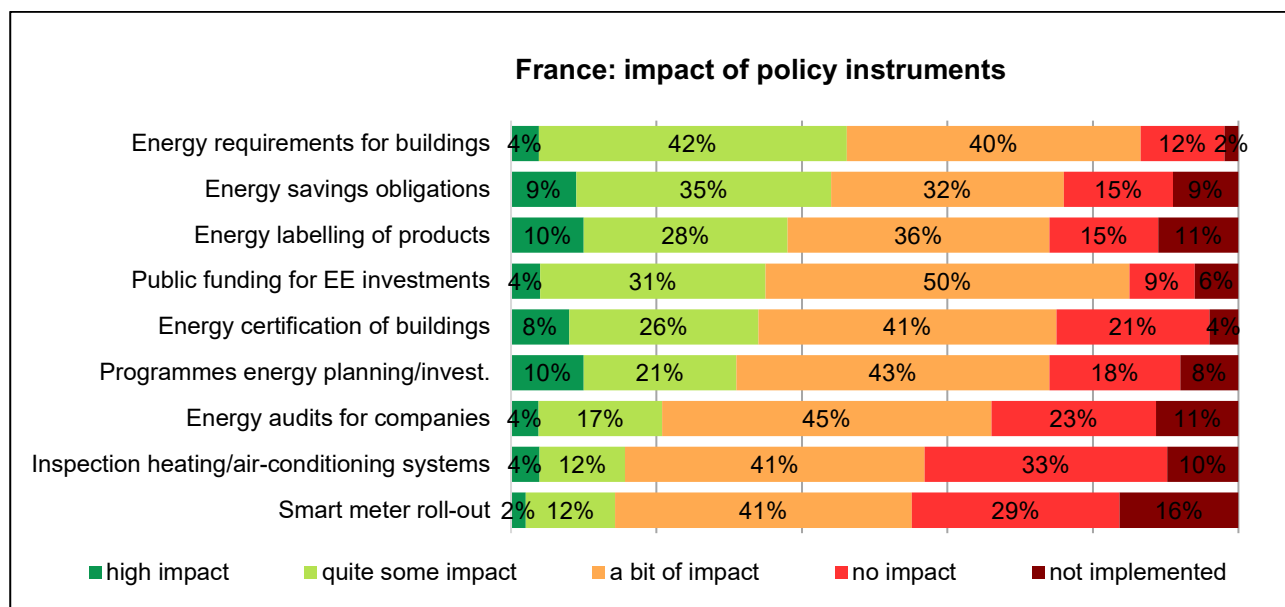
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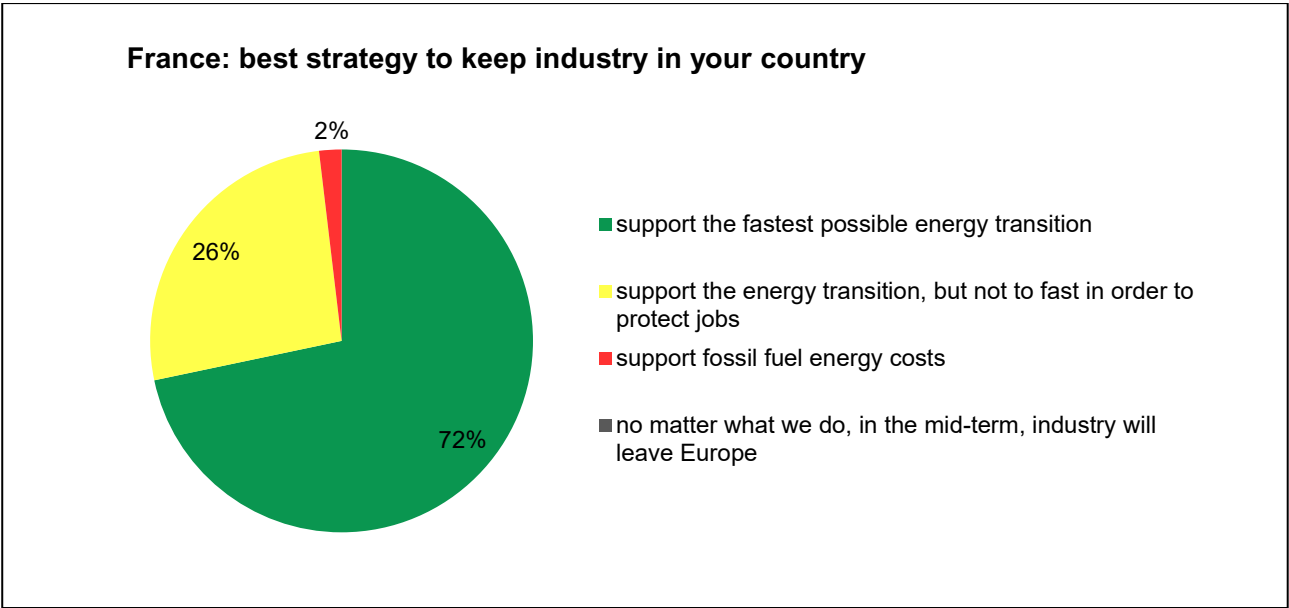
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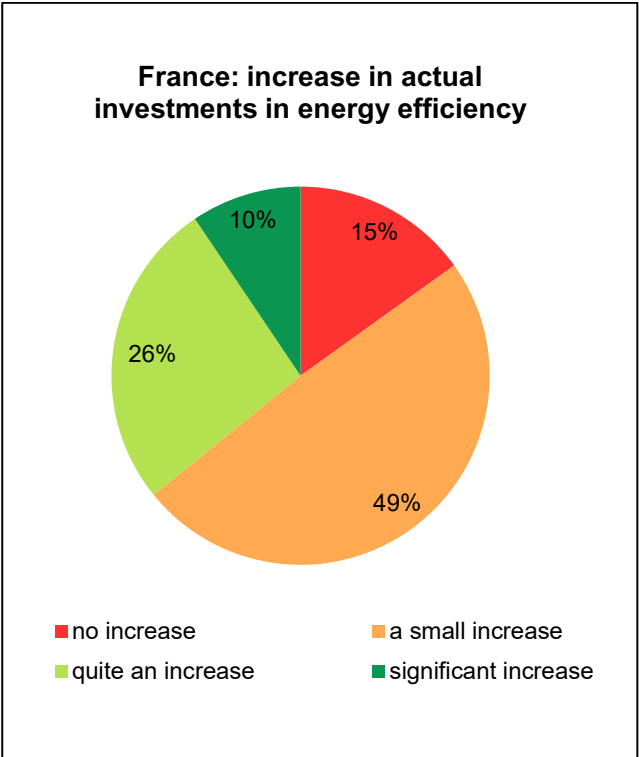
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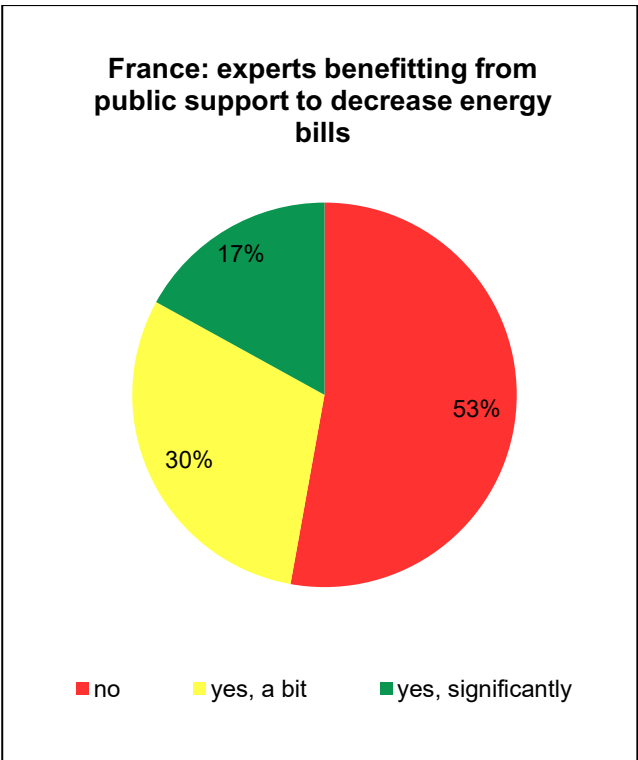
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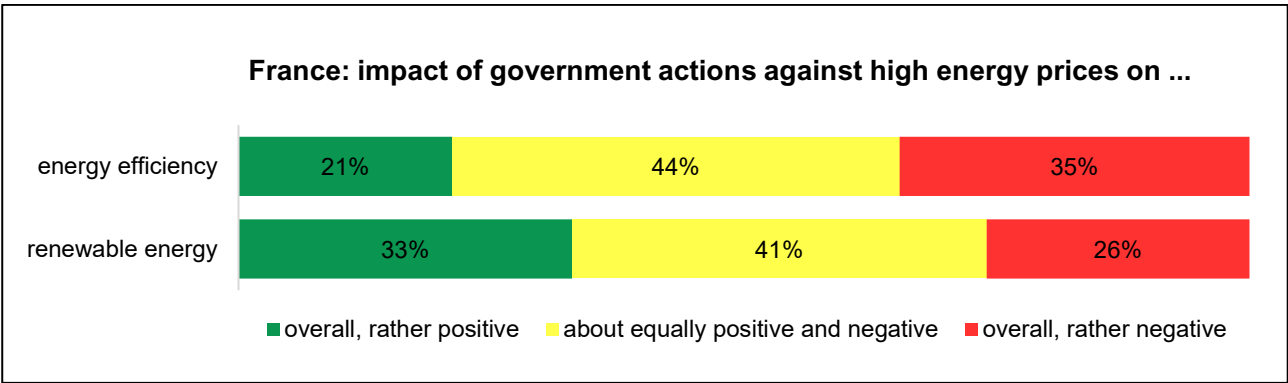
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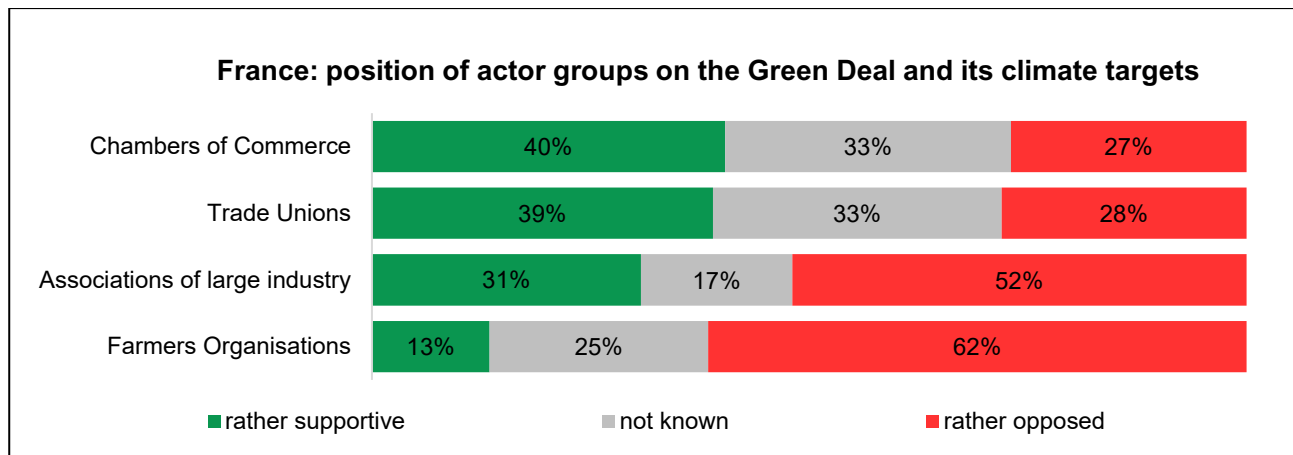
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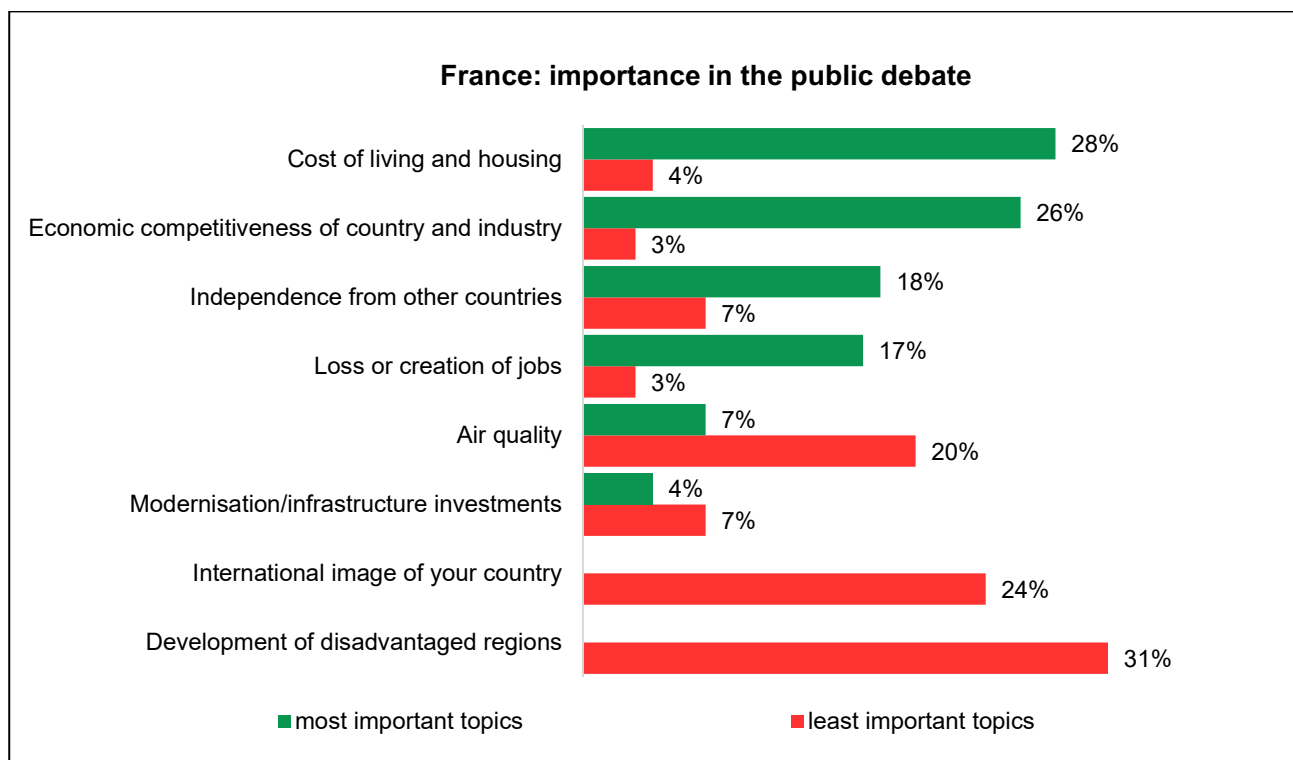
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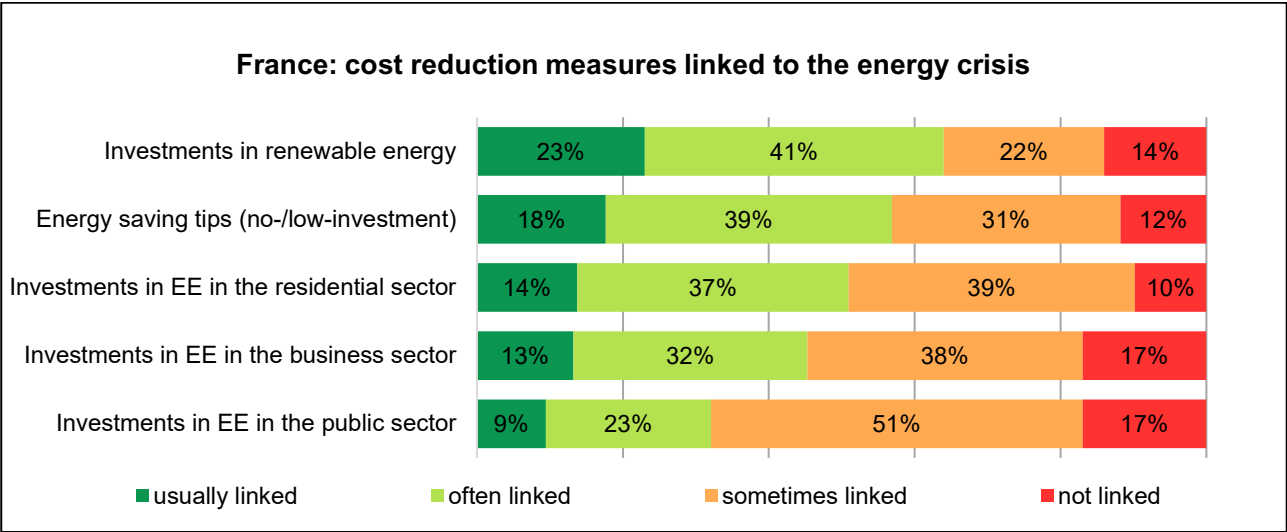
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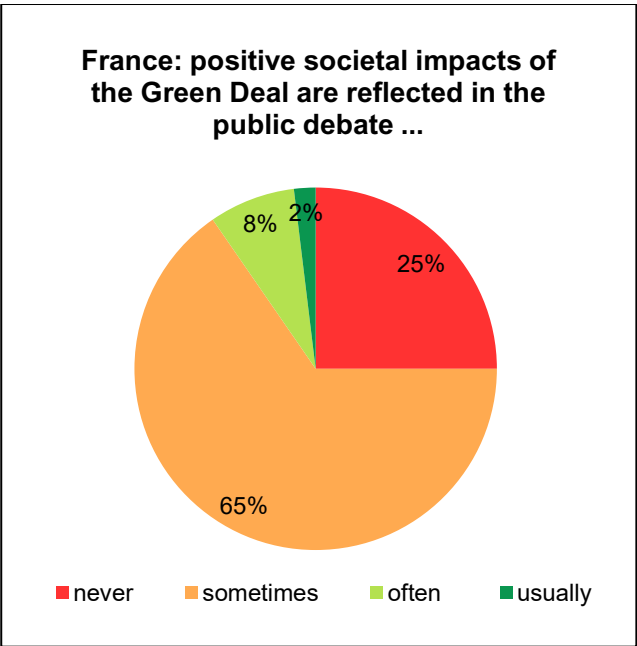
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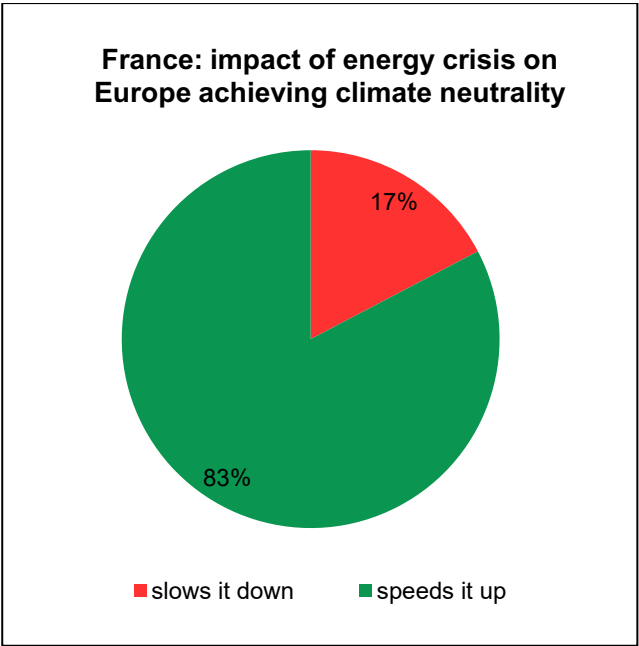
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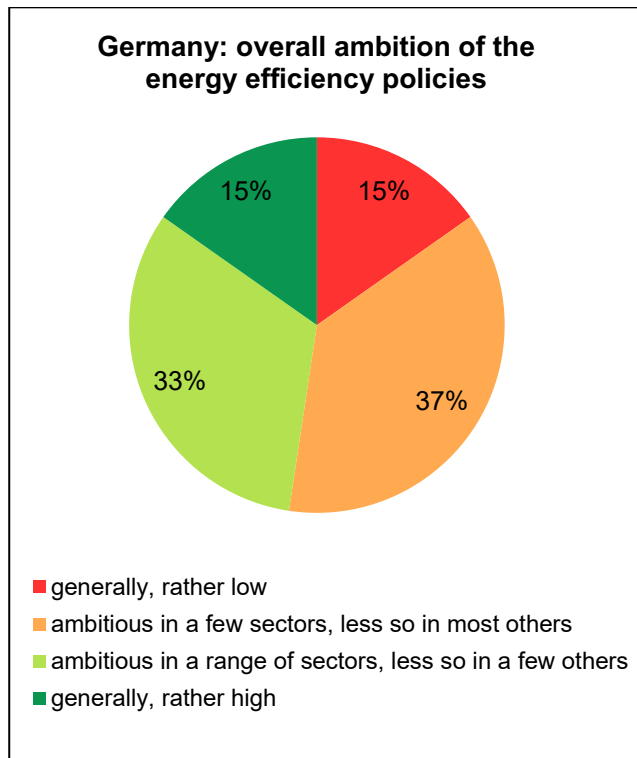
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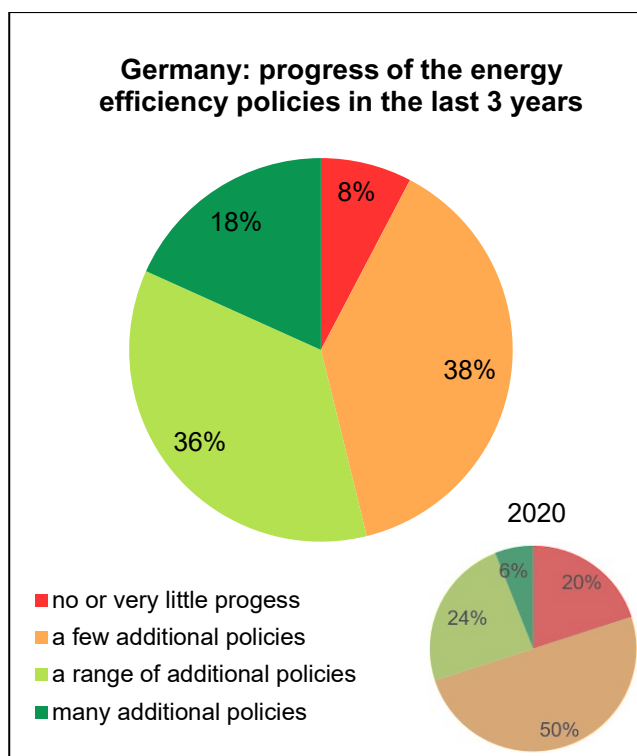
Germany



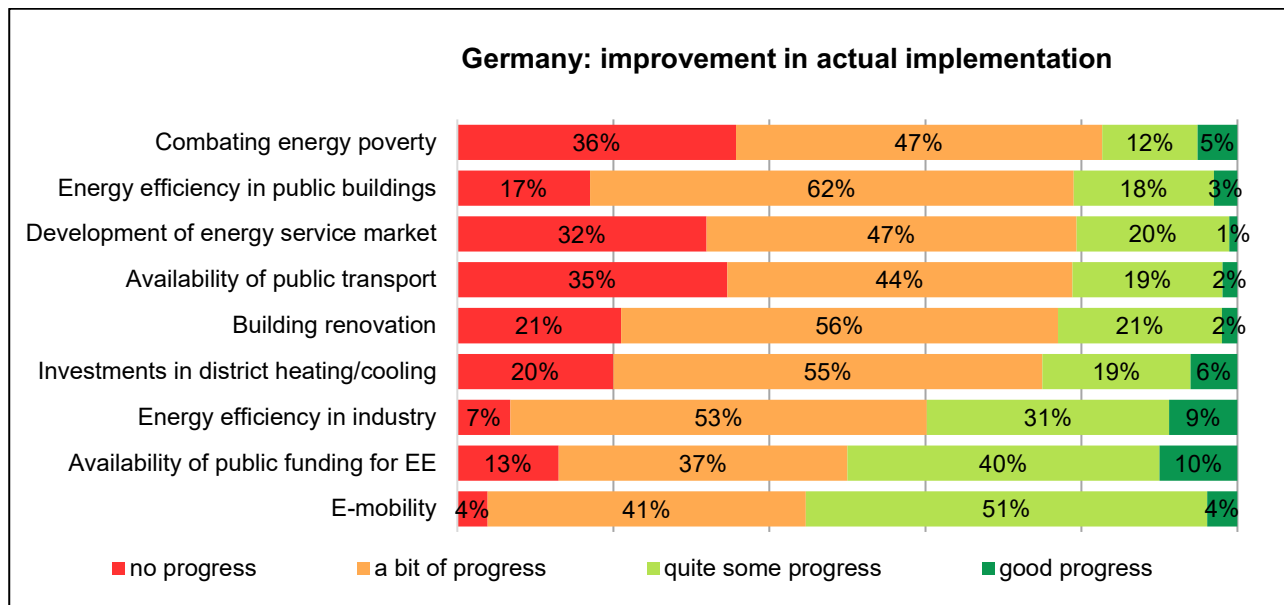
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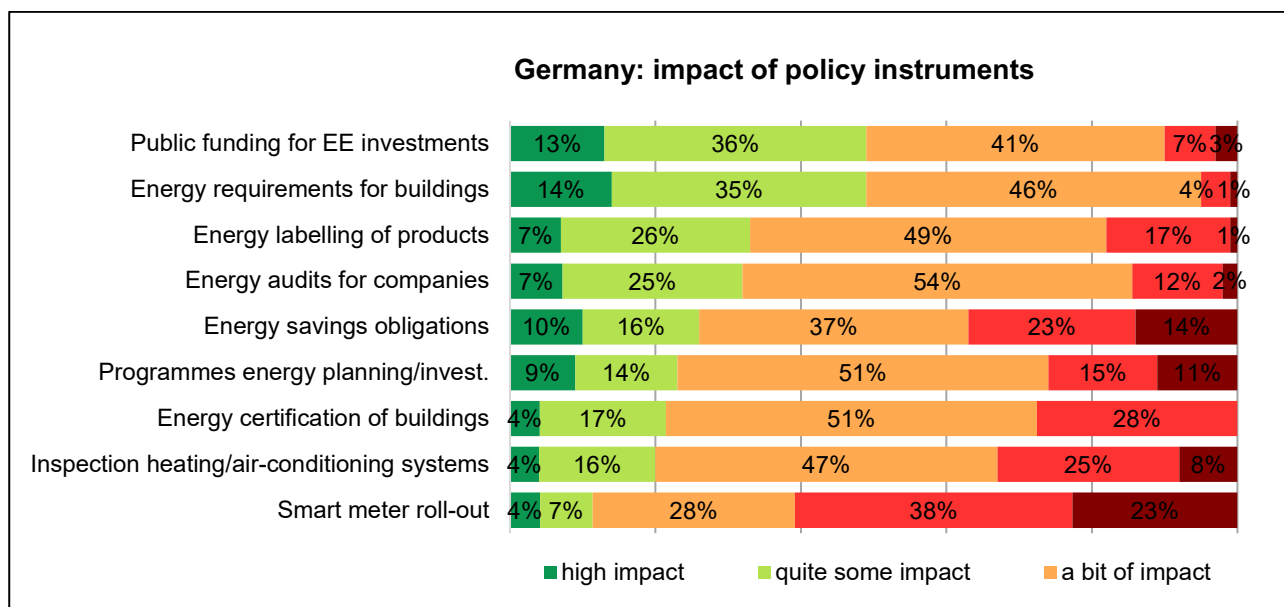
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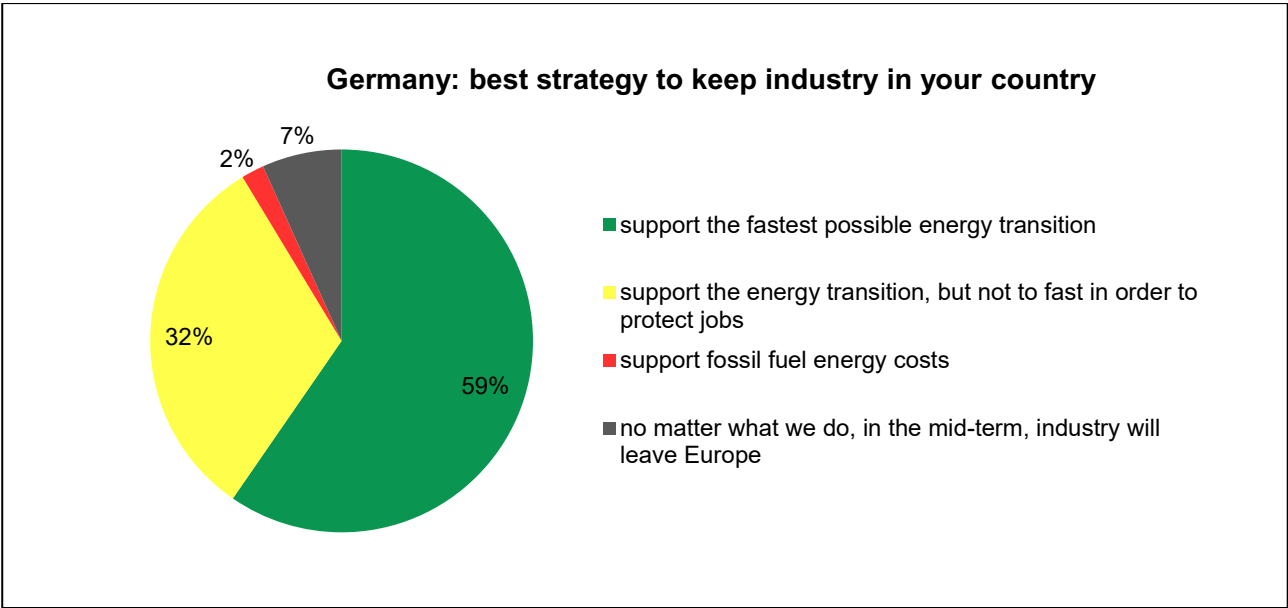
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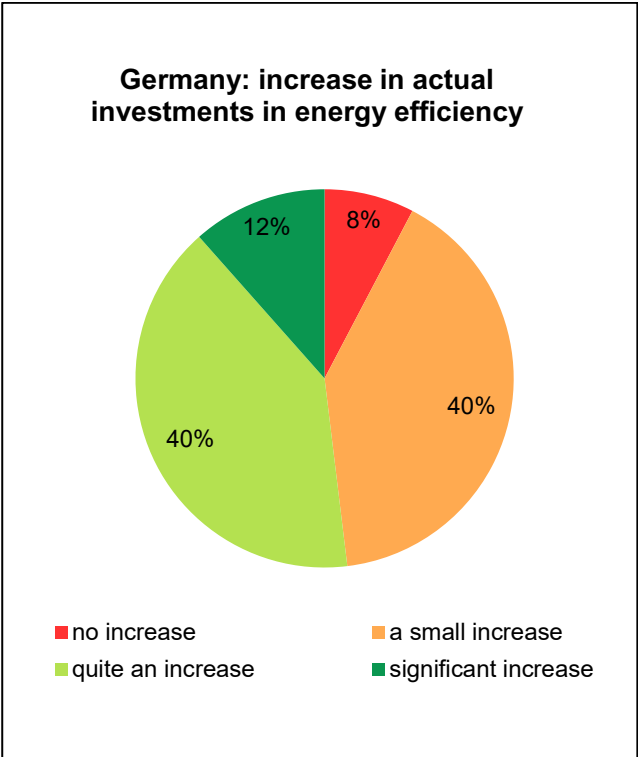
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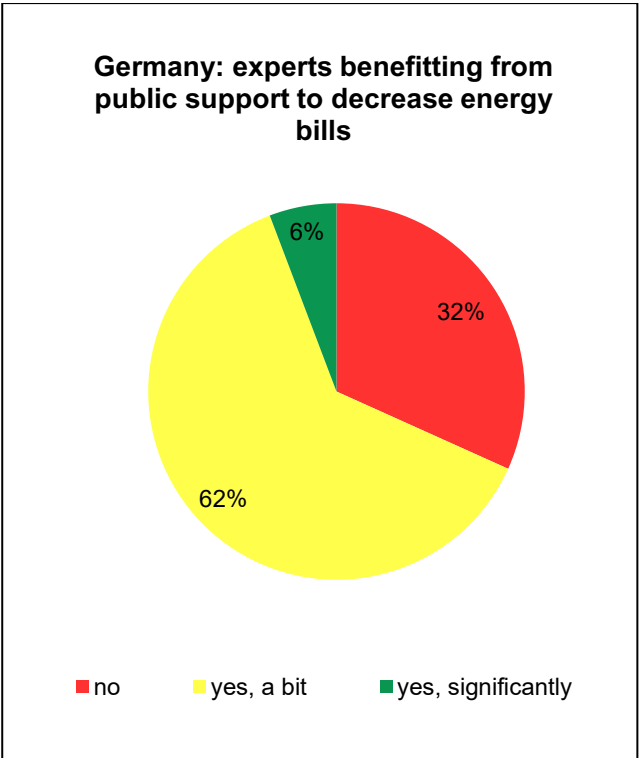
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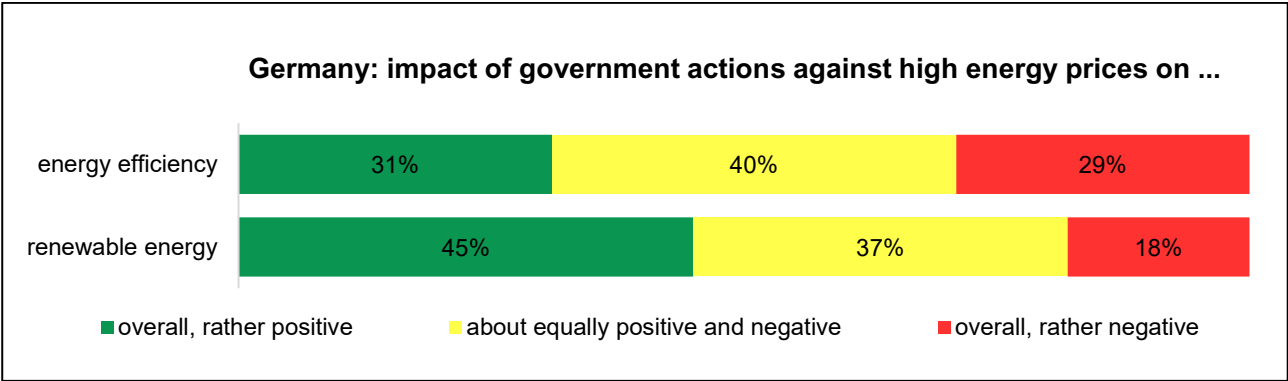
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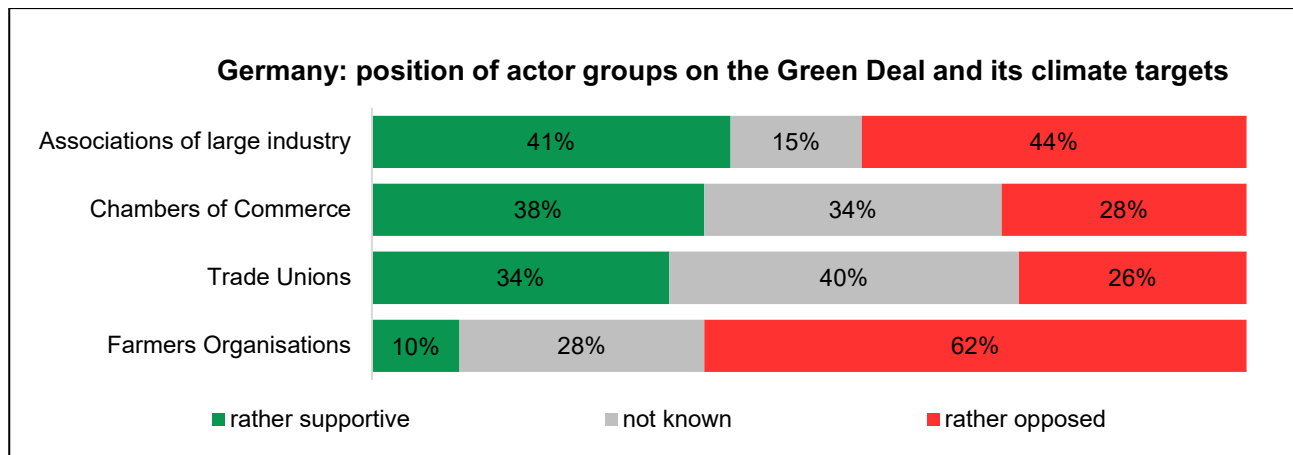
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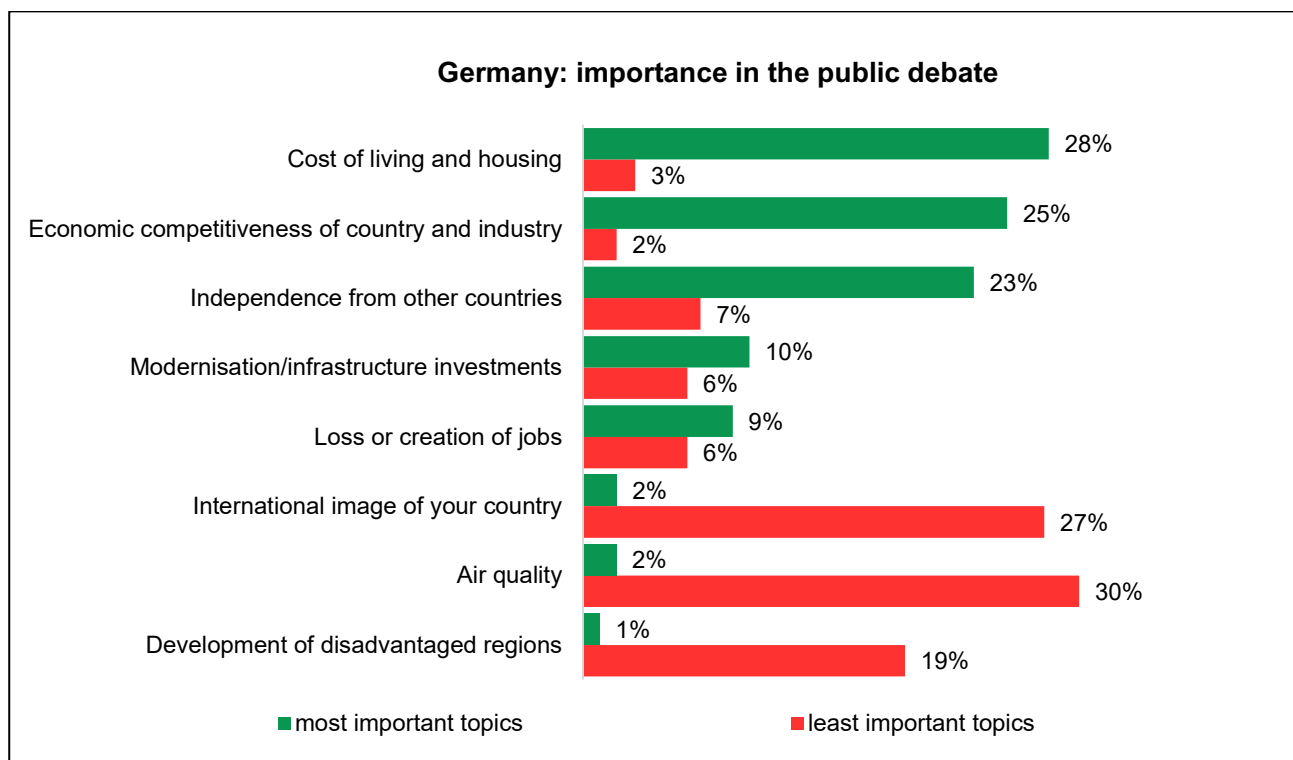
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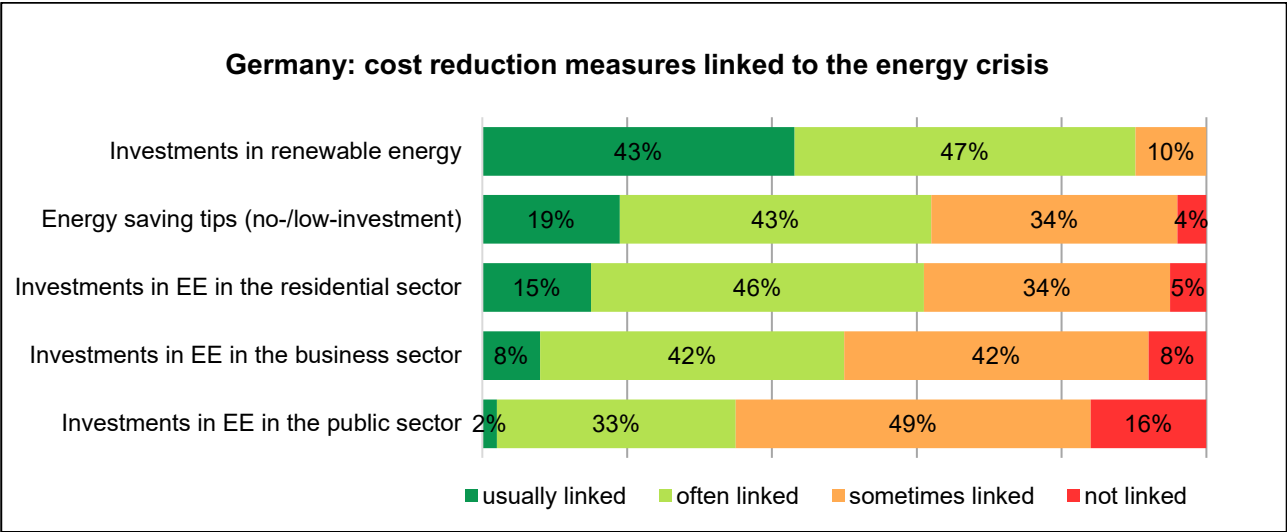
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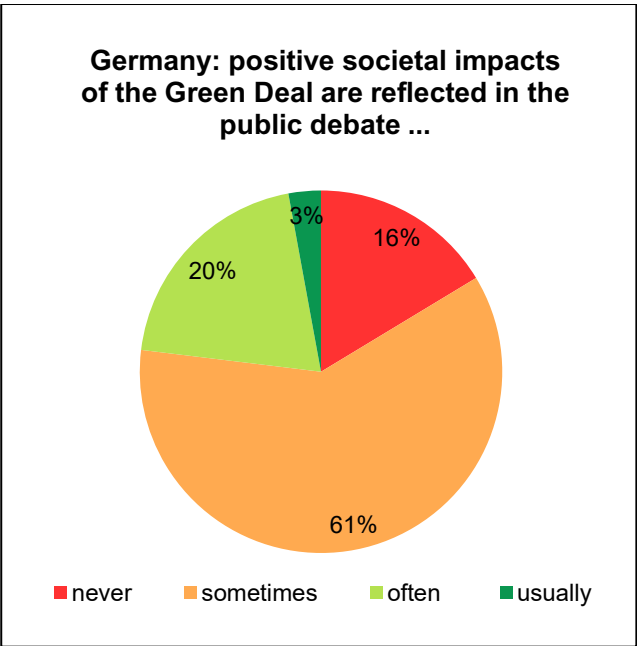
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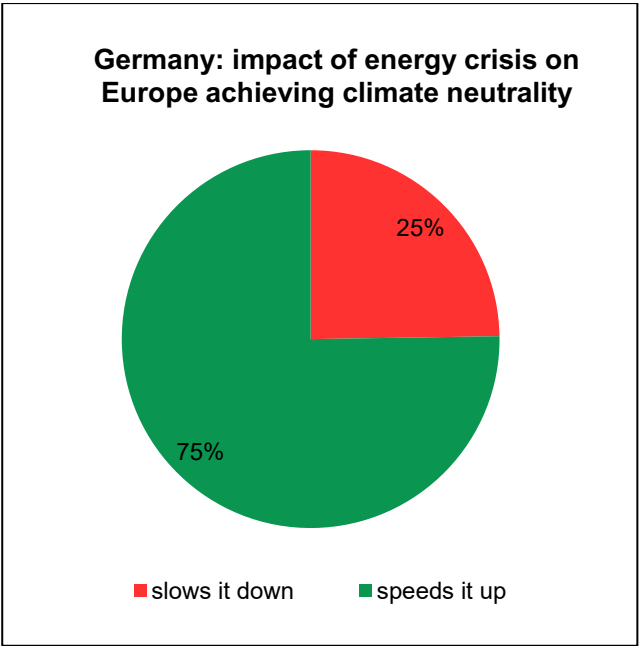
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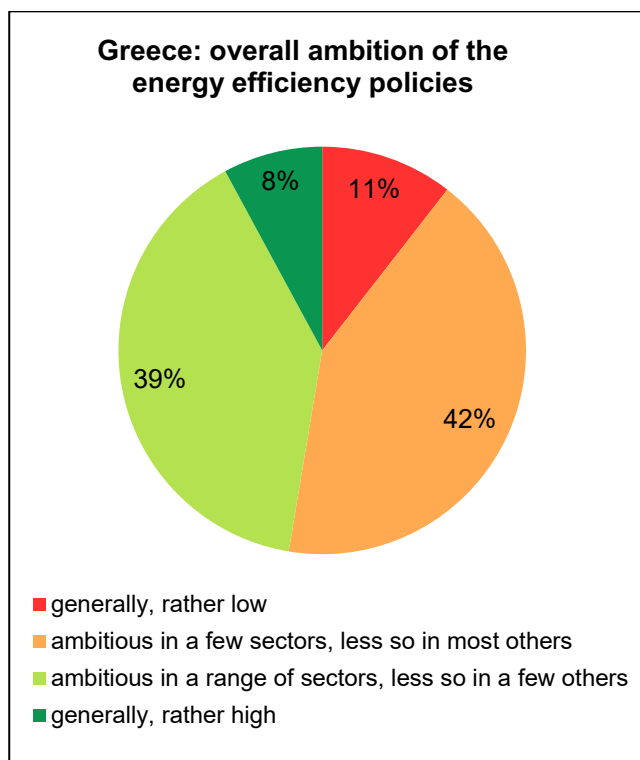
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



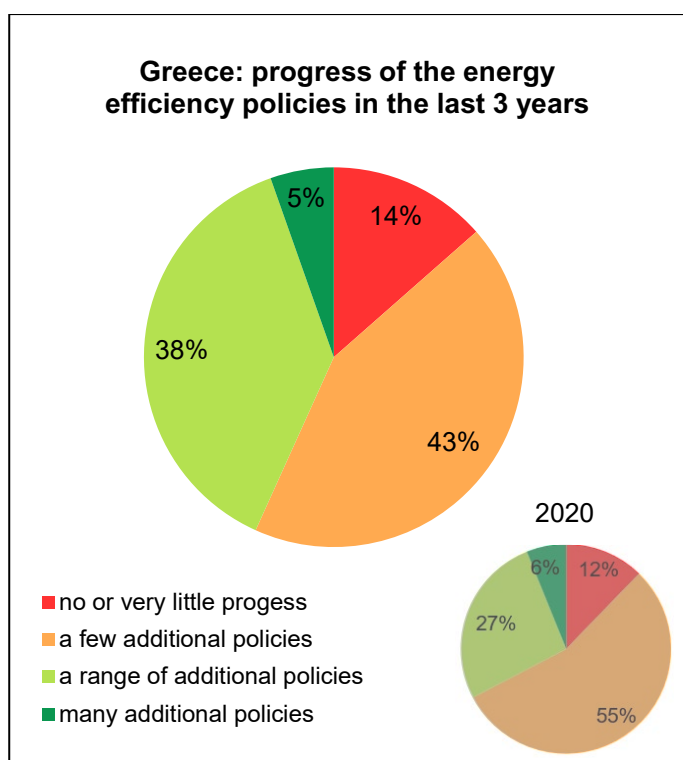
Greece



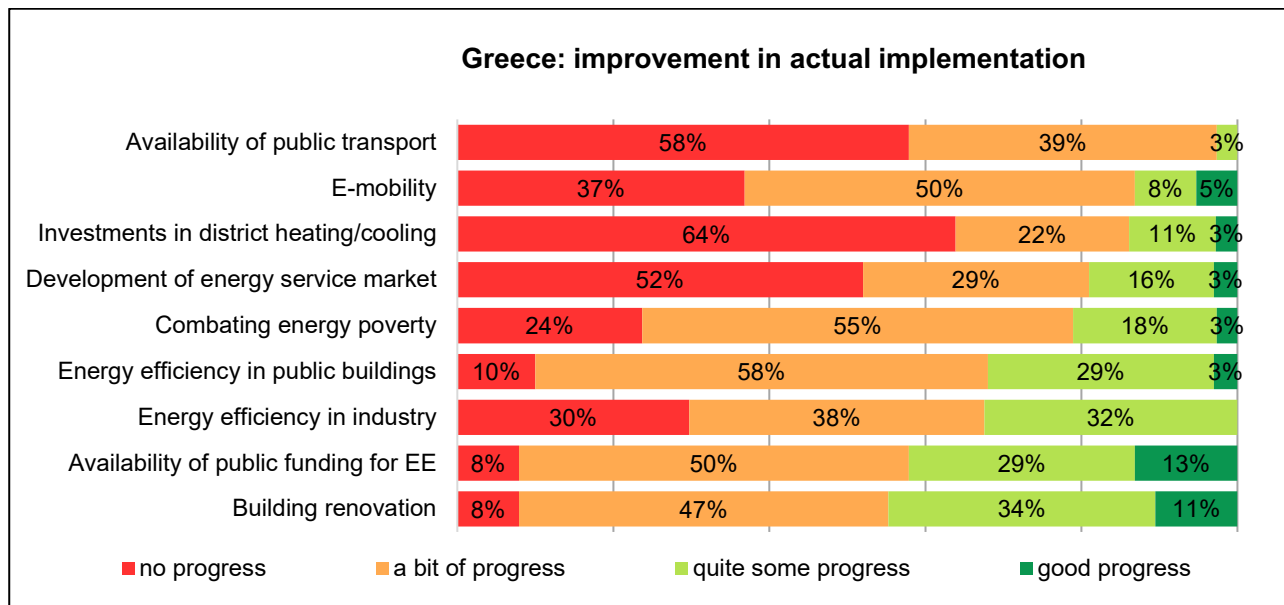
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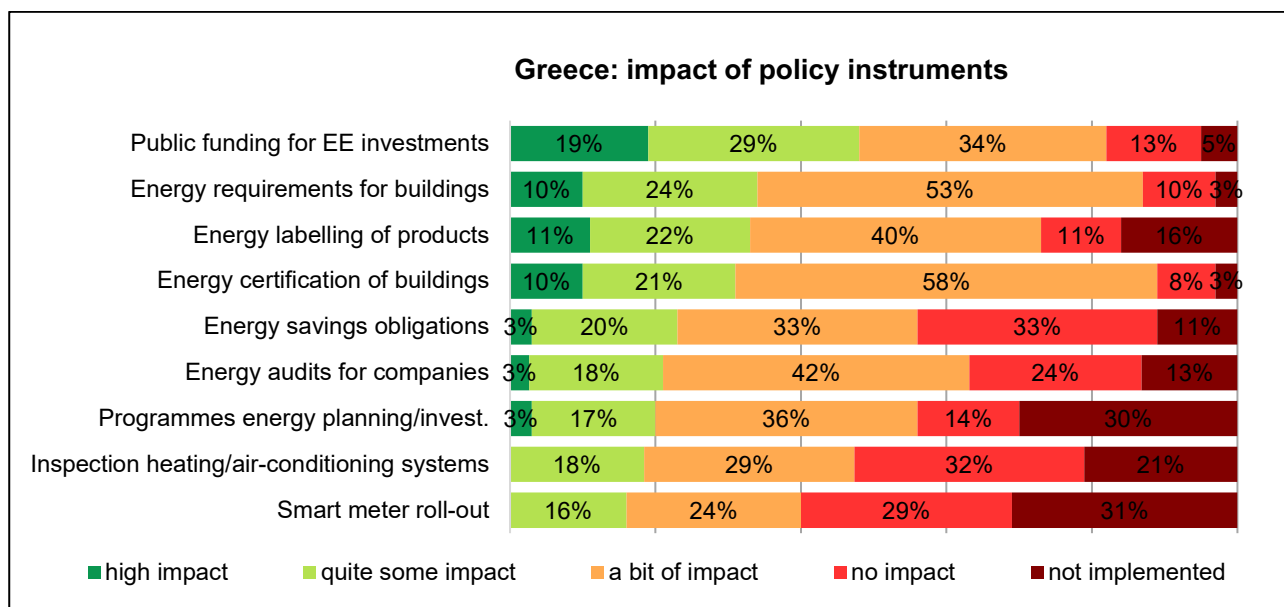
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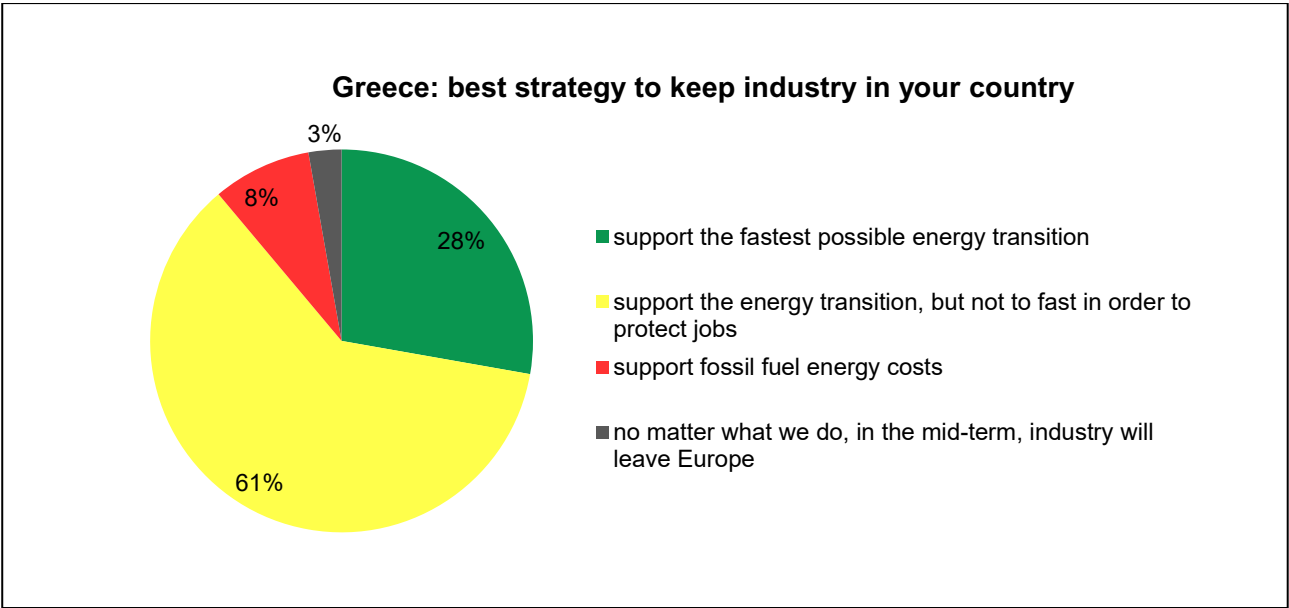
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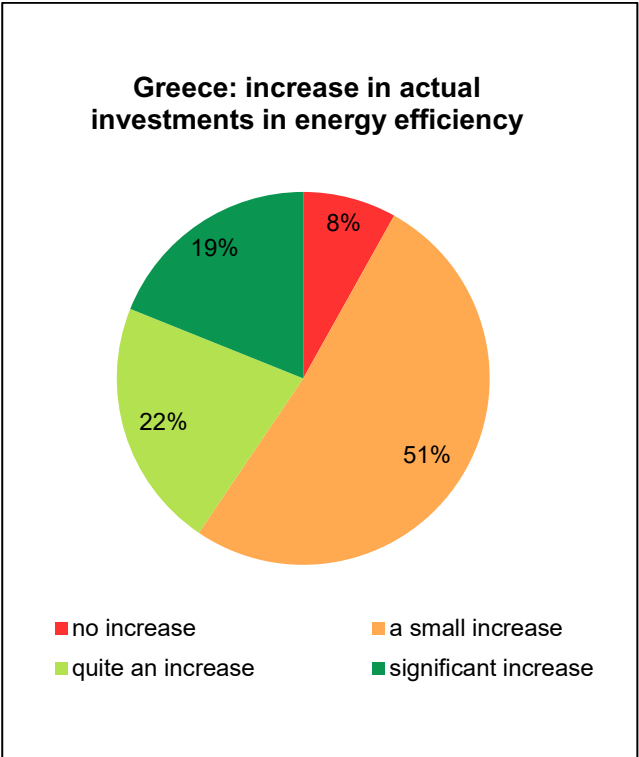
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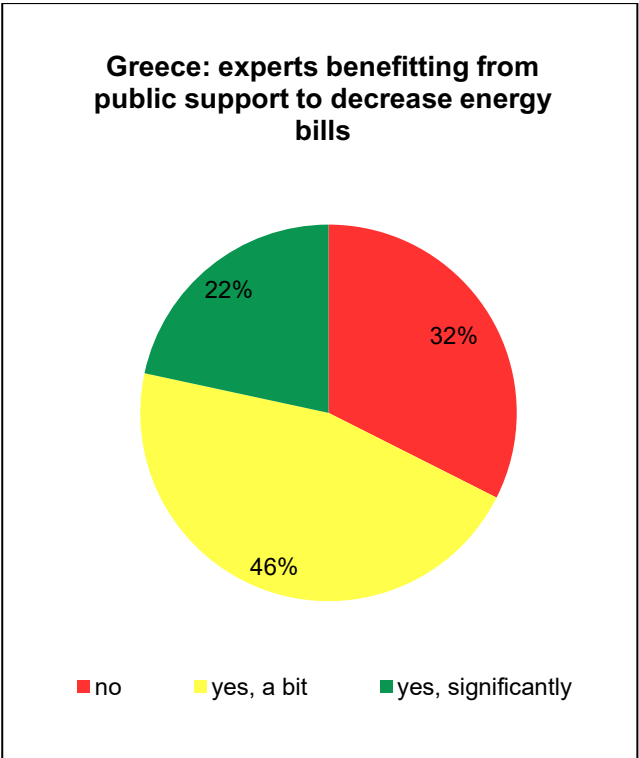
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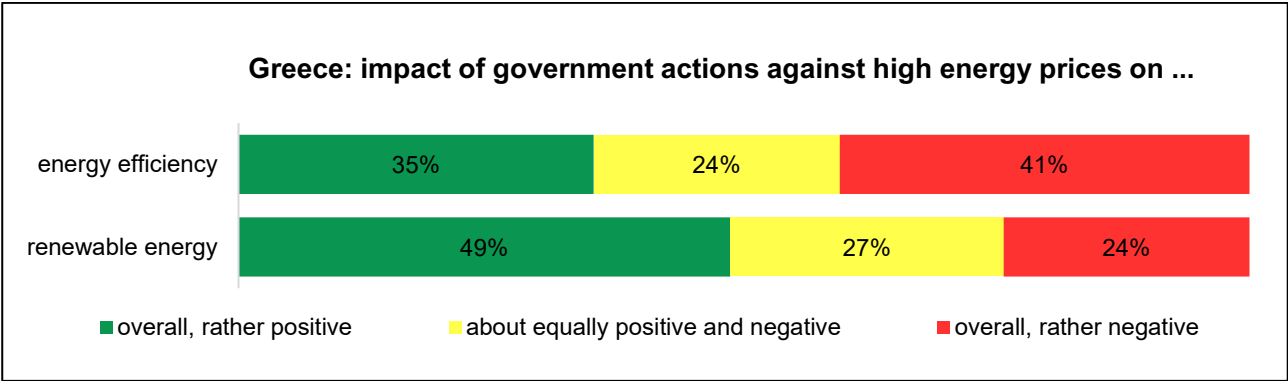
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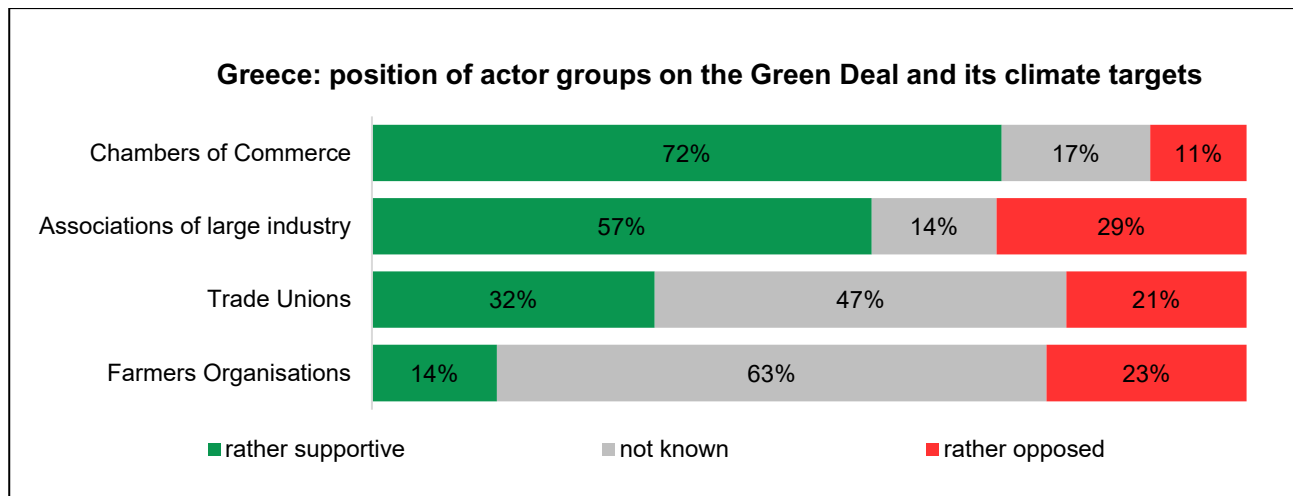
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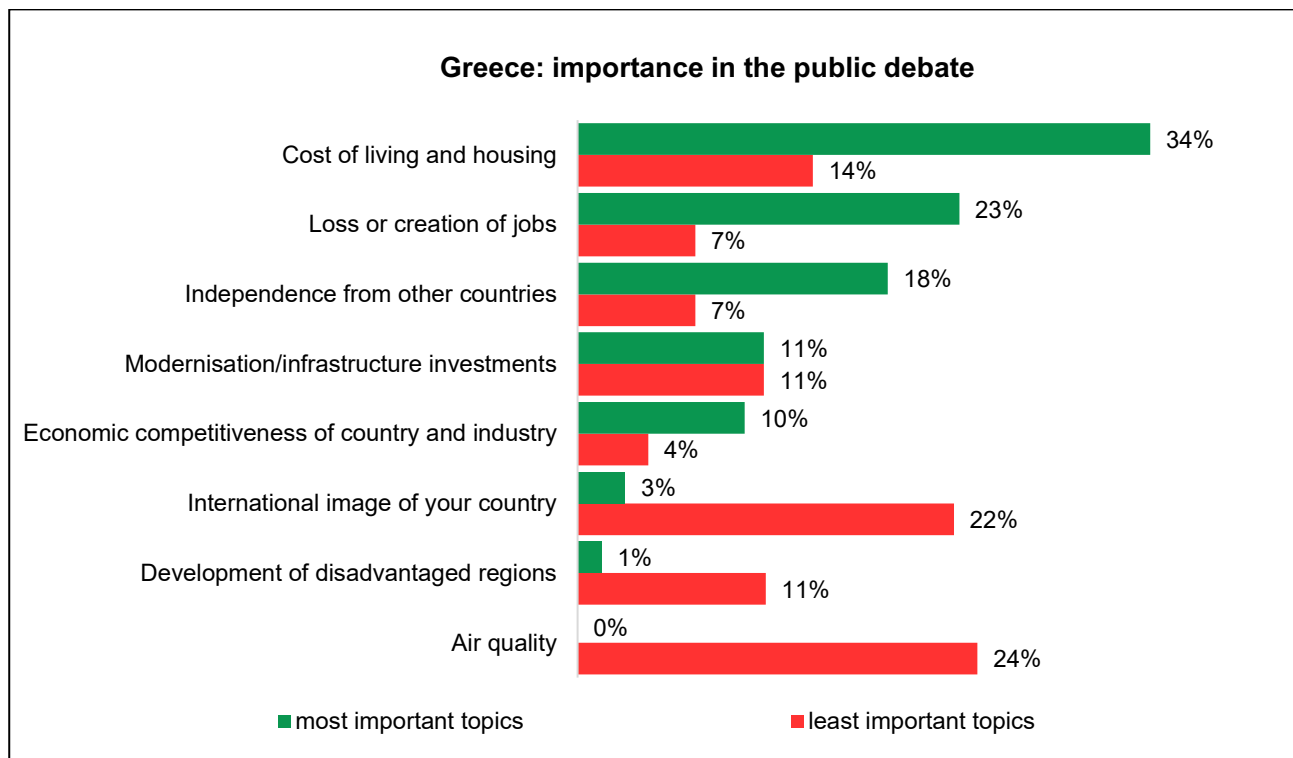
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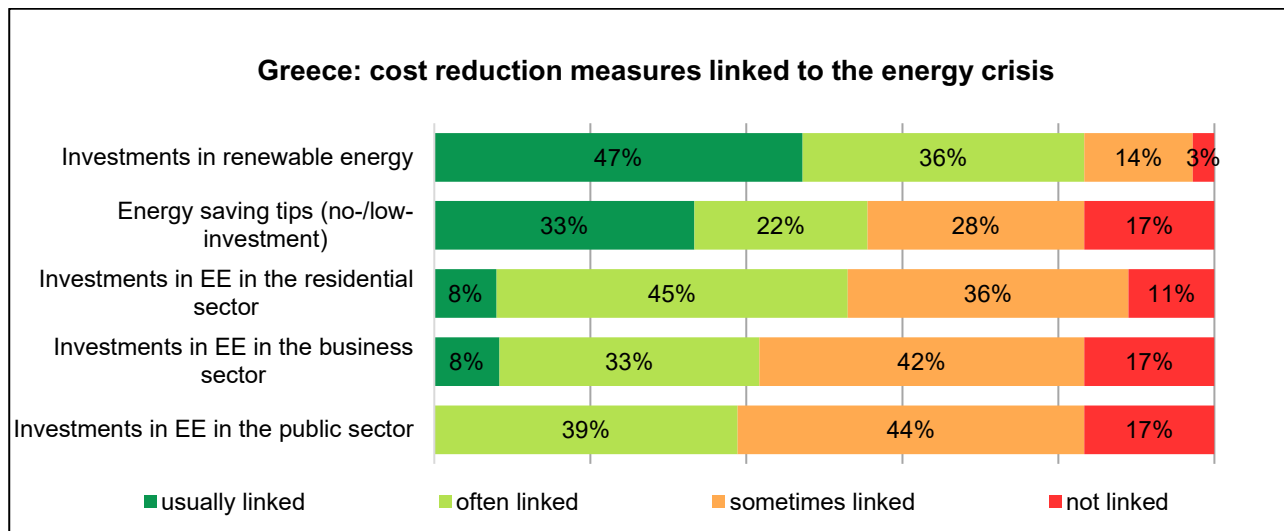
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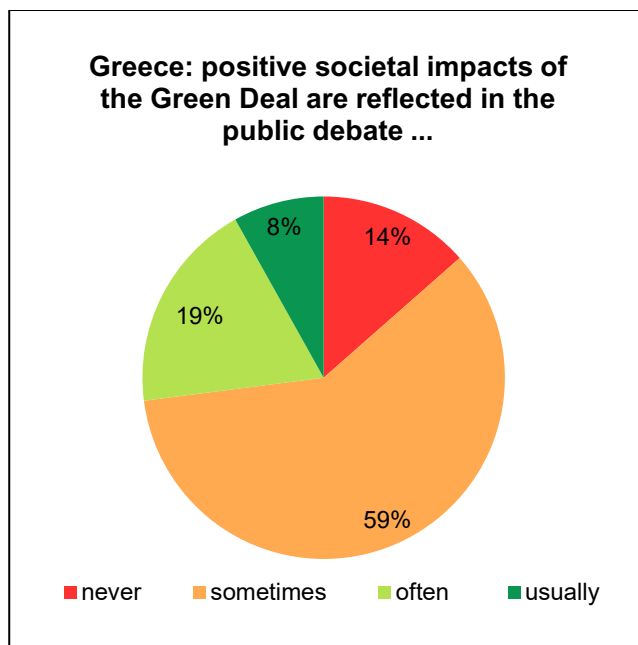
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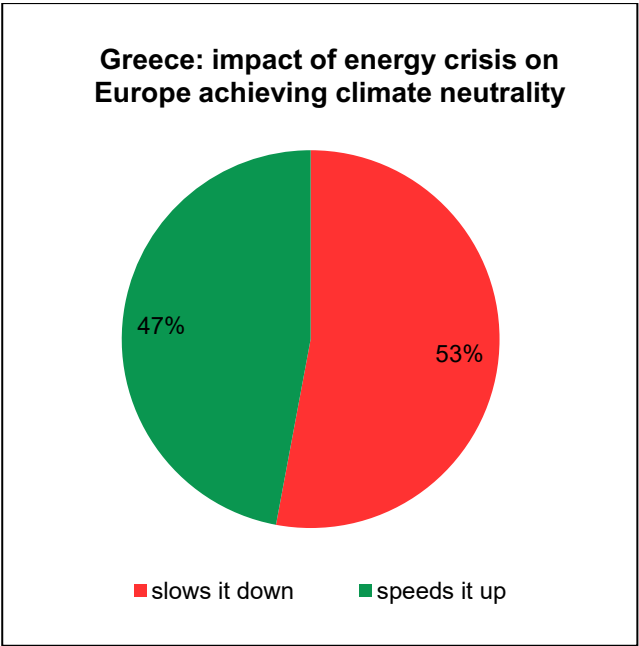
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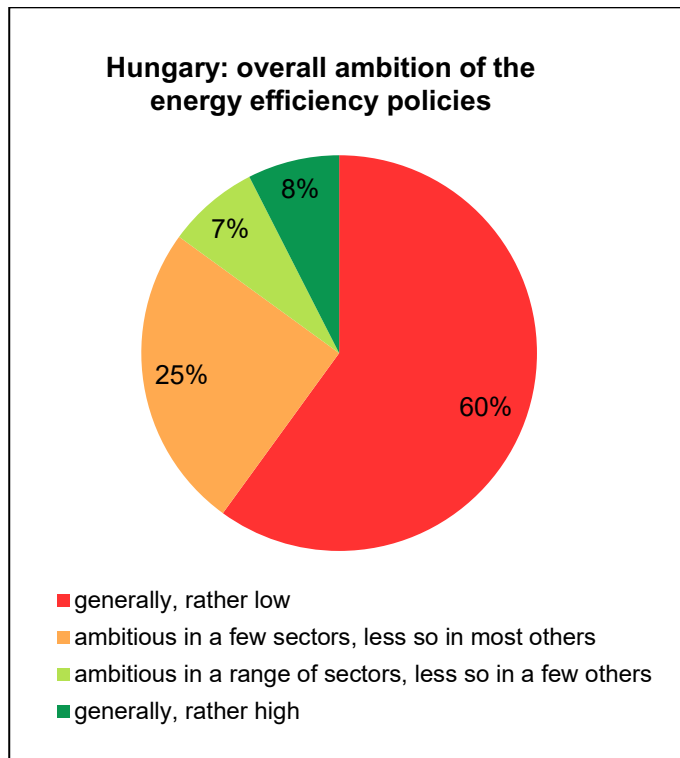
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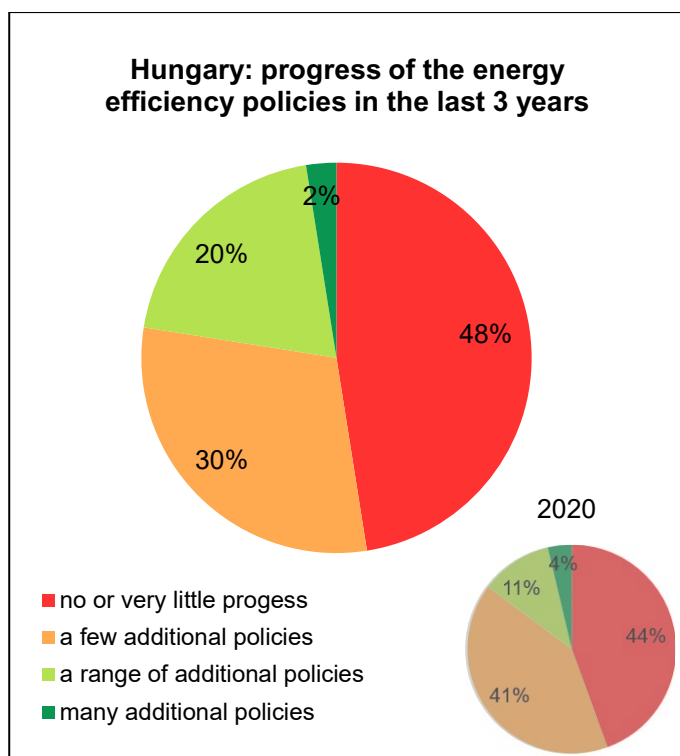
Hungary



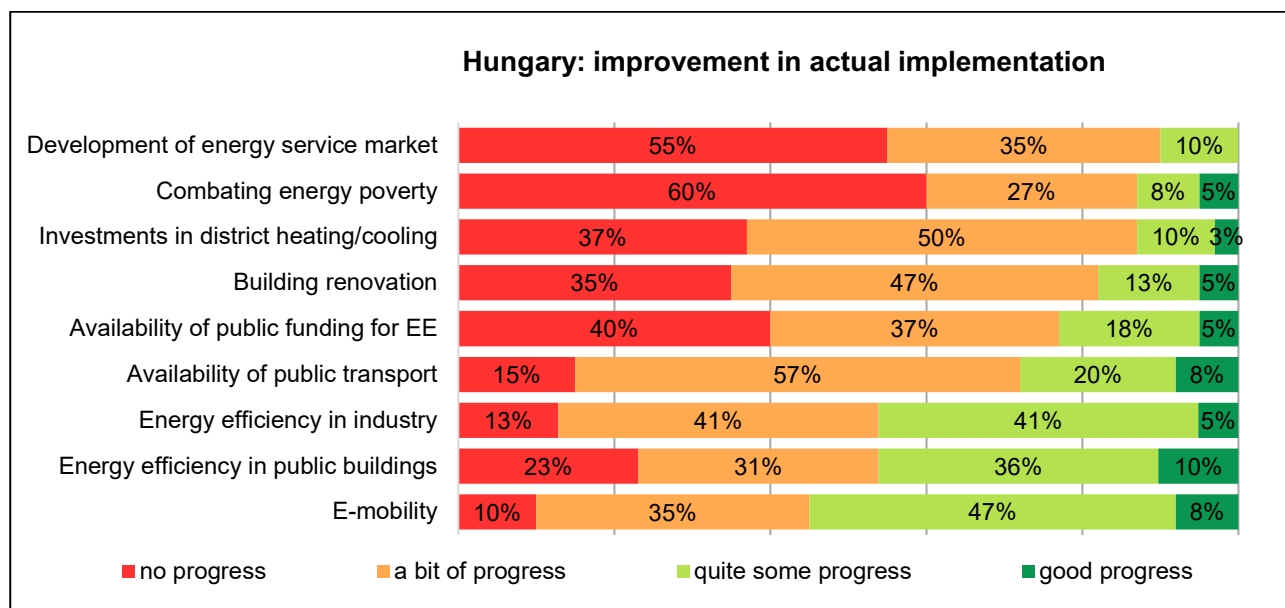
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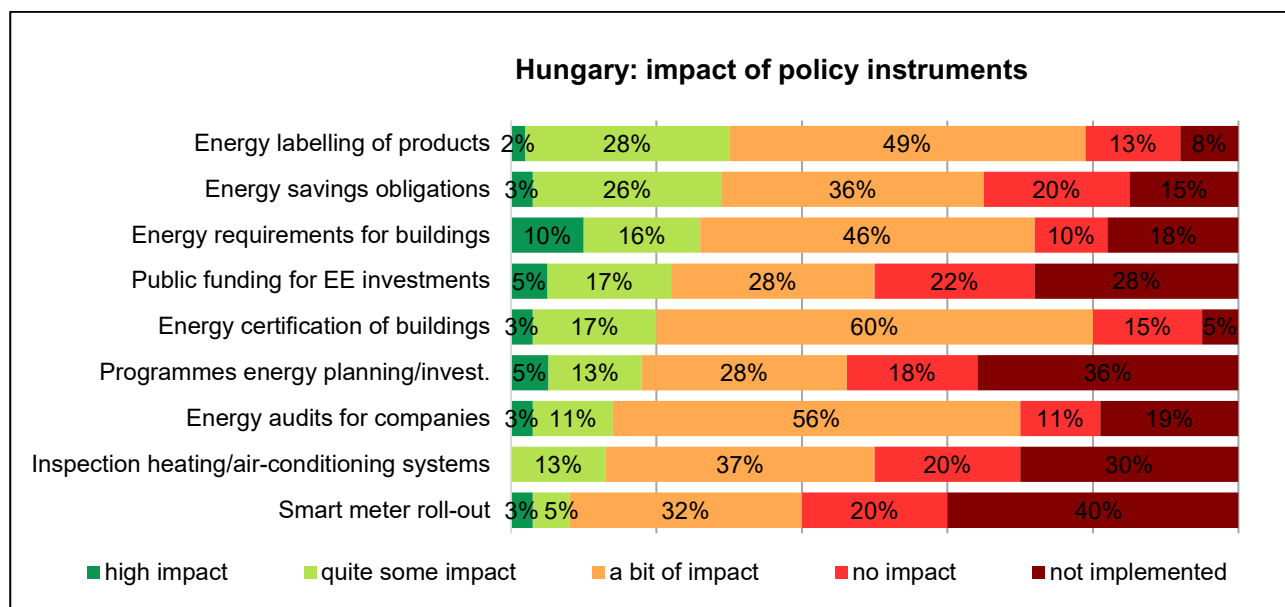
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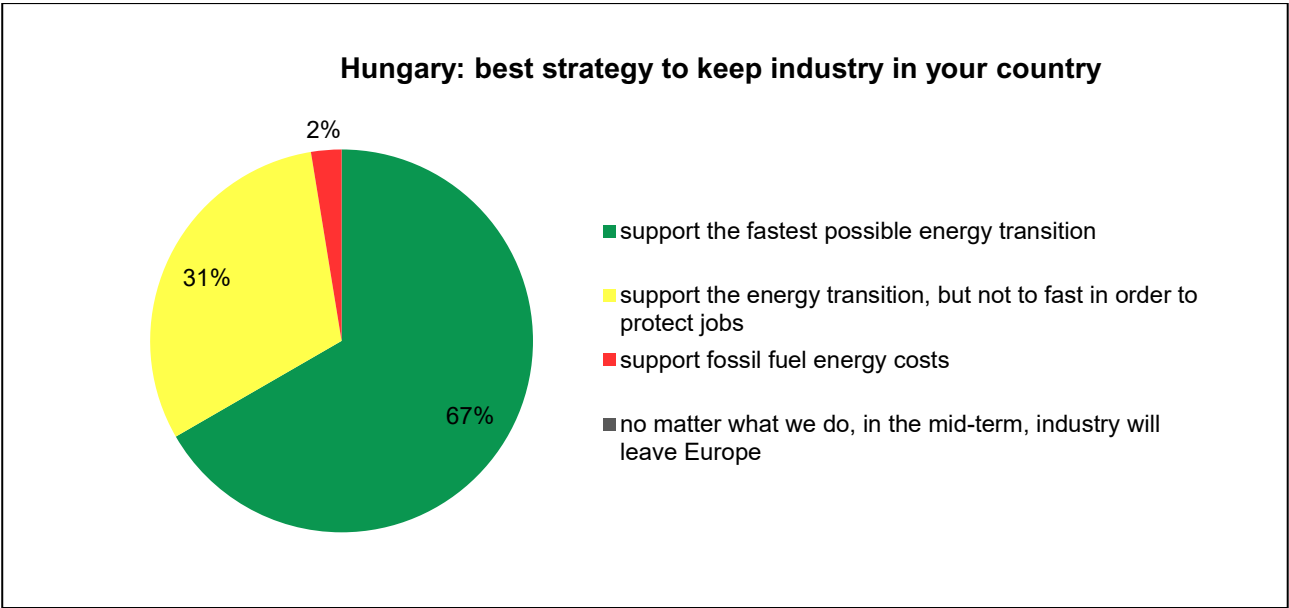
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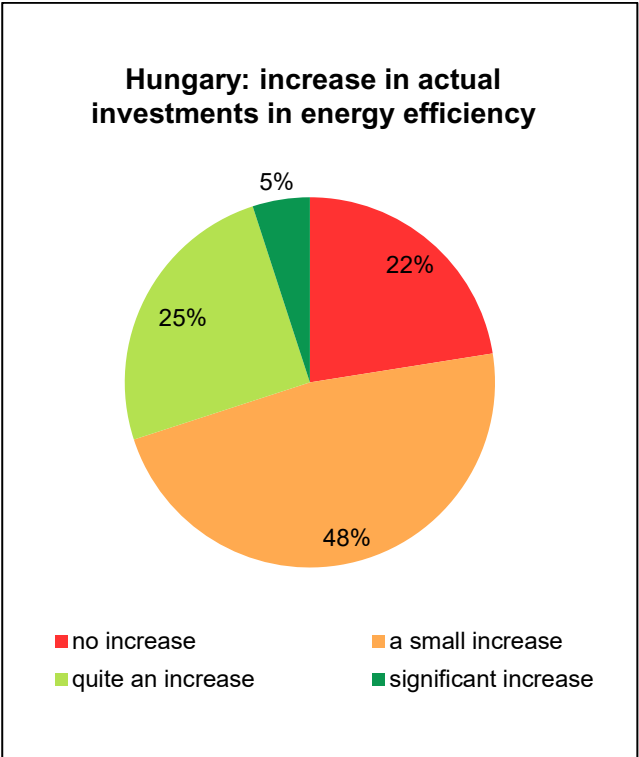
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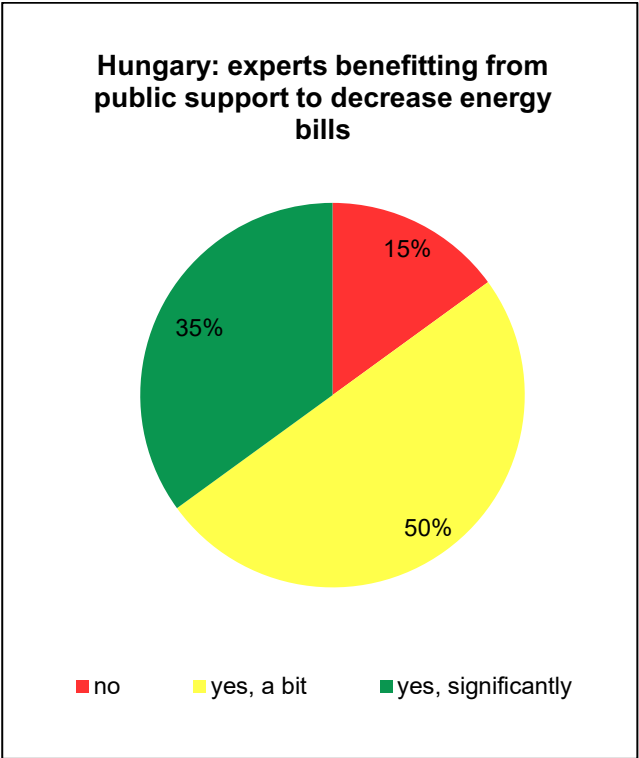
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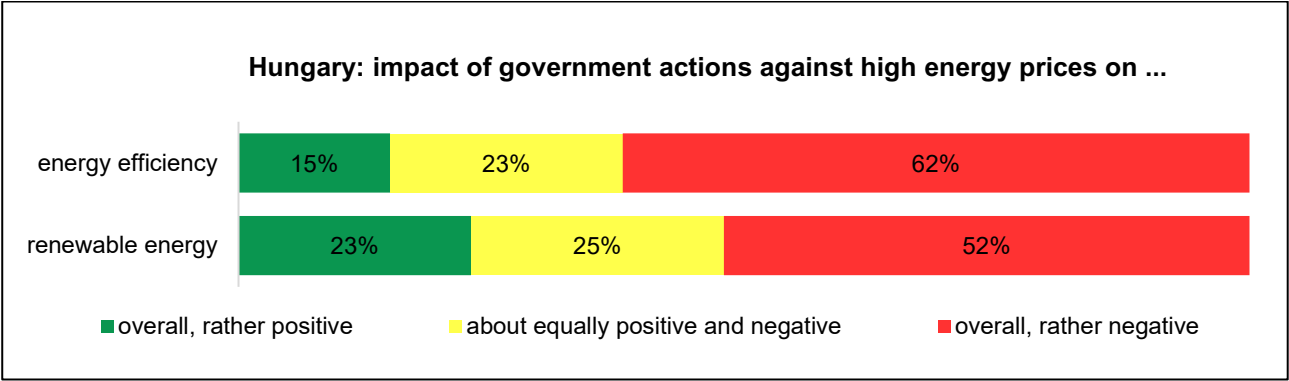
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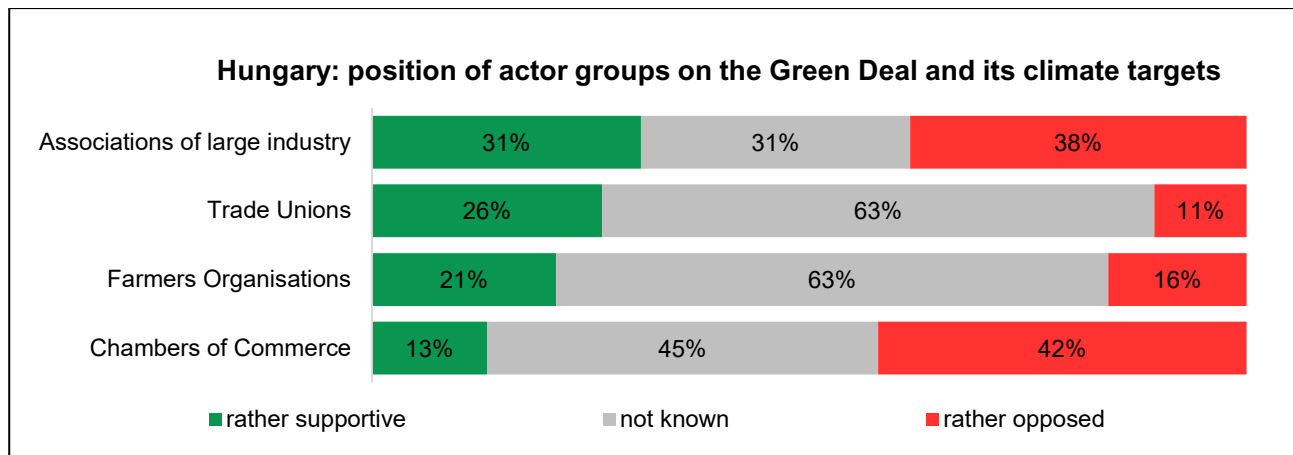
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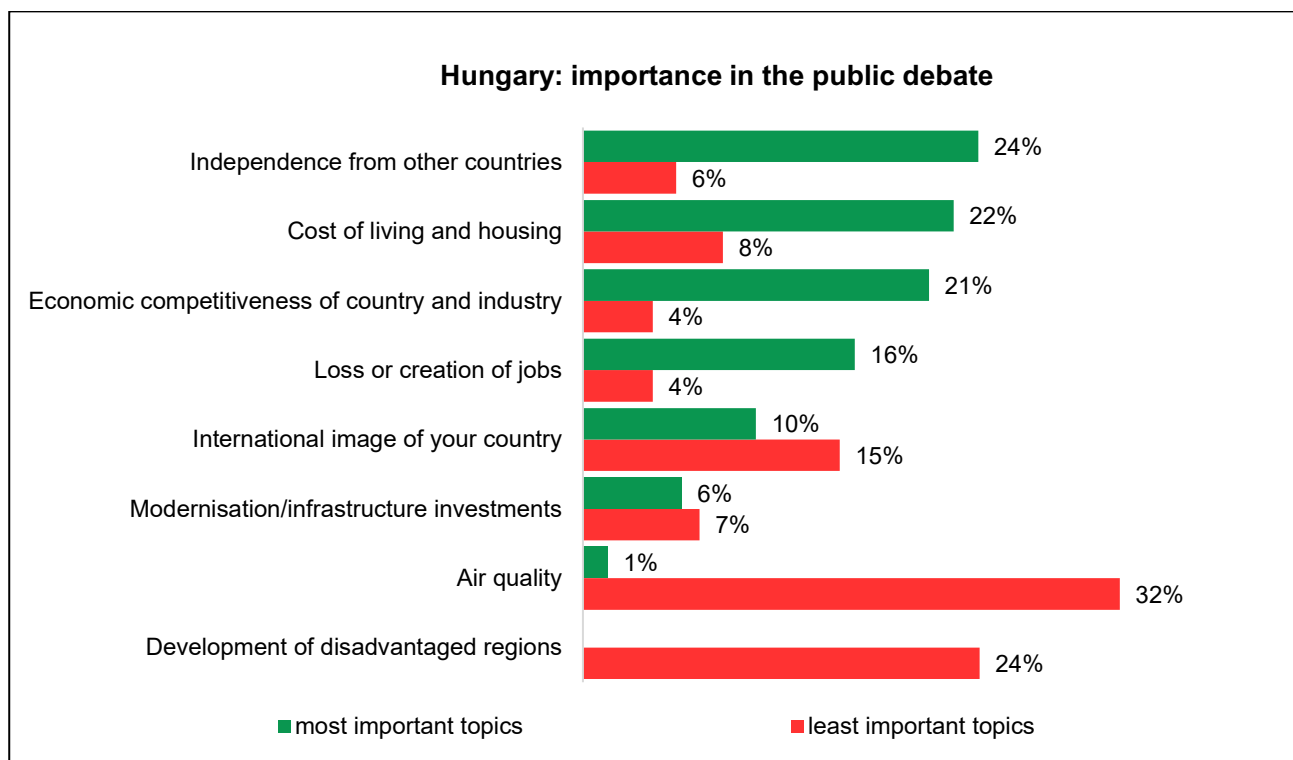
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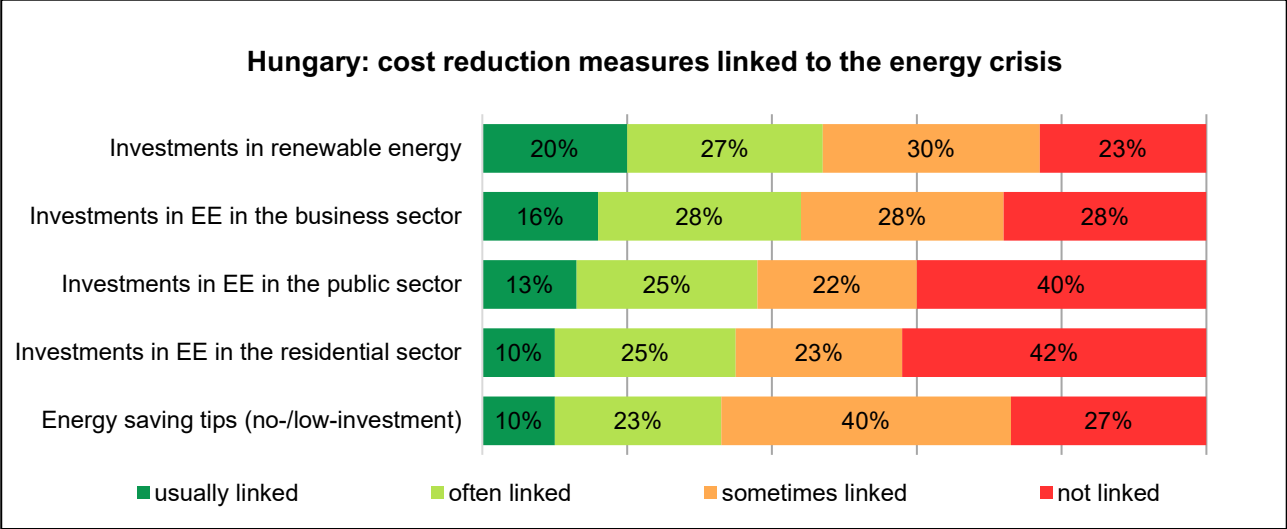
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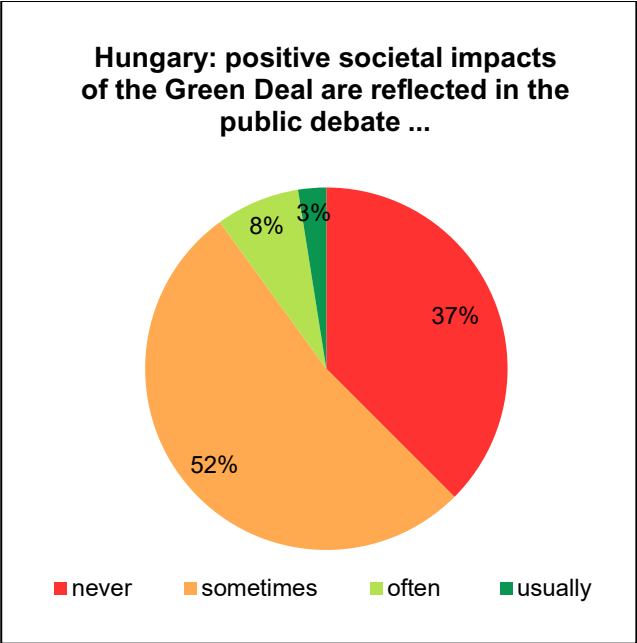
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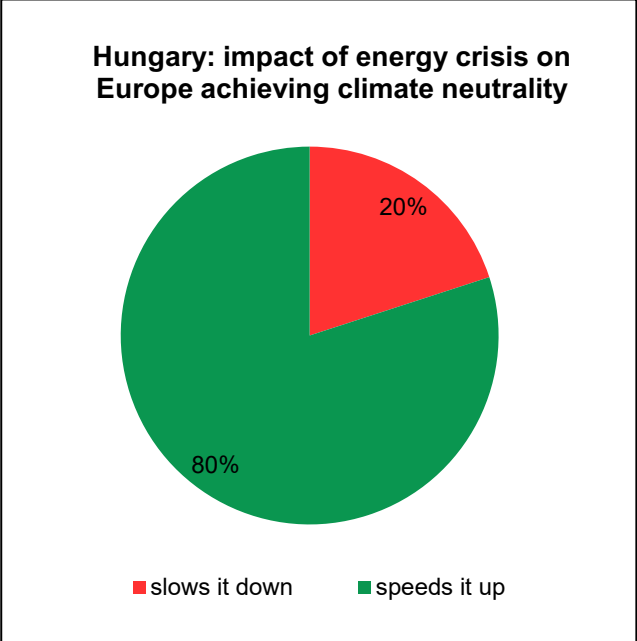
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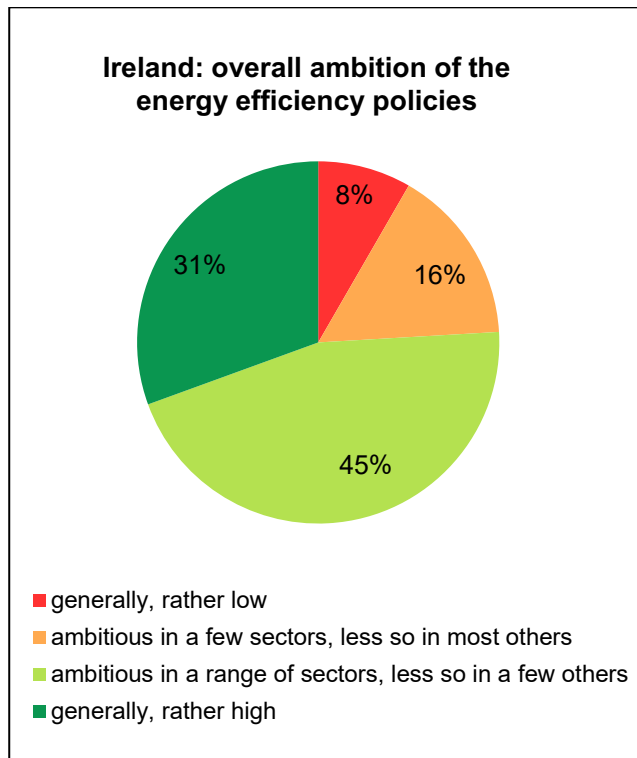
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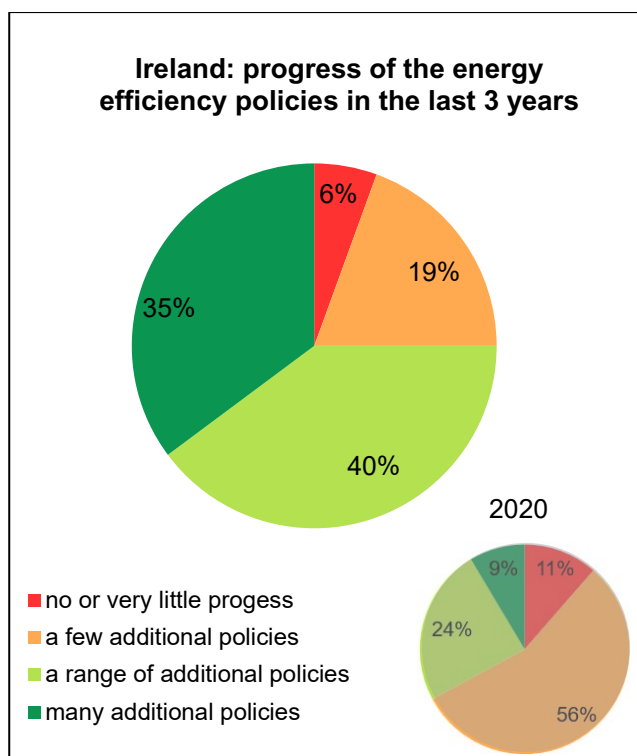
Ireland



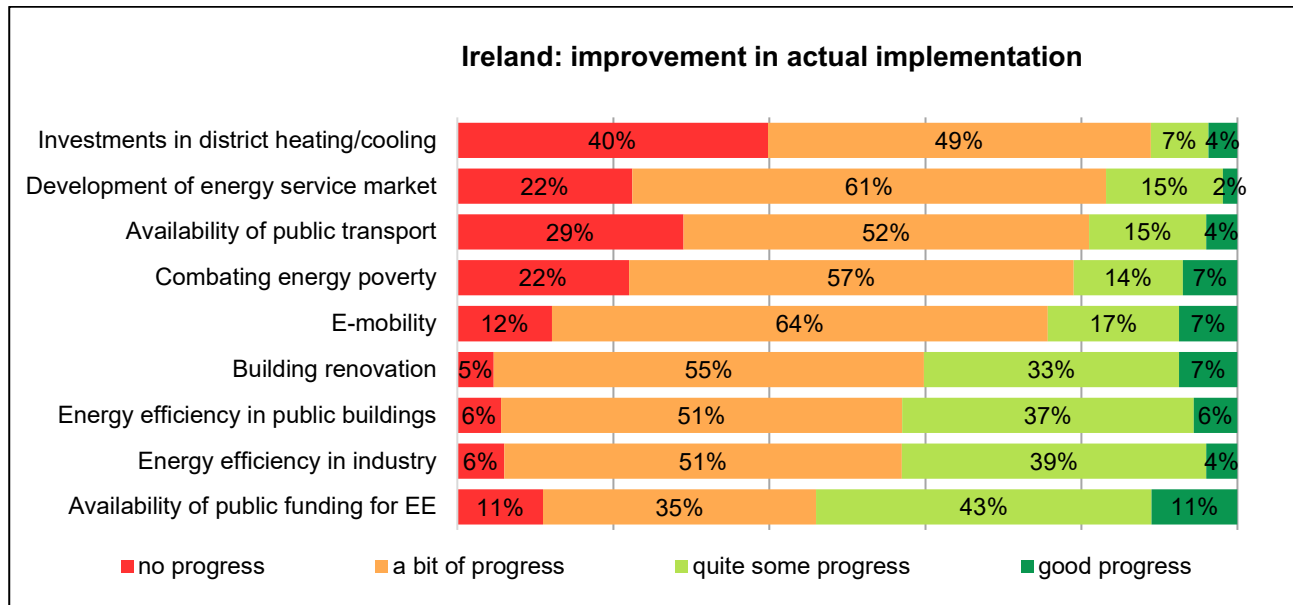
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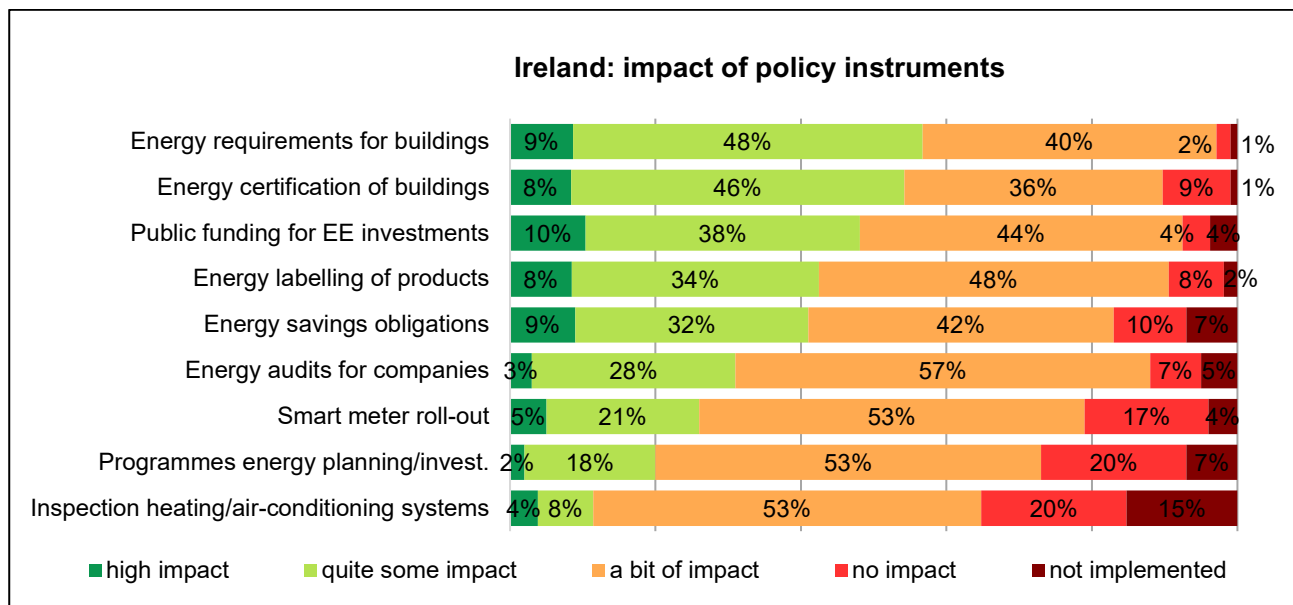
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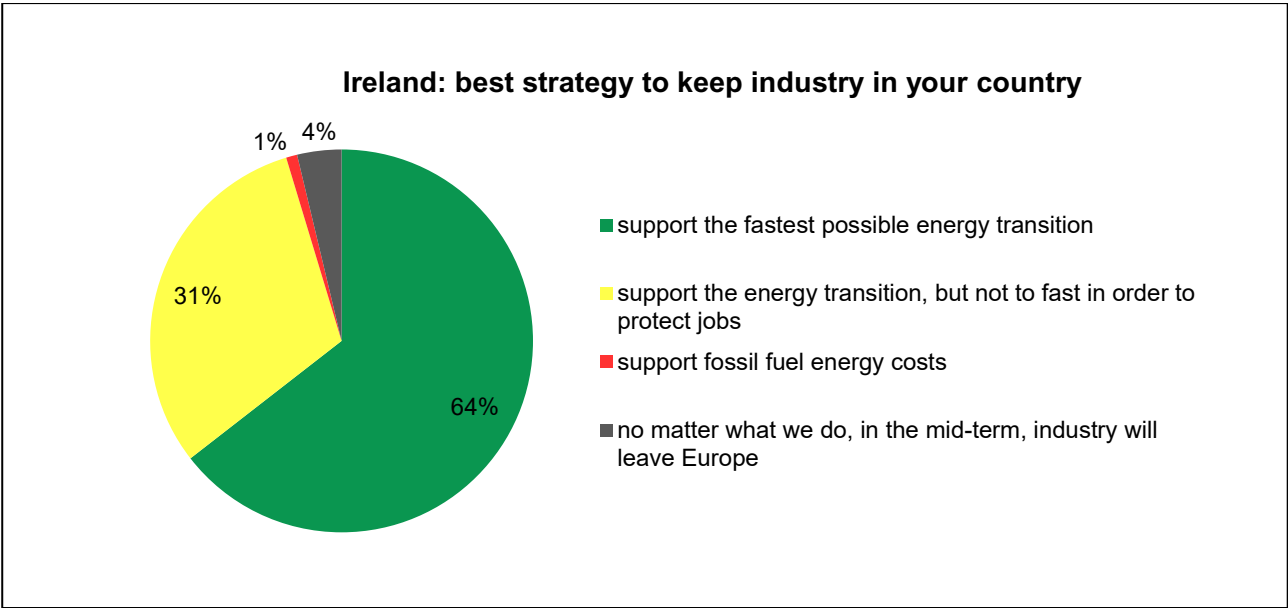
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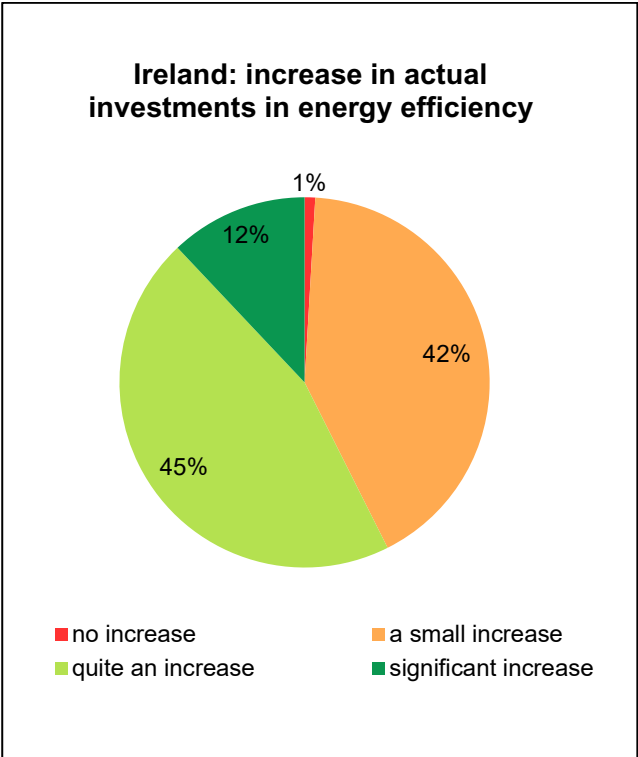
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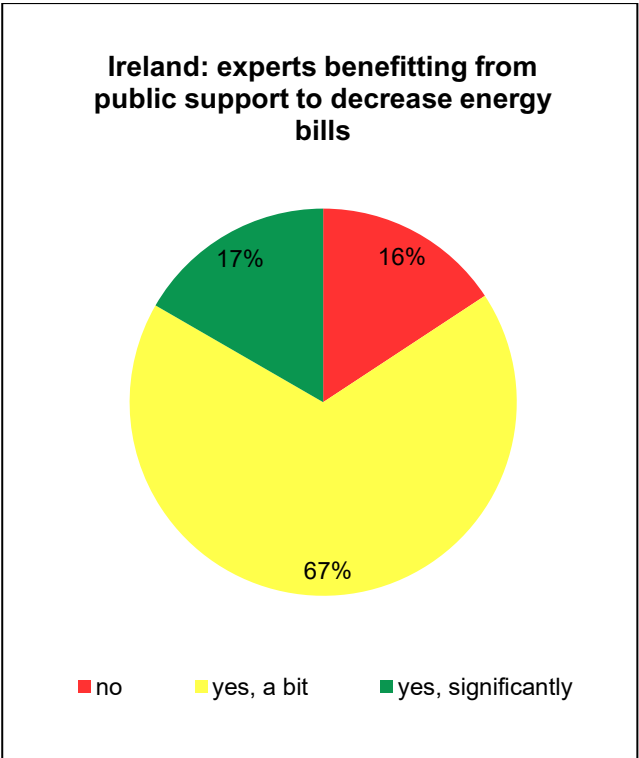
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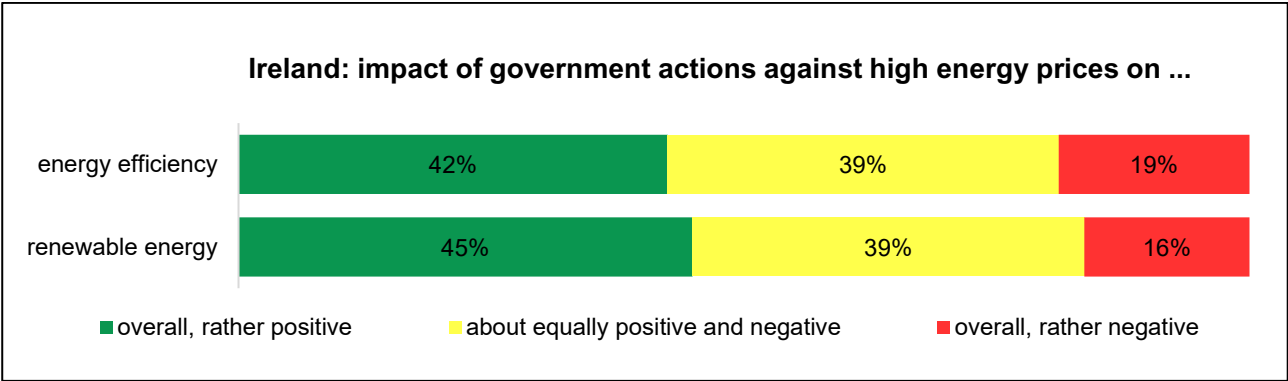
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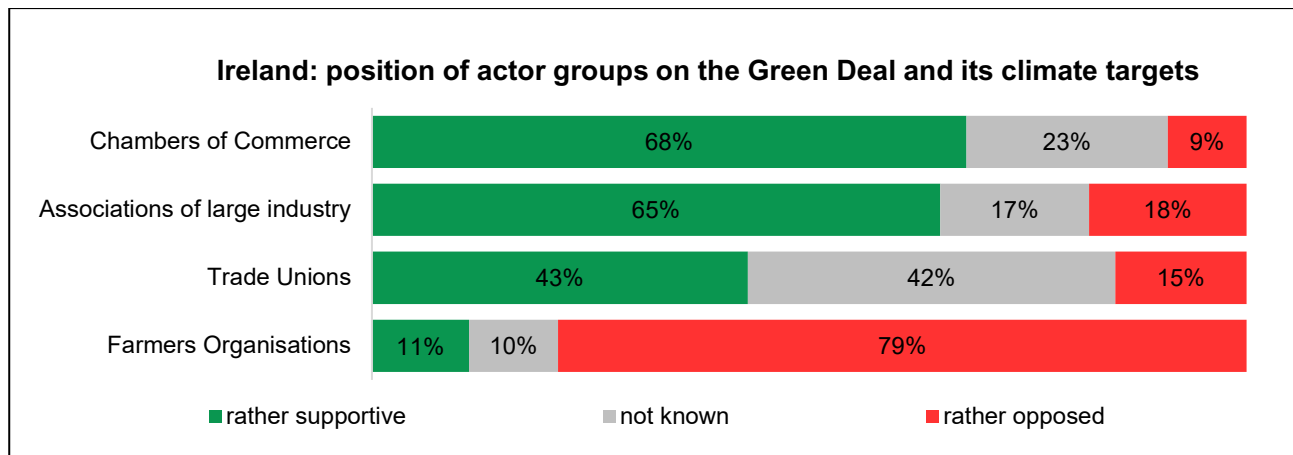
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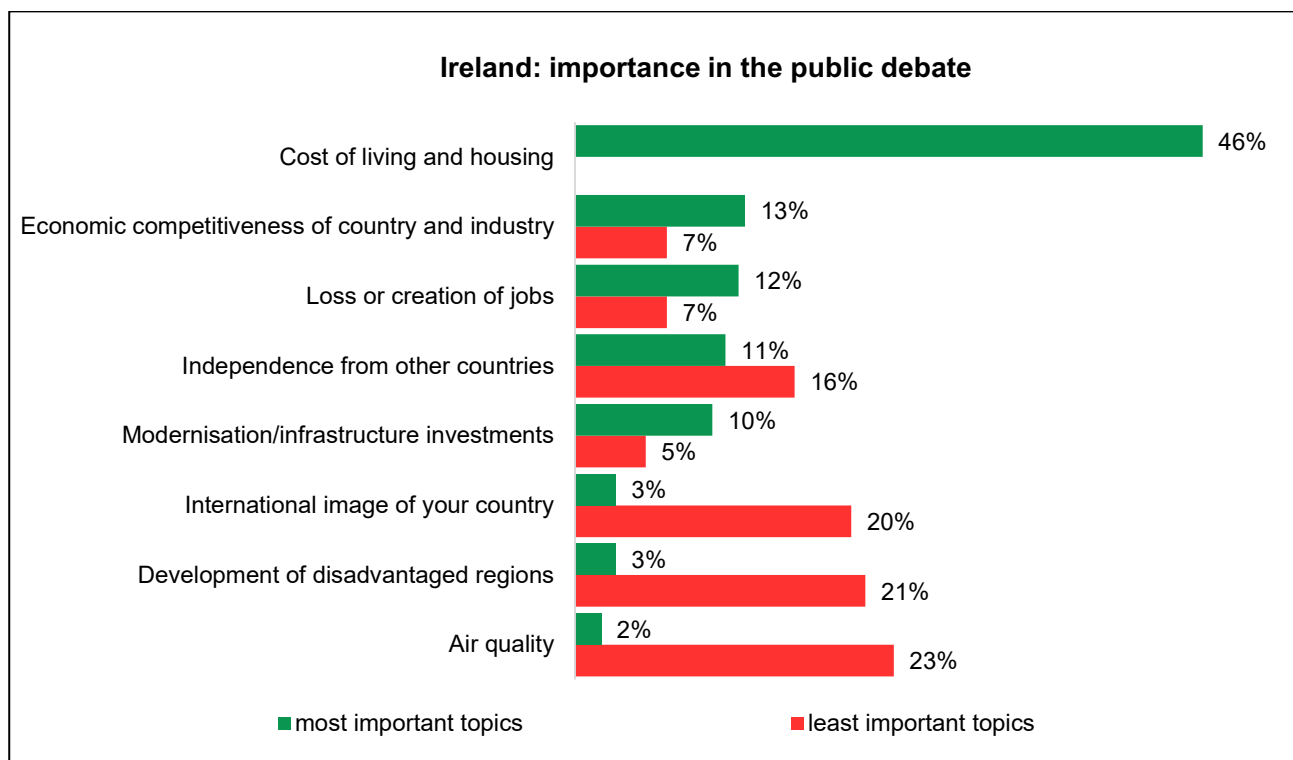
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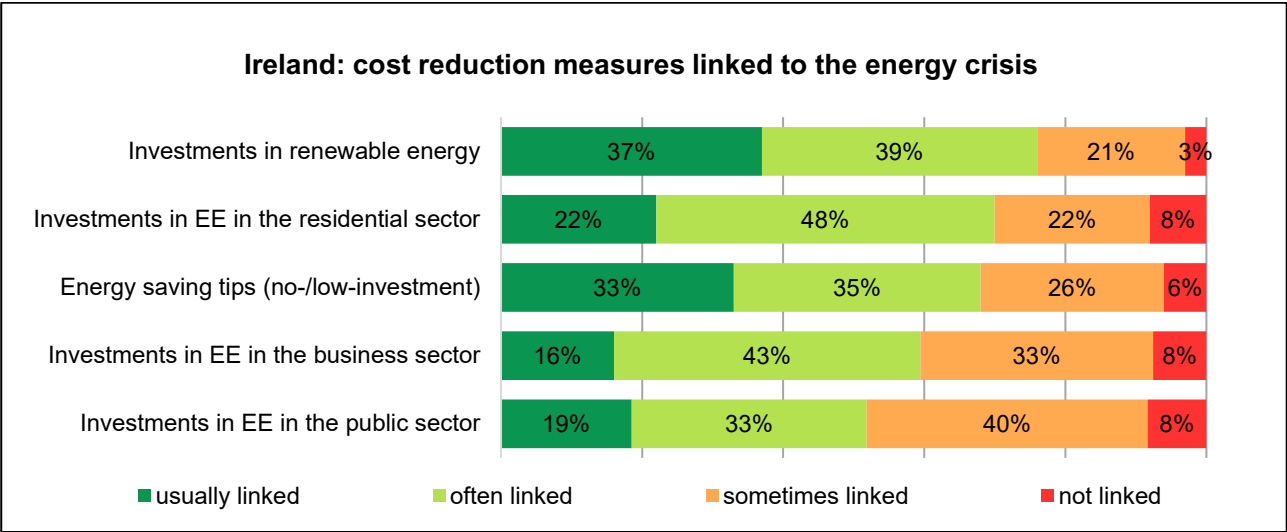
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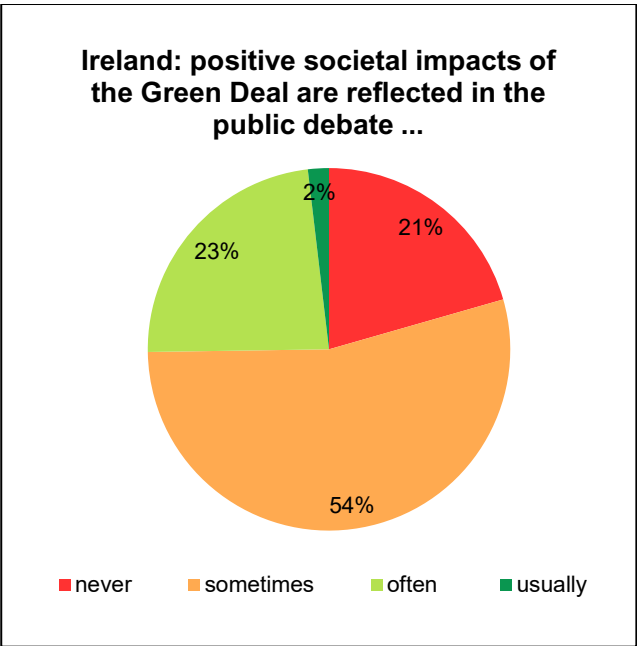
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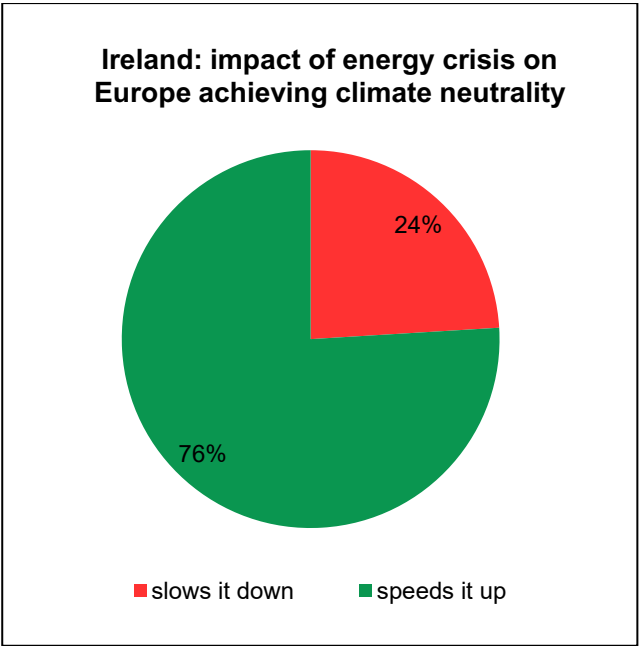
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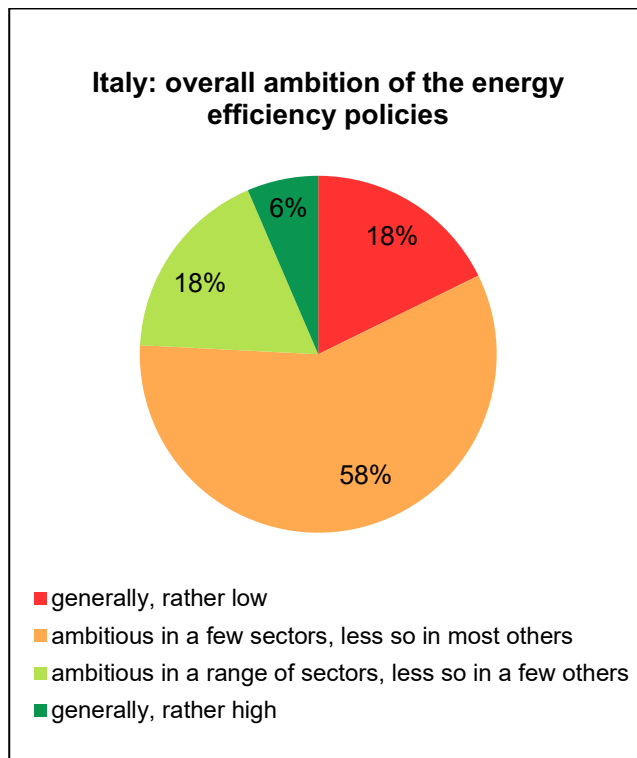
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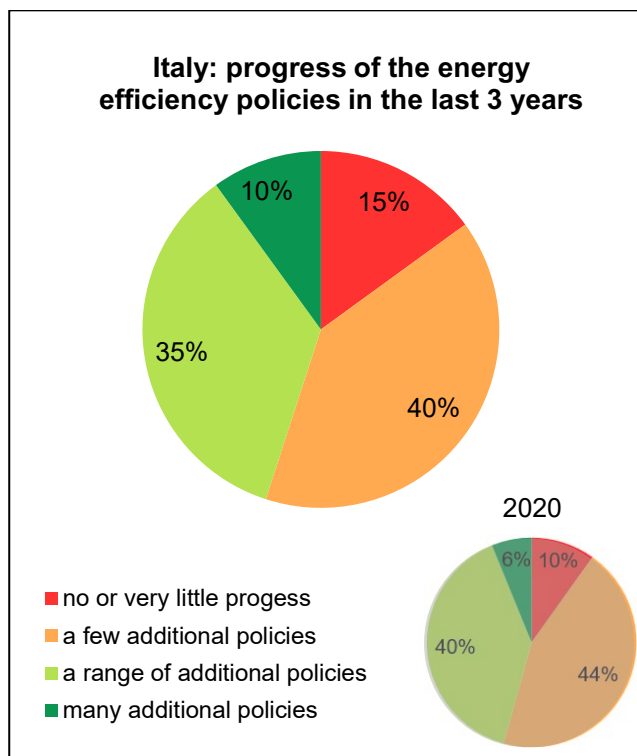
Italy



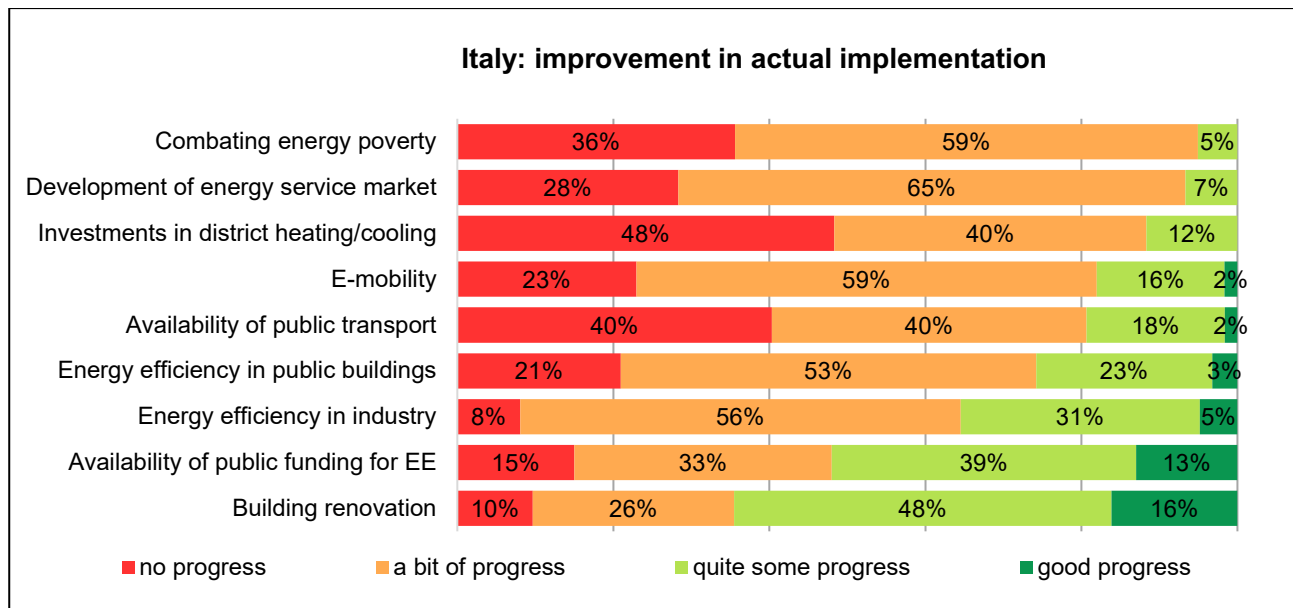
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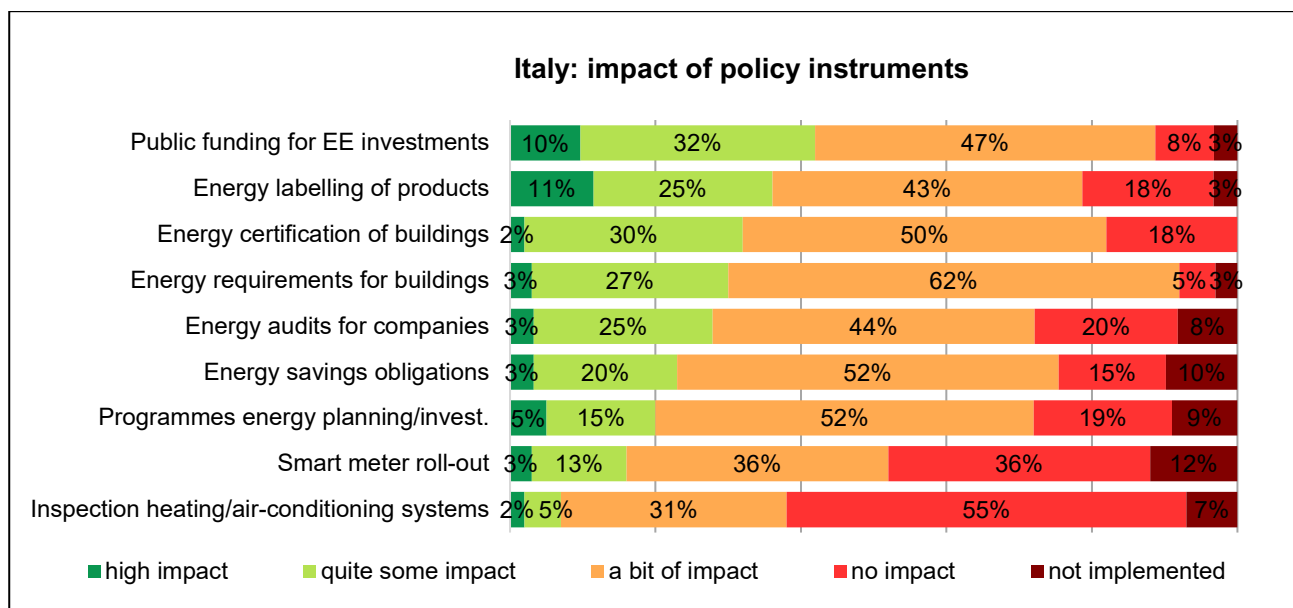
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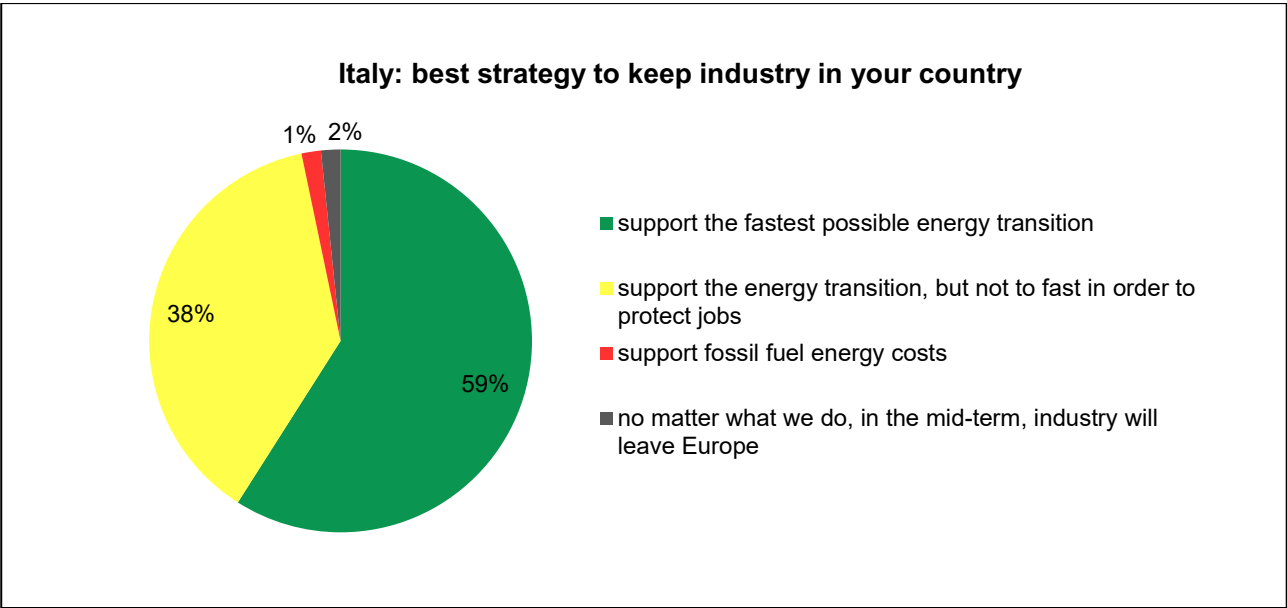
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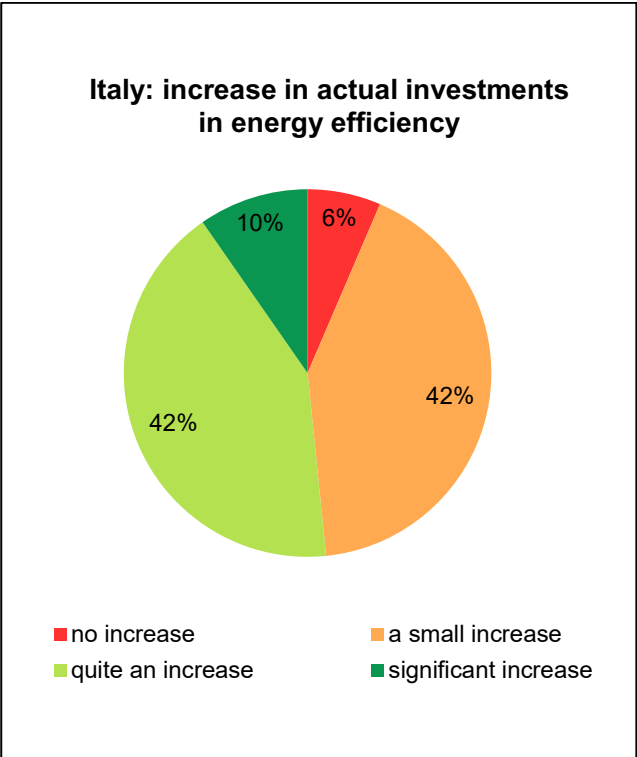
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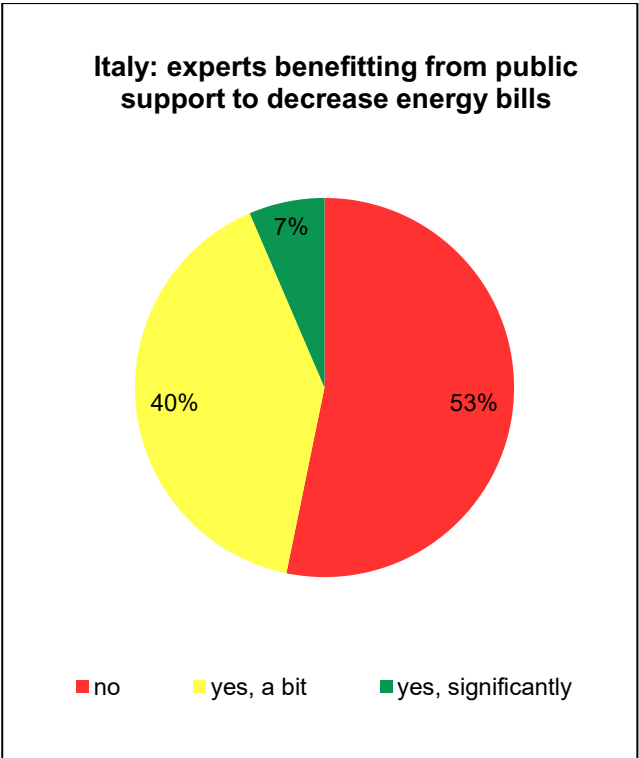
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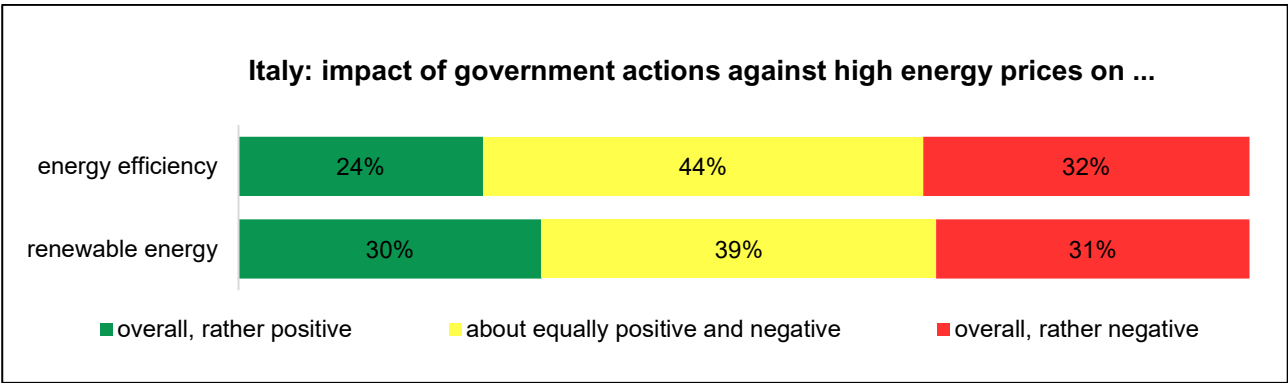
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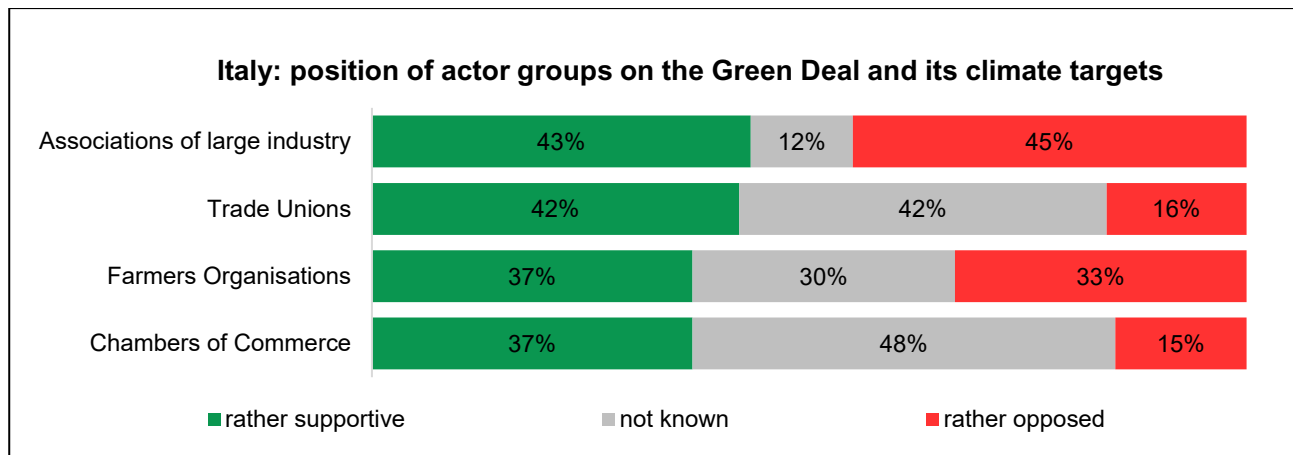
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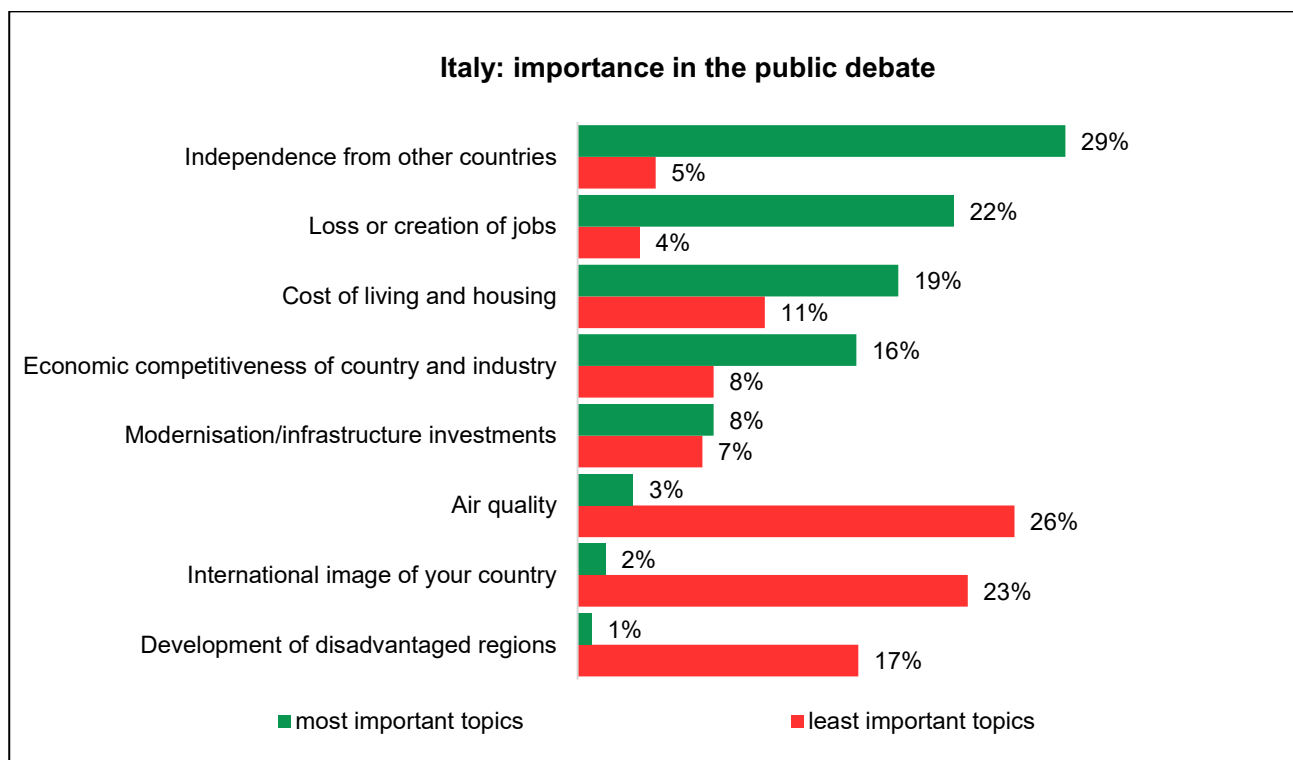
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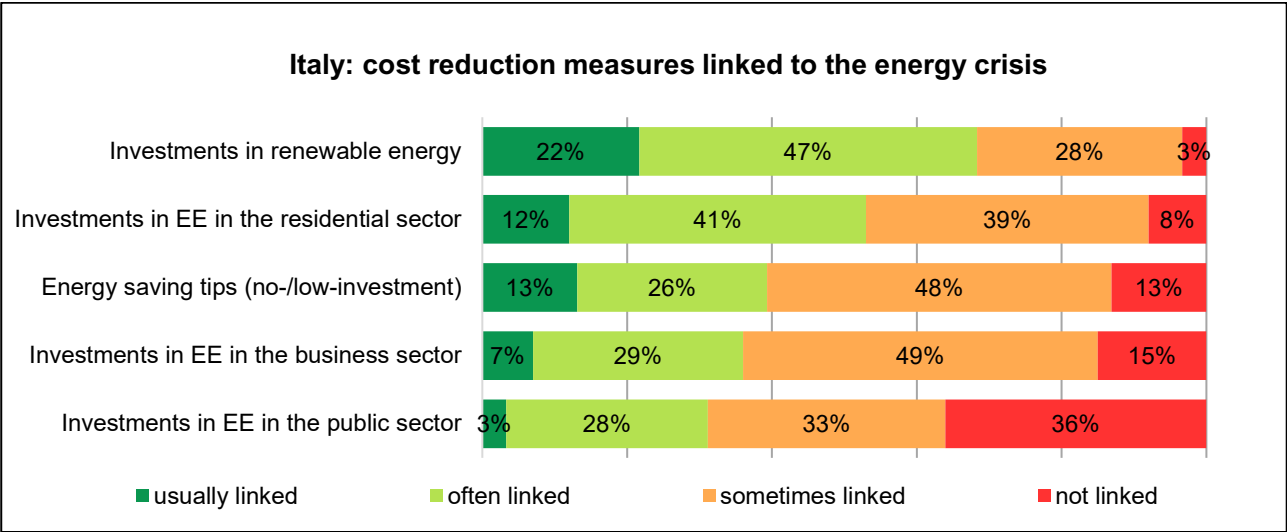
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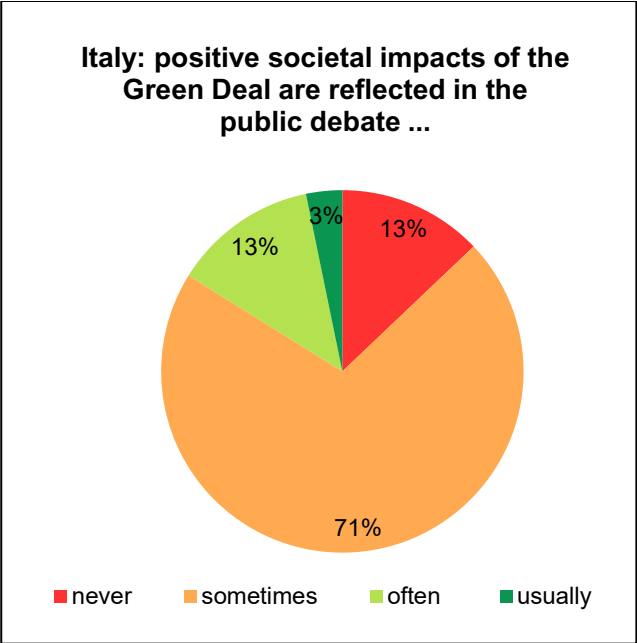
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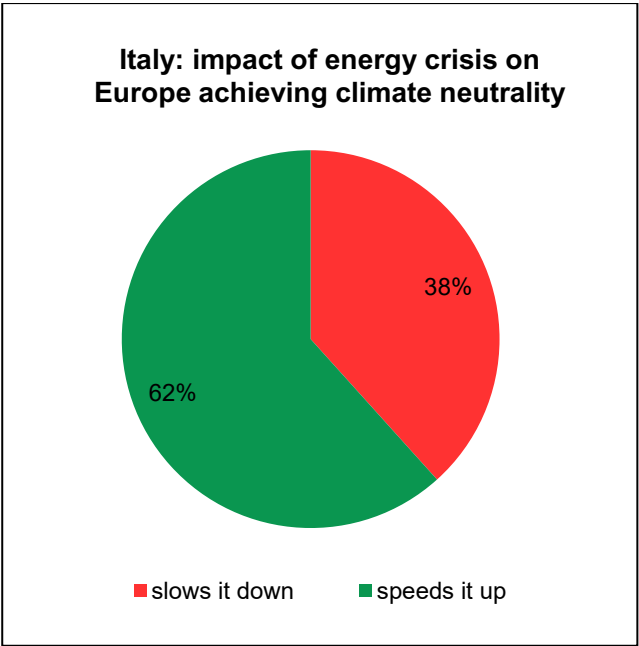
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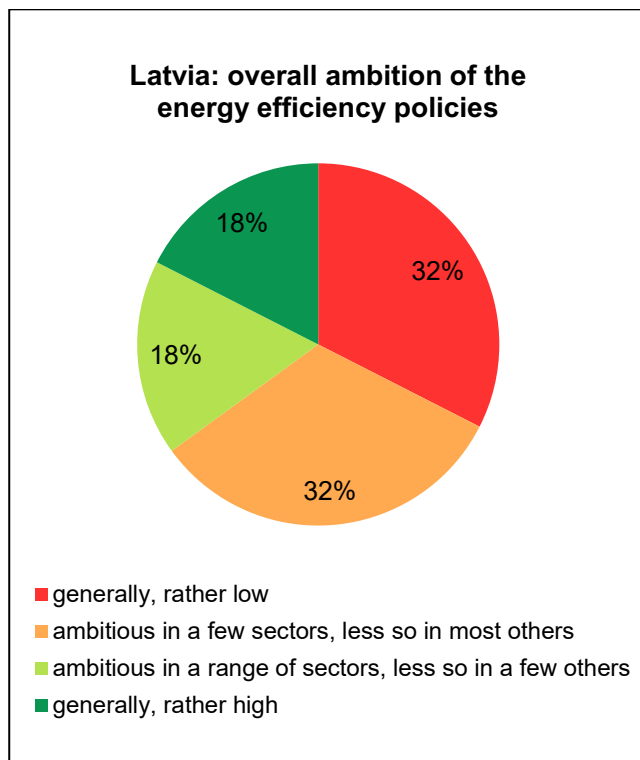
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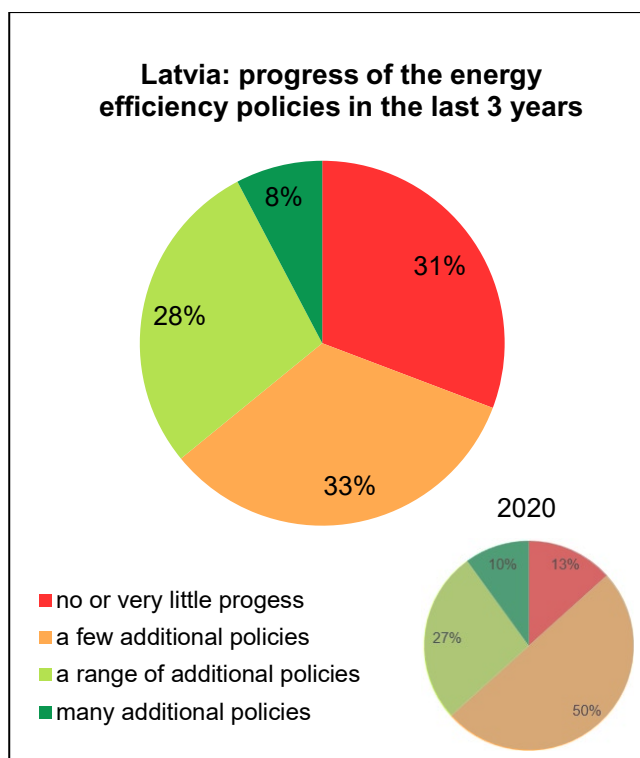
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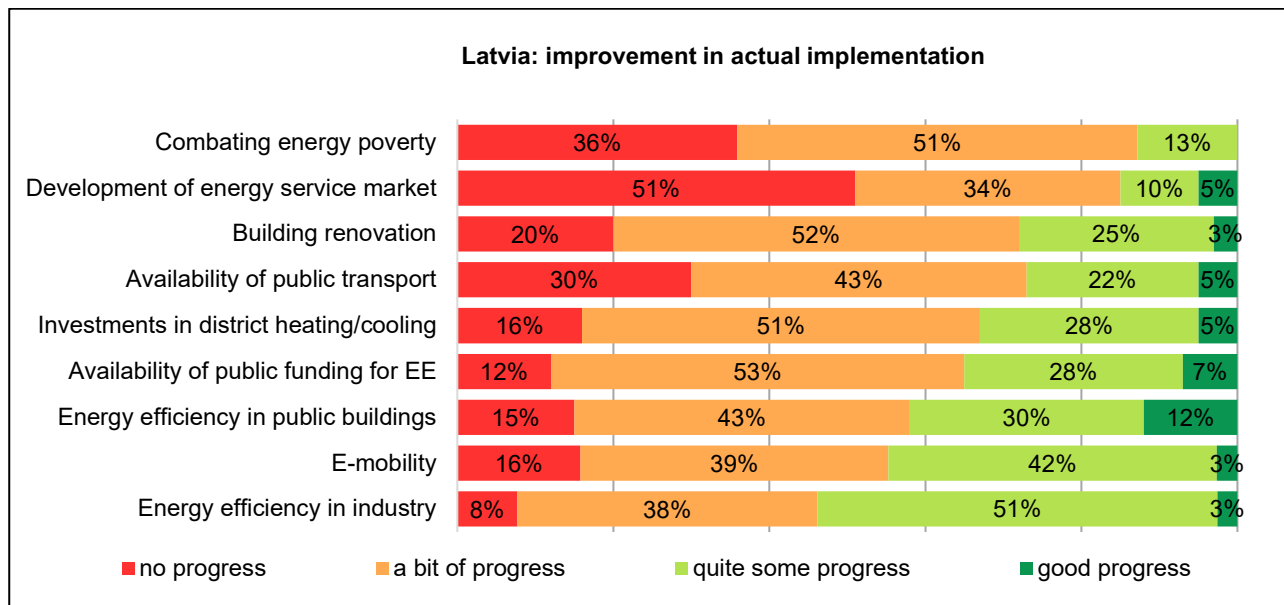
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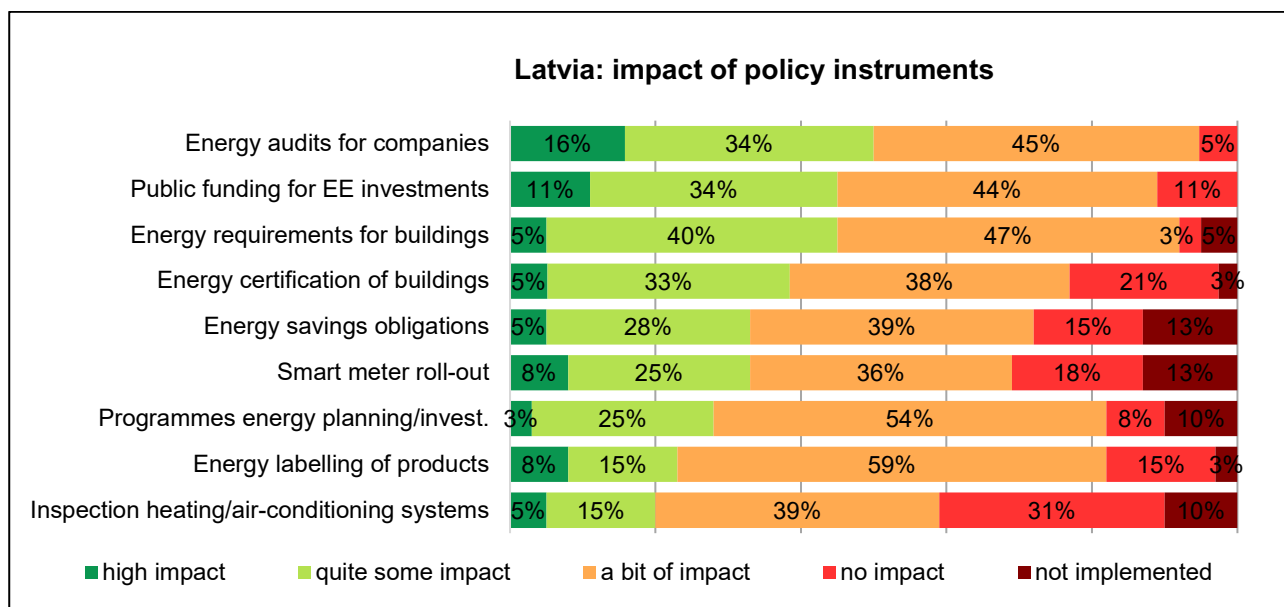
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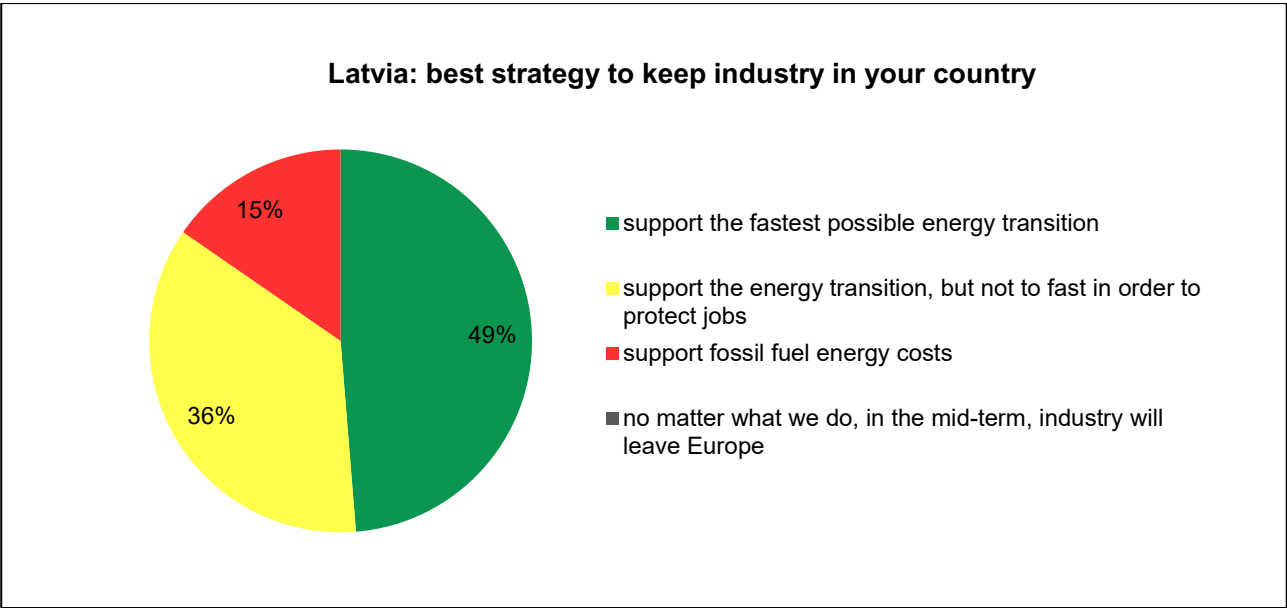
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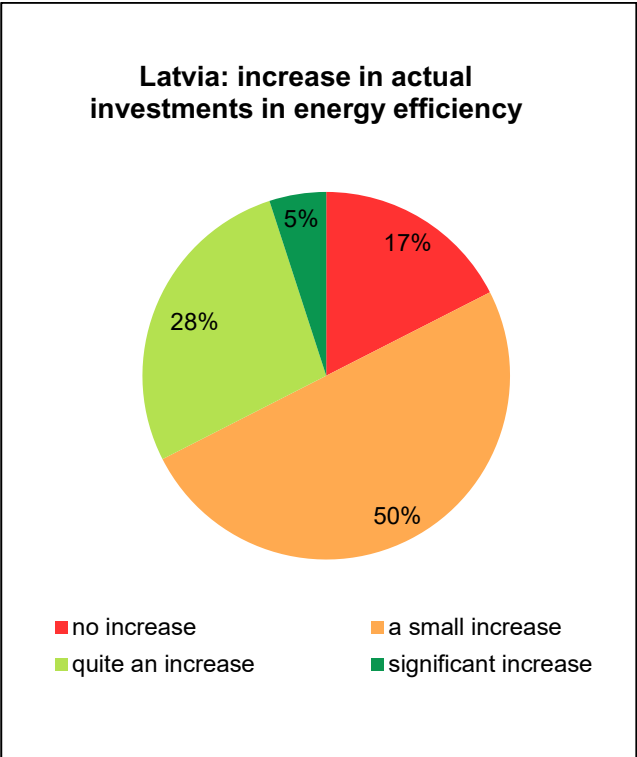
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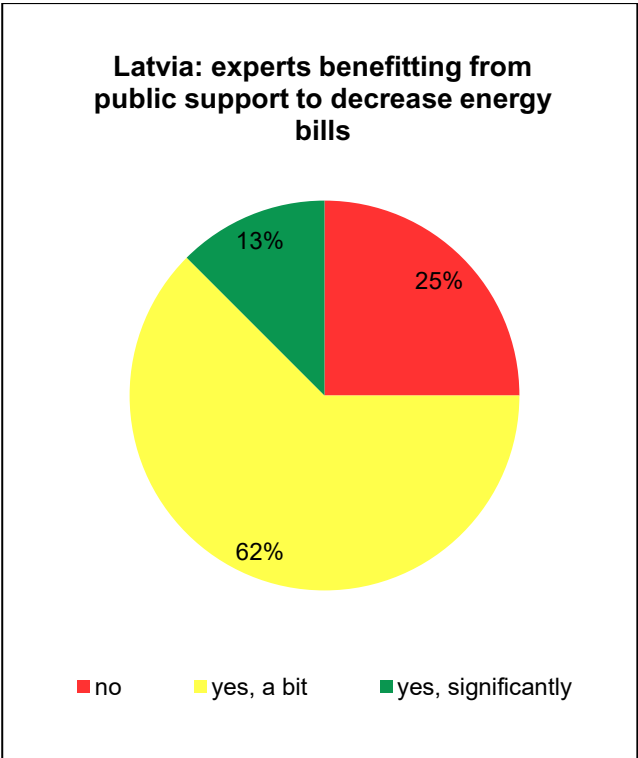
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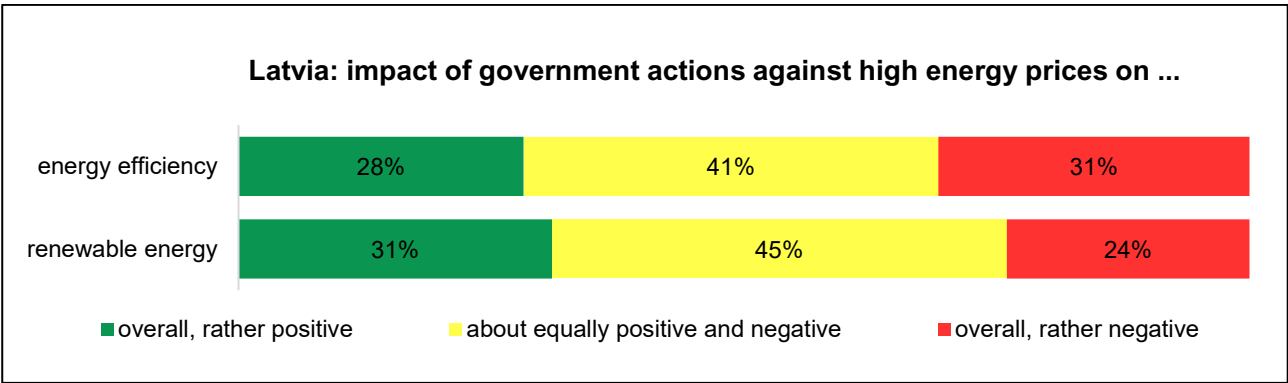
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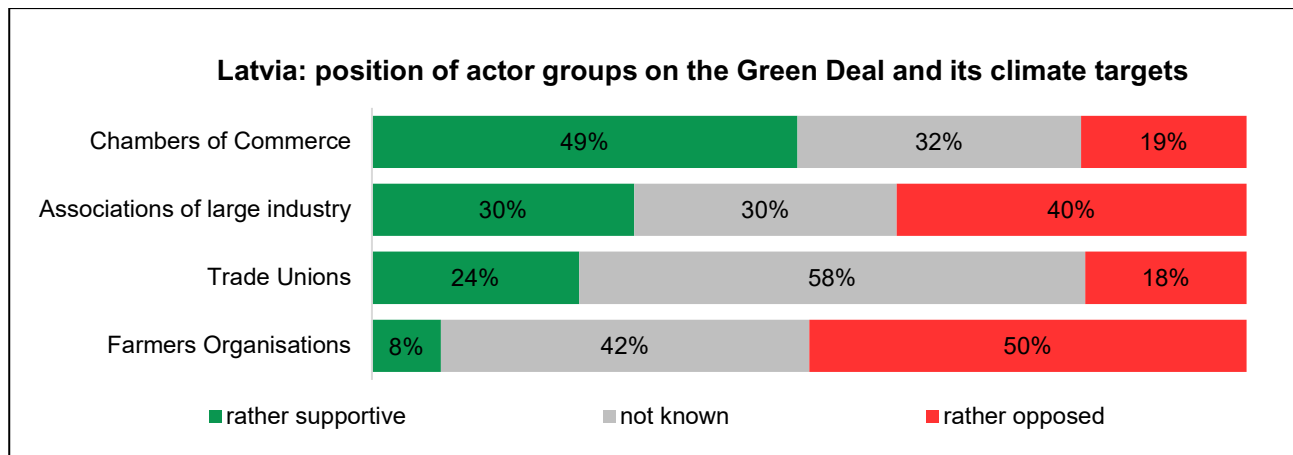
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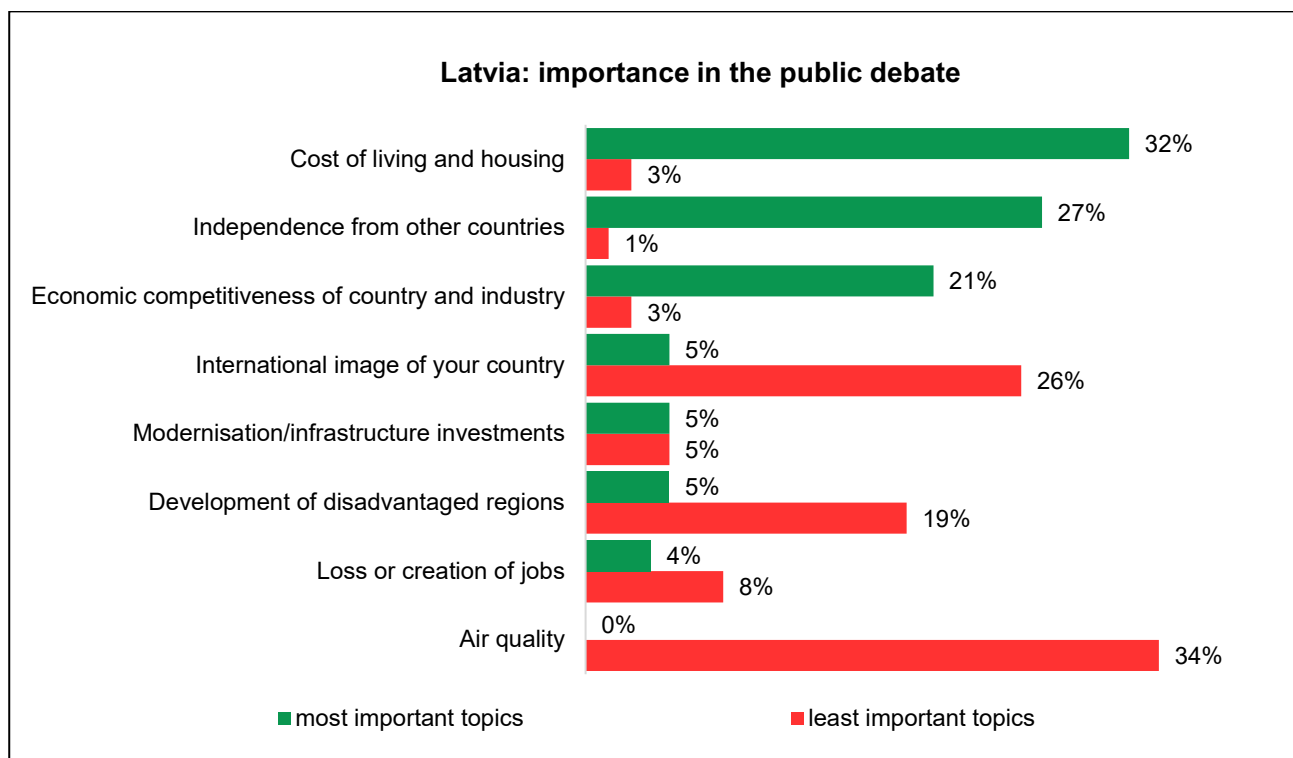
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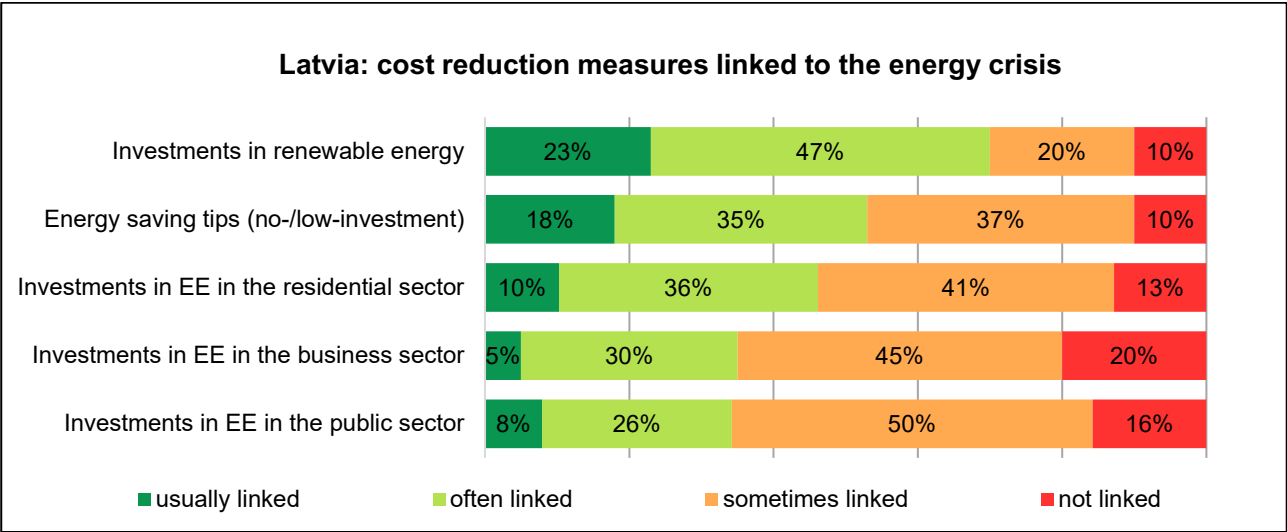
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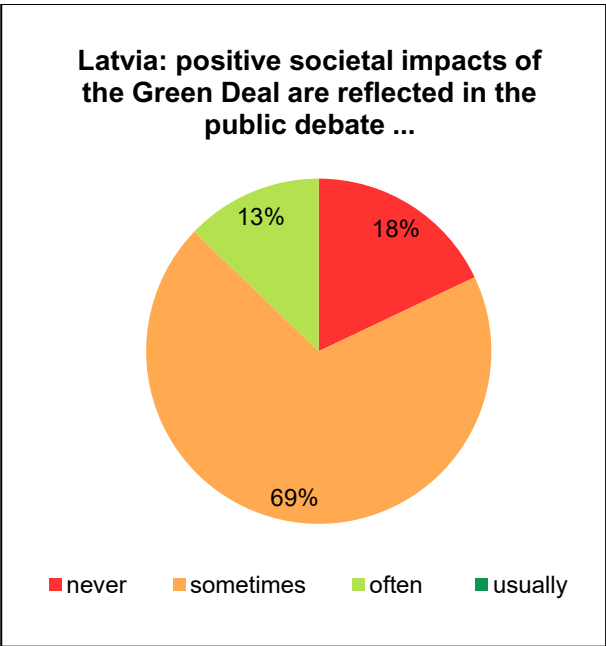
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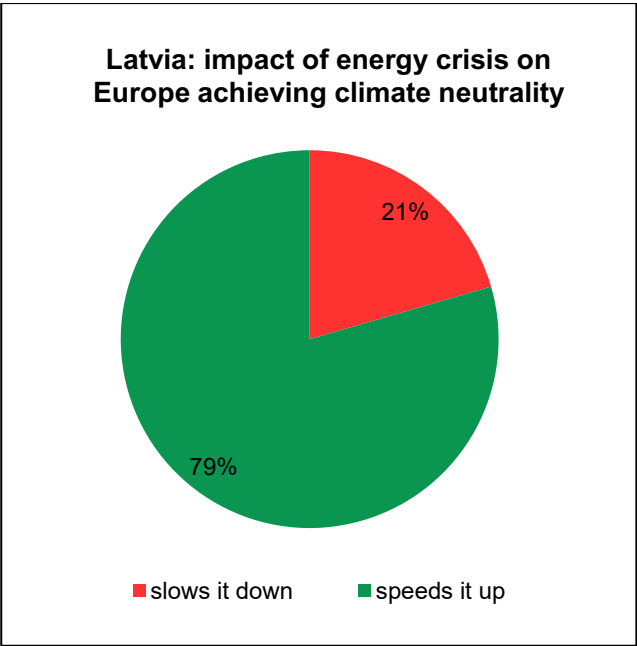
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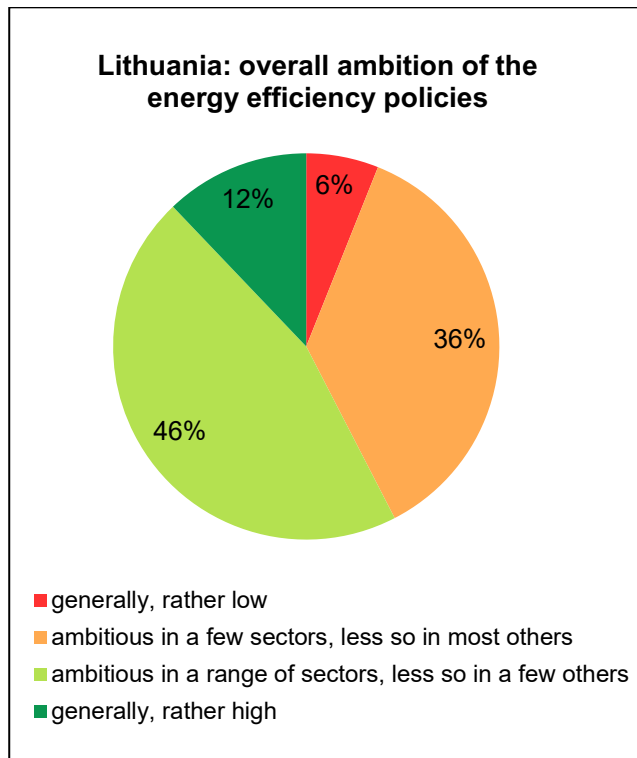
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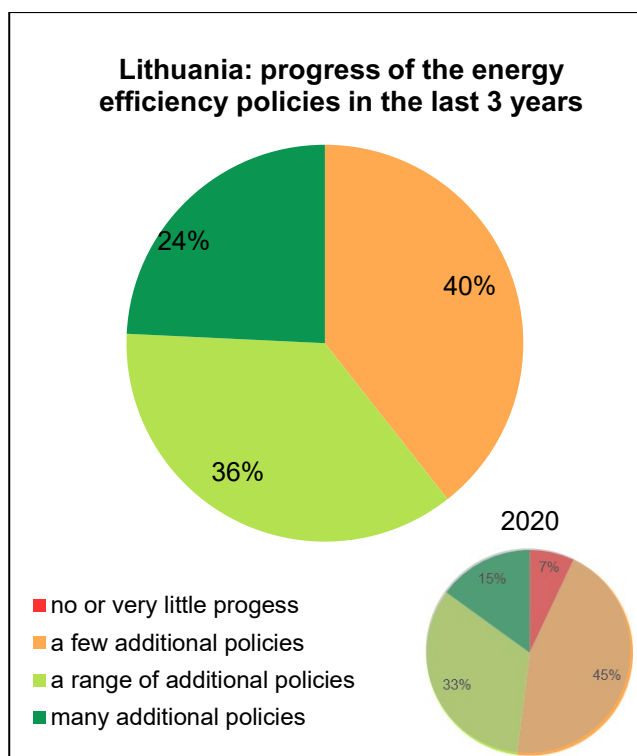
Lithuania



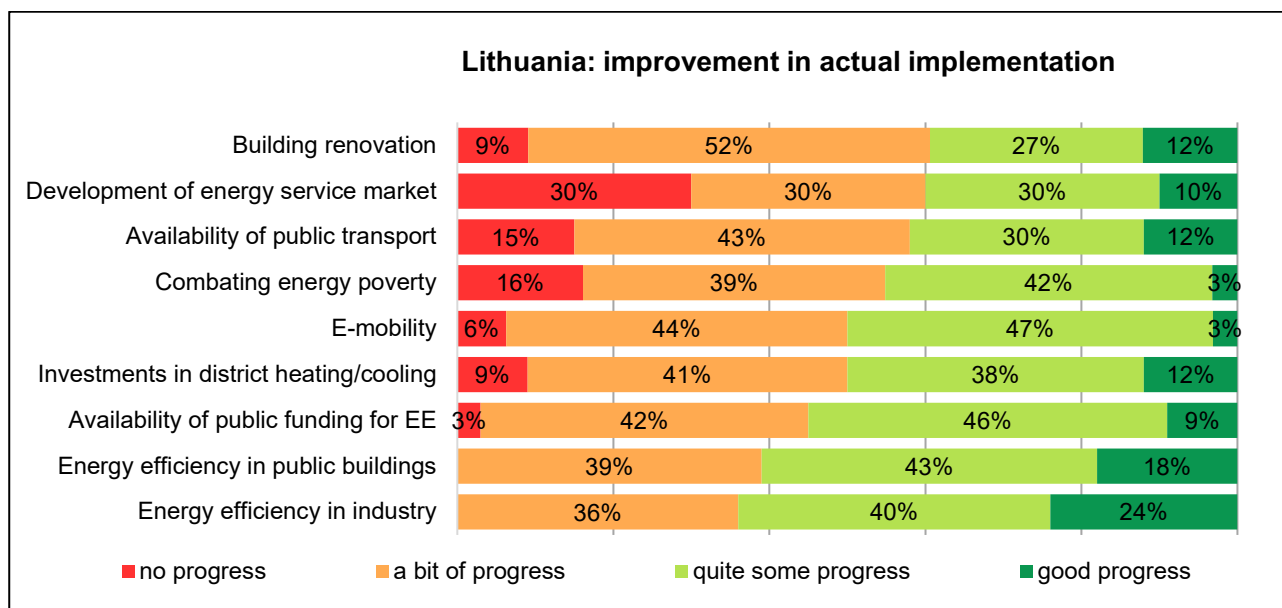
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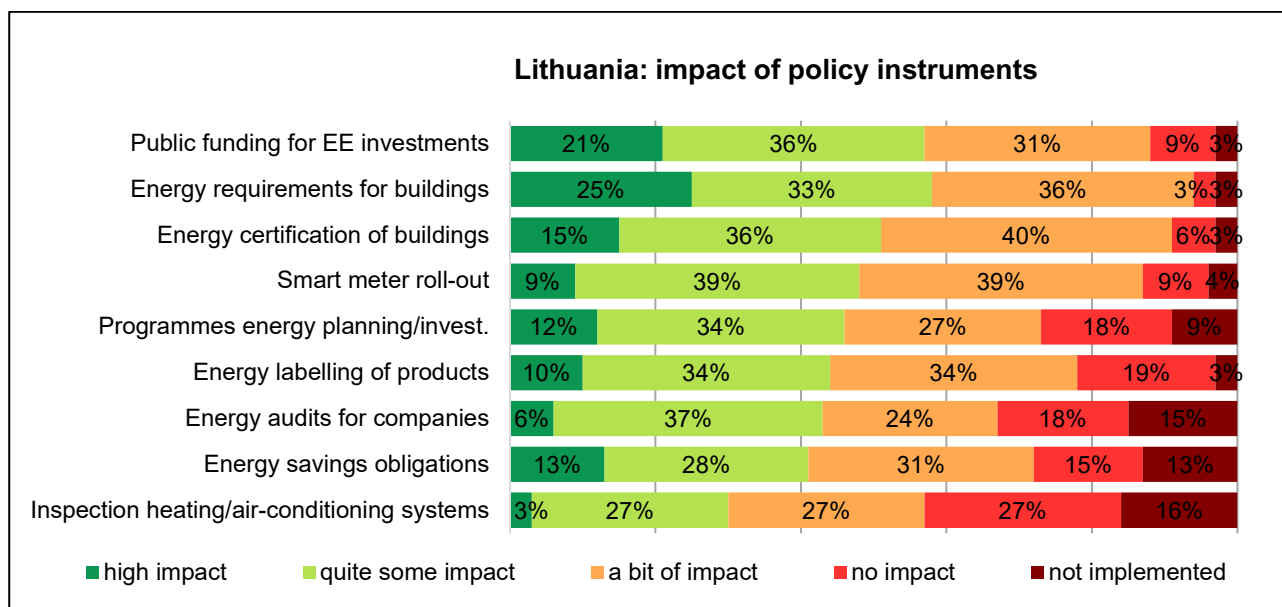
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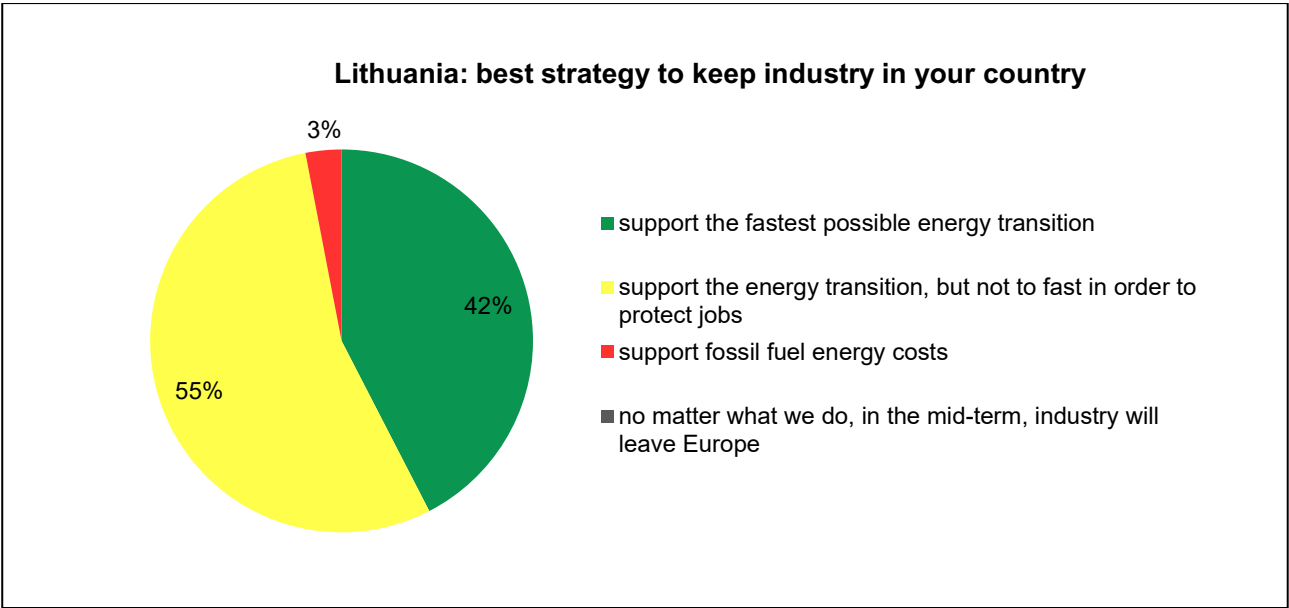
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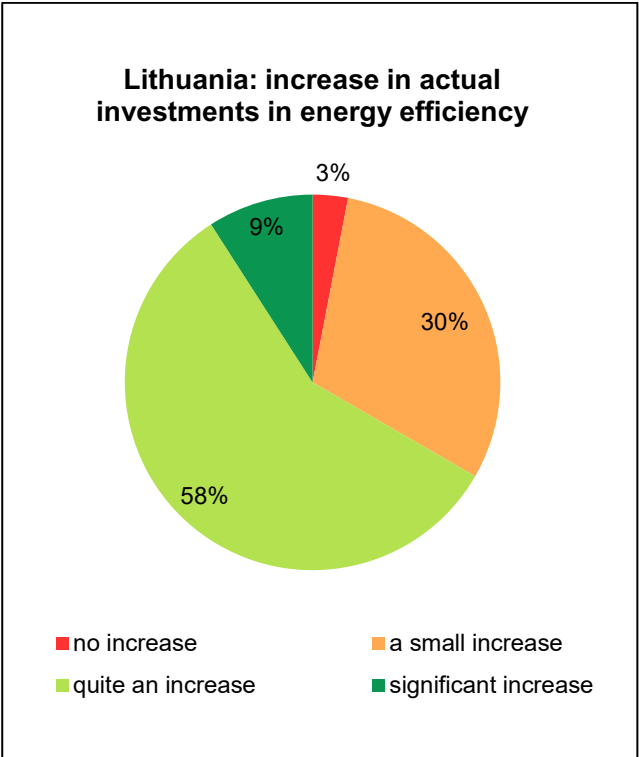
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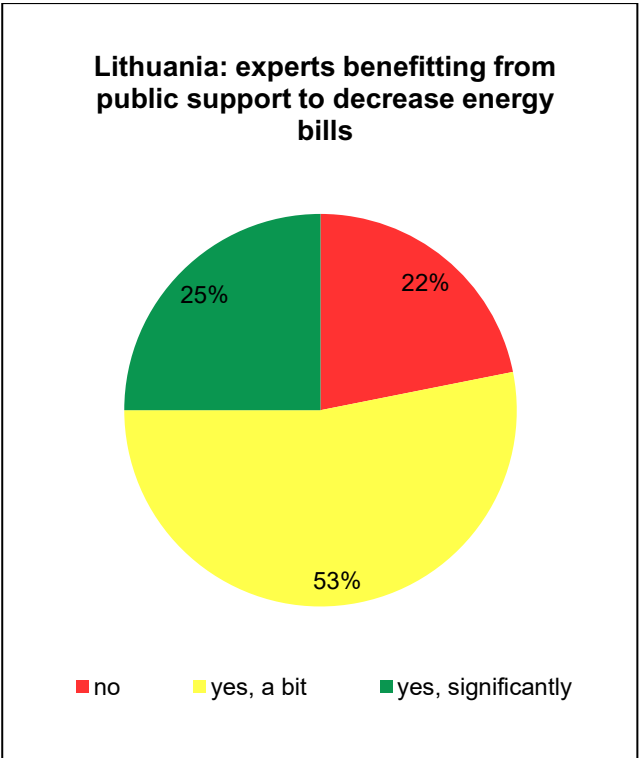
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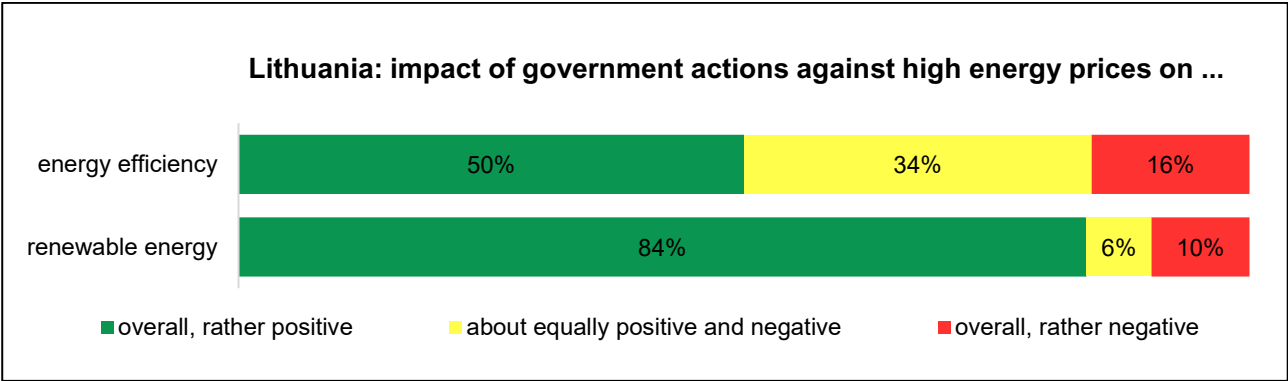
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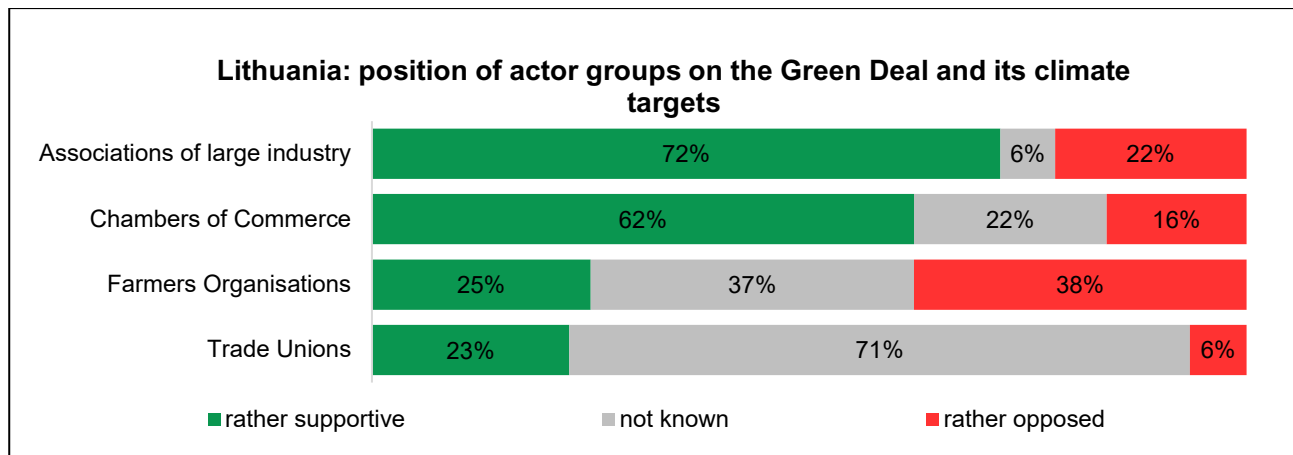
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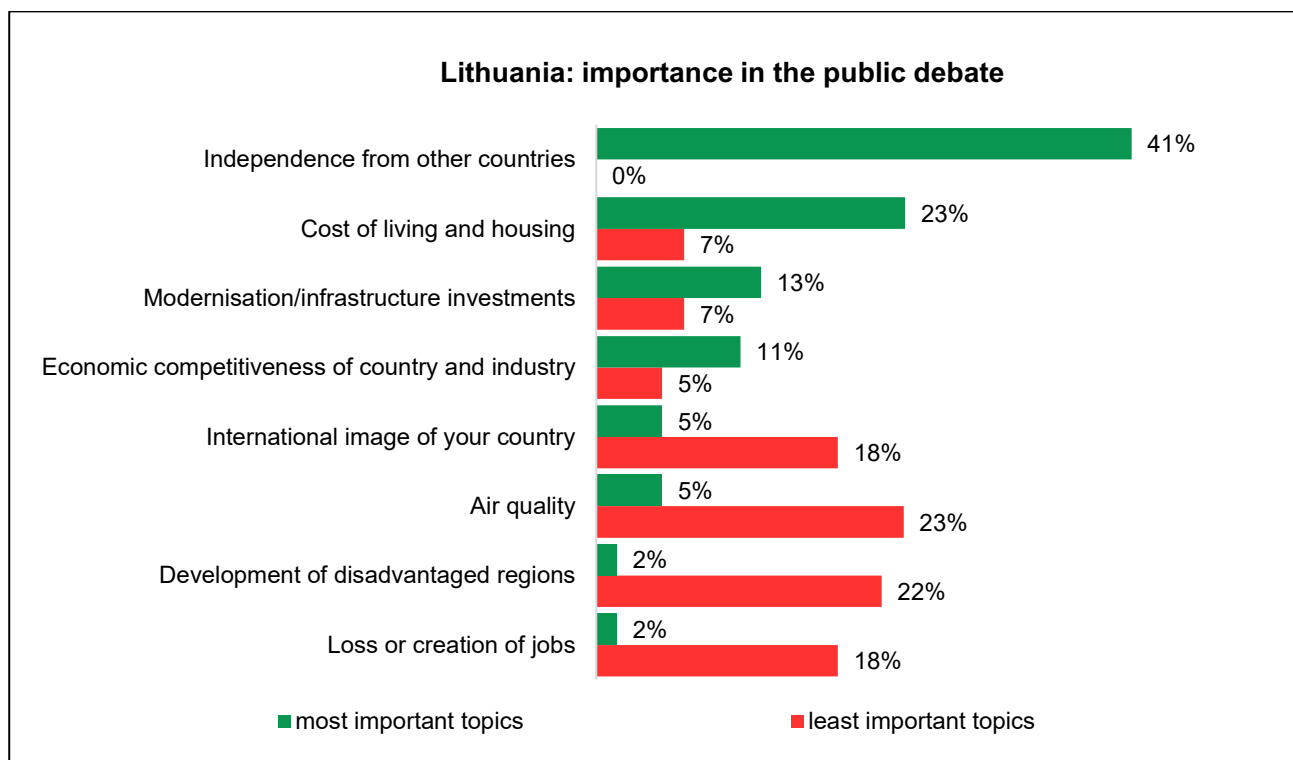
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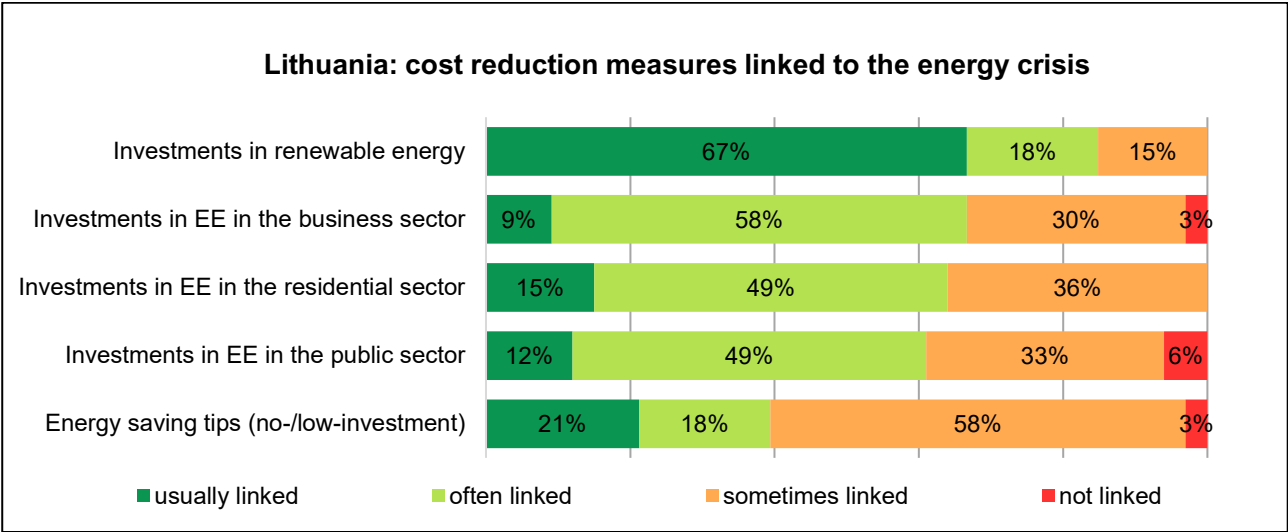
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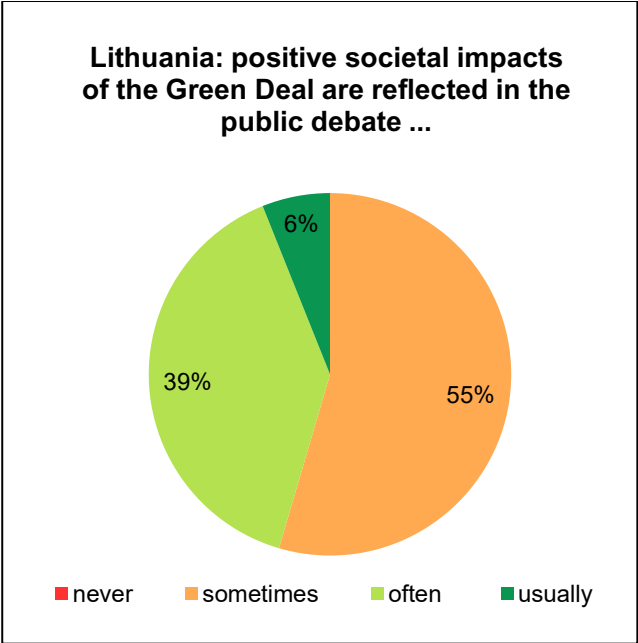
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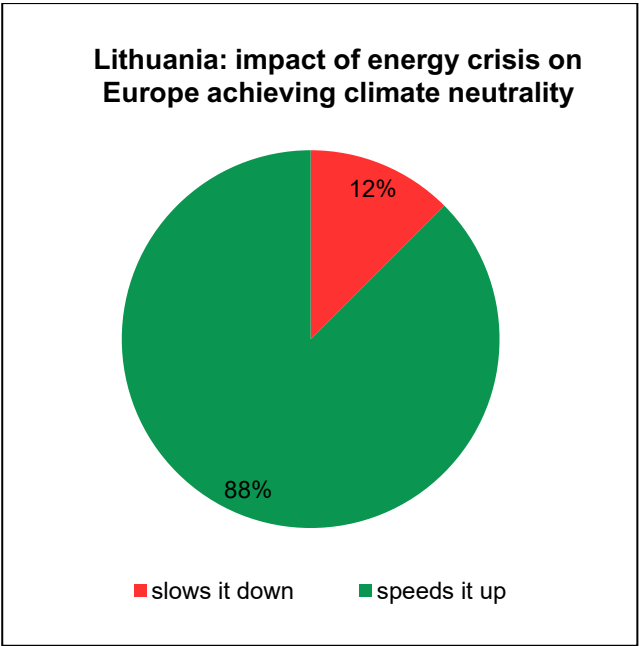
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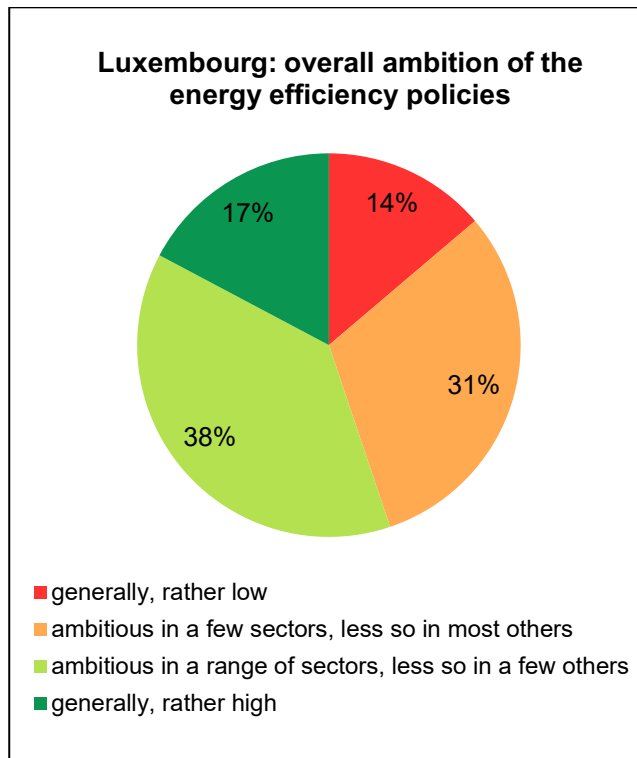
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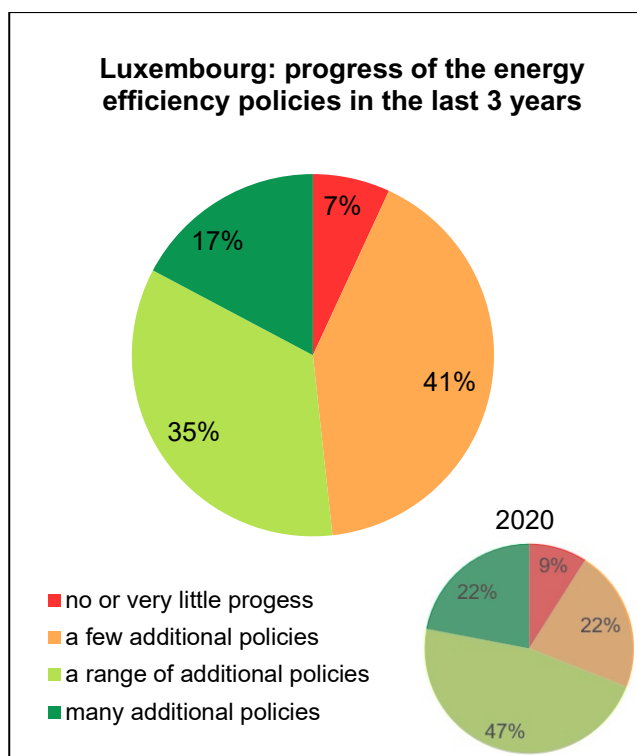
Luxembourg



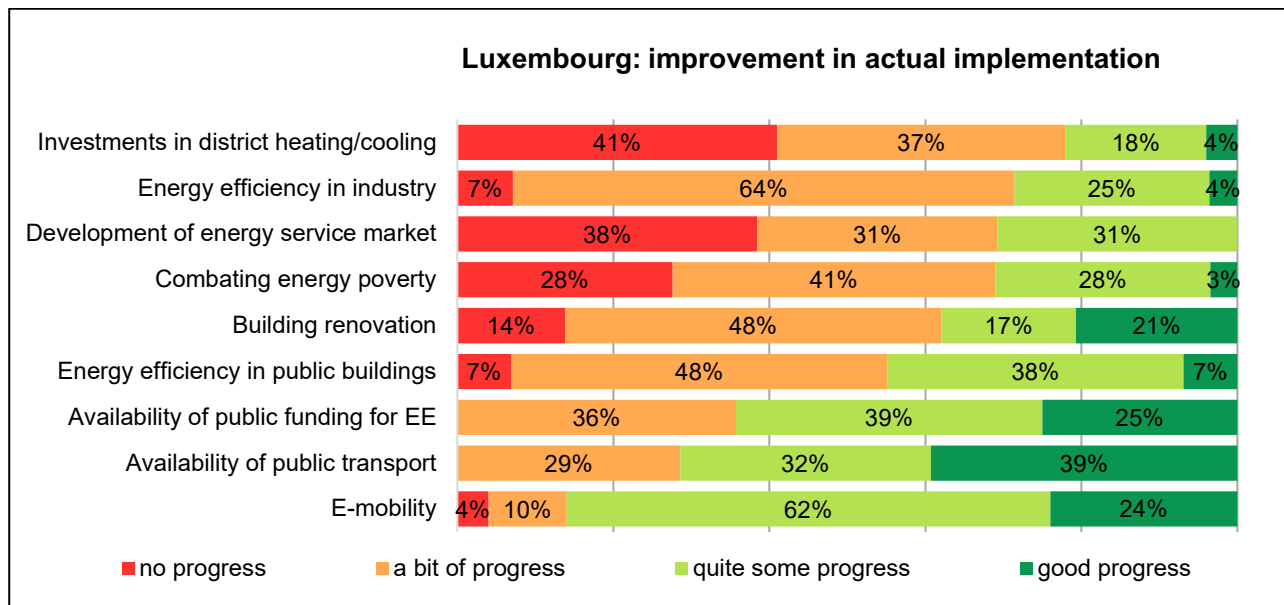
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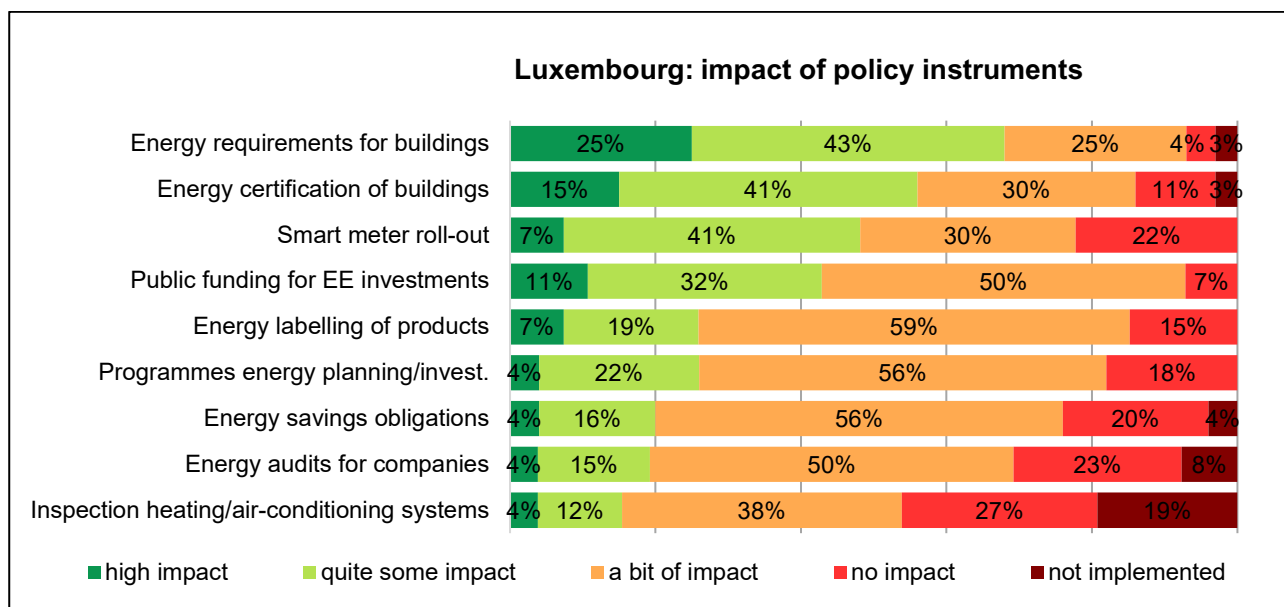
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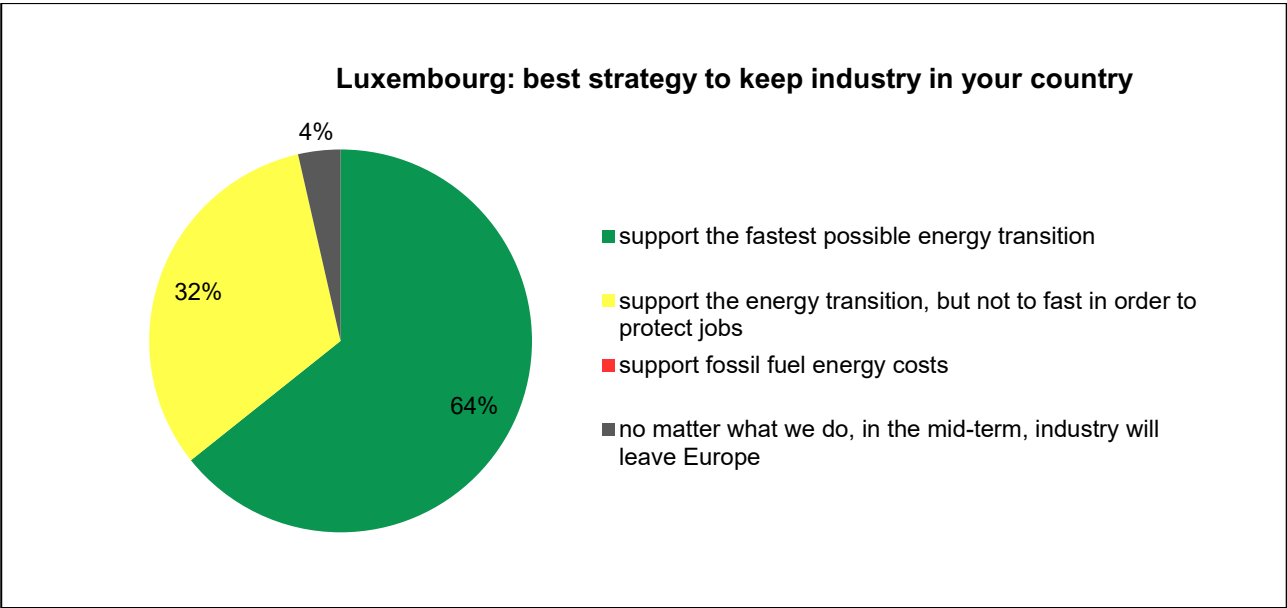
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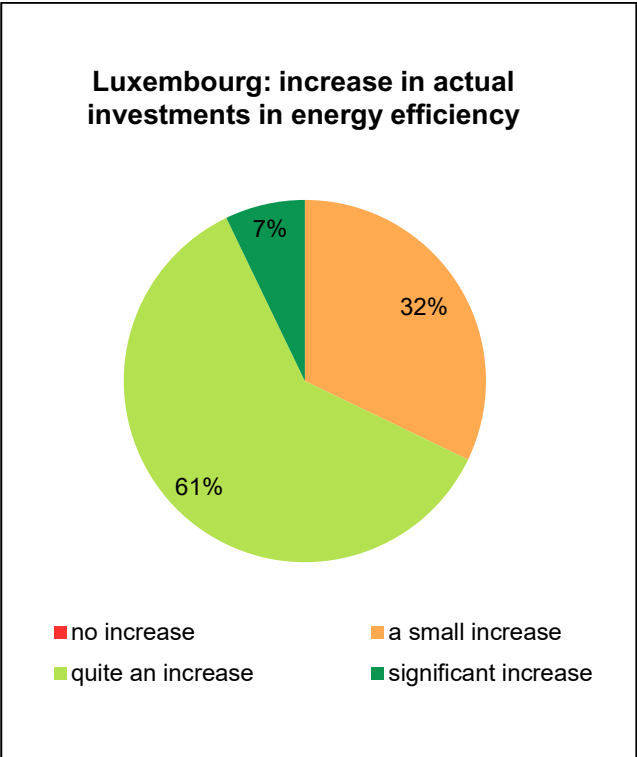
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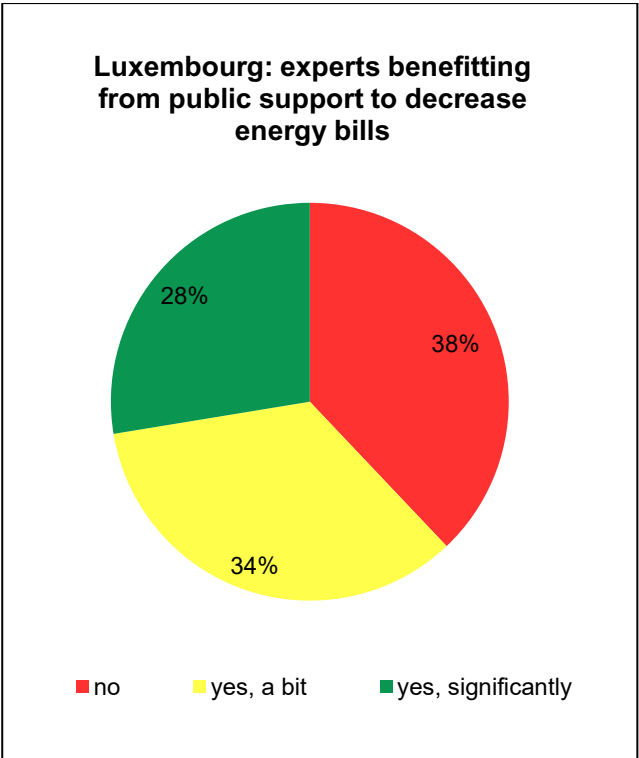
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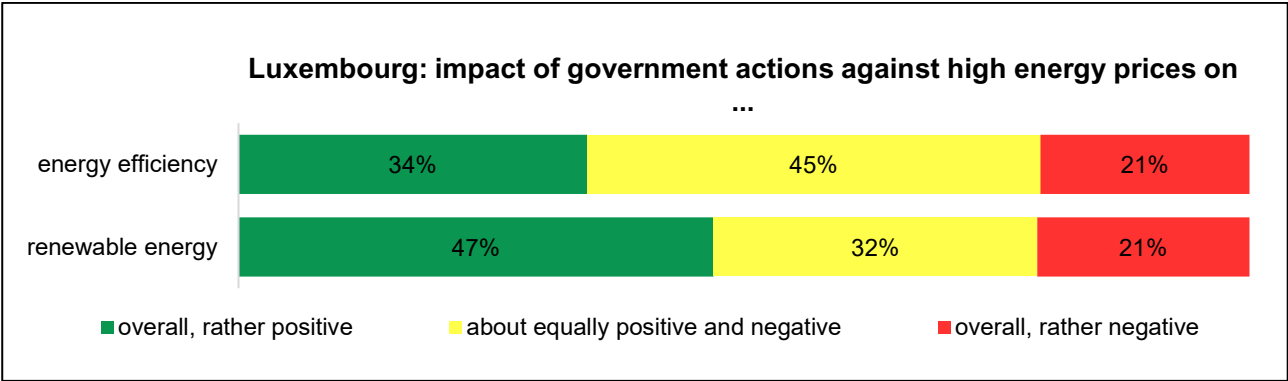
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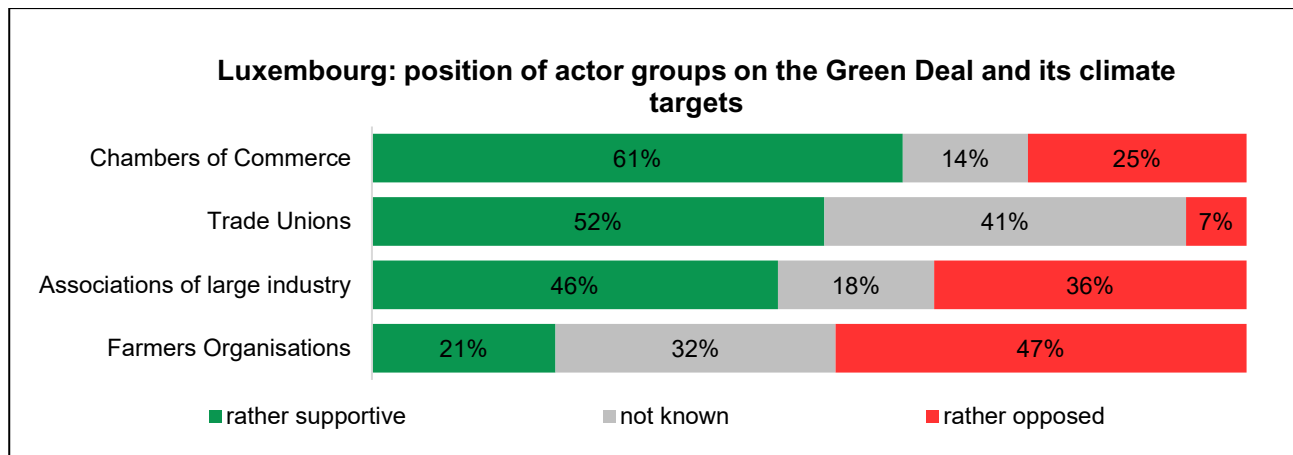
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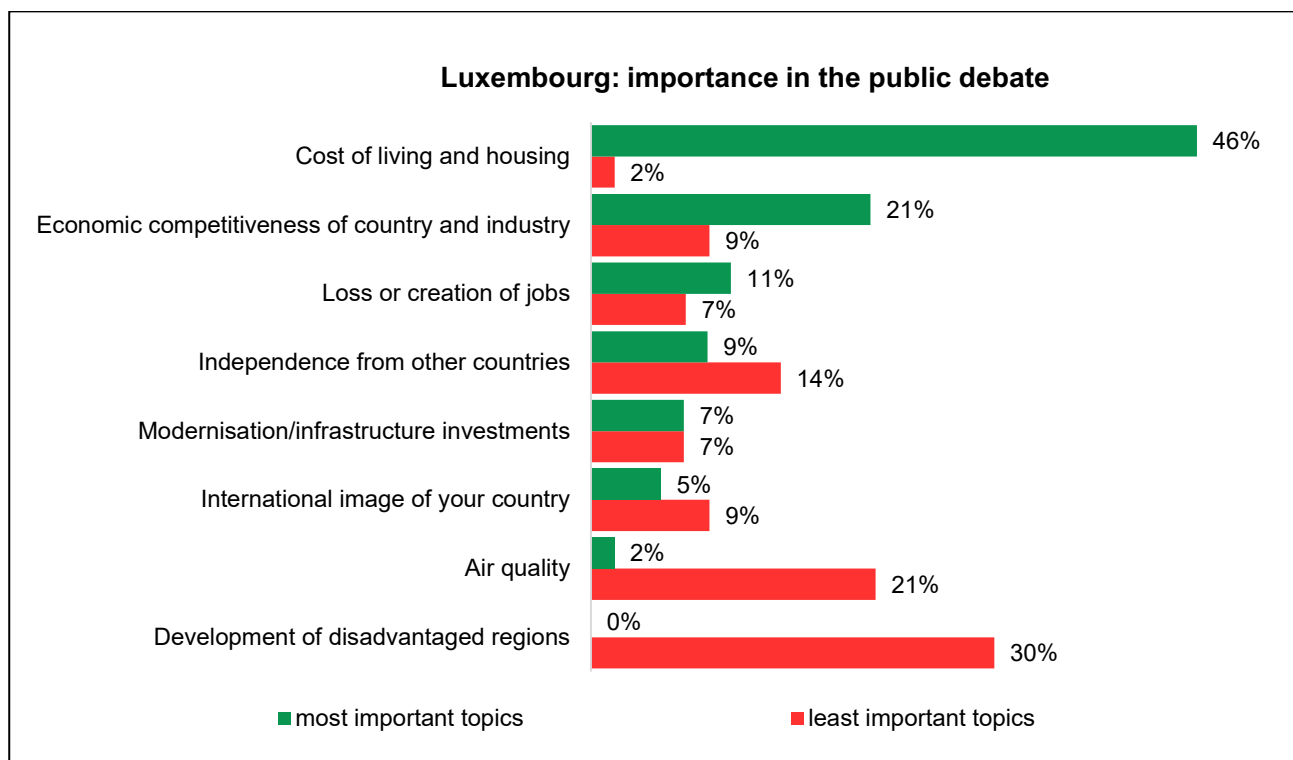
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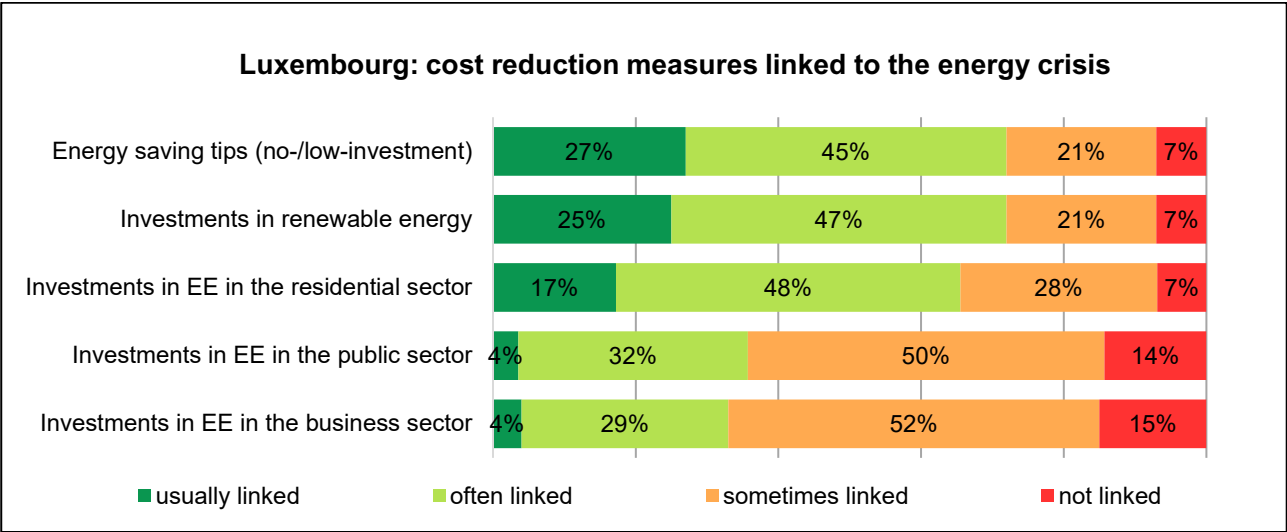
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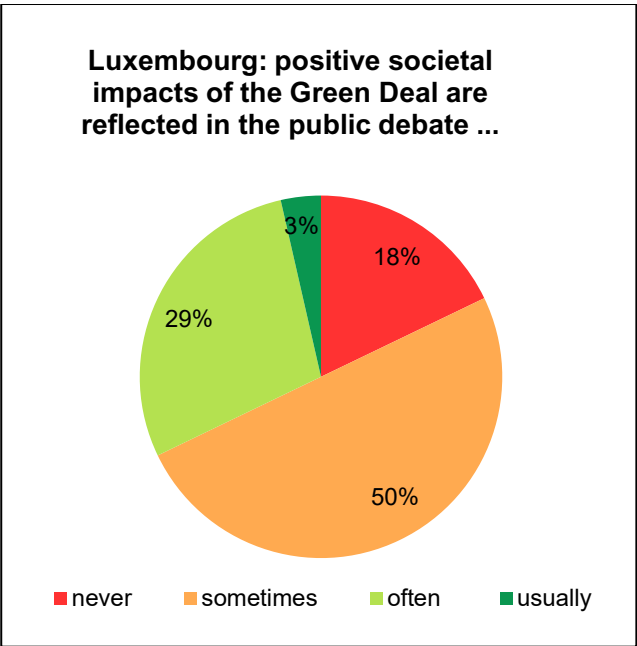
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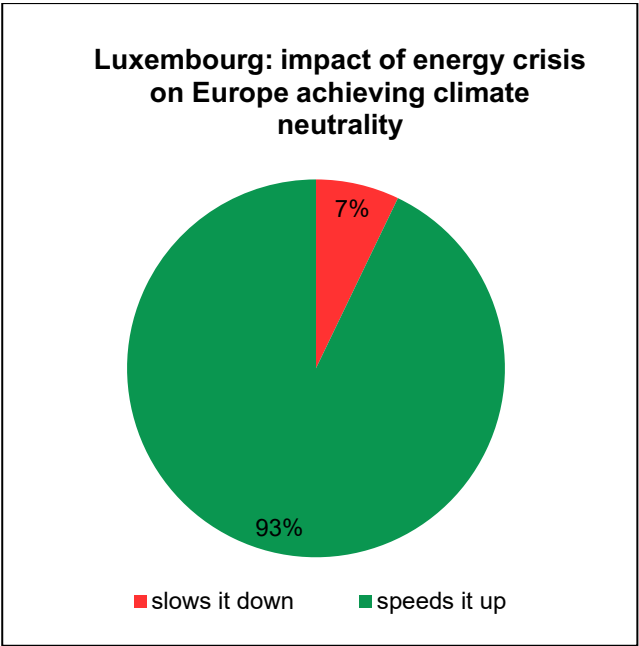
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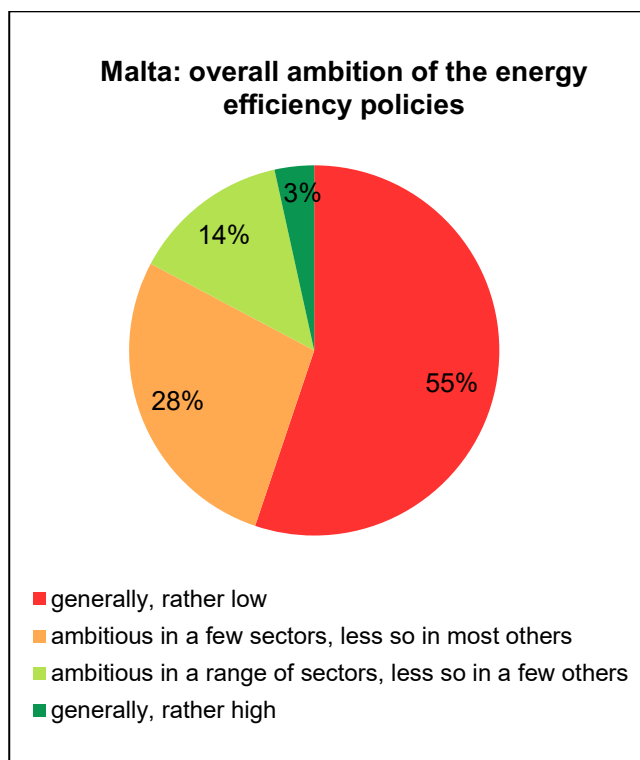
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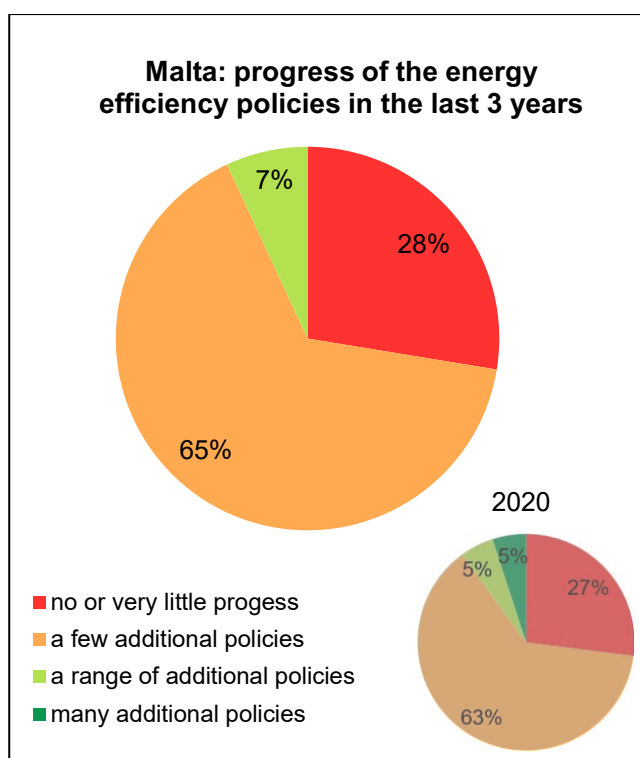
Malta



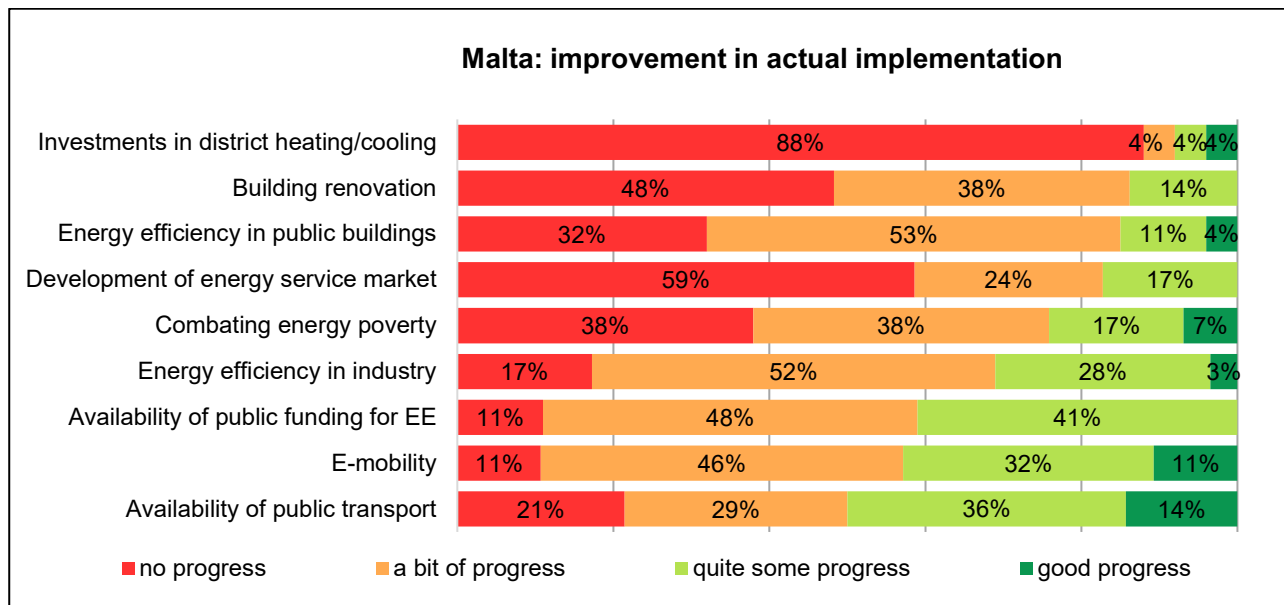
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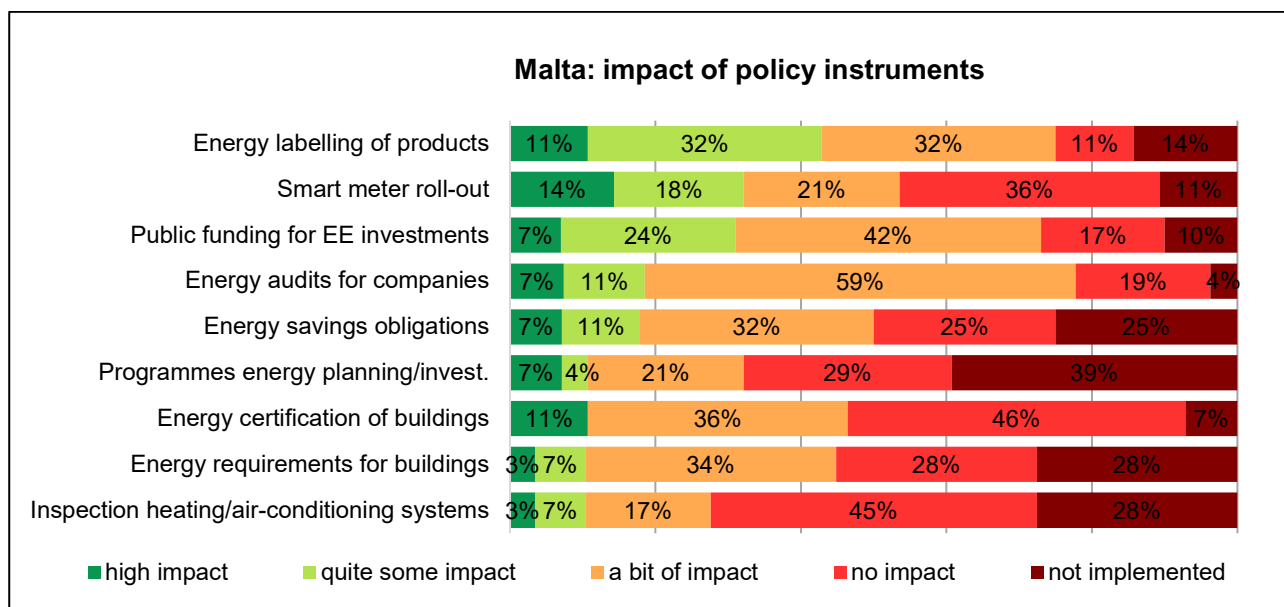
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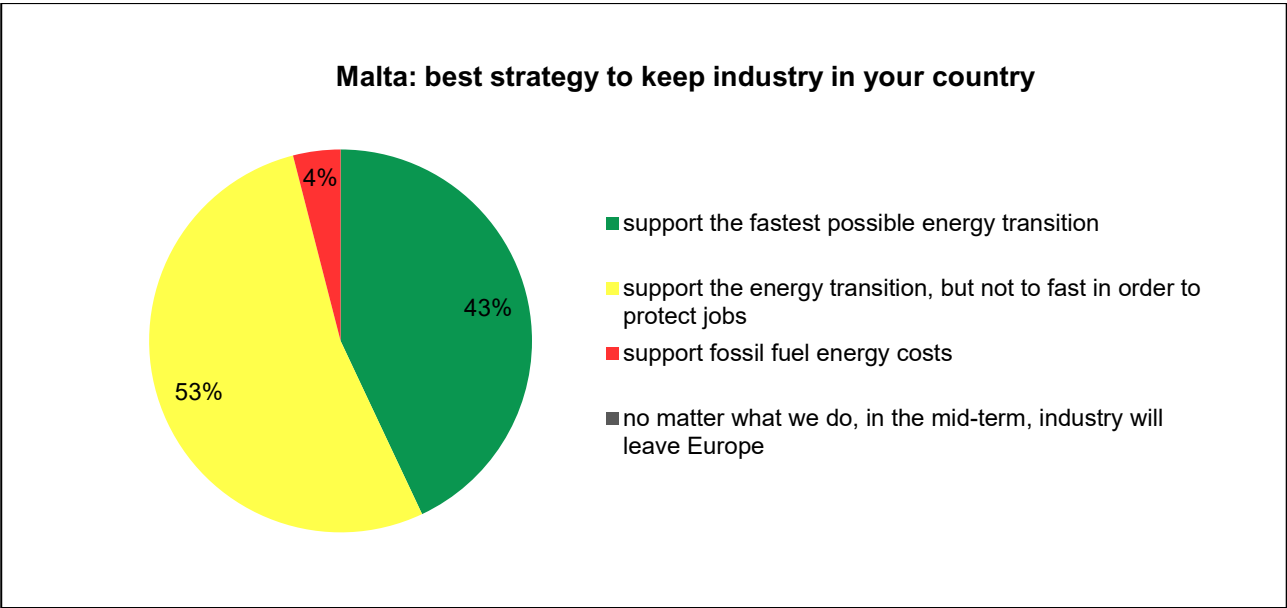
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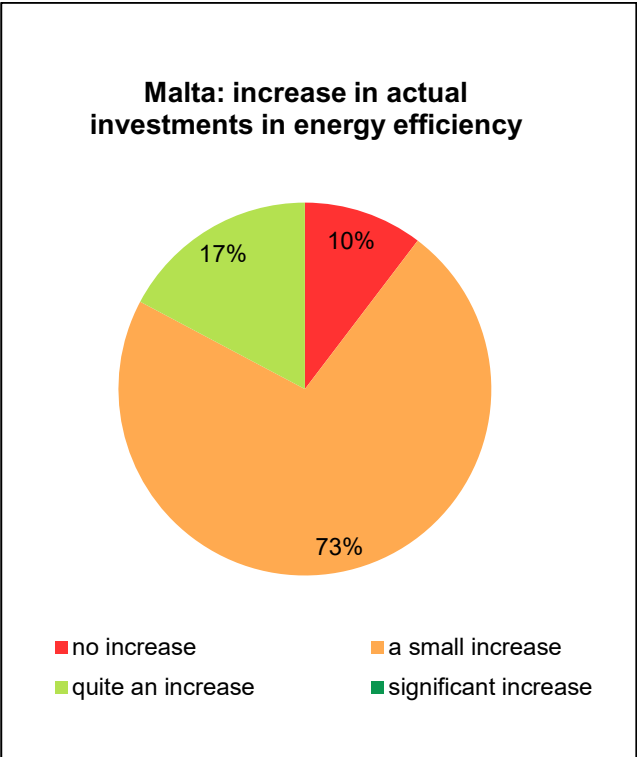
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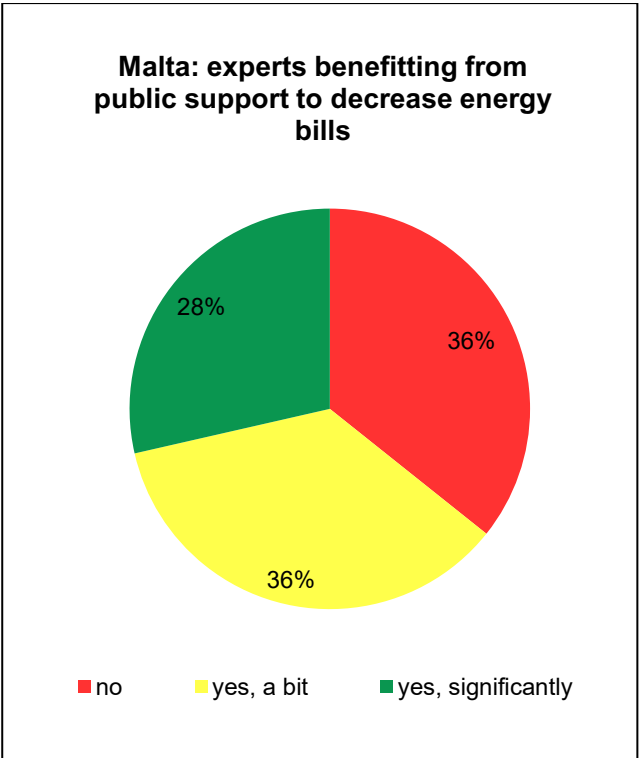
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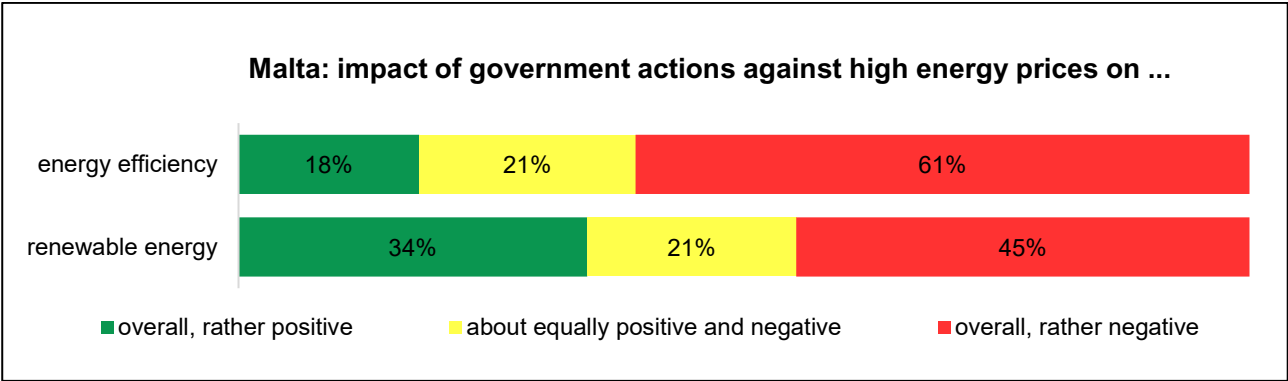
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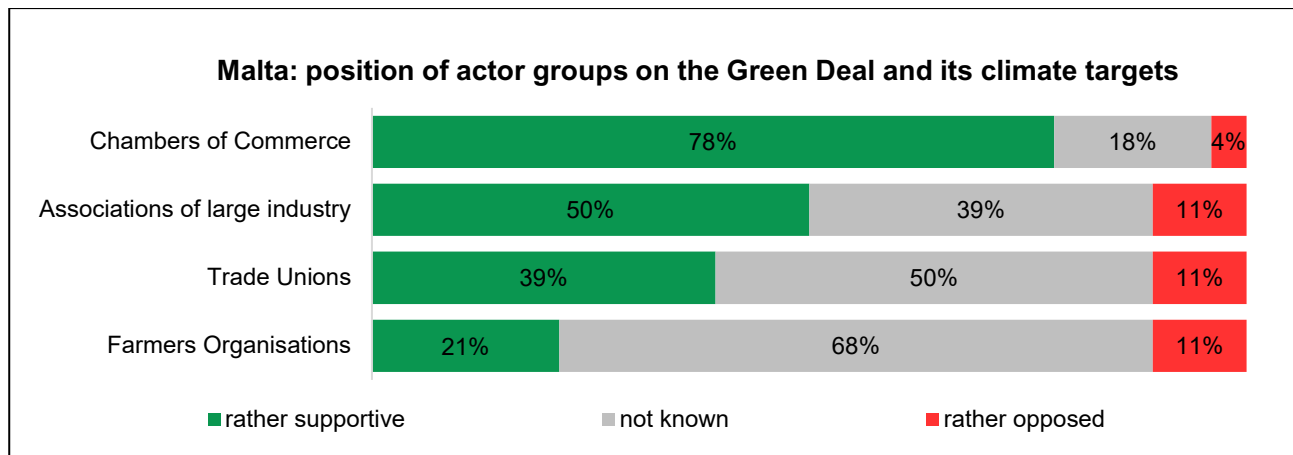
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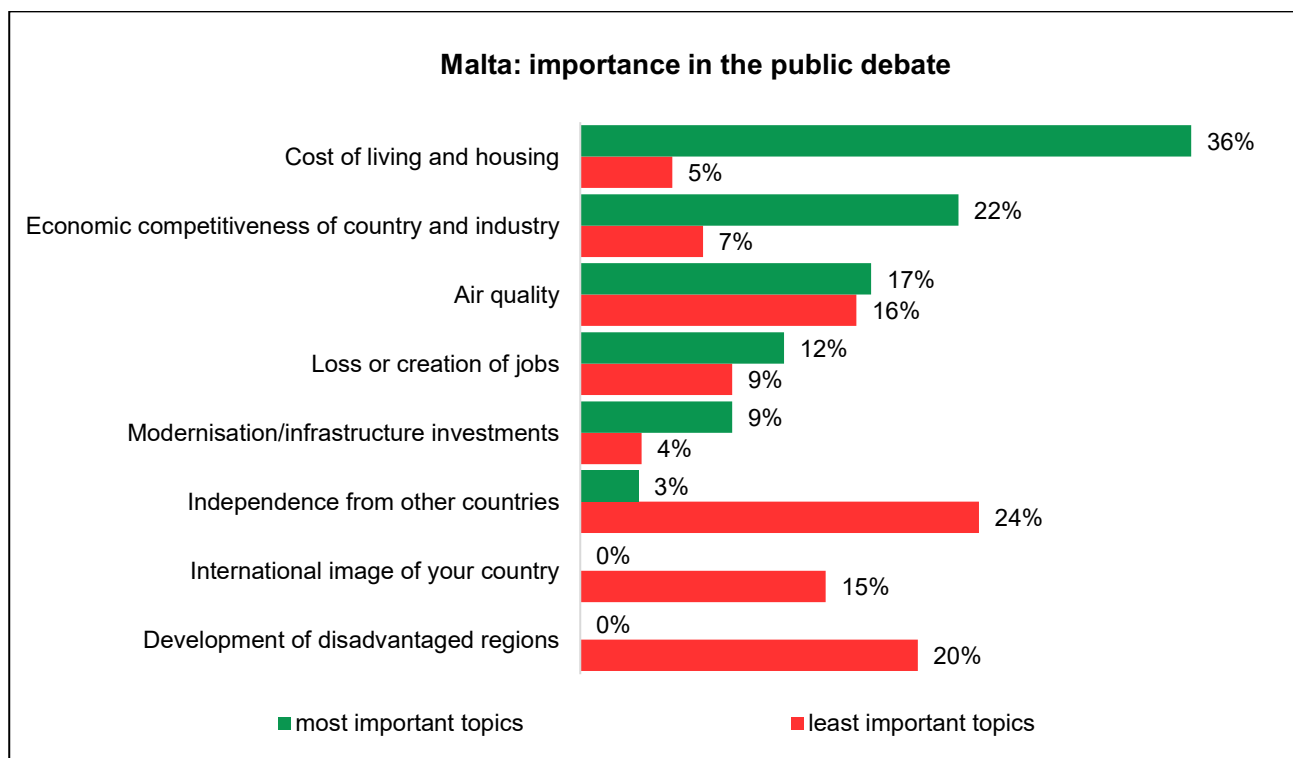
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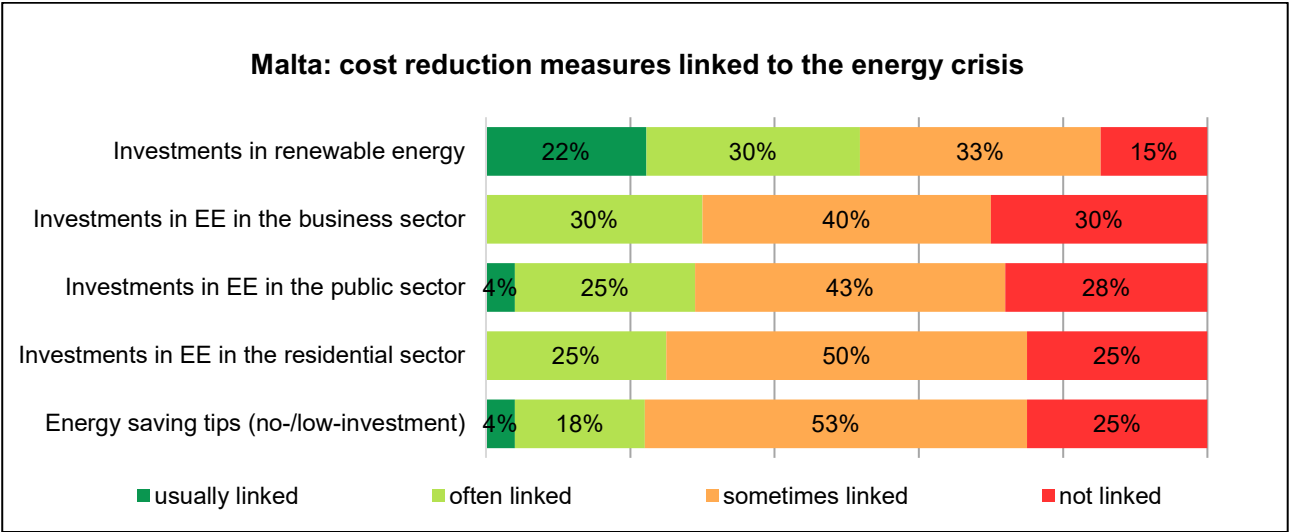
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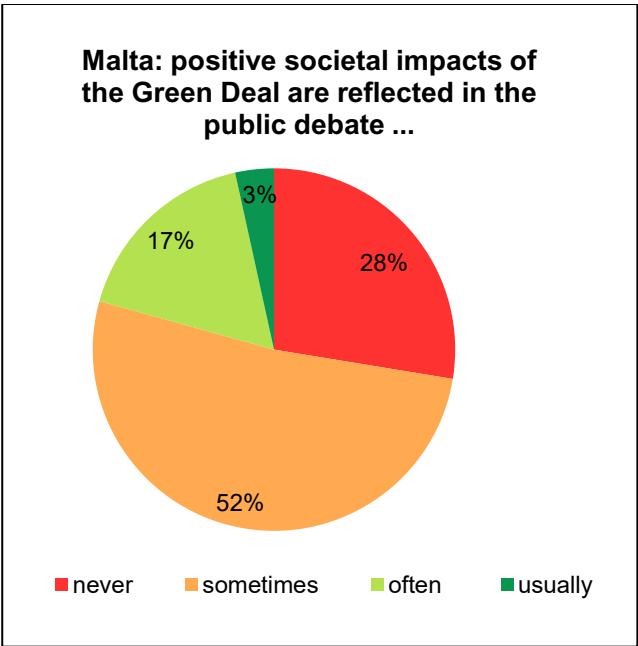
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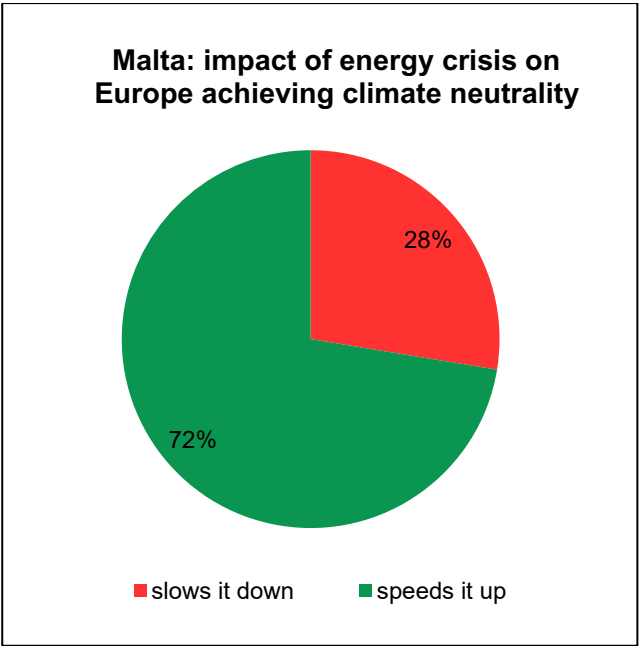
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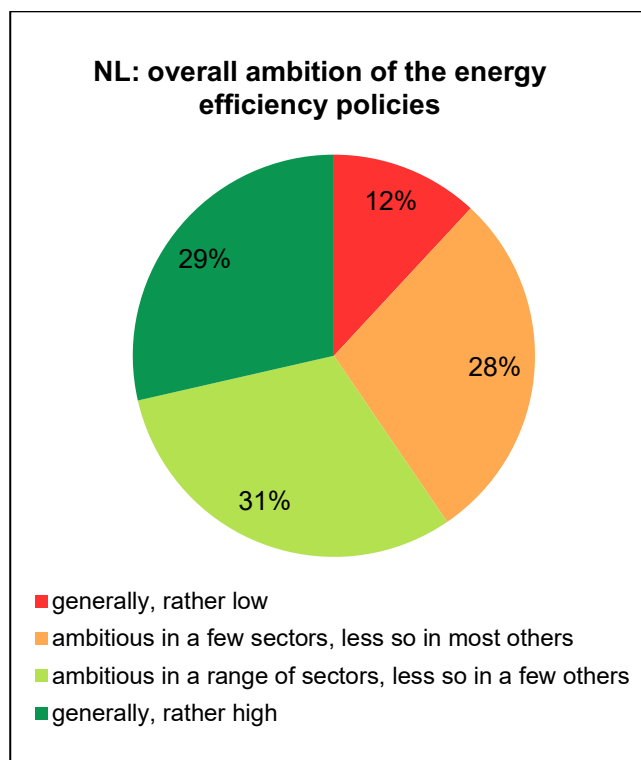
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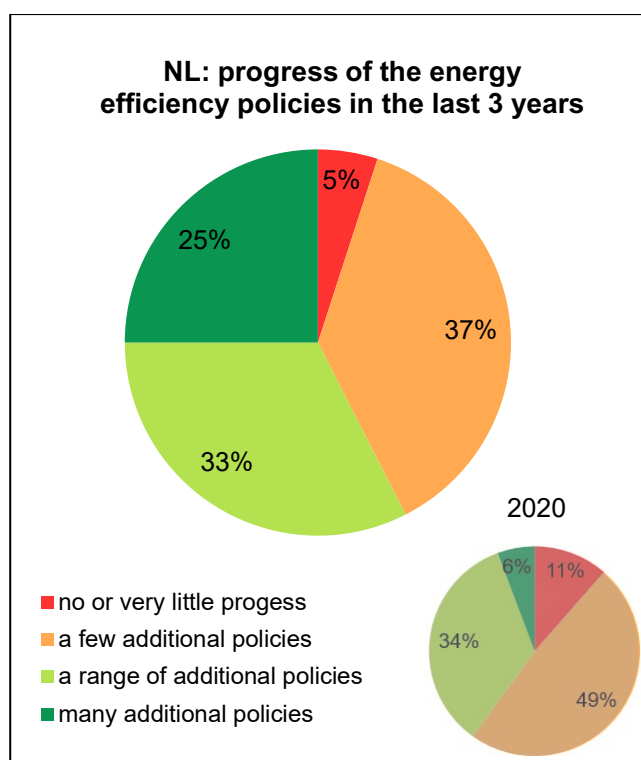
The Netherlands



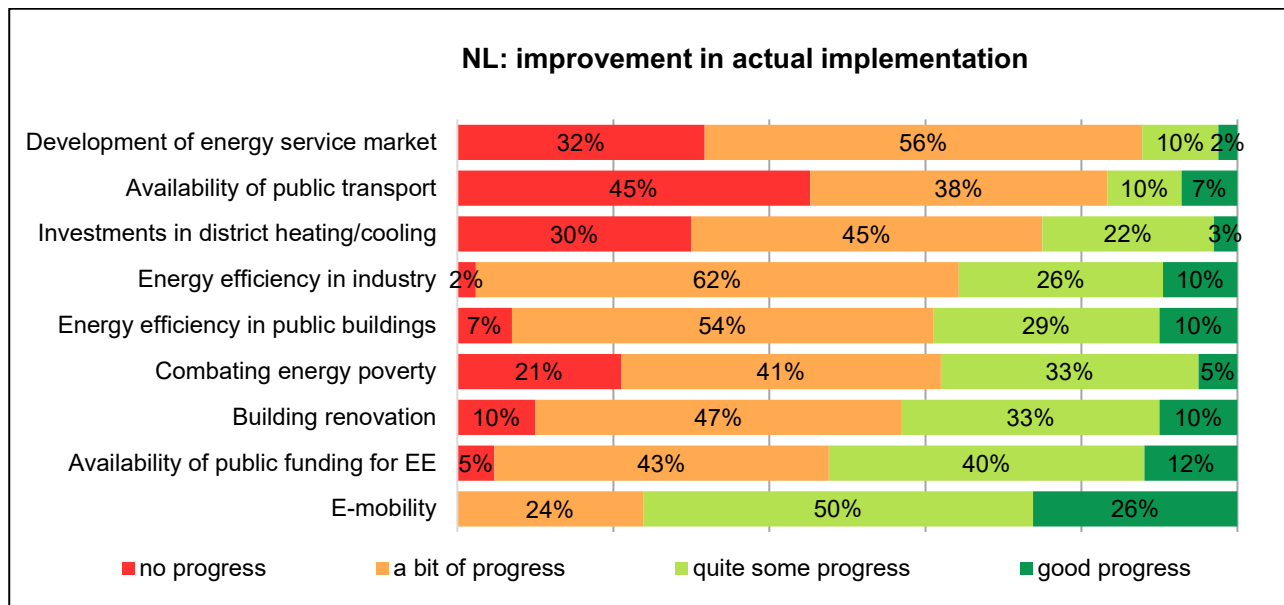
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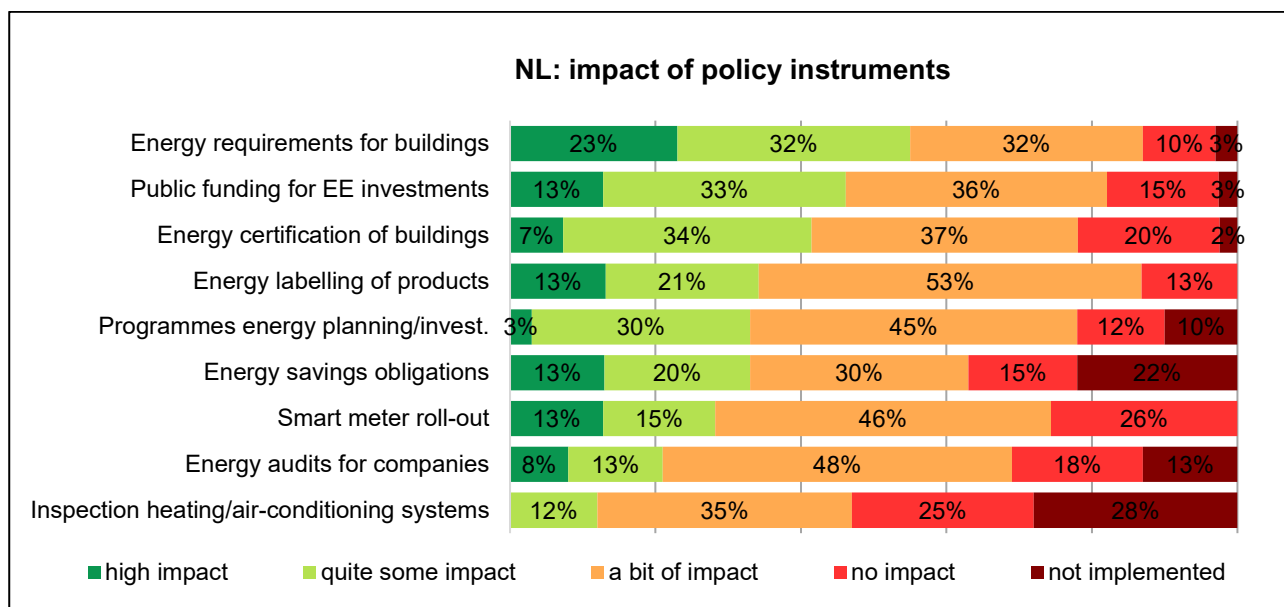
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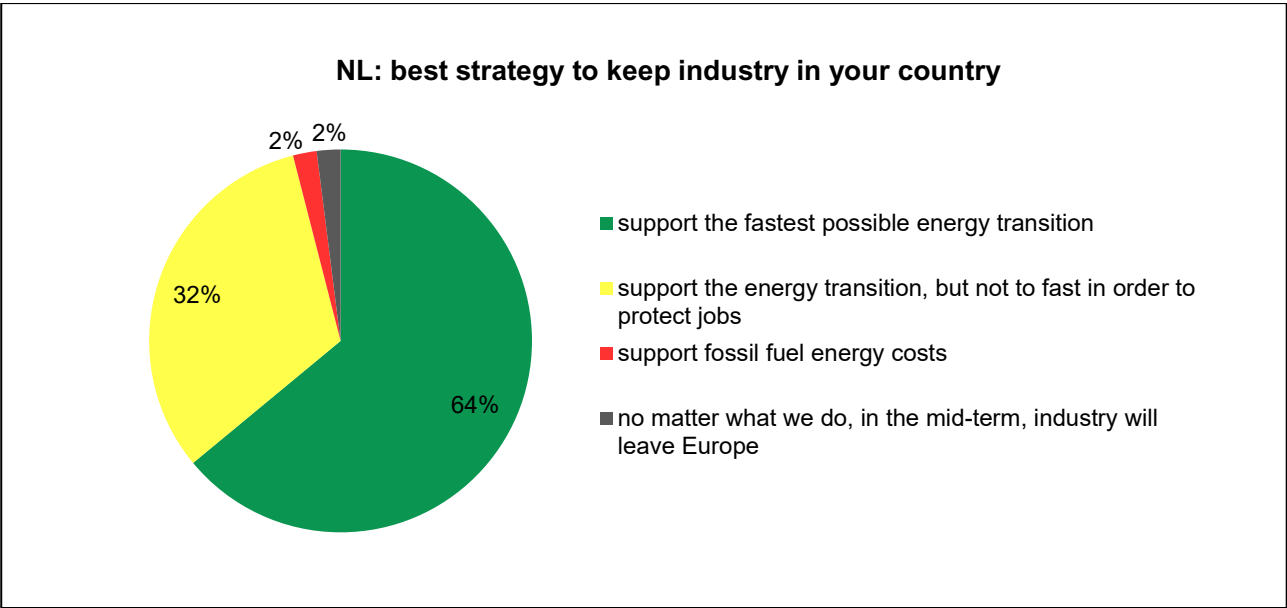
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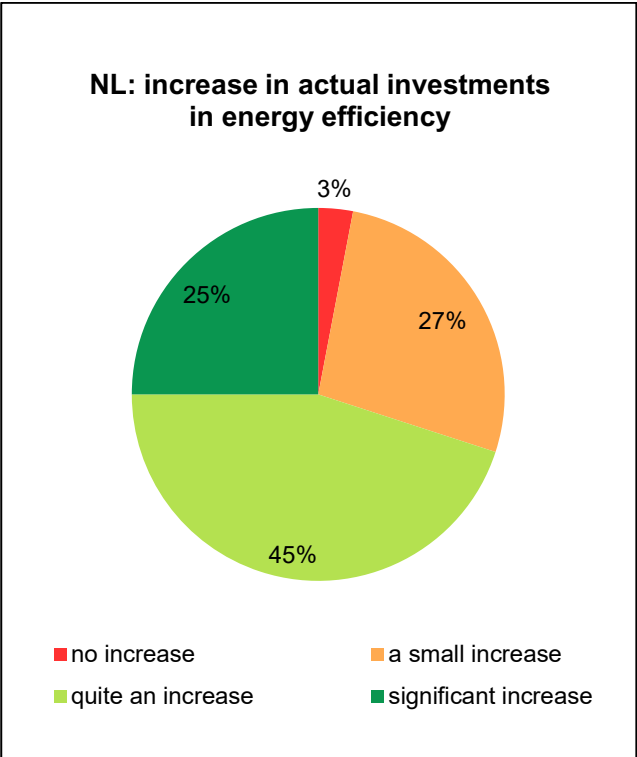
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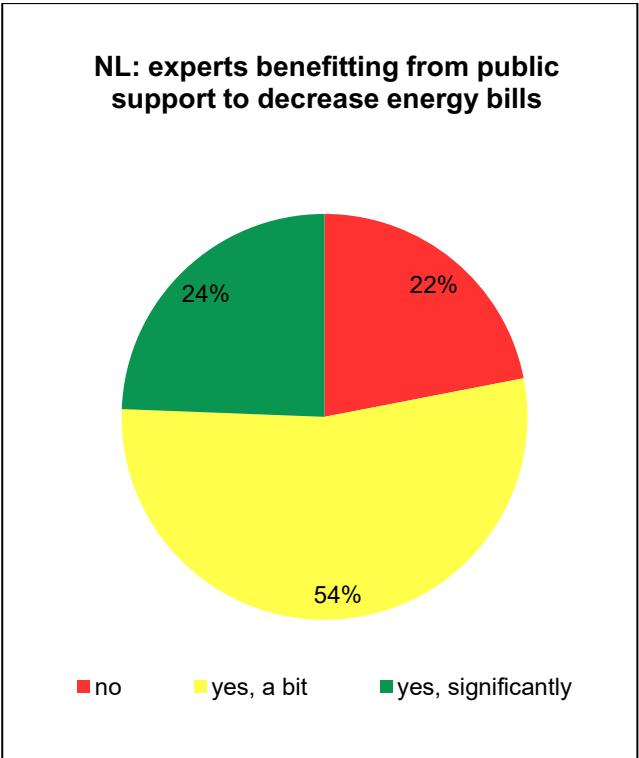
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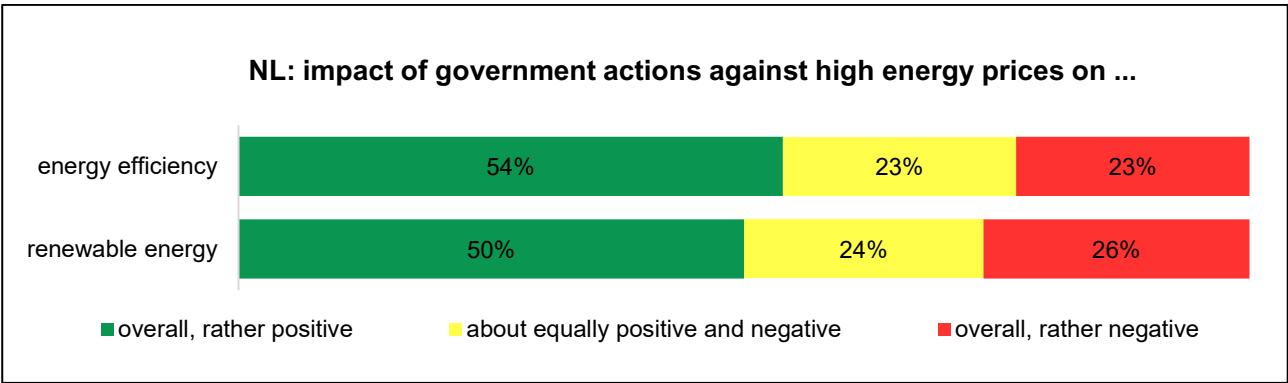
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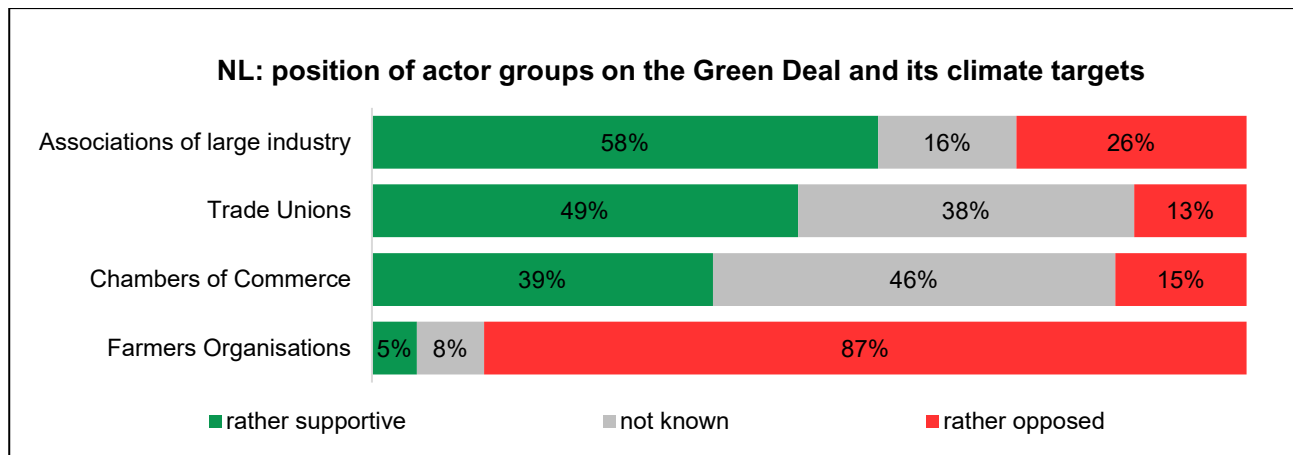
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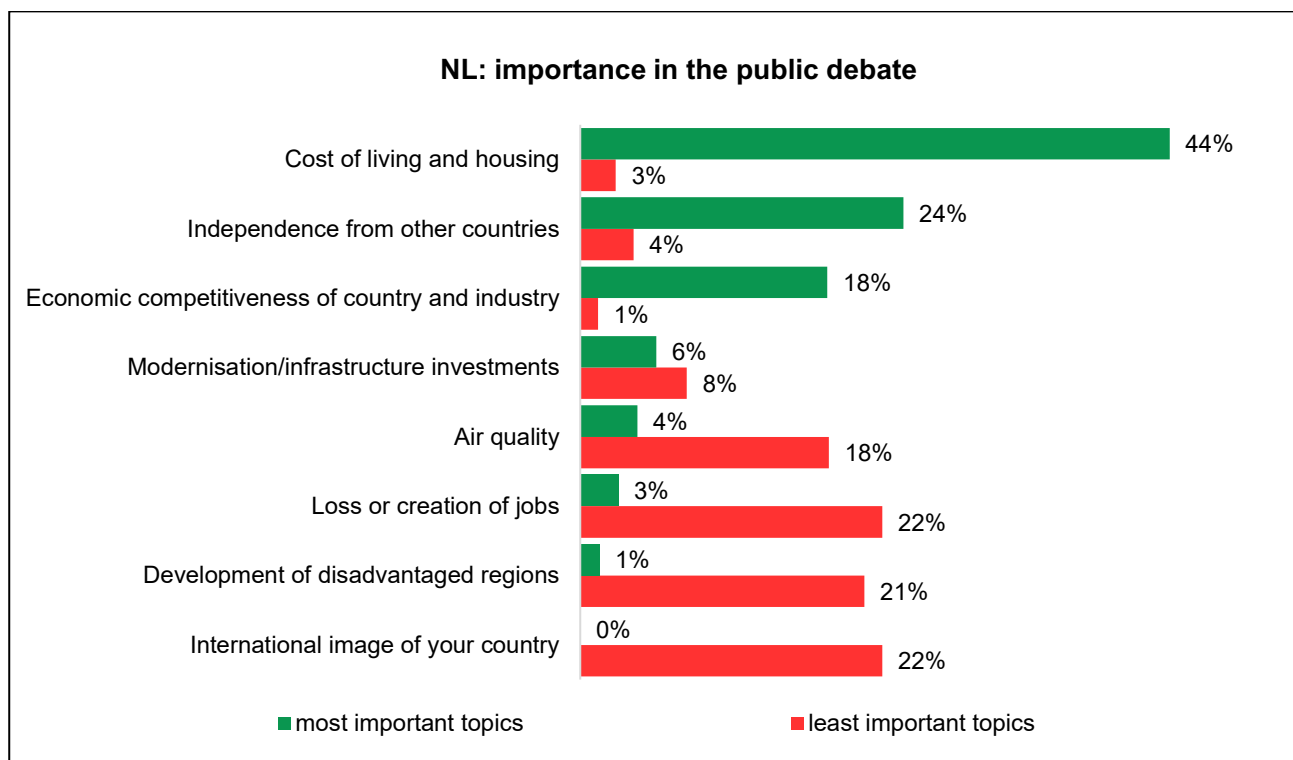
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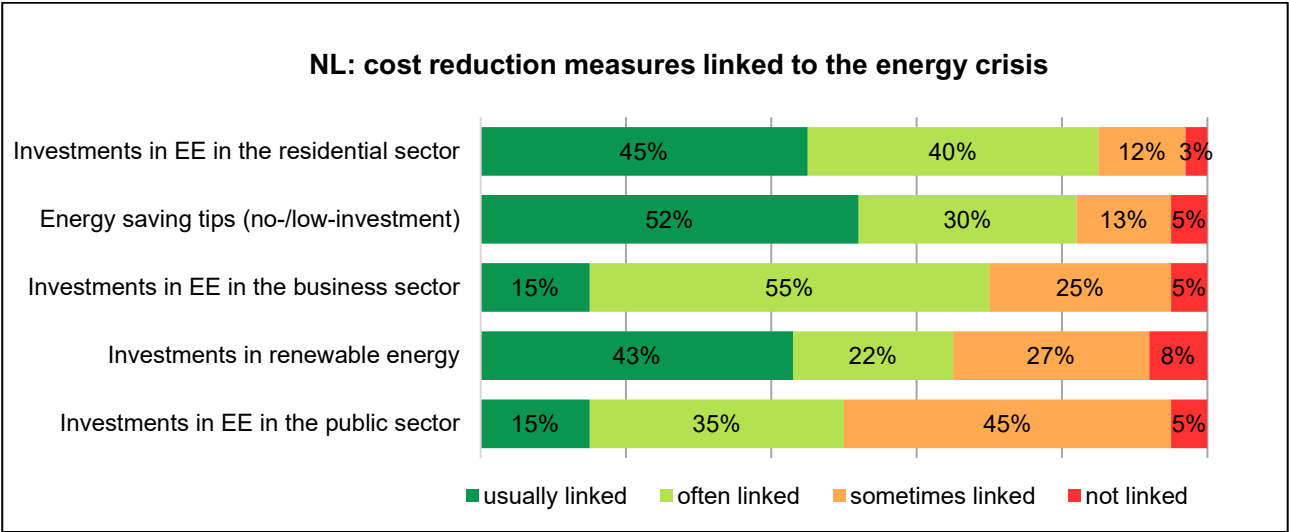
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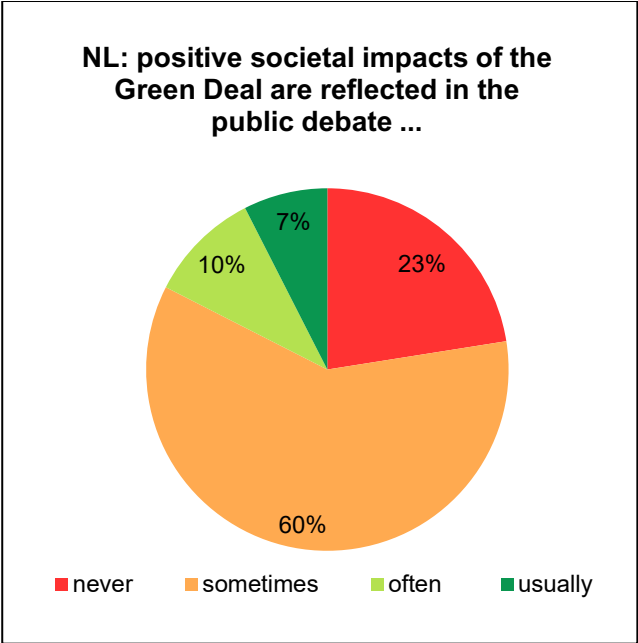
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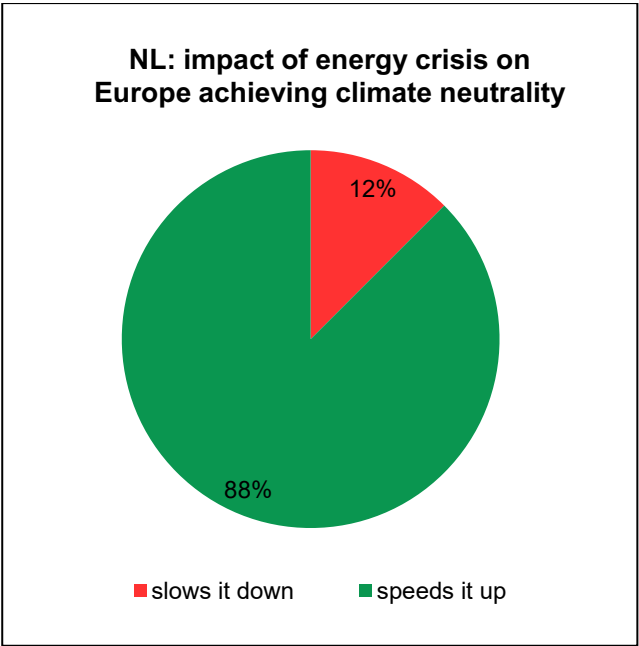
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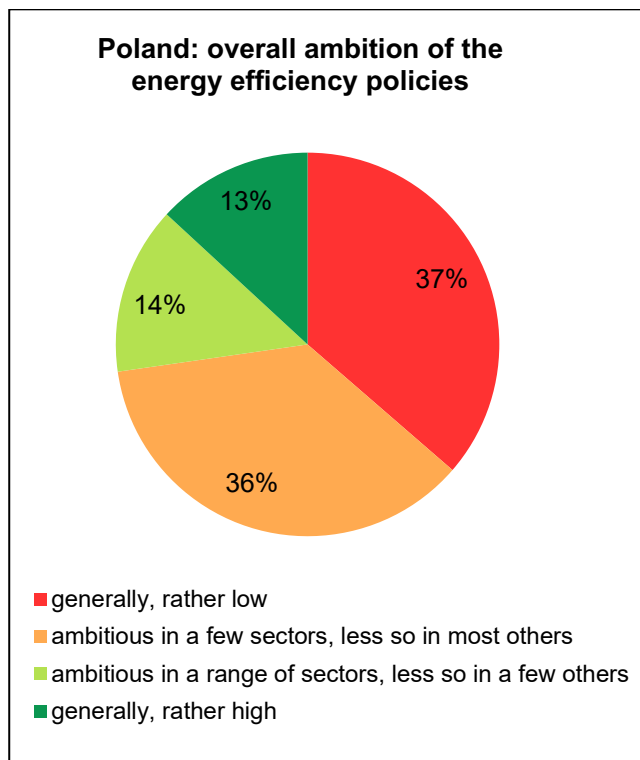
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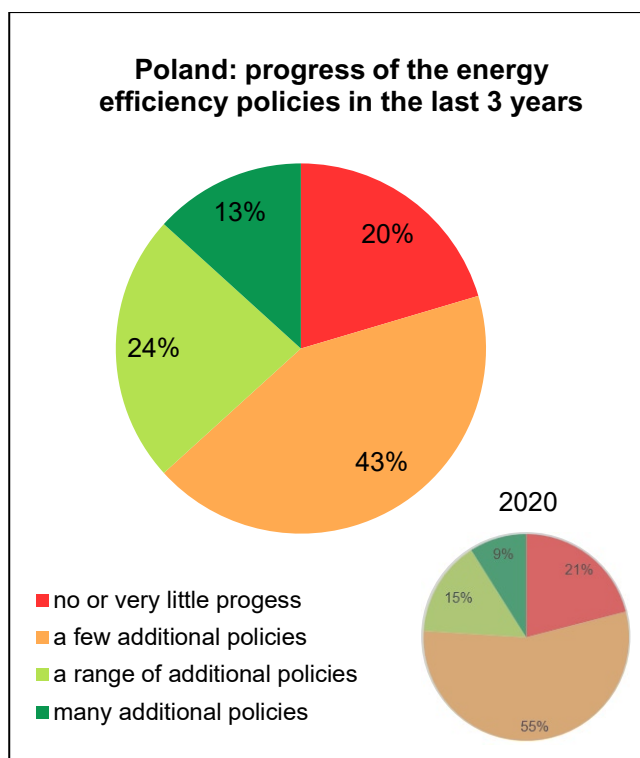
Poland



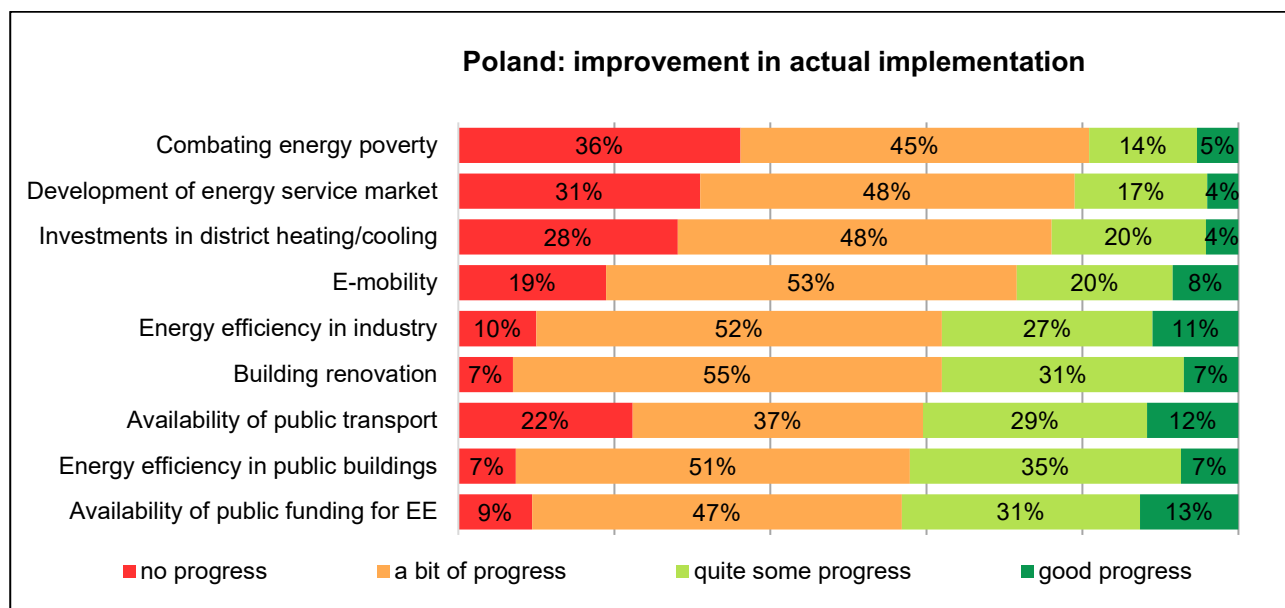
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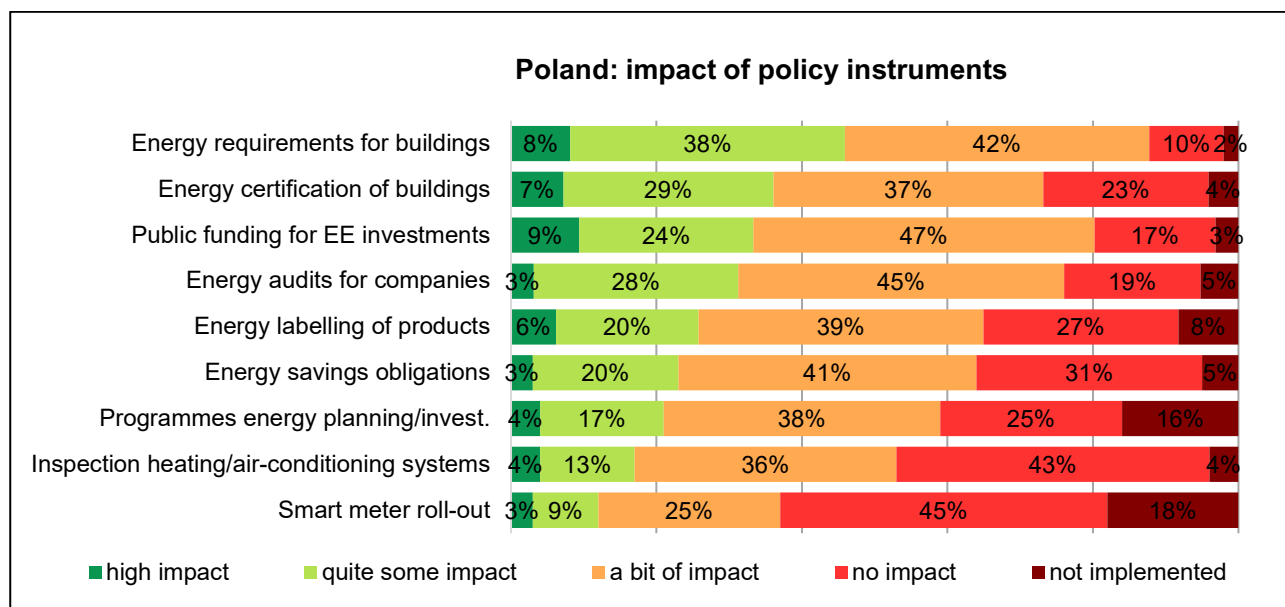
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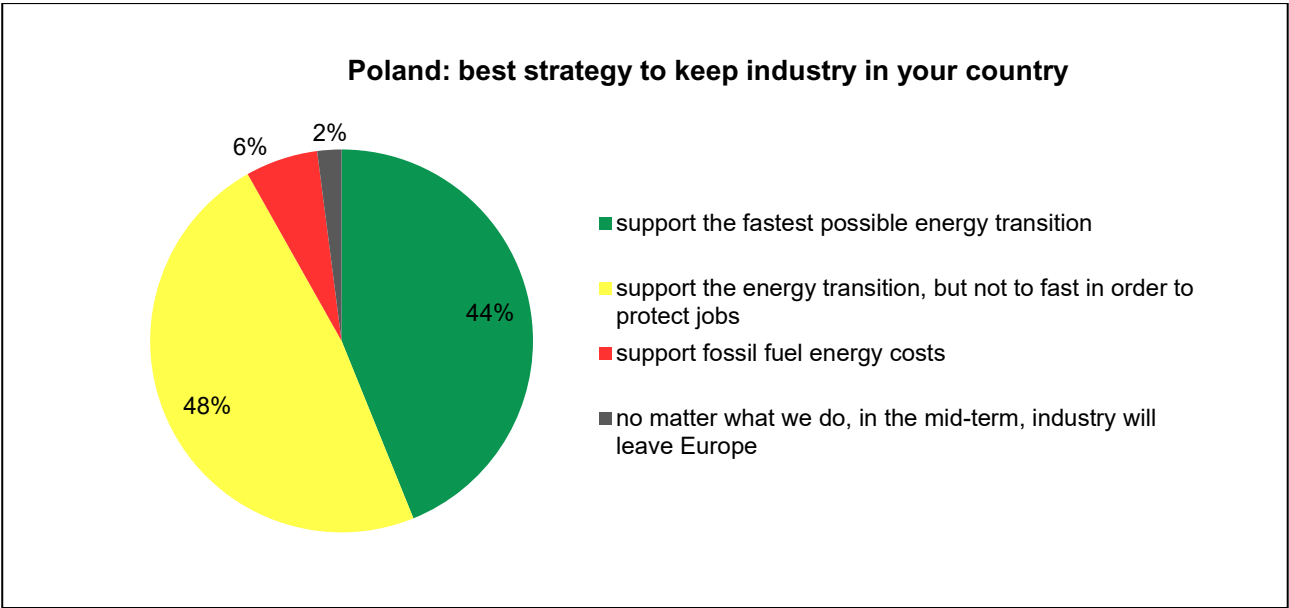
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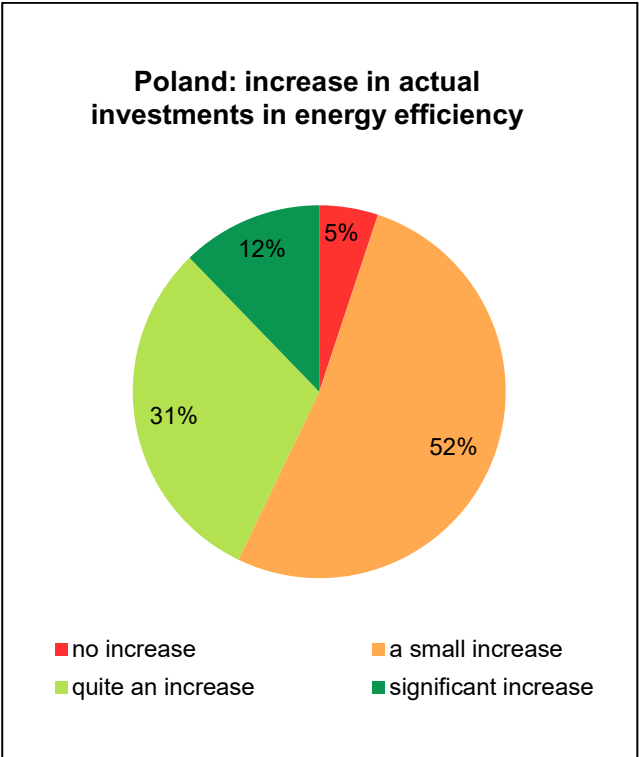
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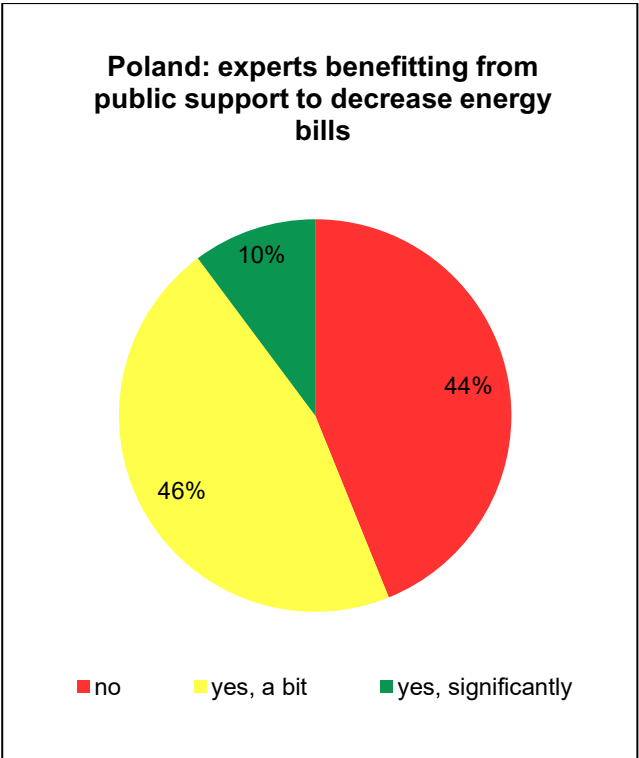
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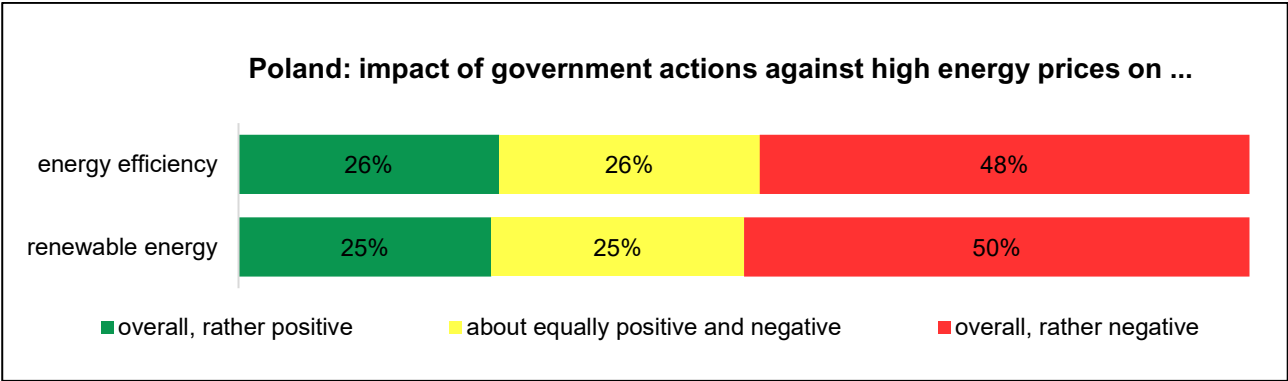
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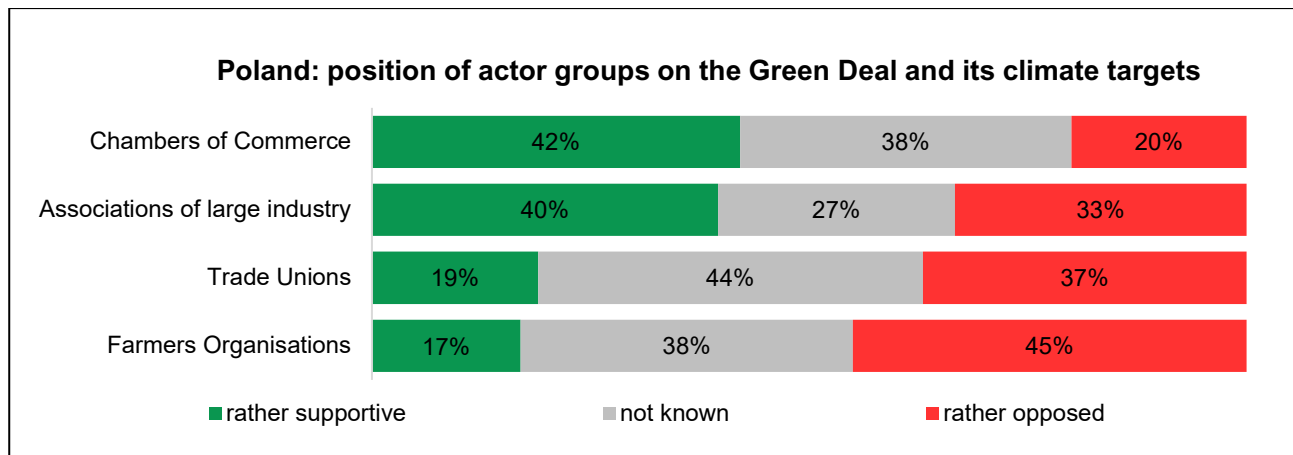
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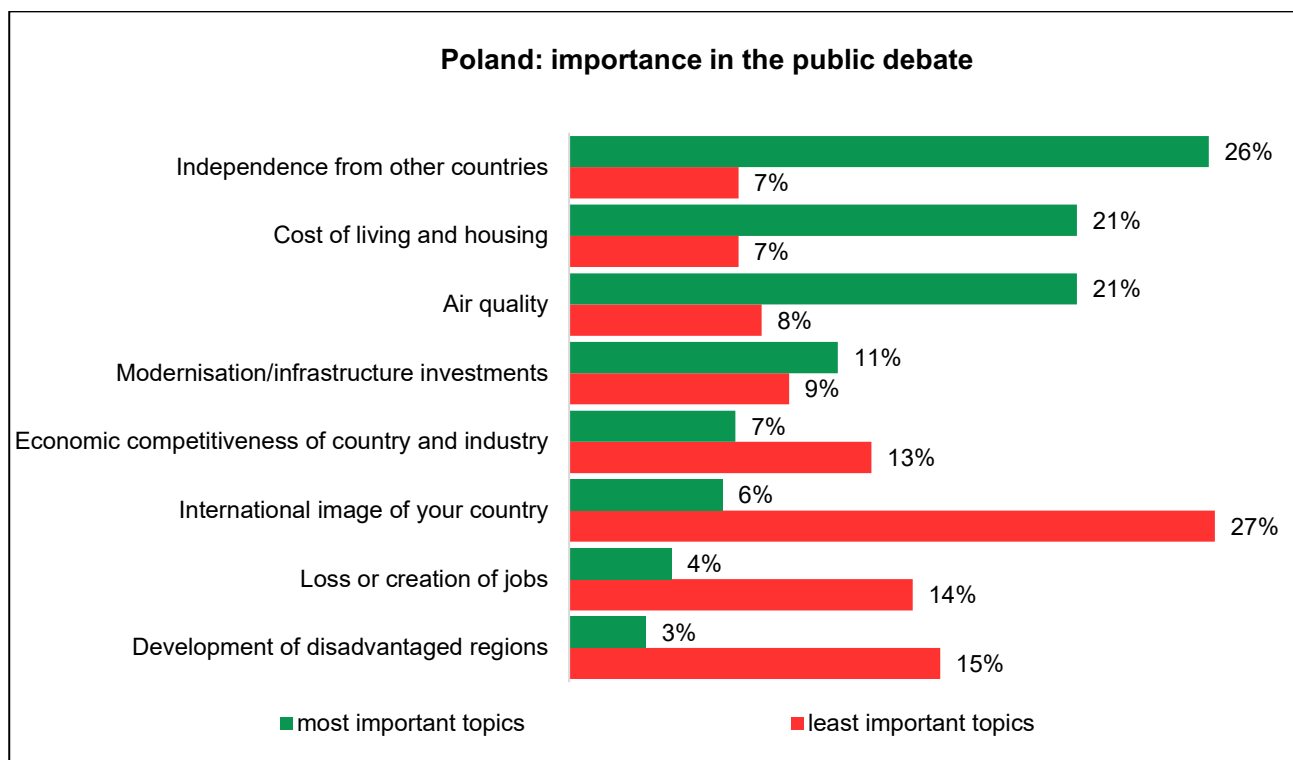
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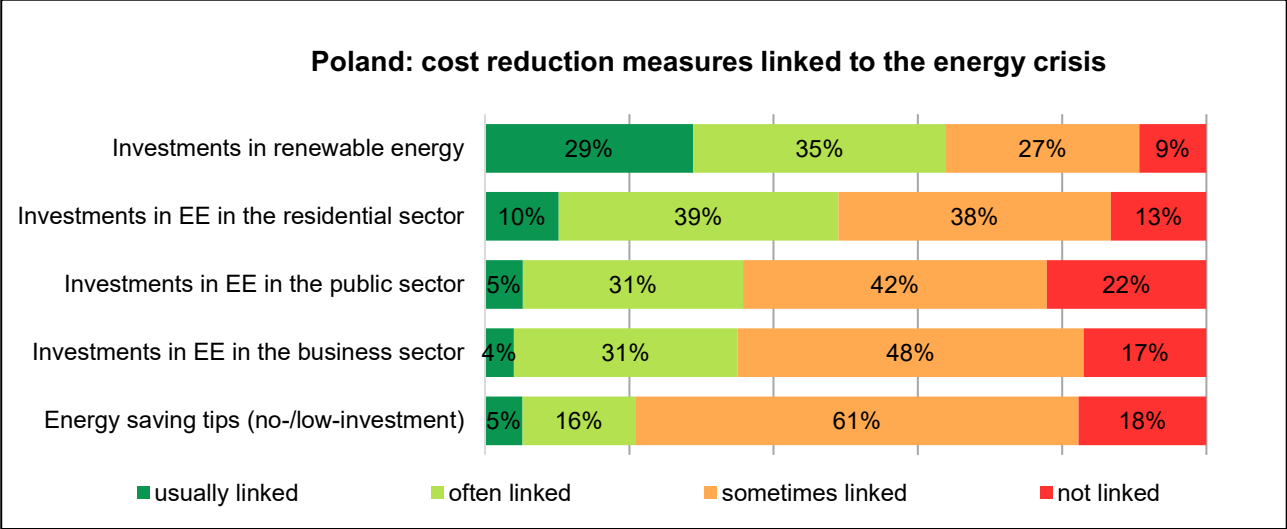
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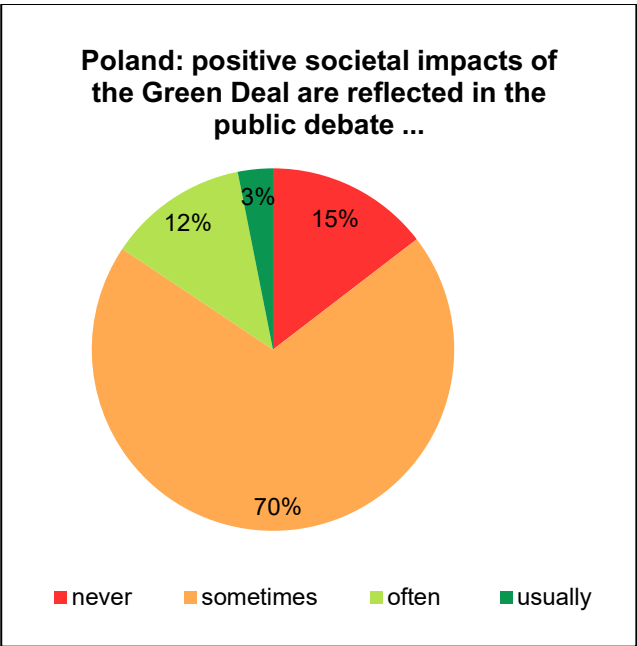
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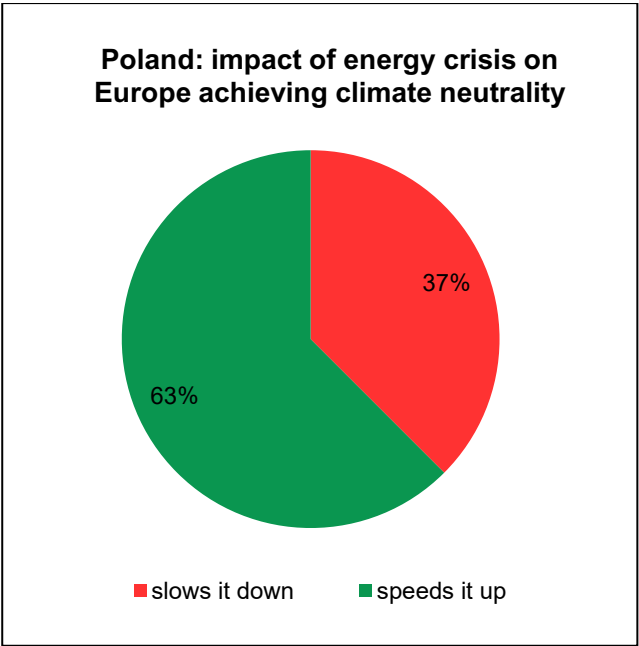
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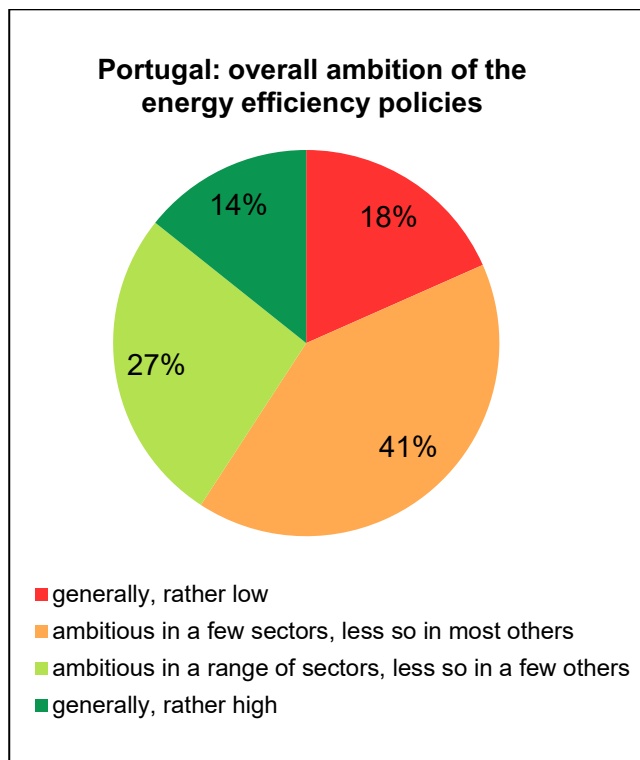
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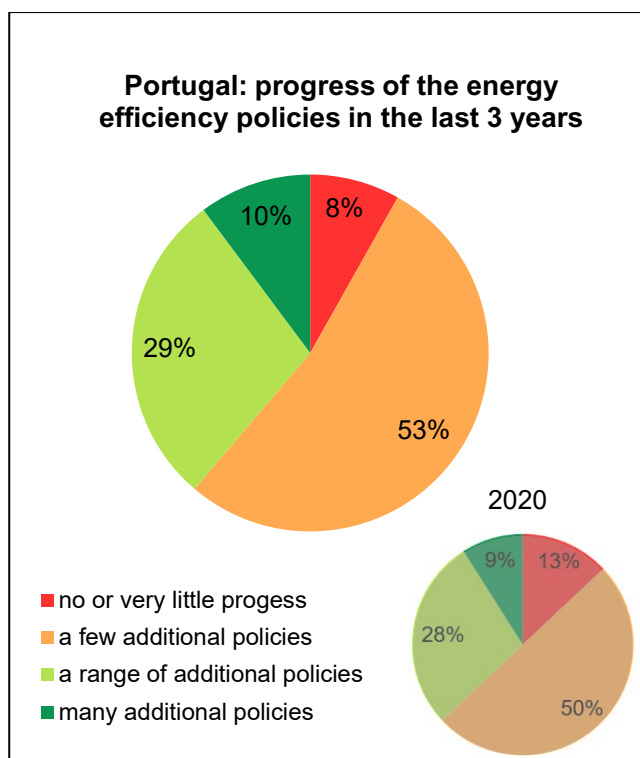
Portugal



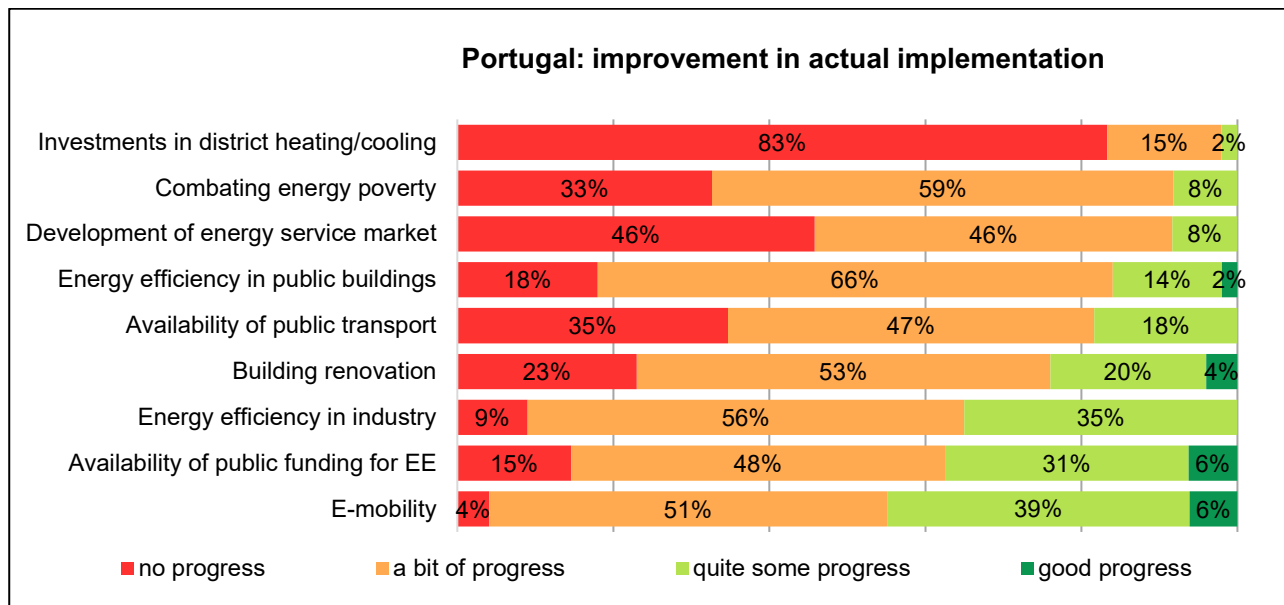
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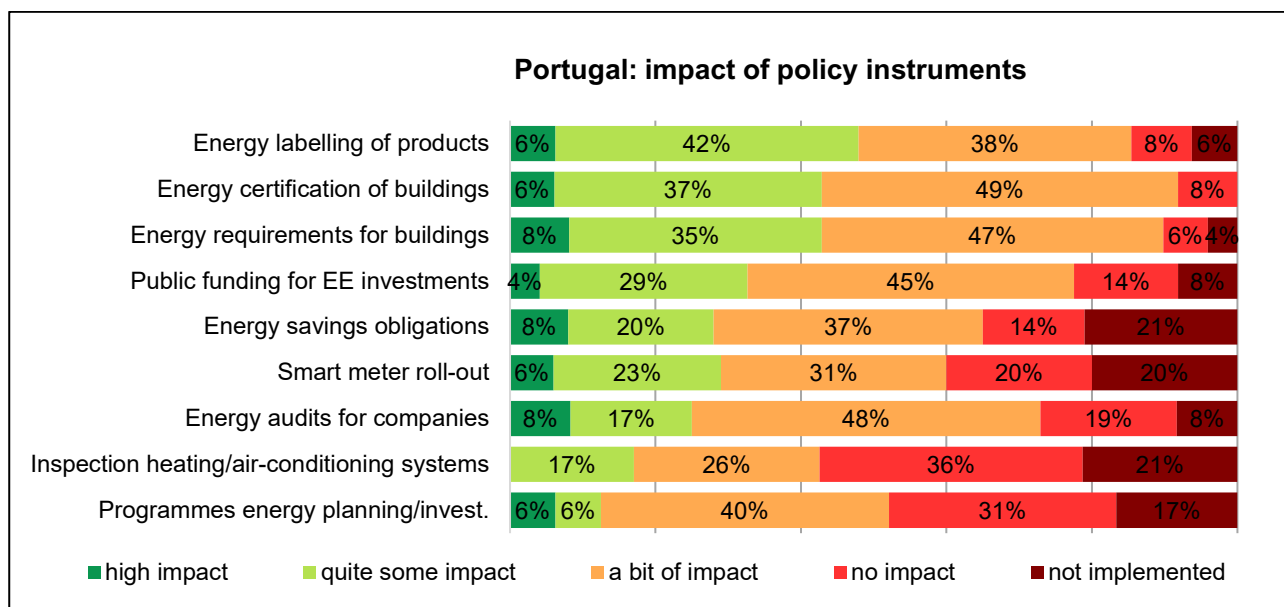
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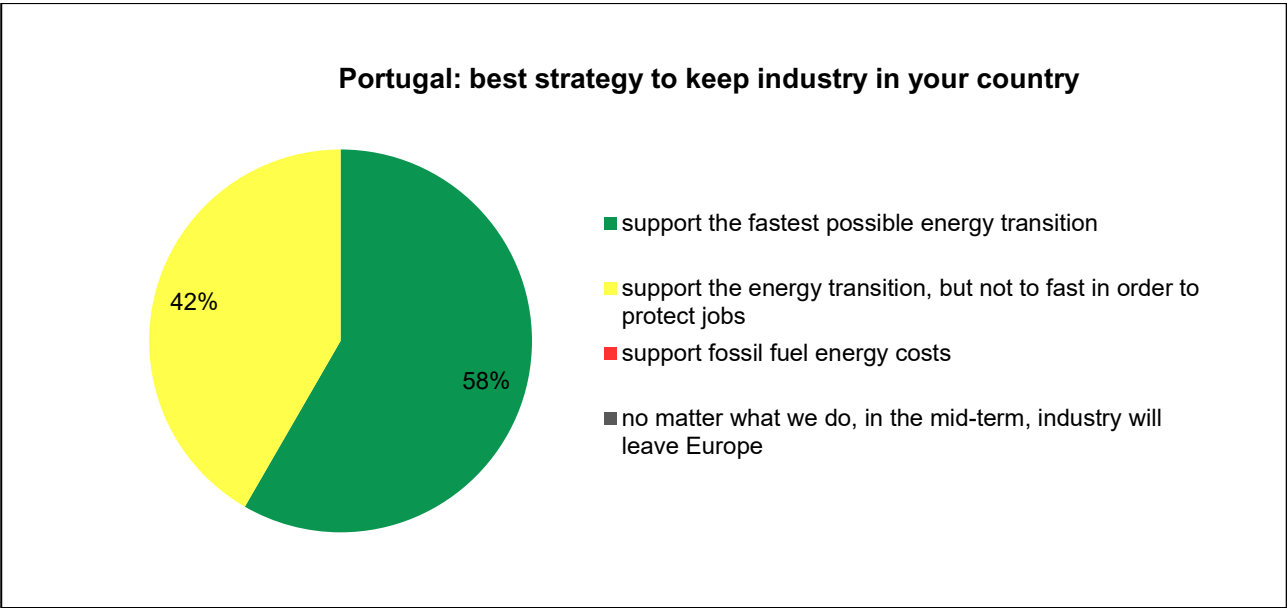
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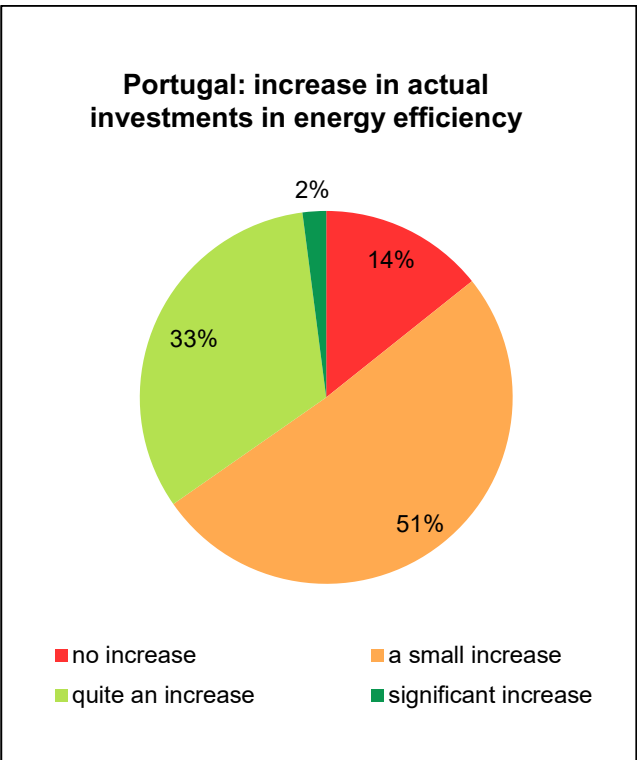
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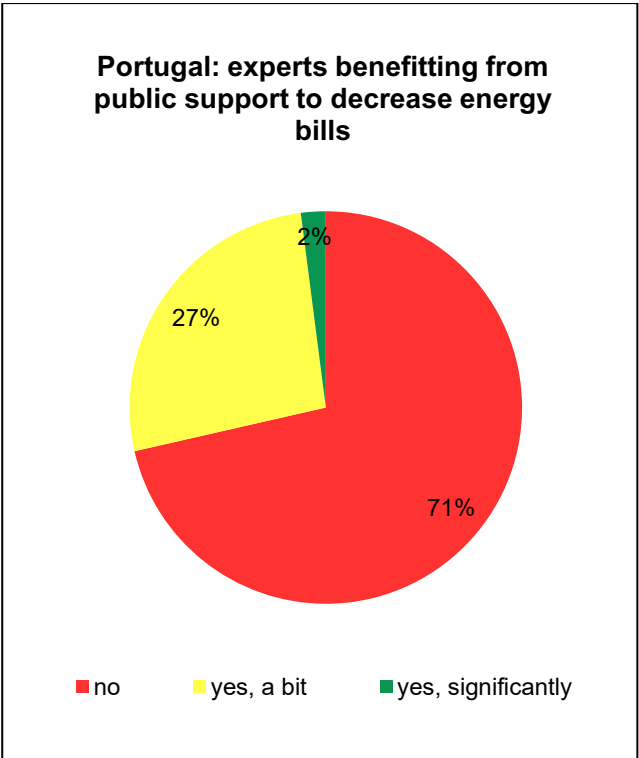
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



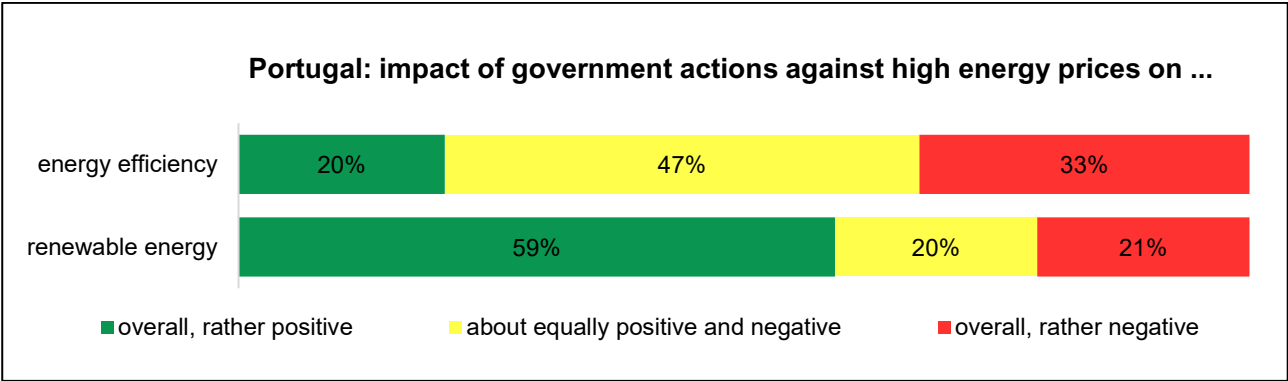
Overall, do you observe an increase in actual investments in energy efficiency (or at least the preparation of such investments) in your country?



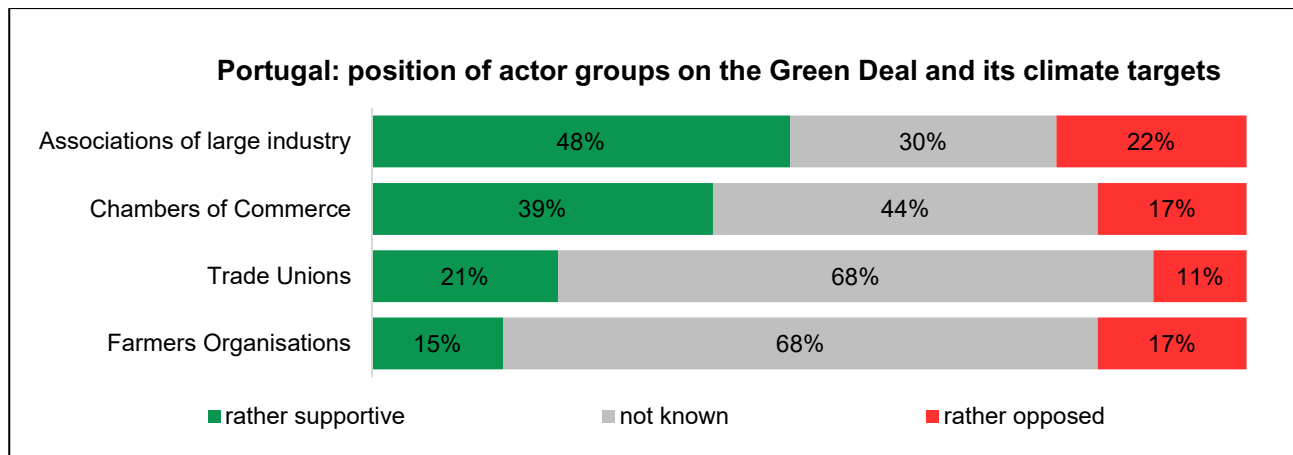
In your household, are you benefitting from public support measures to decrease your energy bills (e.g. price caps, support payments, subsidies)?



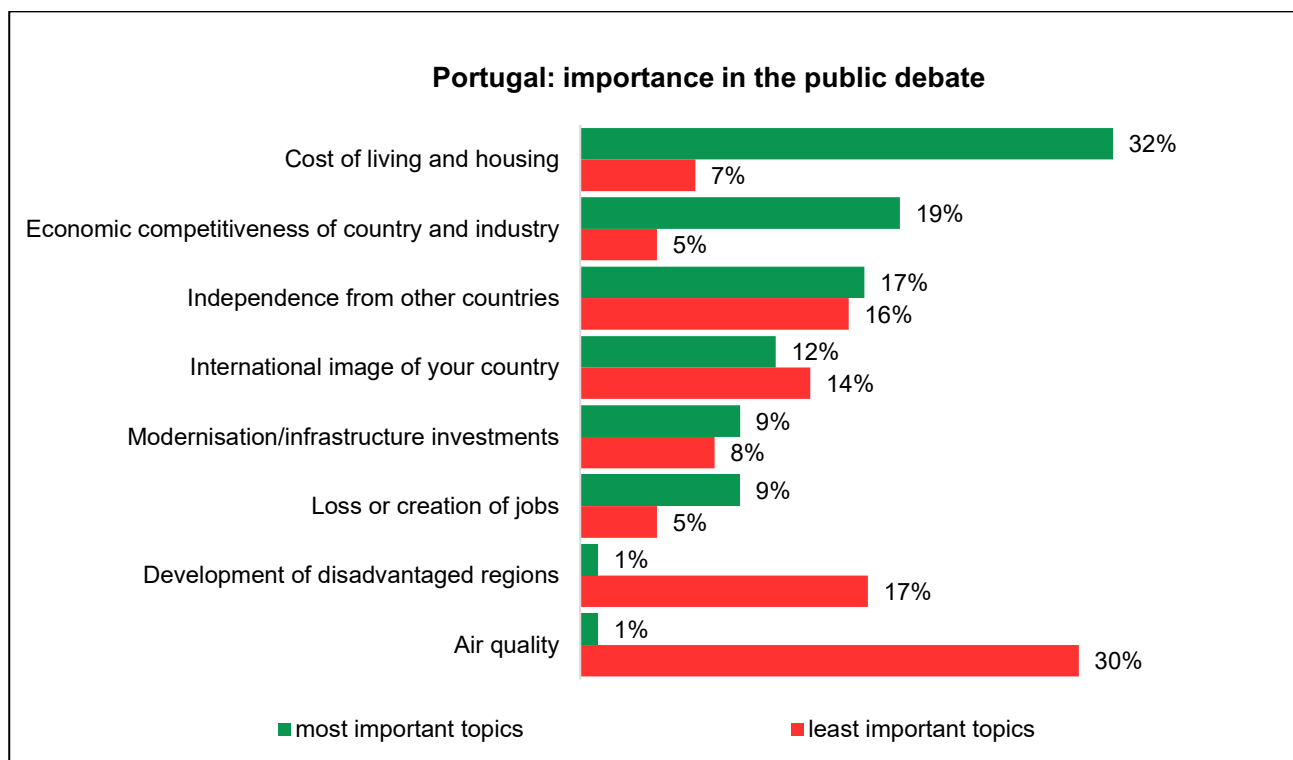
In your opinion, are your government's actions against high energy prices overall positive or negative for energy efficiency and renewable energy?



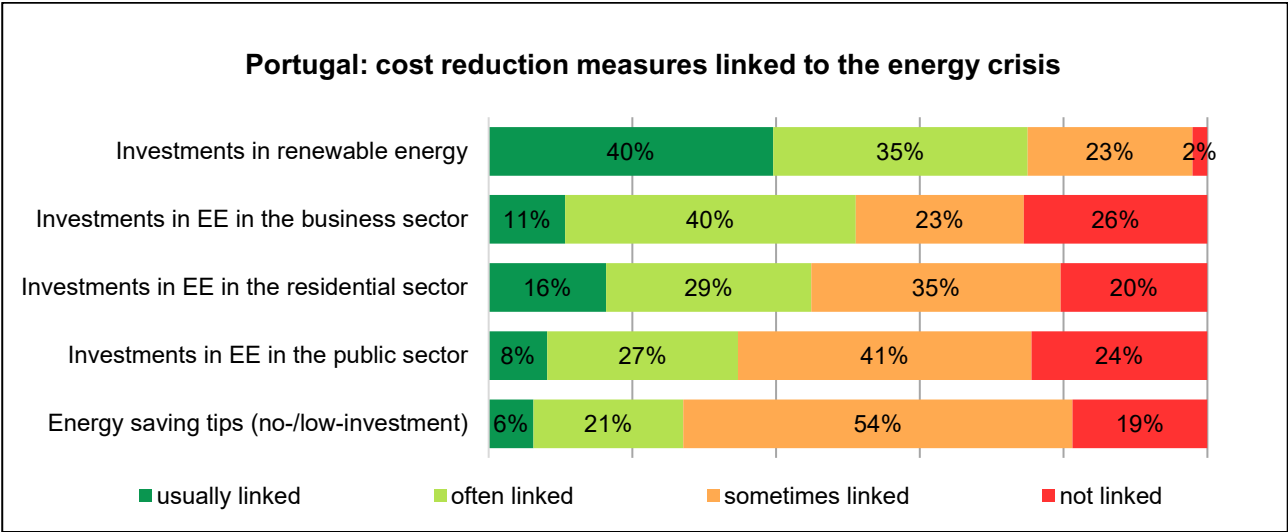
In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets? What is their position?



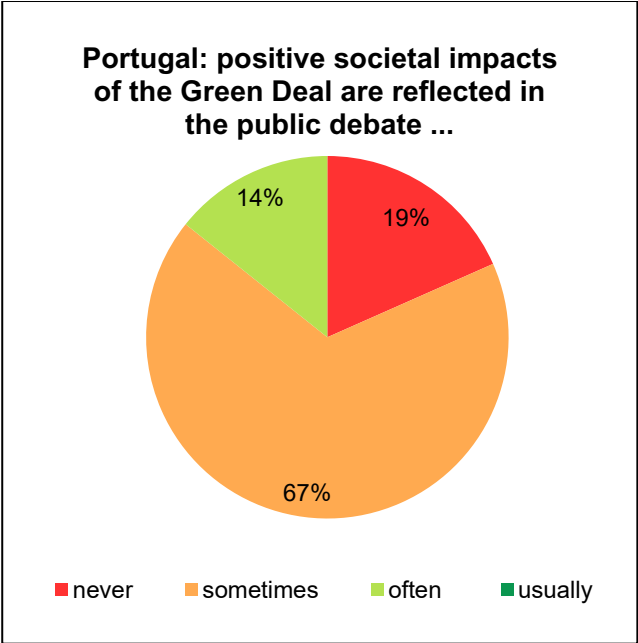
Independent of energy and climate, how important are the following topics in the general public debate in your country (media, politicians - not your personal opinion)? Please select the two most and the two least important topics.



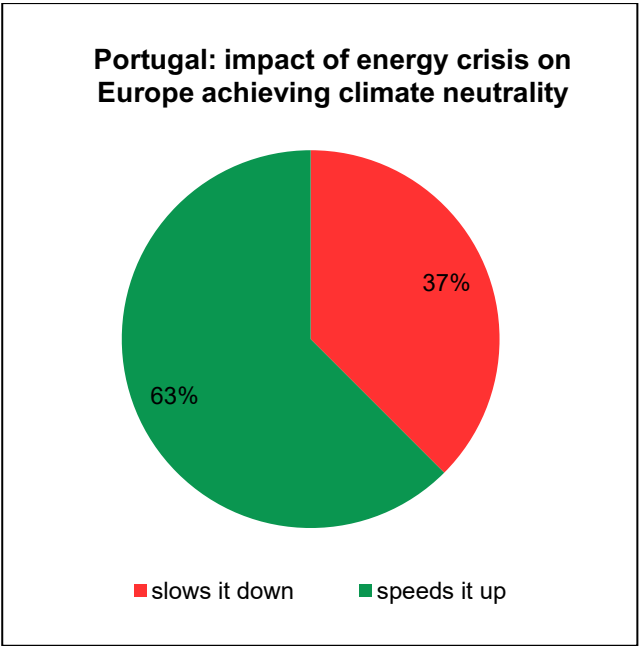
In the general public debate in your country (media, politicians), is a connection being made between the energy price crisis and the following energy cost reduction measures?



How often are the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") reflected in the public debate in your country?



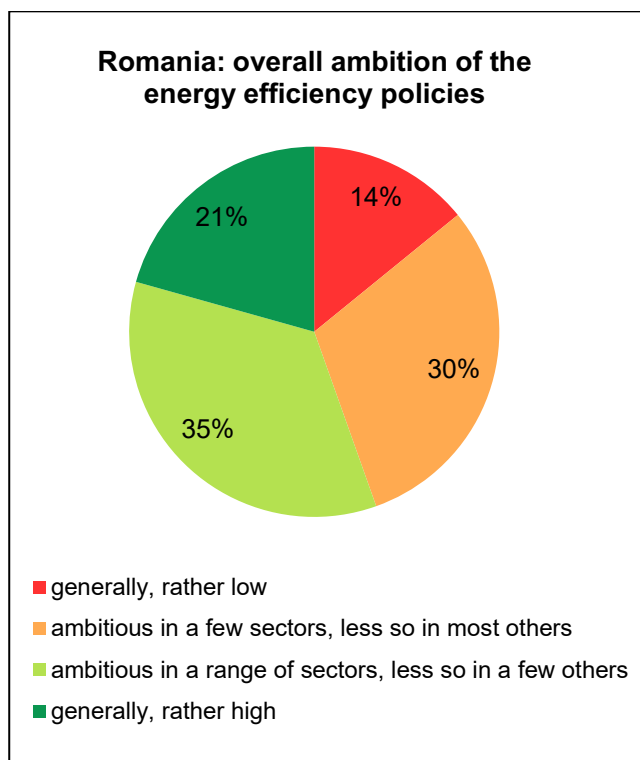
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



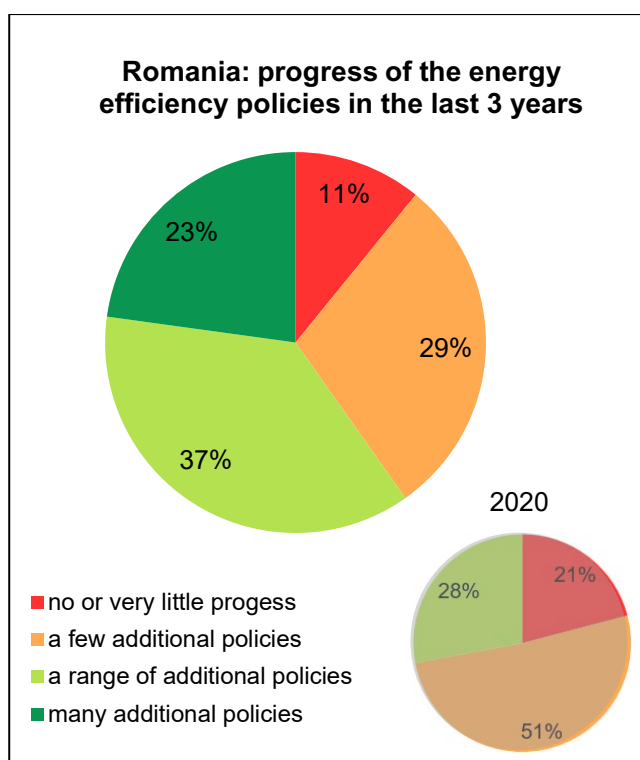
Romania



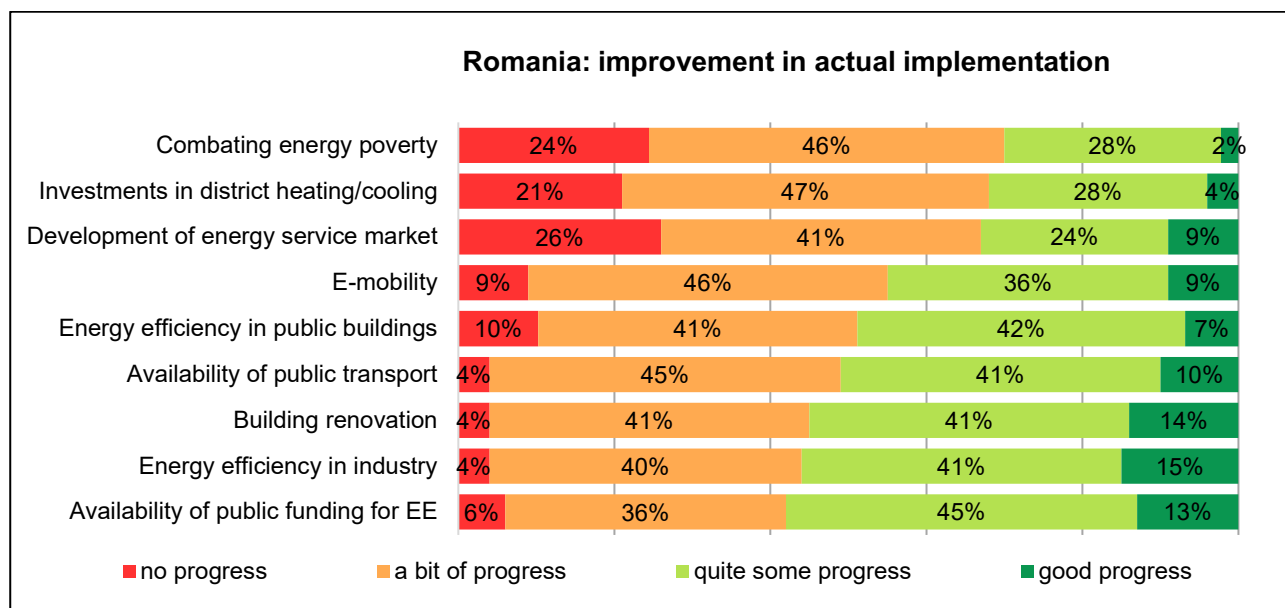
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



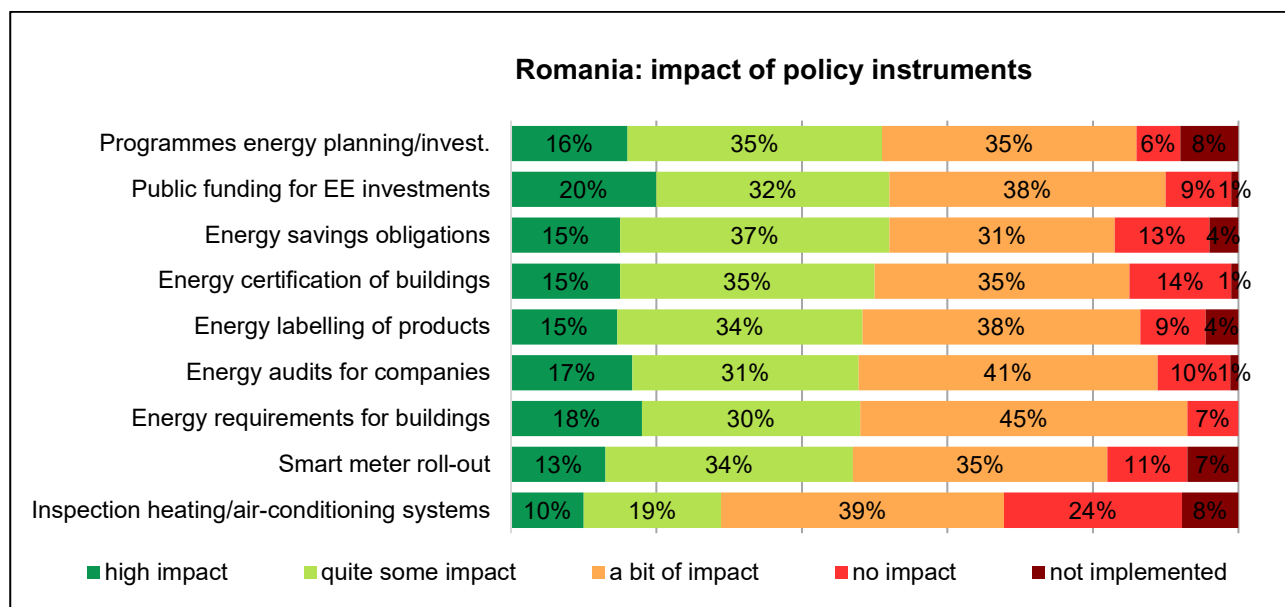
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



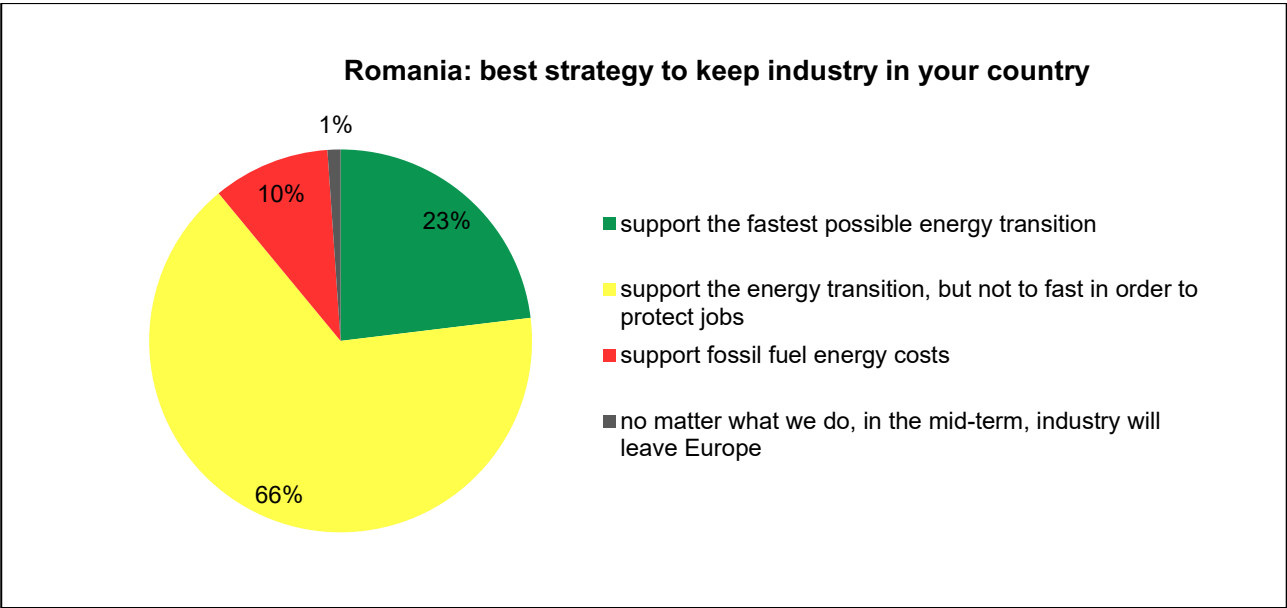
How do you see the improvements in the actual implementation (scale/rate) in your country in the last 3 years in the following fields?



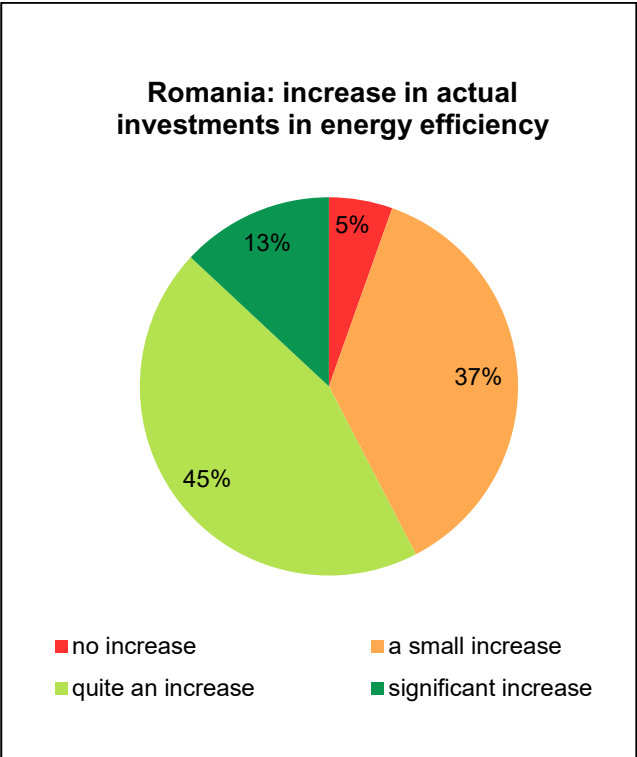
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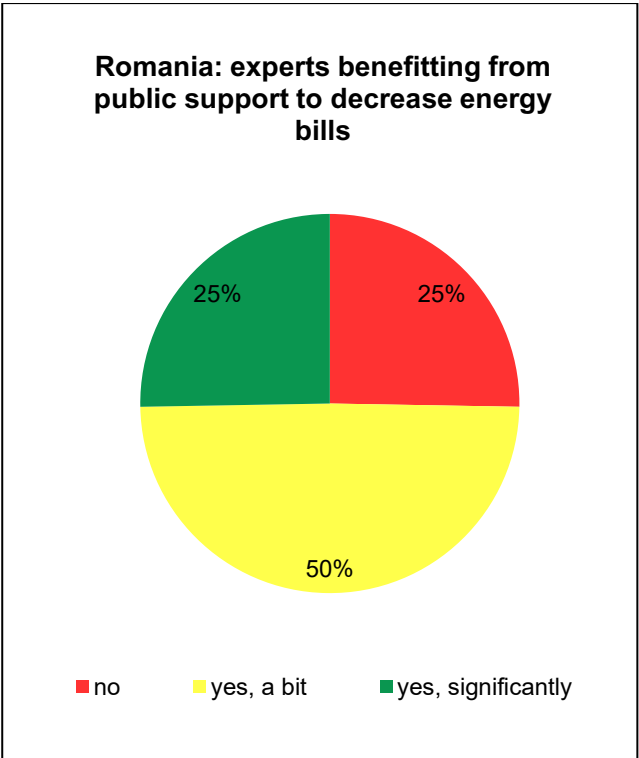
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



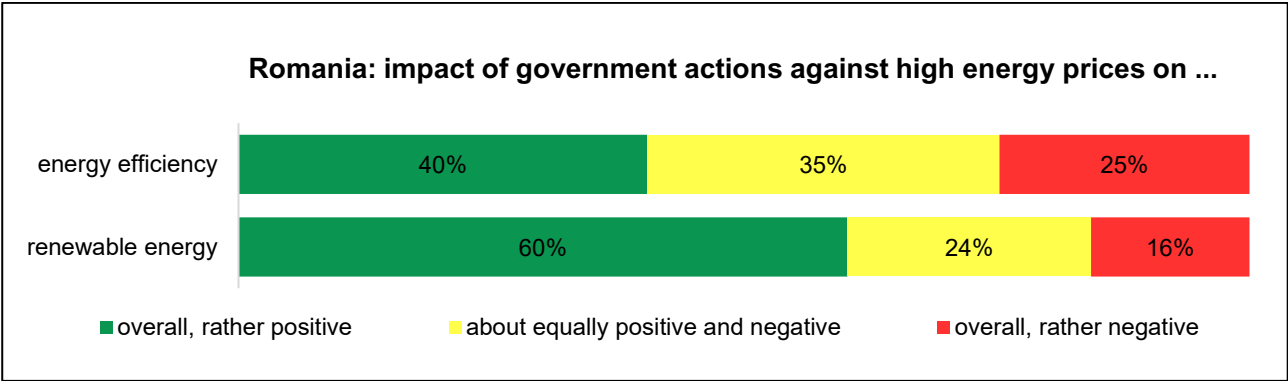
Overall, do you observe an increase in actual investments in energy efficiency (or at least the preparation of such investments) in your country?



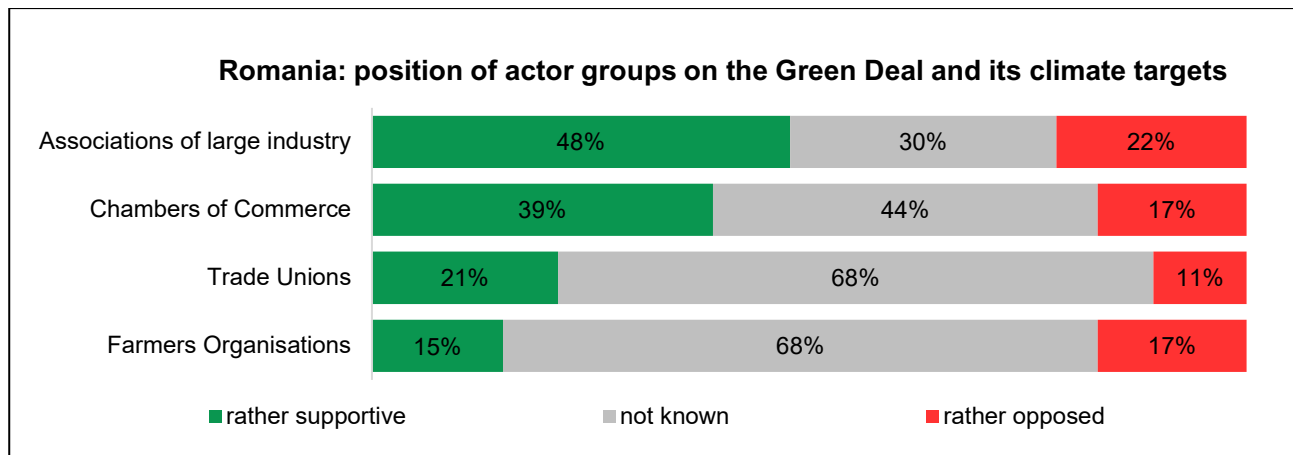
In your household, are you benefitting from public support measures to decrease your energy bills (e.g. price caps, support payments, subsidies)?



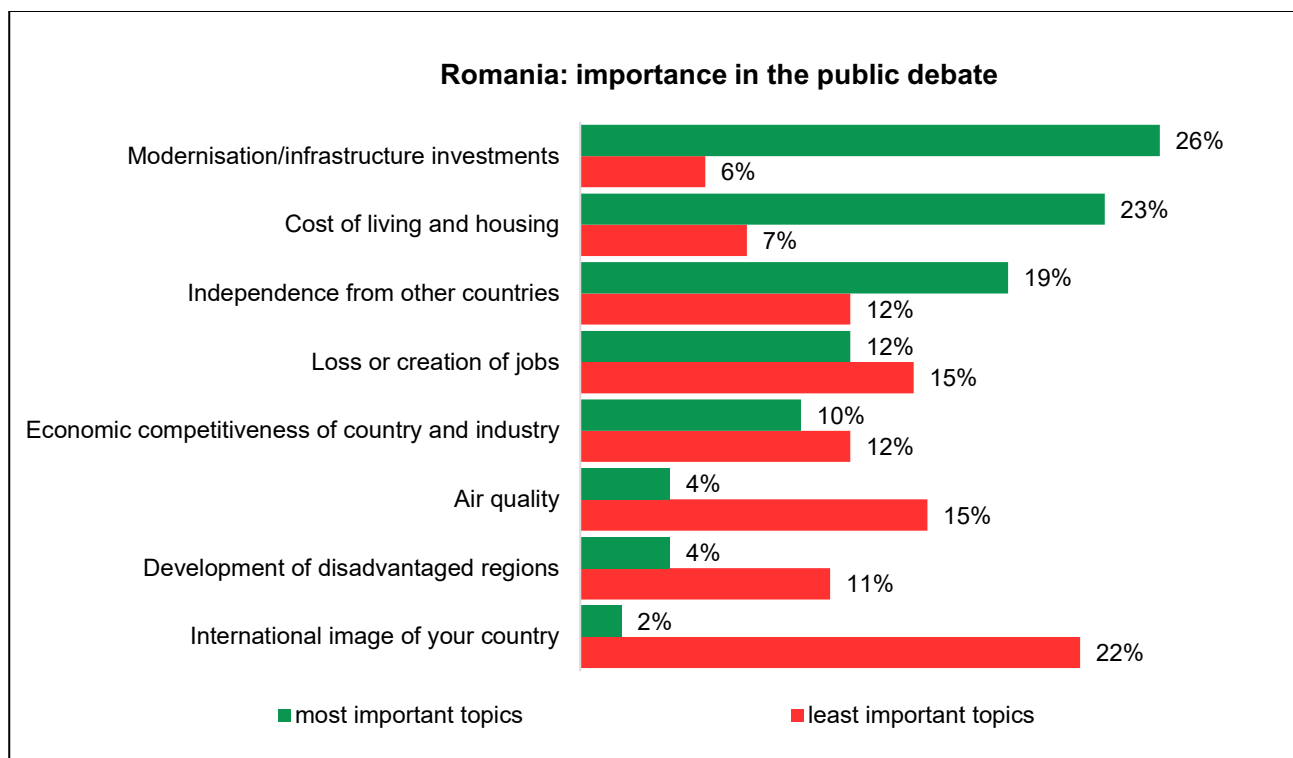
In your opinion, are your government's actions against high energy prices overall positive or negative for energy efficiency and renewable energy?



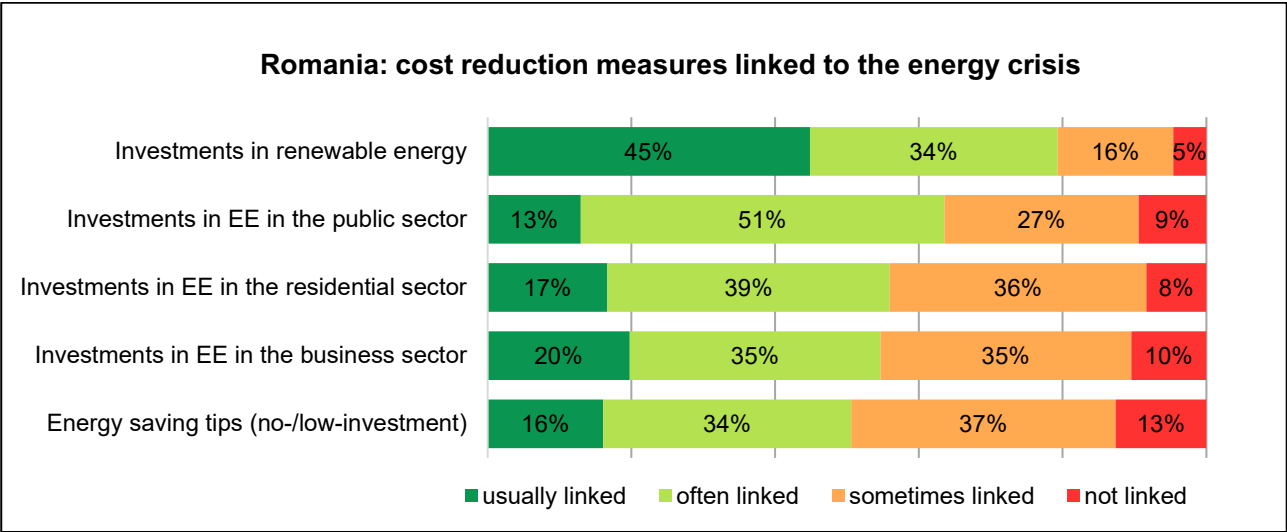
In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets? What is their position?



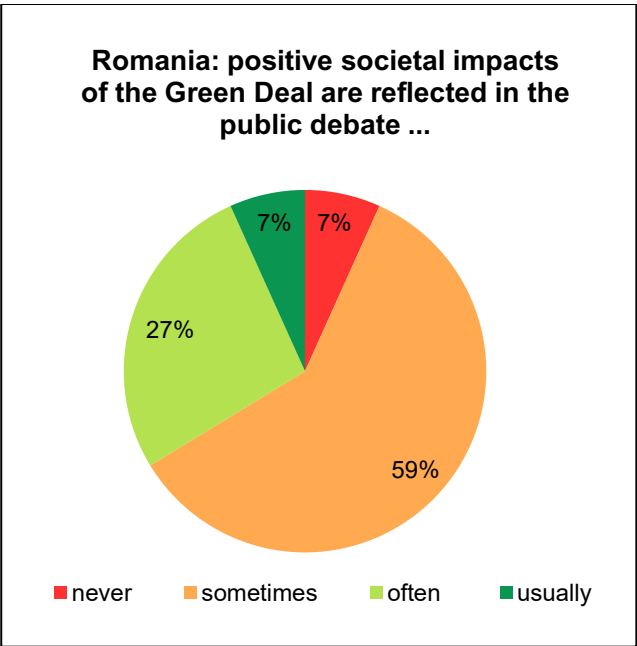
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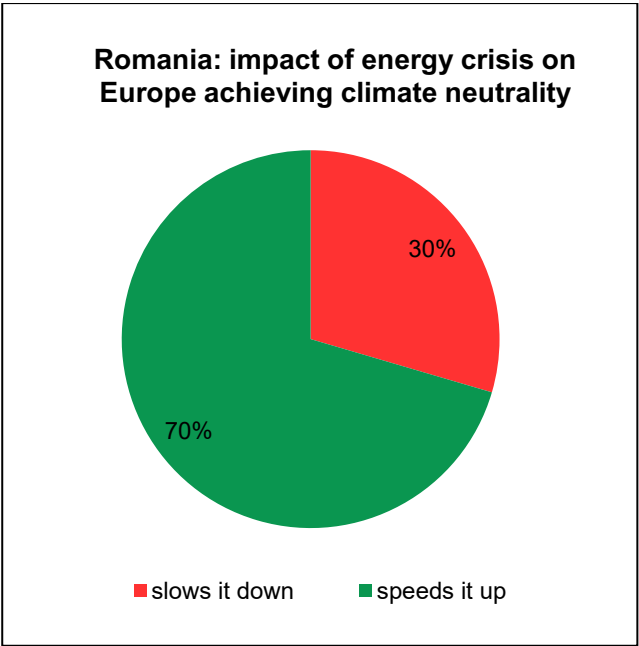
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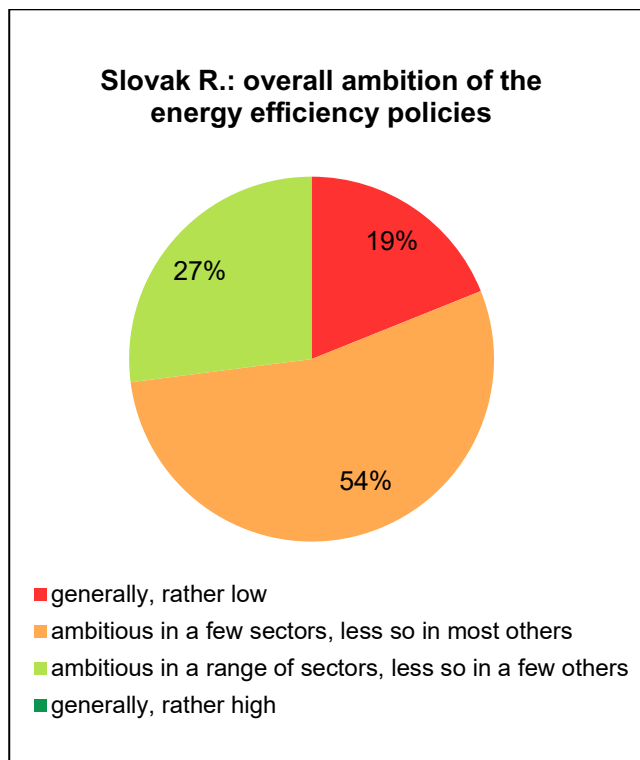
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



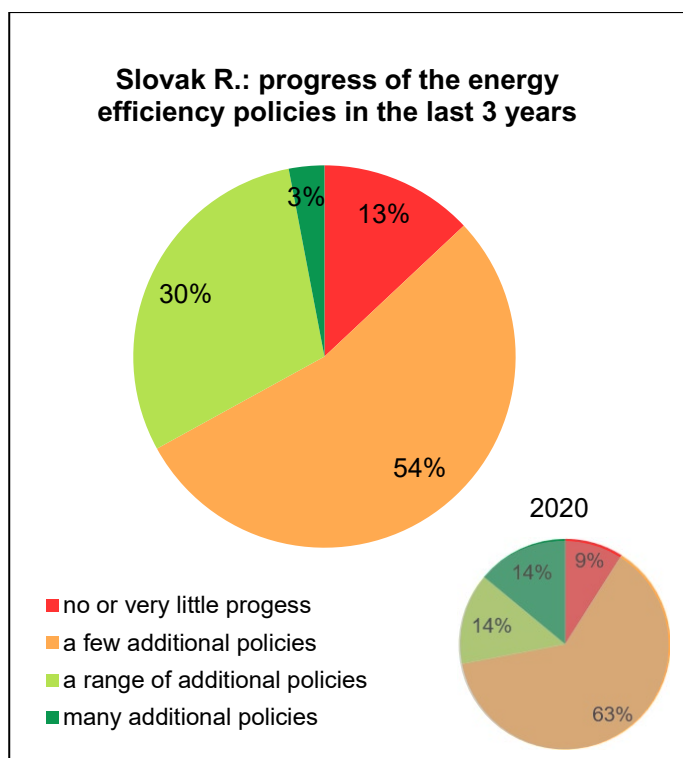
Slovak Republic



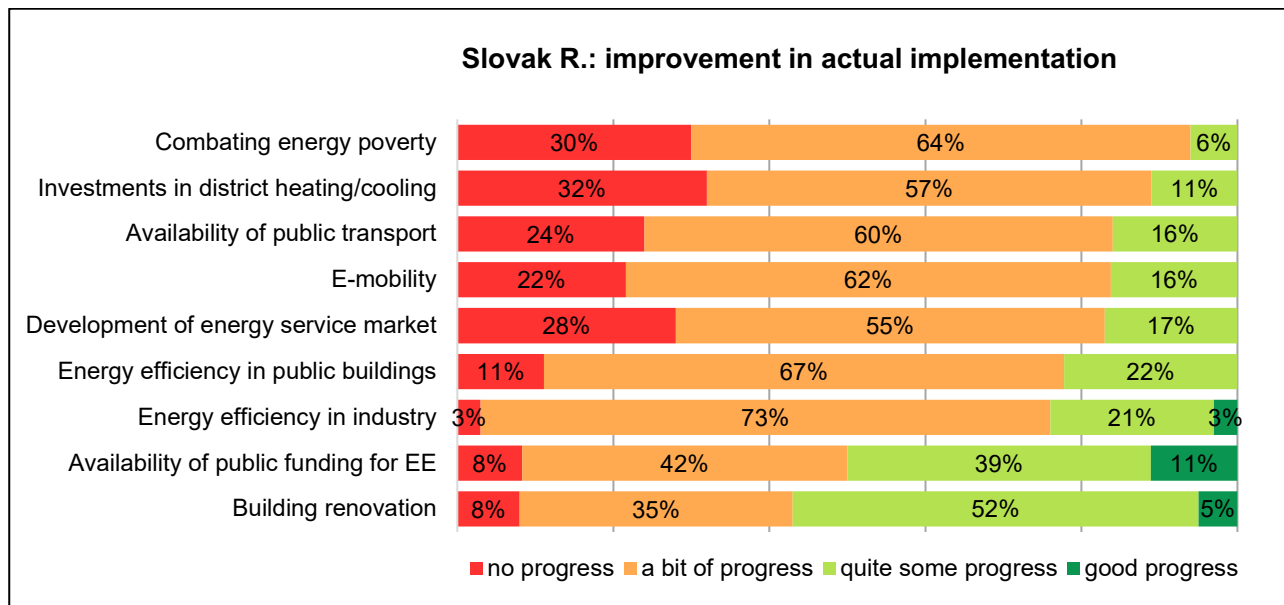
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



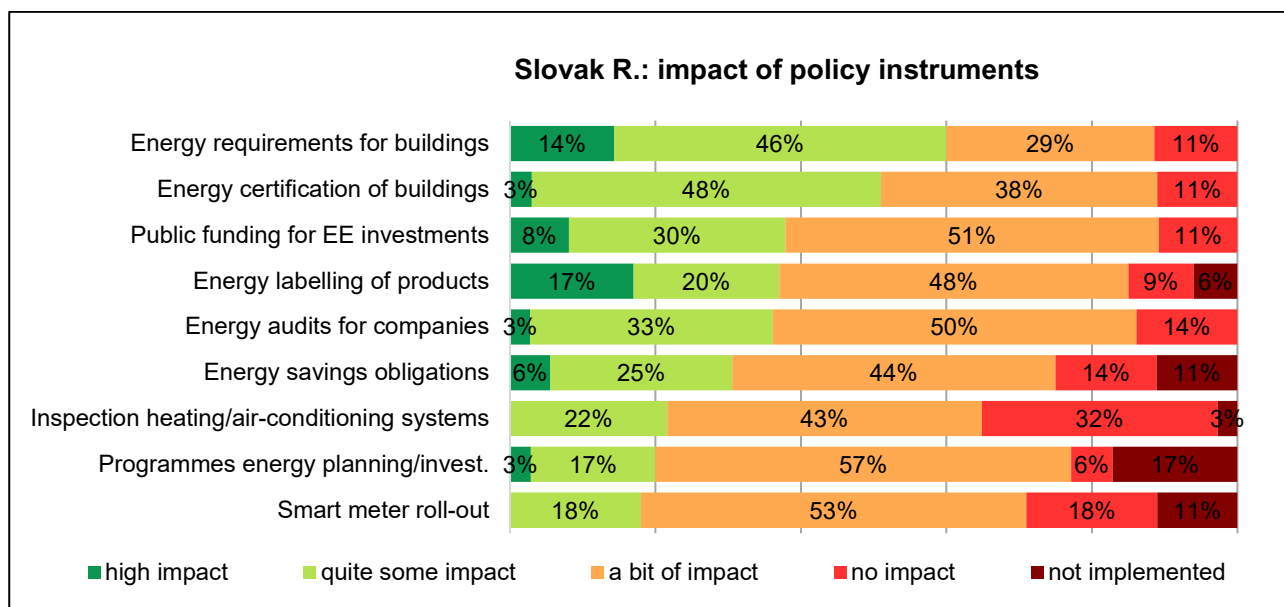
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



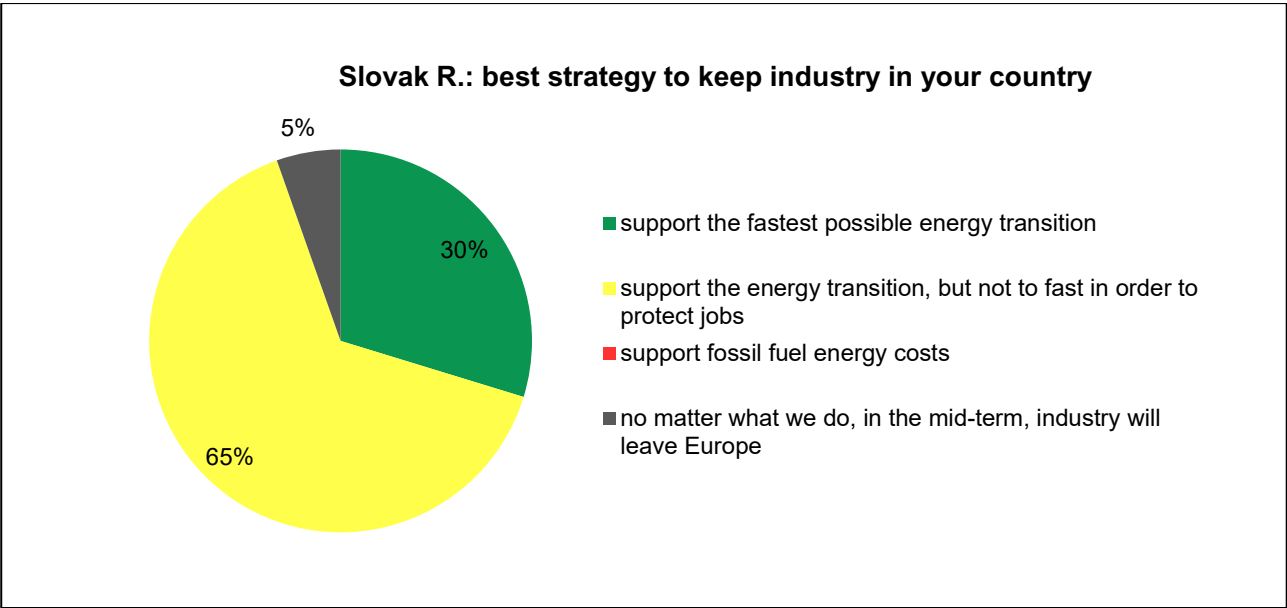
How do you see the improvements in the actual implementation (scale/rate) in your country in the last 3 years in the following fields?



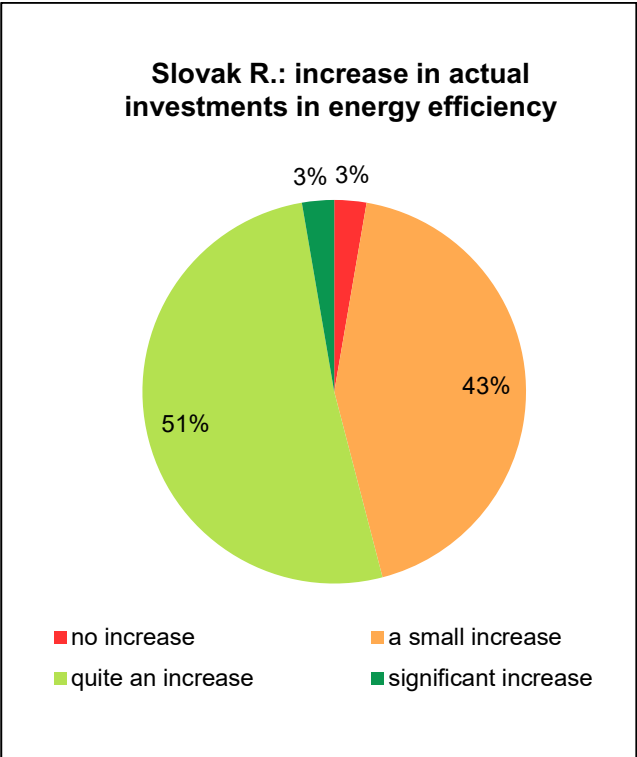
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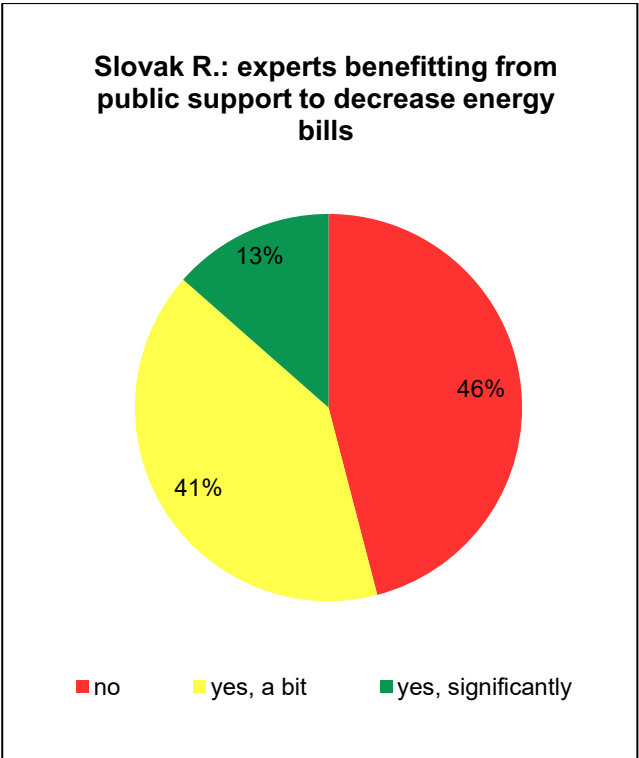
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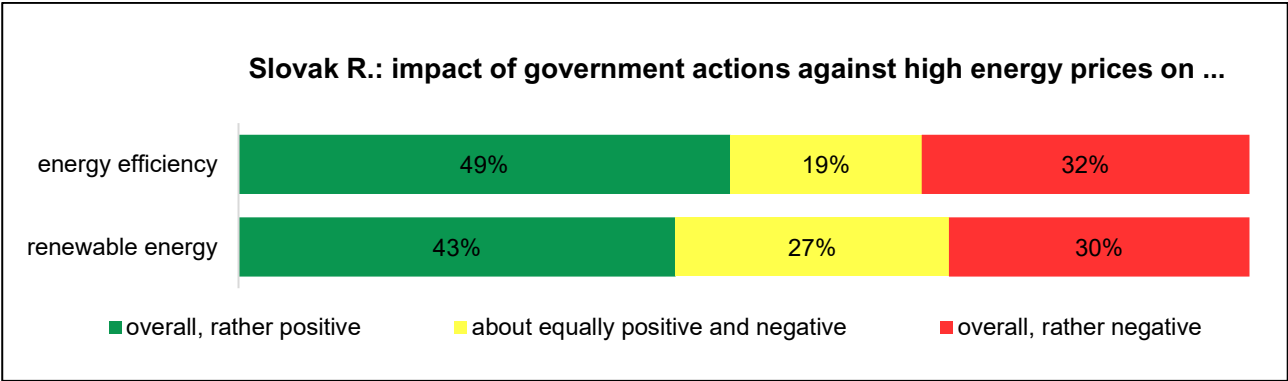
Overall, do you observe an increase in actual investments in energy efficiency (or at least the preparation of such investments) in your country?



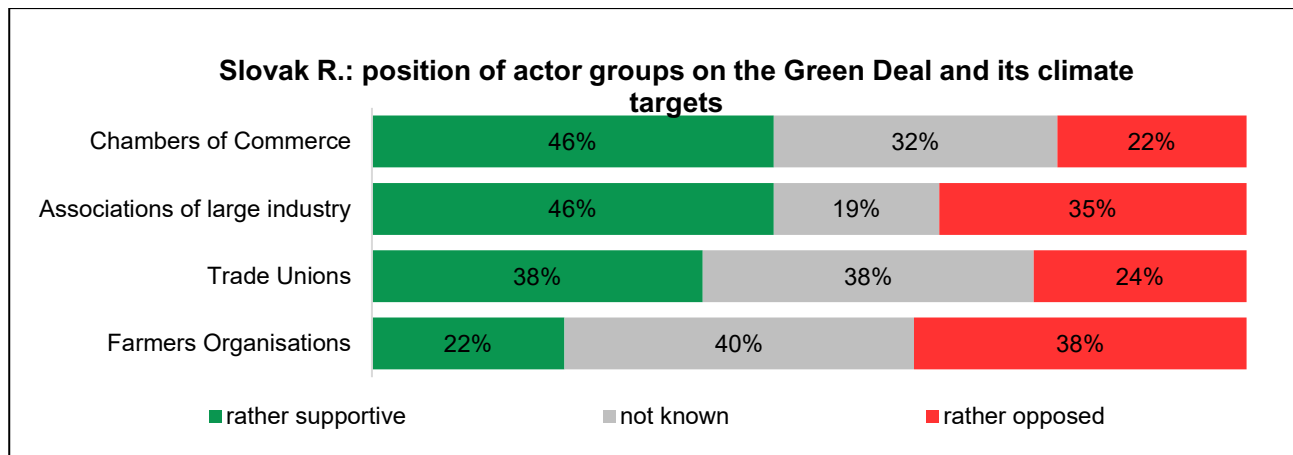
In your household, are you benefitting from public support measures to decrease your energy bills (e.g. price caps, support payments, subsidies)?



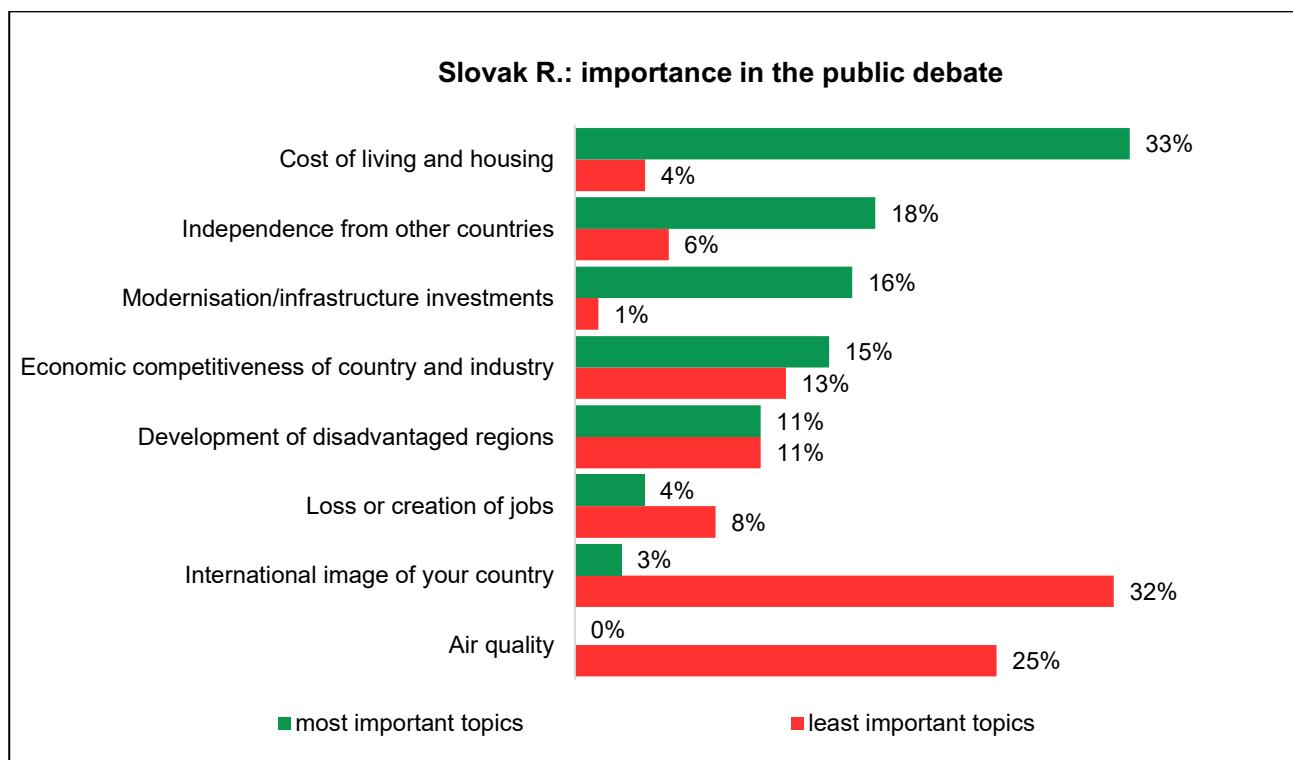
In your opinion, are your government's actions against high energy prices overall positive or negative for energy efficiency and renewable energy?



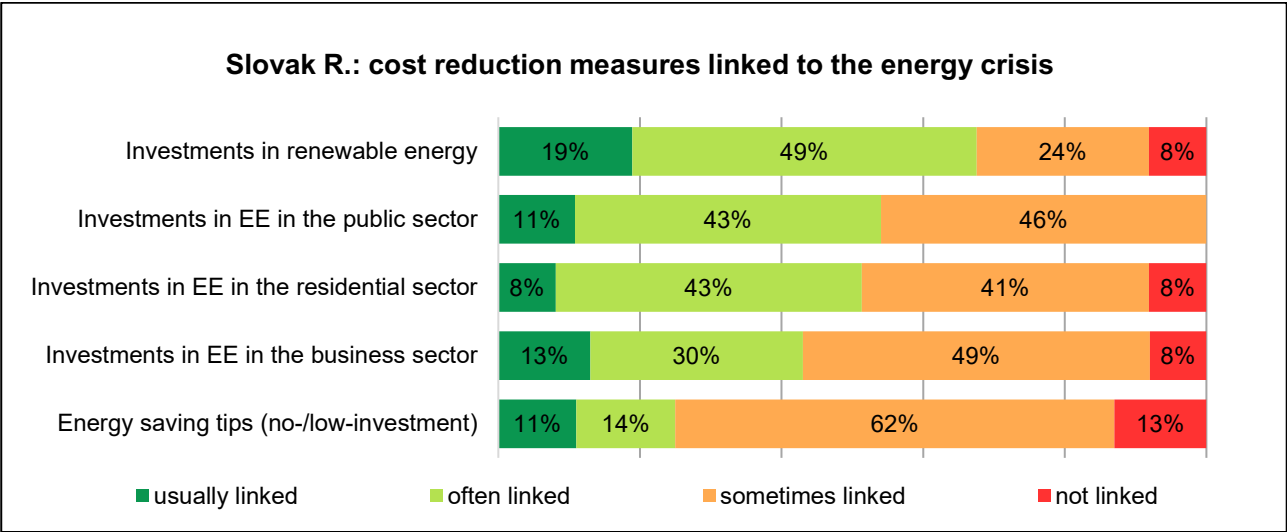
In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets? What is their position?



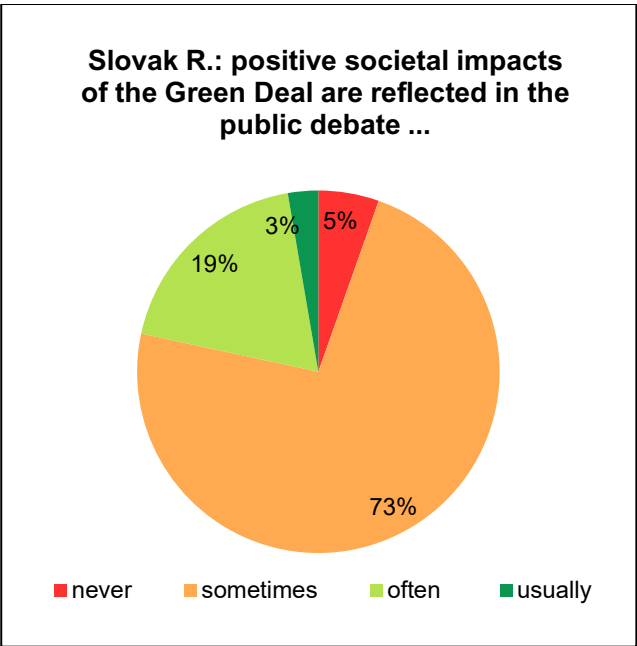
Independent of energy and climate, how important are the following topics in the general public debate in your country (media, politicians - not your personal opinion)? Please select the two most and the two least important topics.



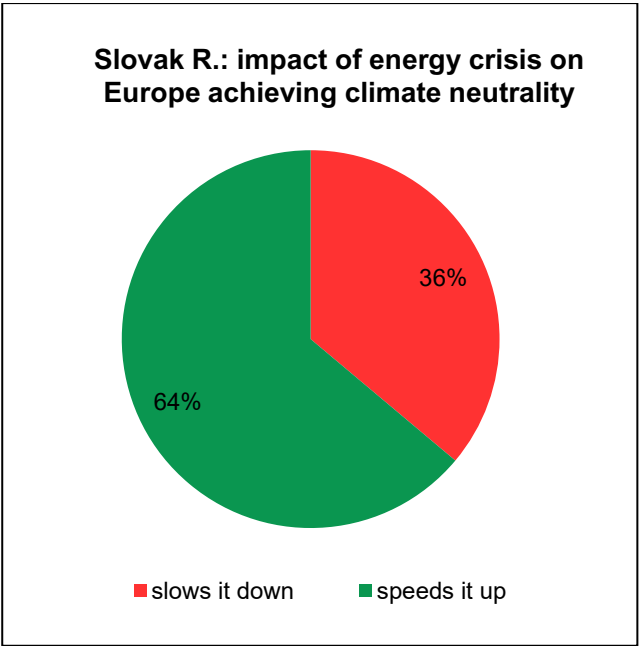
In the general public debate in your country (media, politicians), is a connection being made between the energy price crisis and the following energy cost reduction measures?



How often are the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") reflected in the public debate in your country?



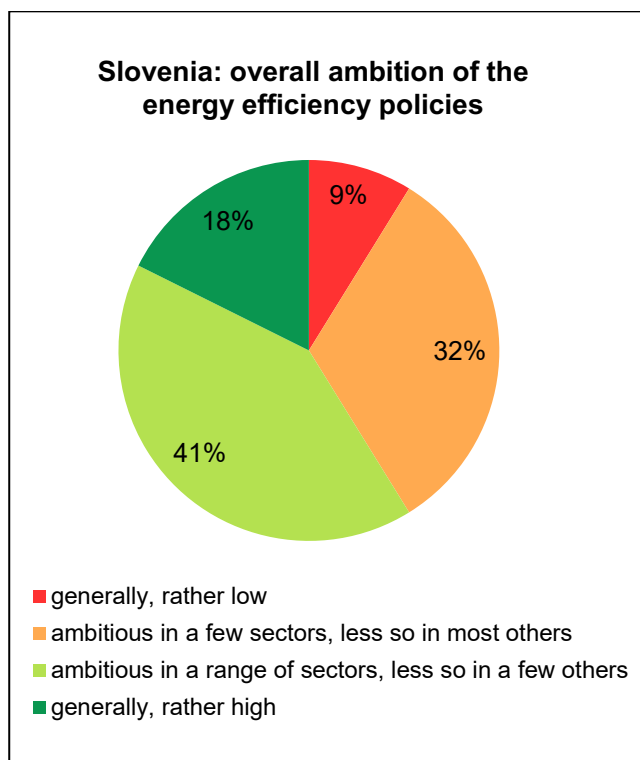
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



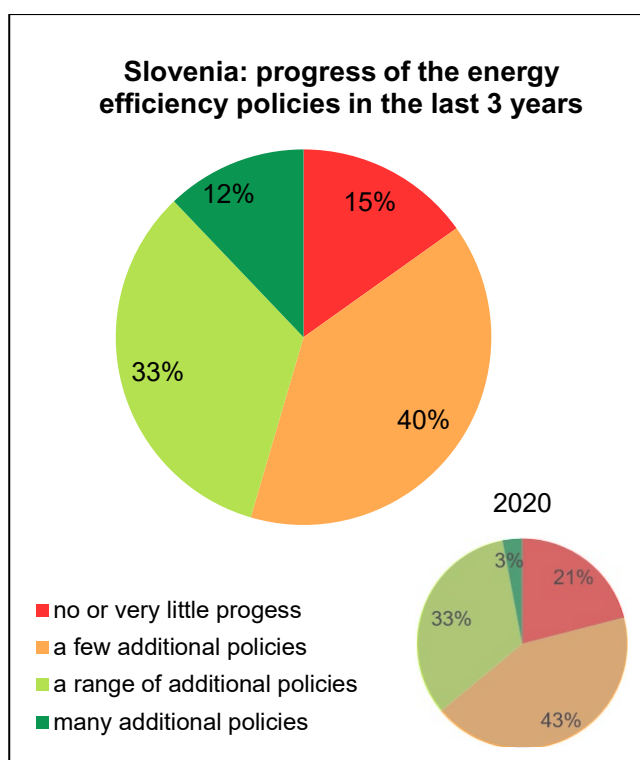
Slovenia



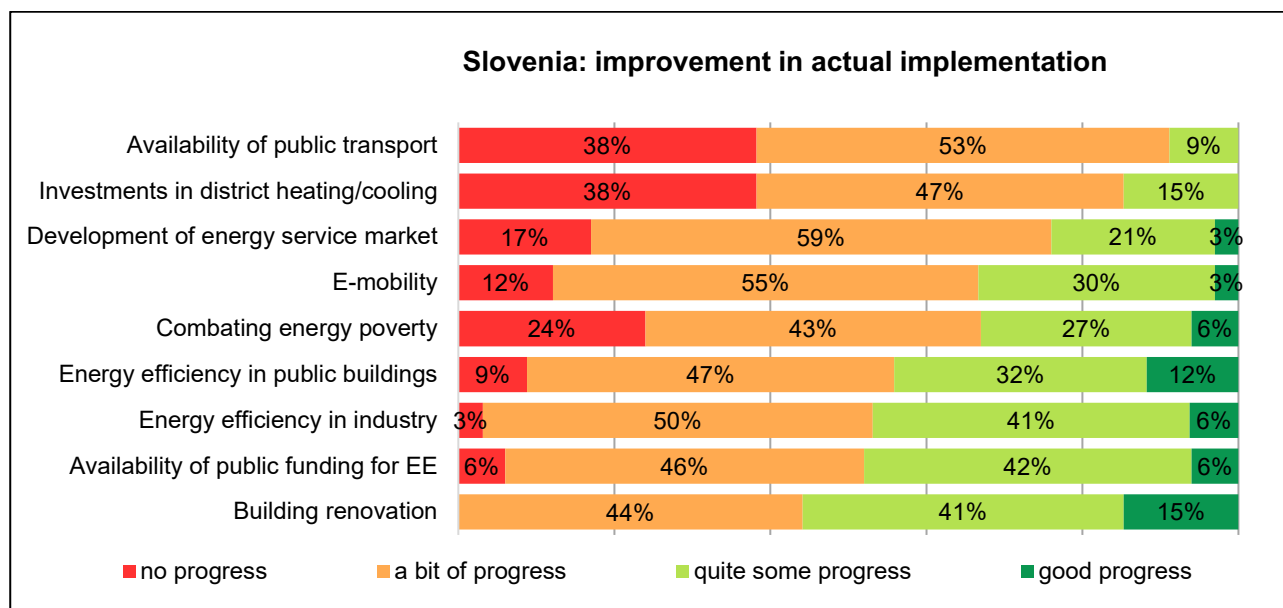
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



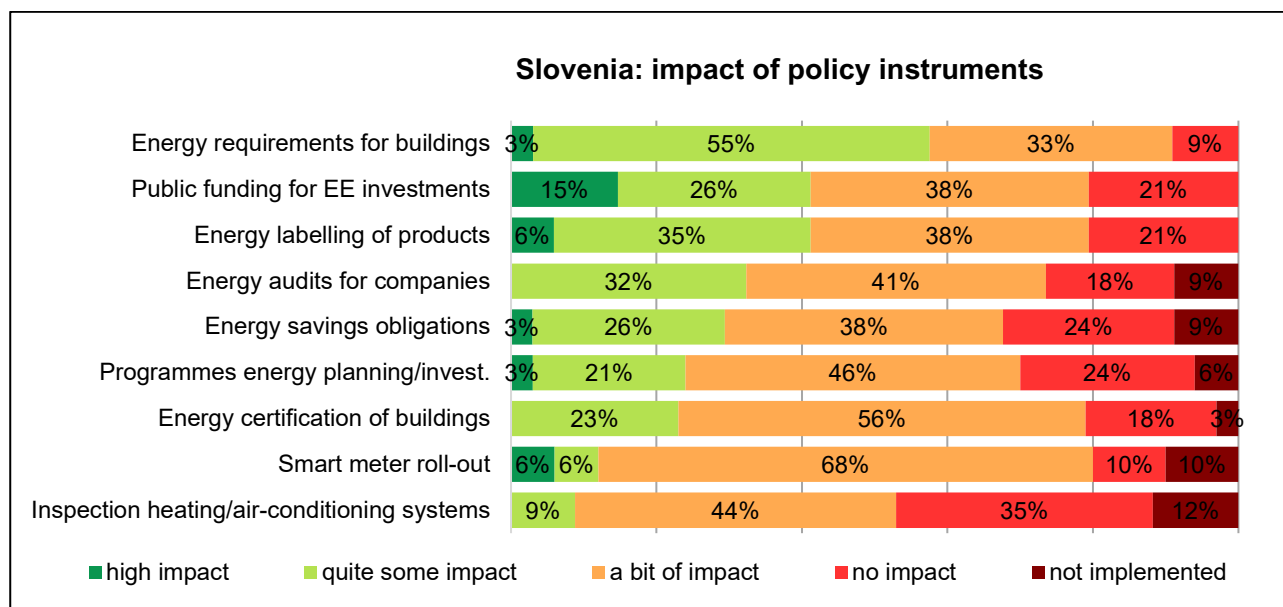
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



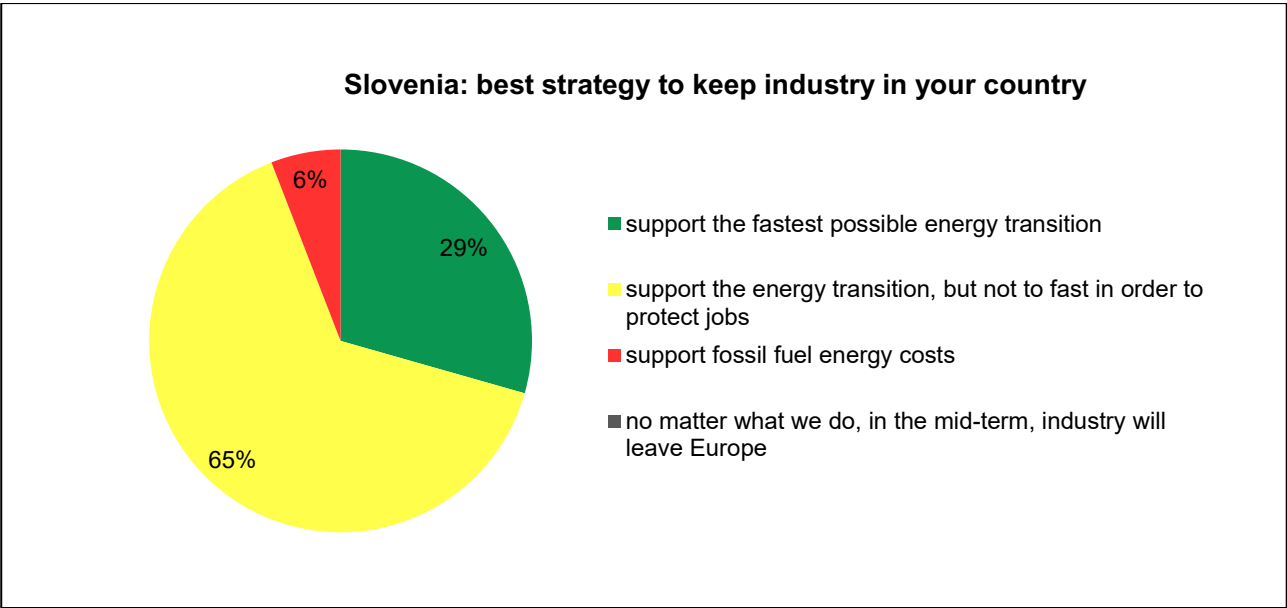
How do you see the improvements in the actual implementation (scale/rate) in your country in the last 3 years in the following fields?



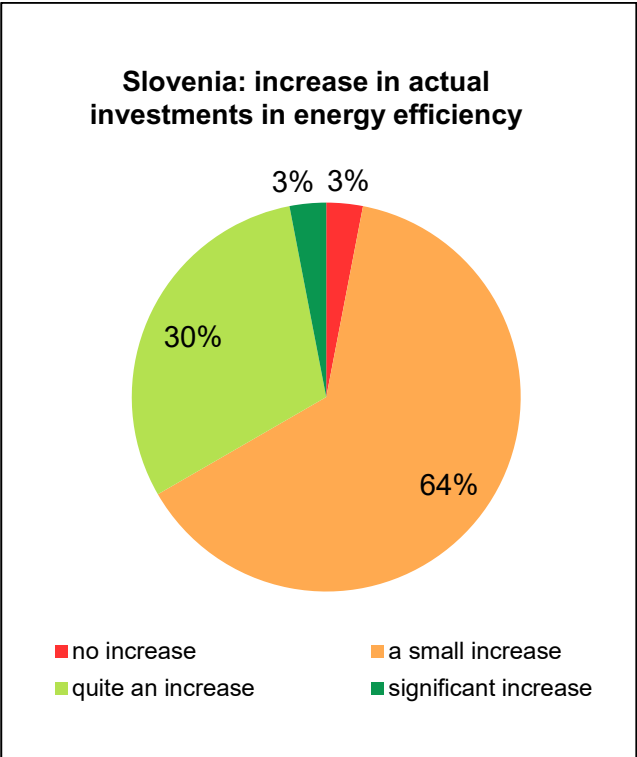
How big is the positive impact of the following policy instruments in your country?



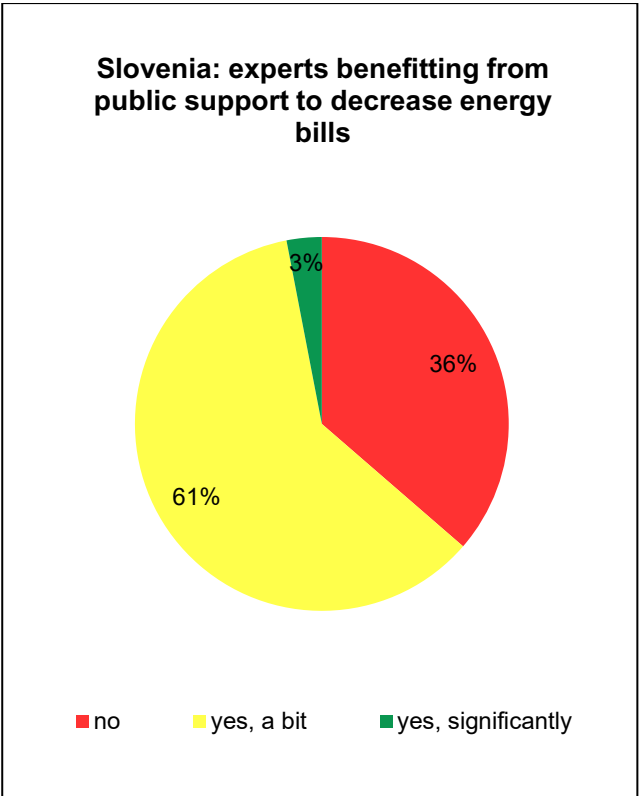
In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



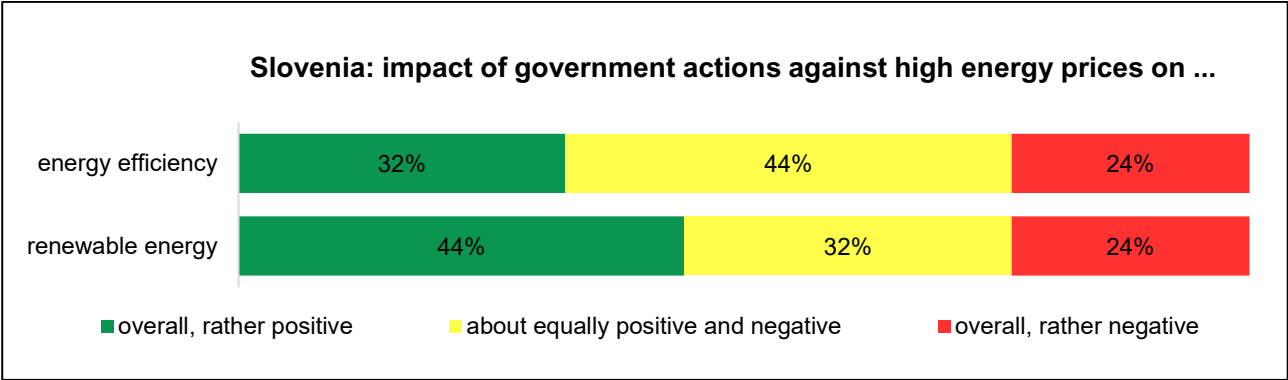
Overall, do you observe an increase in actual investments in energy efficiency (or at least the preparation of such investments) in your country?



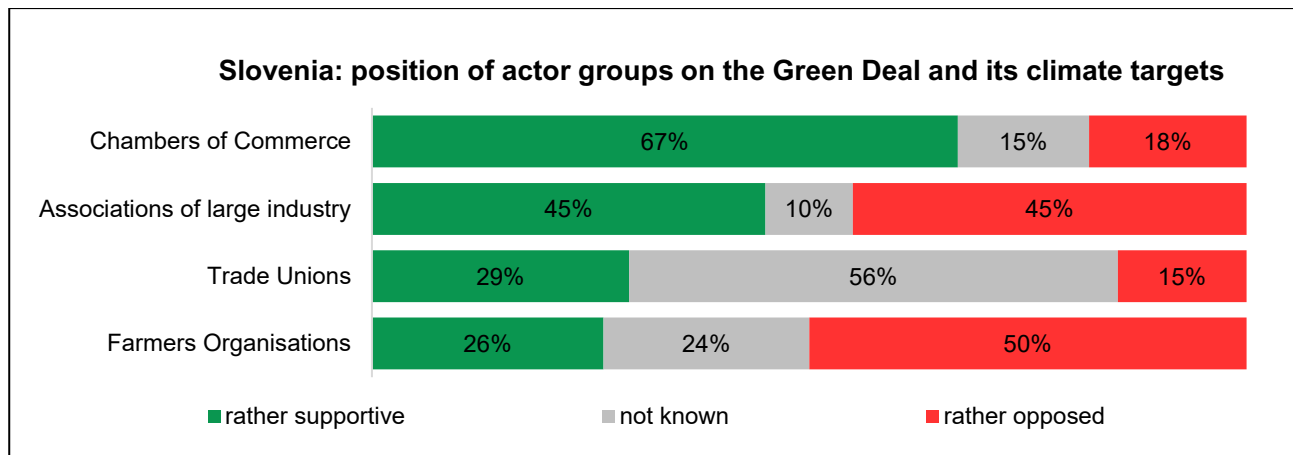
In your household, are you benefitting from public support measures to decrease your energy bills (e.g. price caps, support payments, subsidies)?



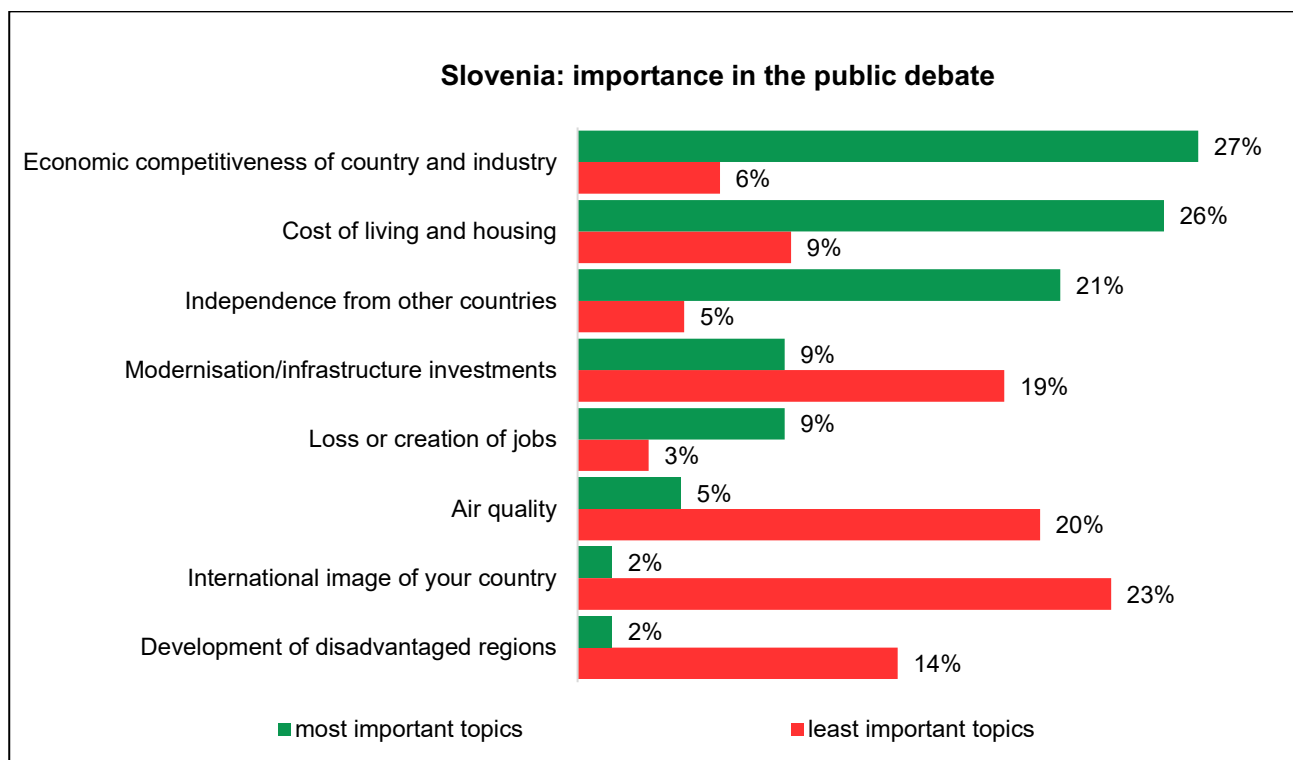
In your opinion, are your government's actions against high energy prices overall positive or negative for energy efficiency and renewable energy?



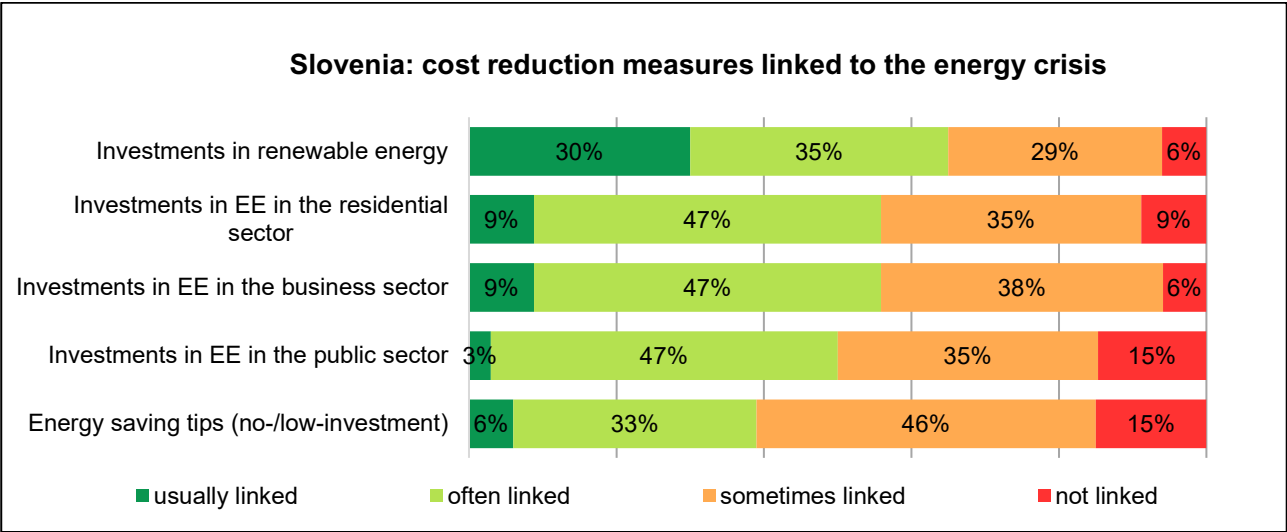
In general, do the following actor groups in your country support or oppose the Green Deal and its climate targets? What is their position?



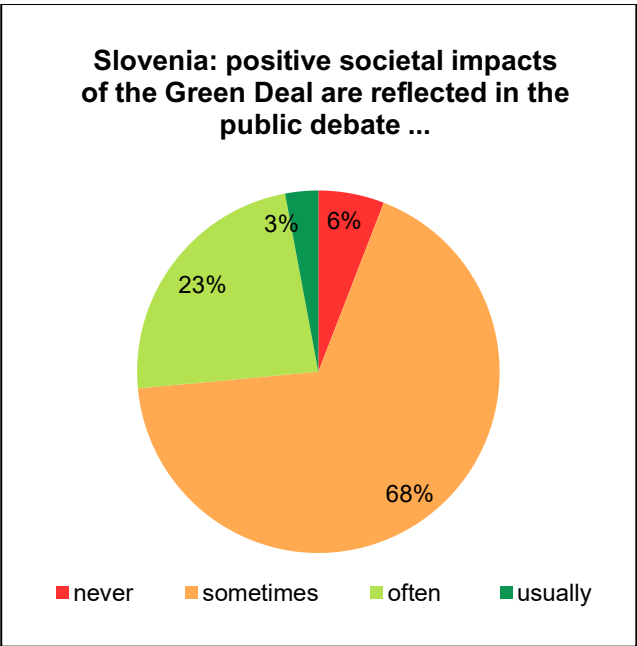
Independent of energy and climate, how important are the following topics in the general public debate in your country (media, politicians - not your personal opinion)? Please select the two most and the two least important topics.



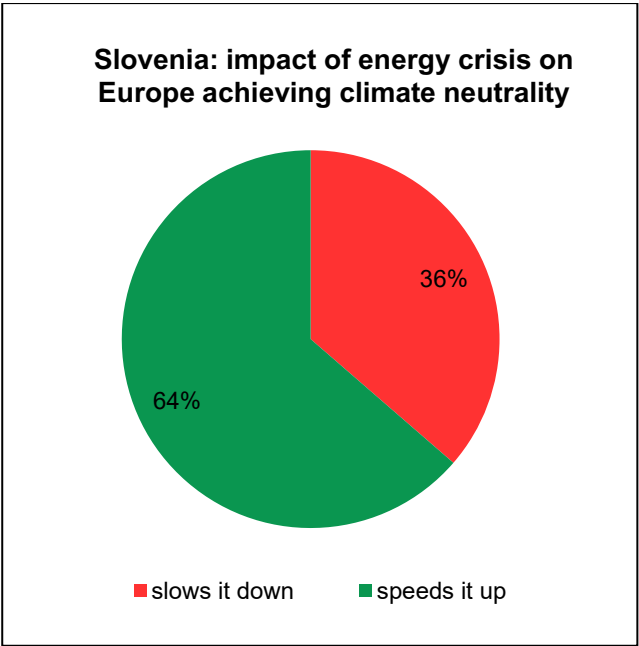
In the general public debate in your country (media, politicians), is a connection being made between the energy price crisis and the following energy cost reduction measures?



How often are the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") reflected in the public debate in your country?



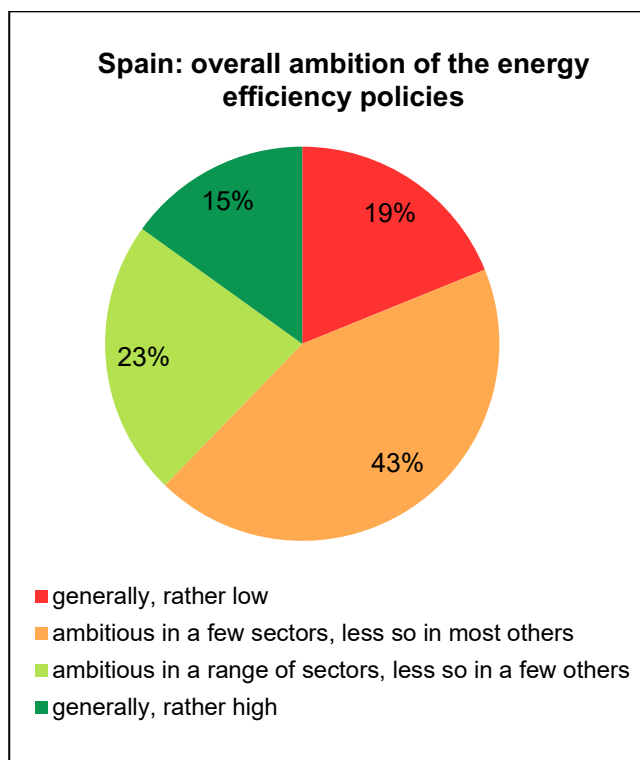
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



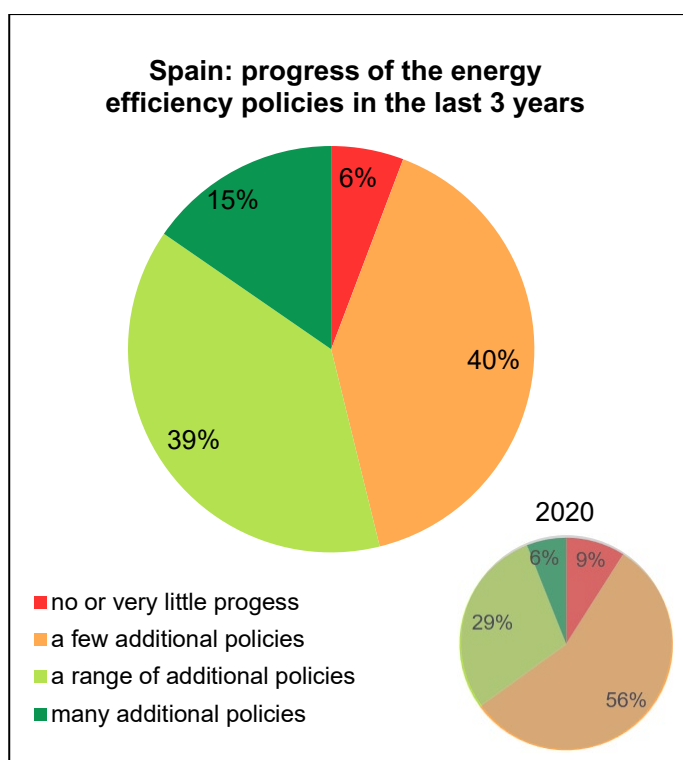
Spain



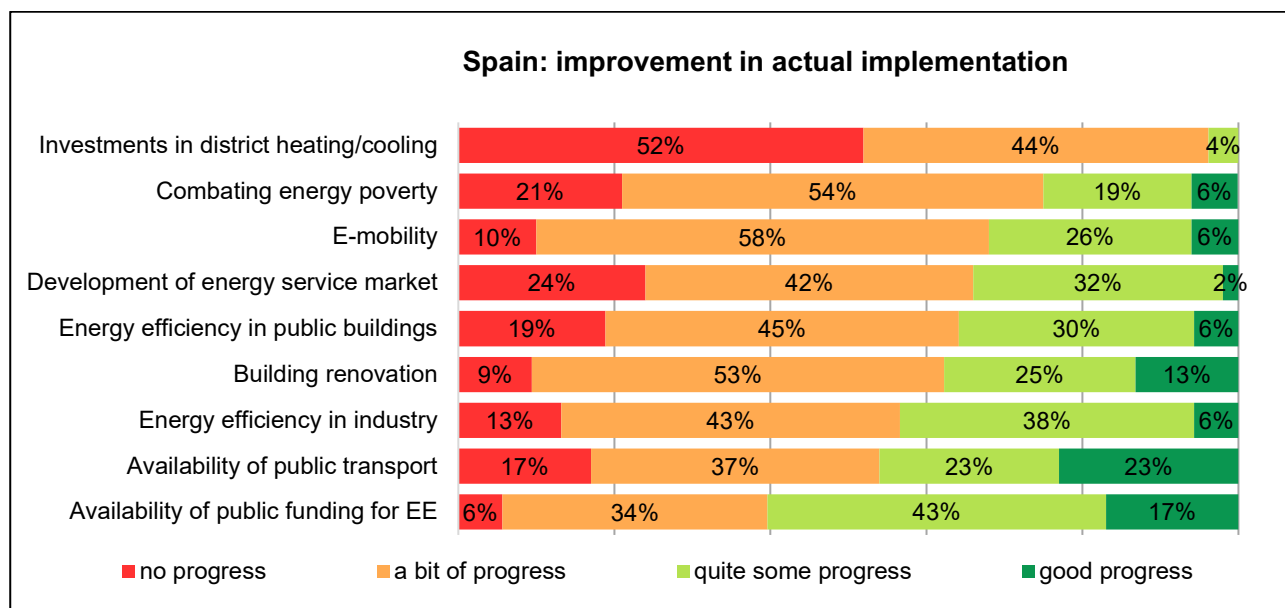
In general, how do you personally rate the overall ambition of the energy efficiency policies in your country?



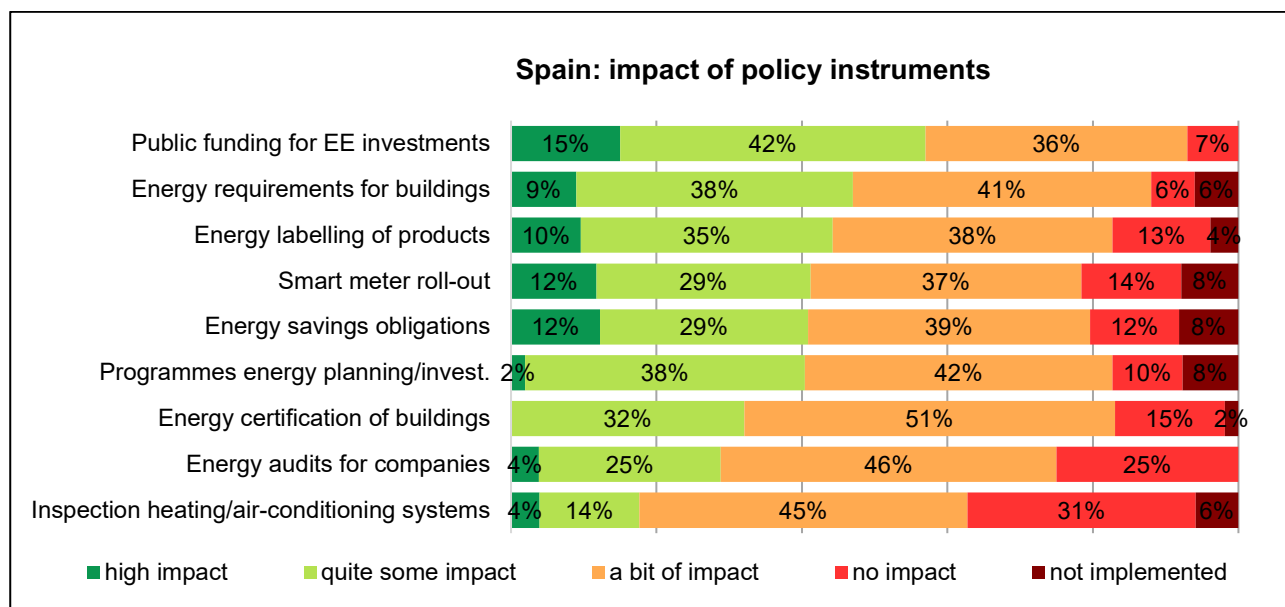
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



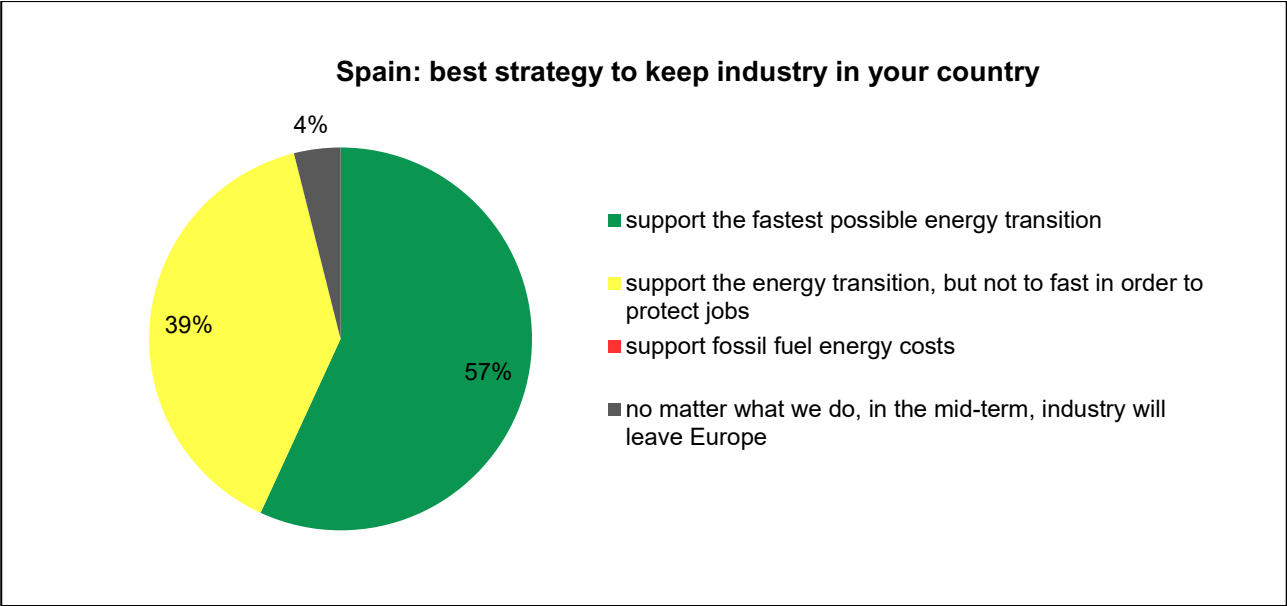
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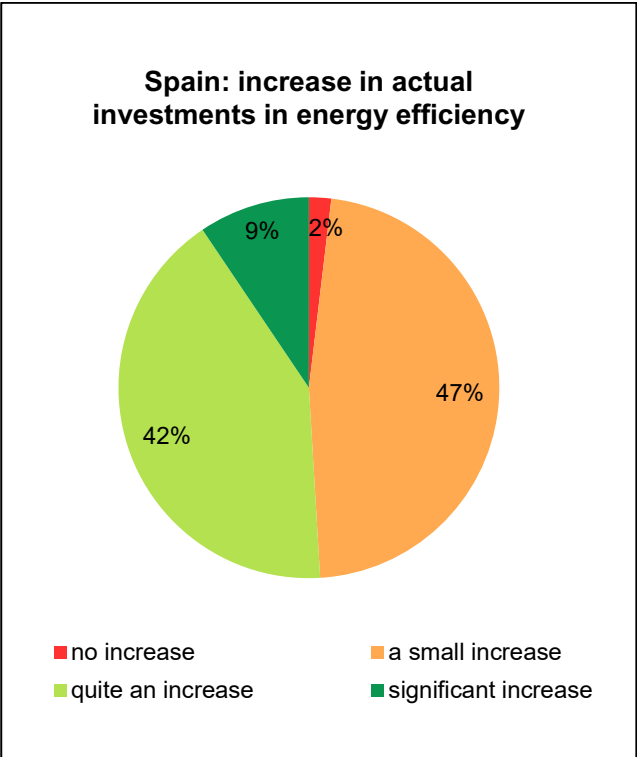
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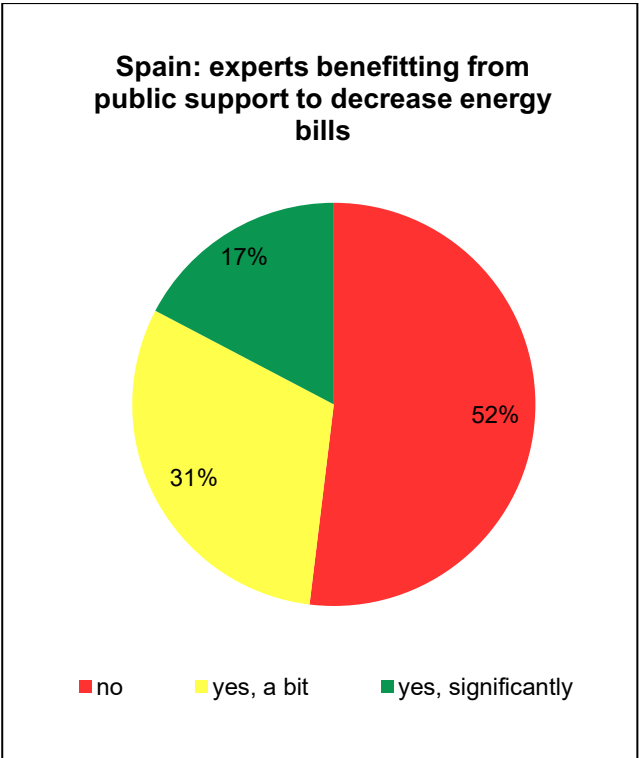
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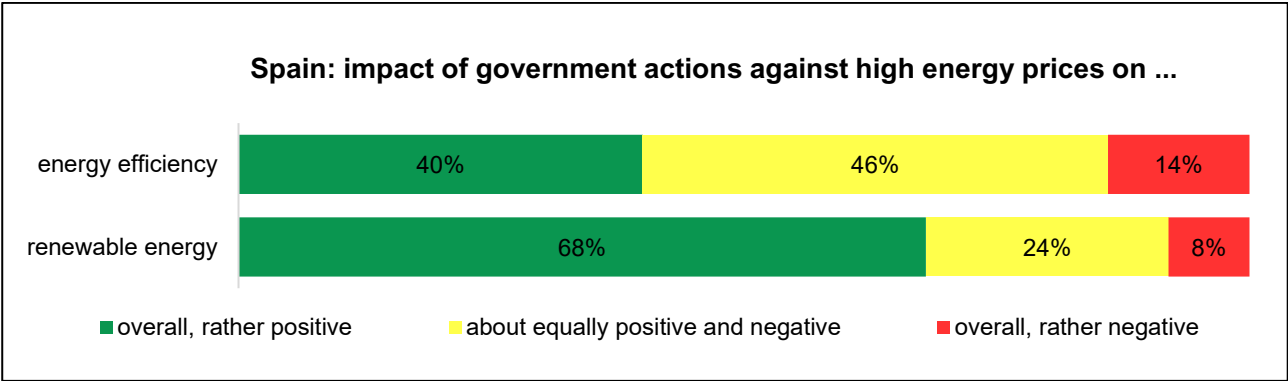
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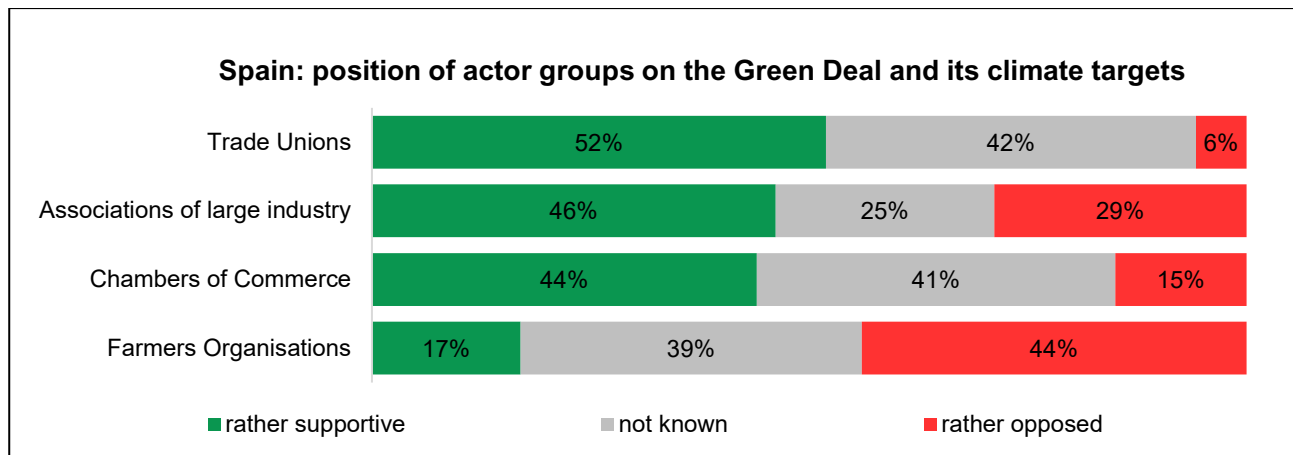
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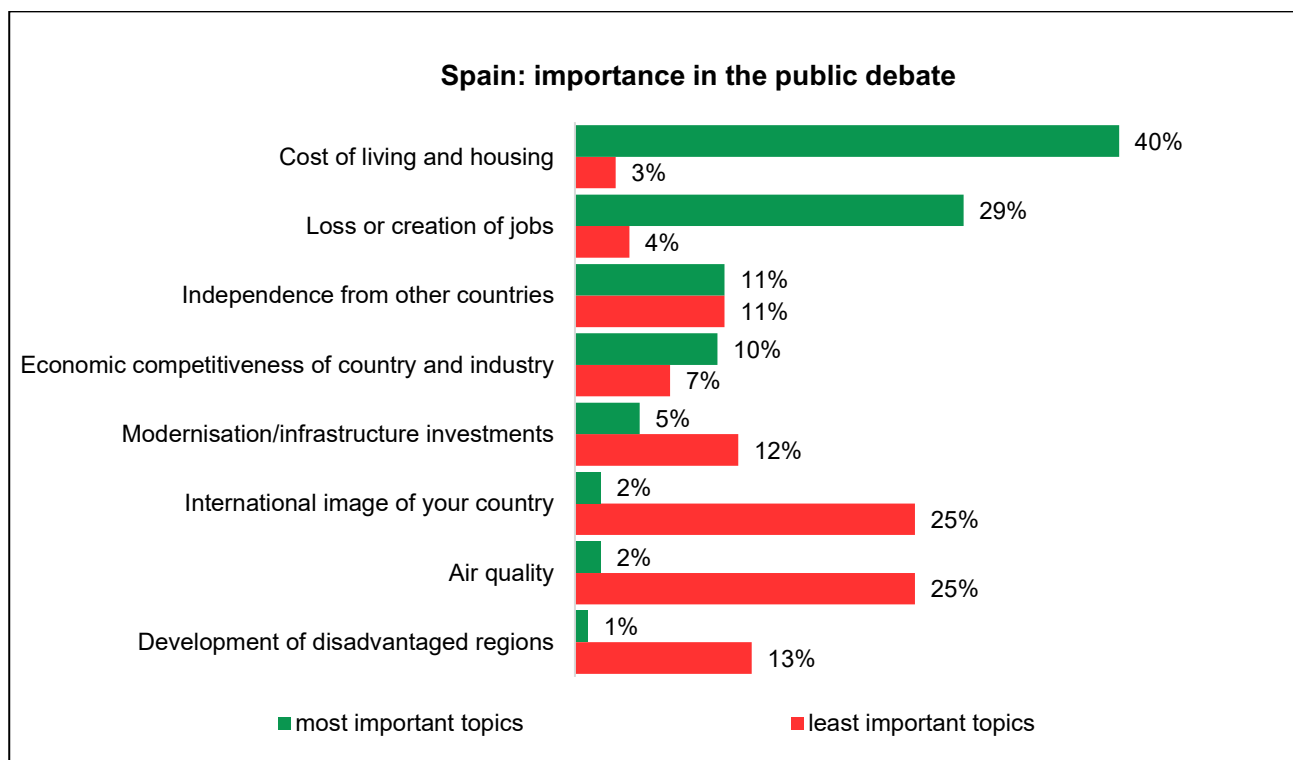
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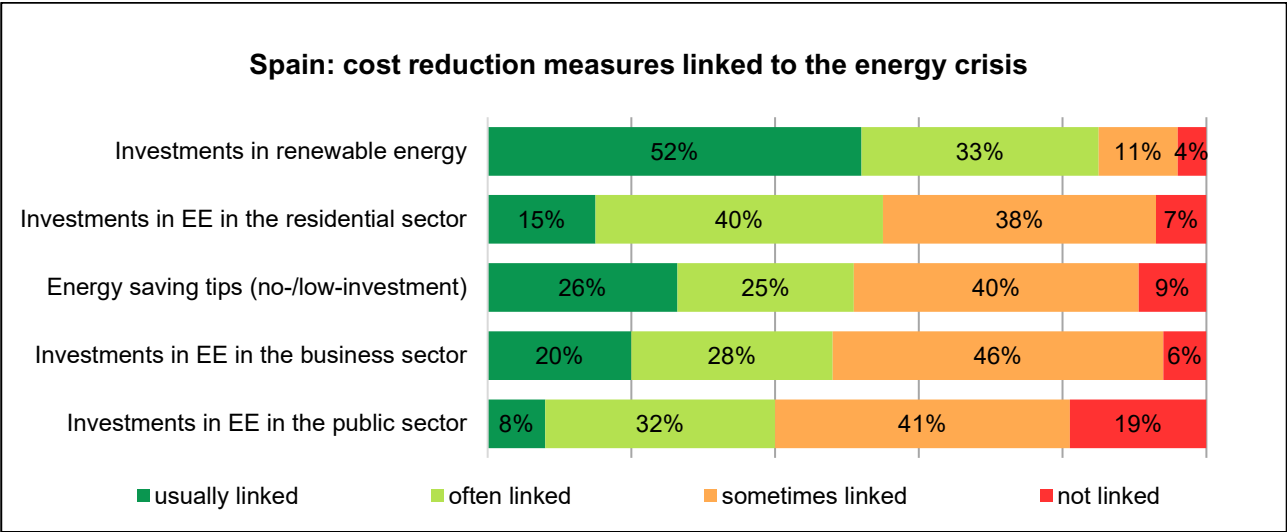
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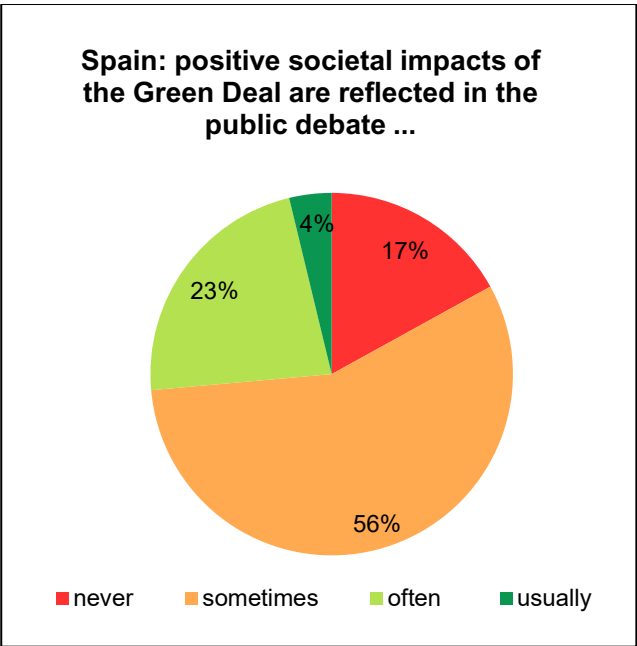
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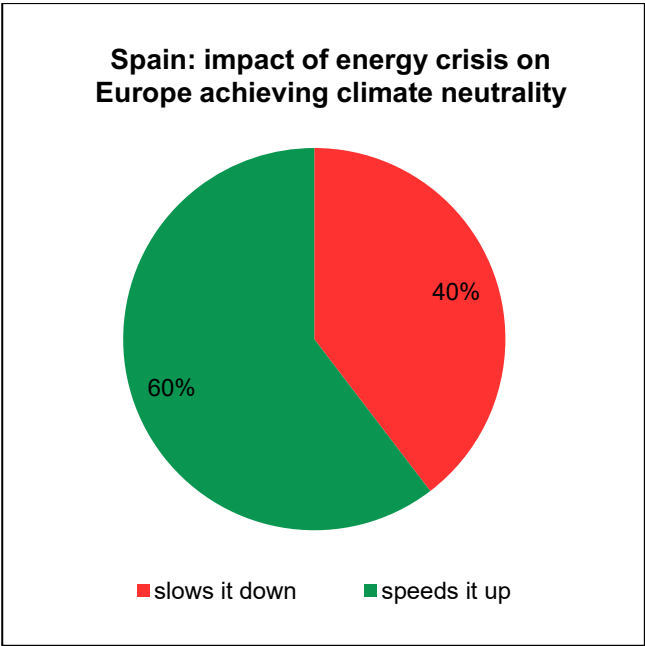
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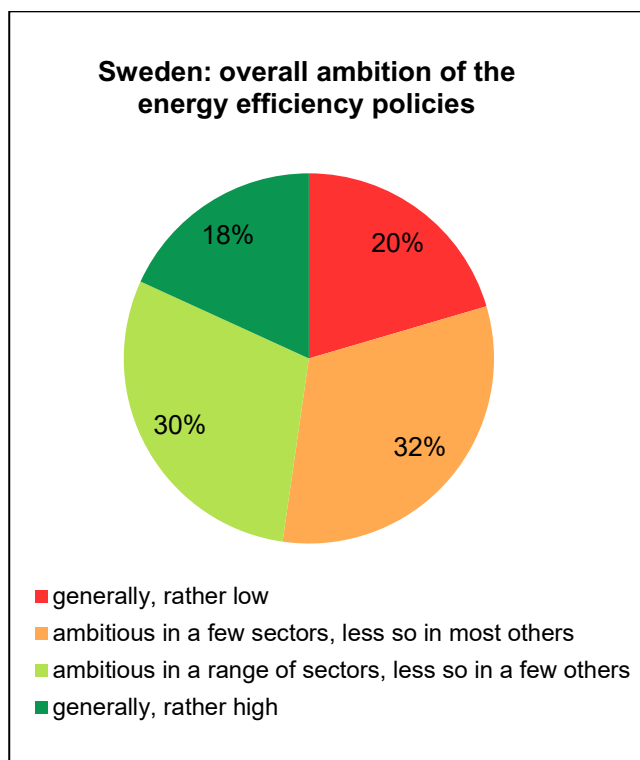
How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



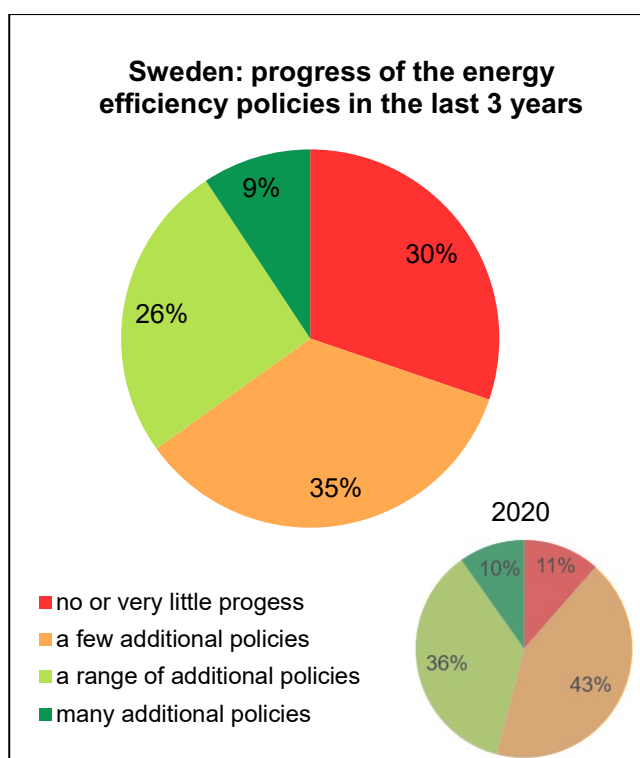
Sweden



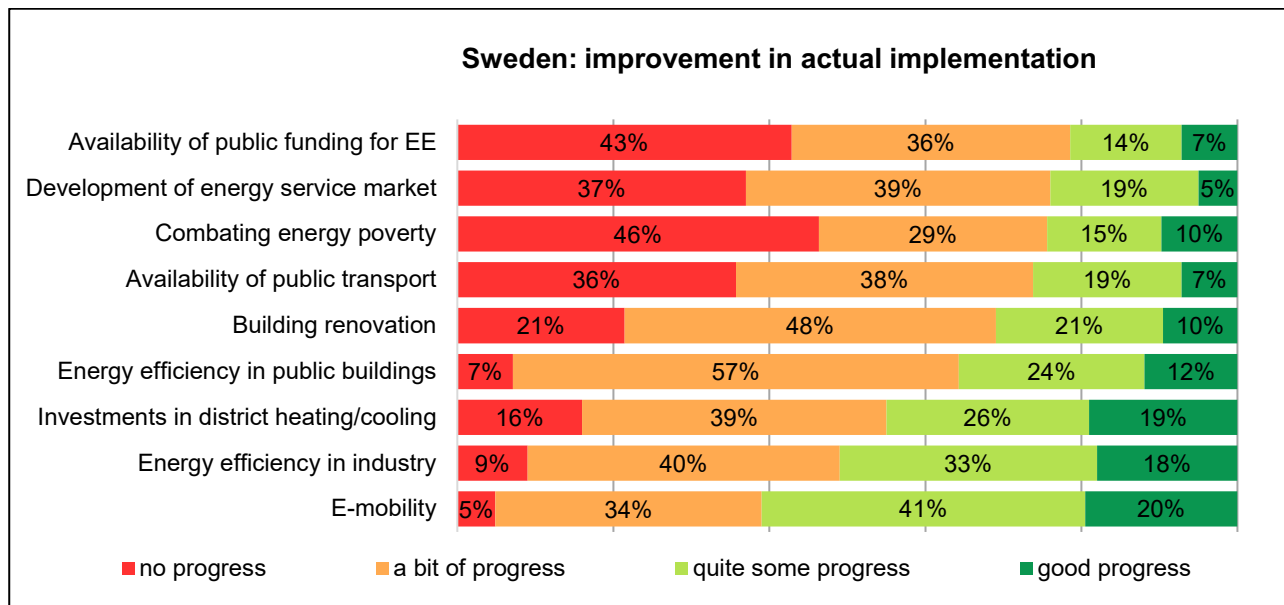
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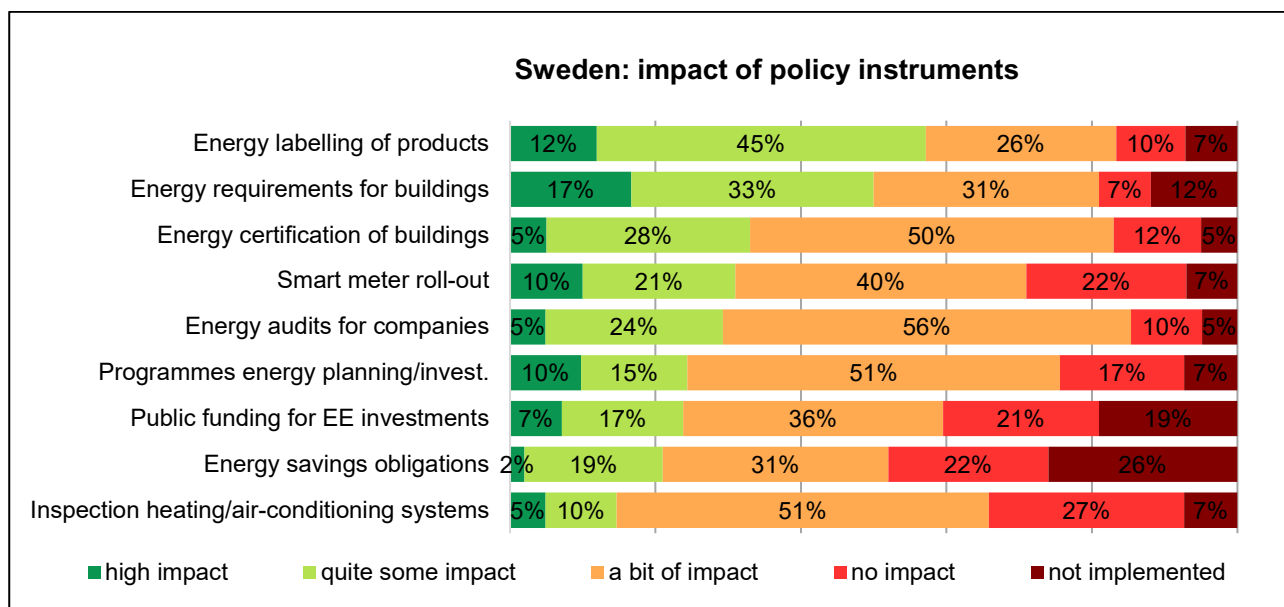
How do you rank the progress in energy efficiency policies in the last 3 years in your country (new policies introduced, existing ones improved)?



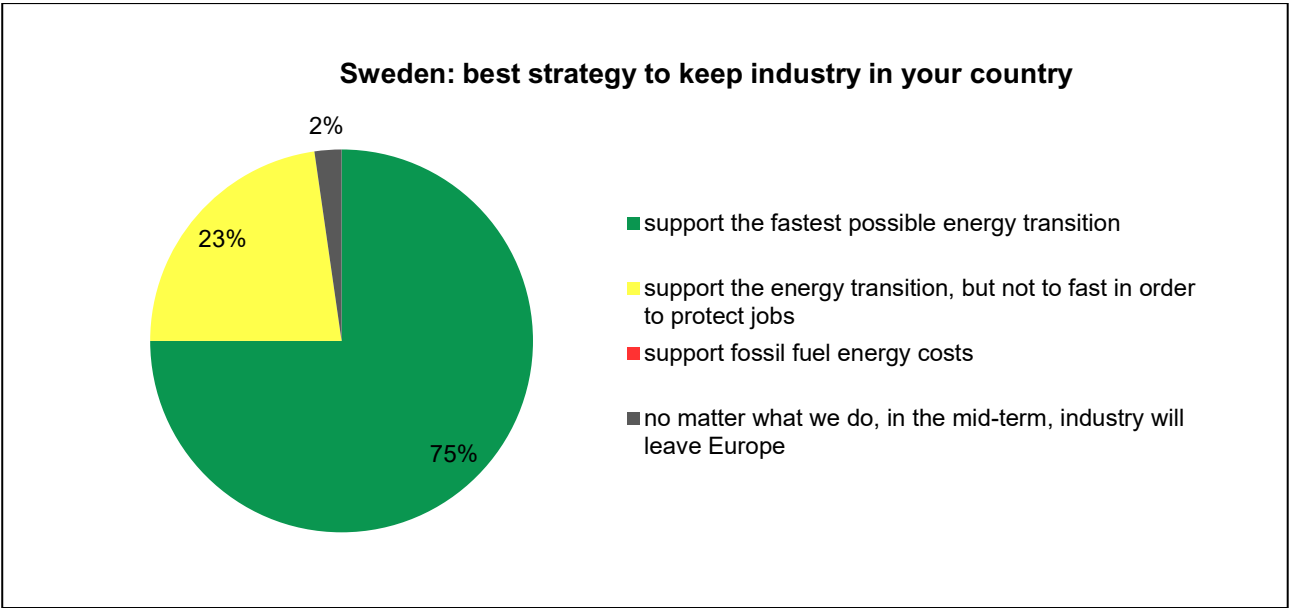
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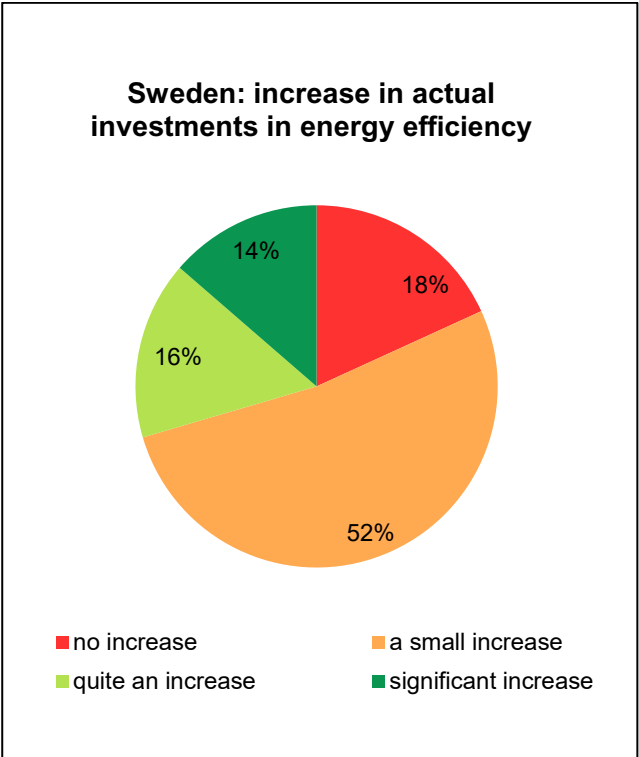
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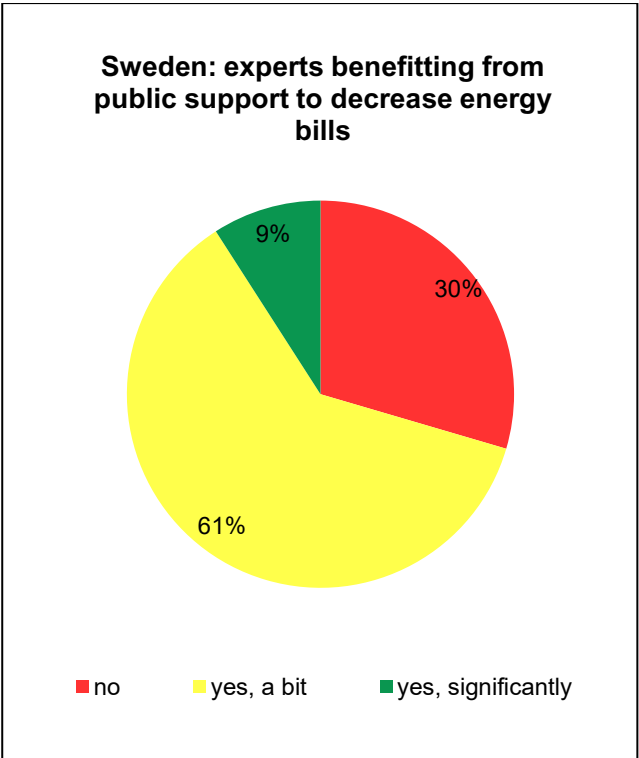
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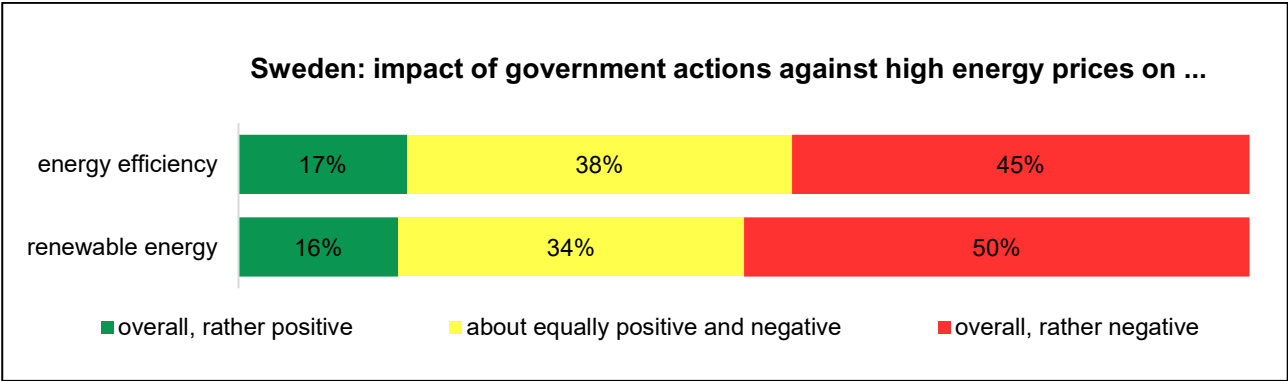
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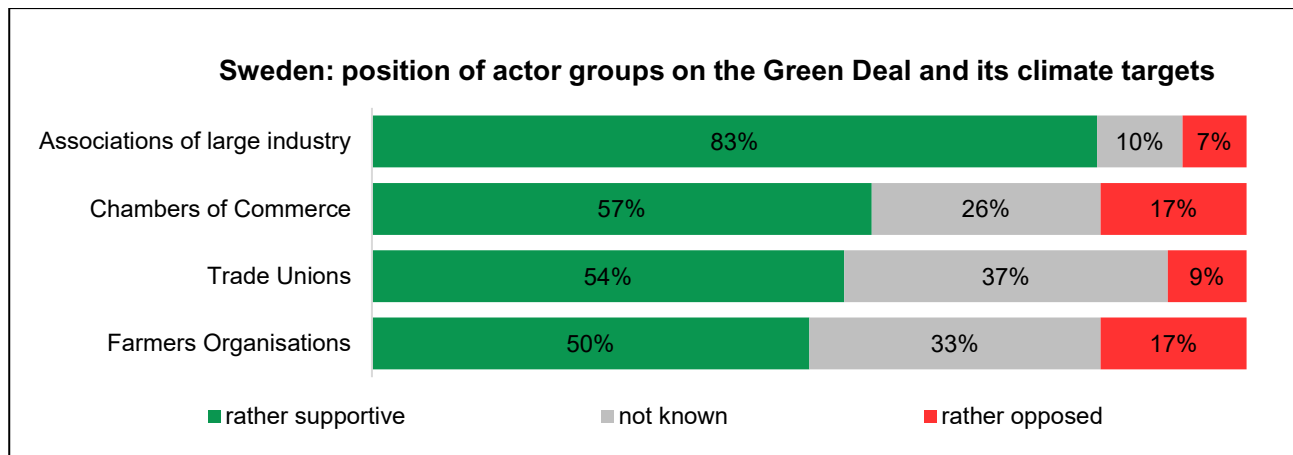
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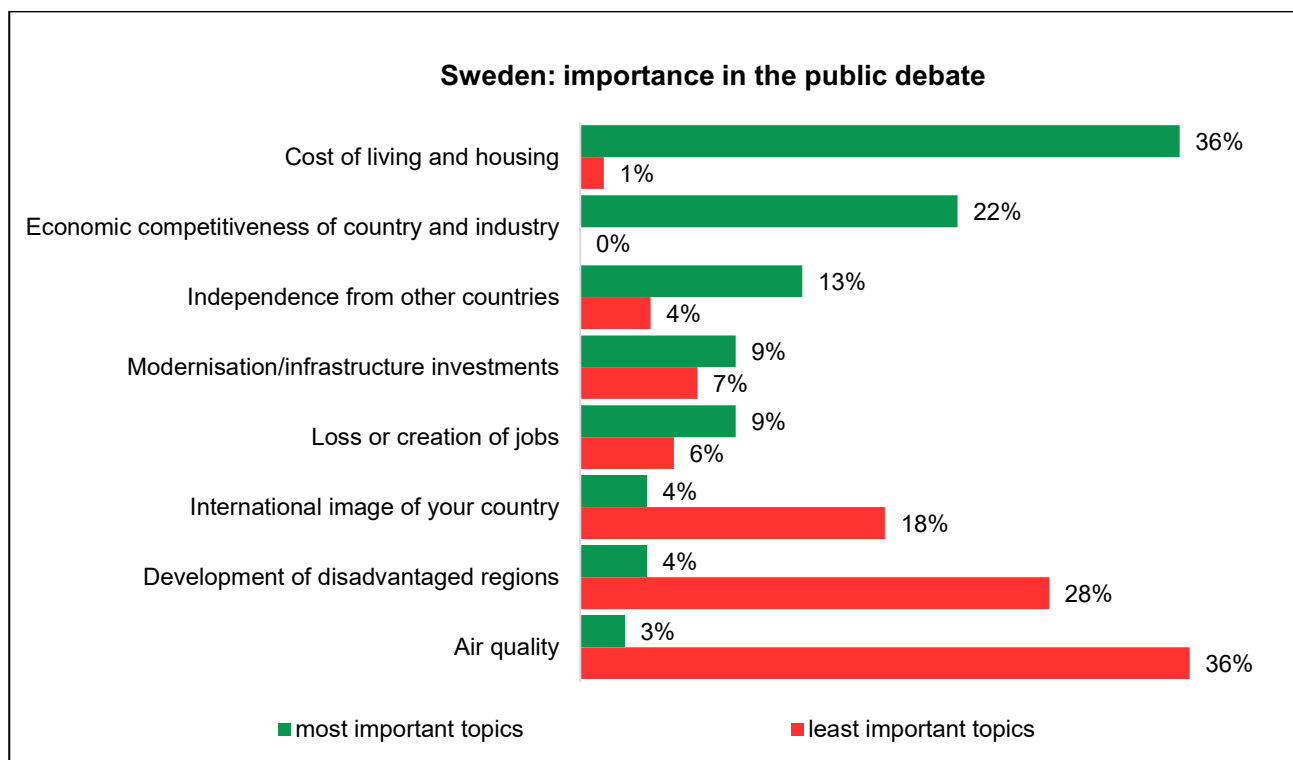
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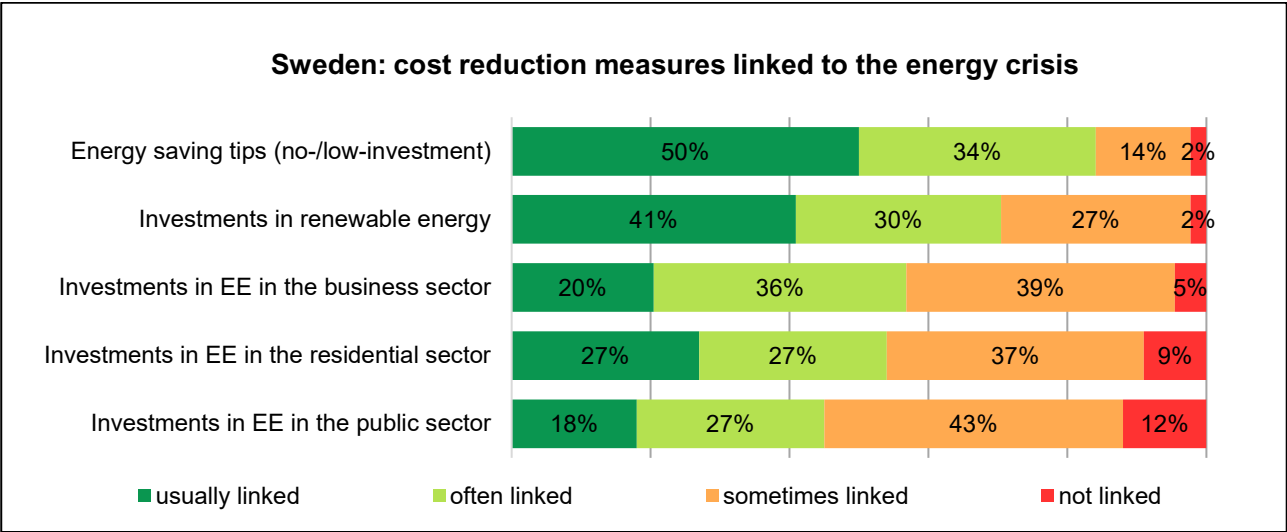
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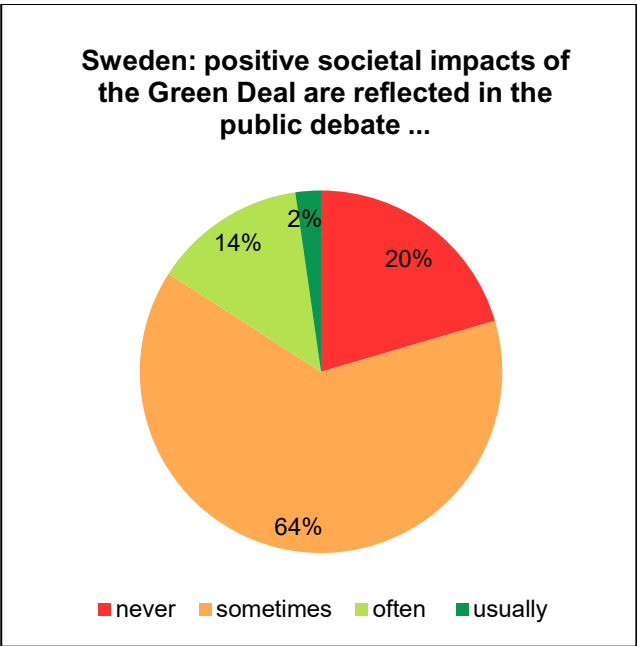
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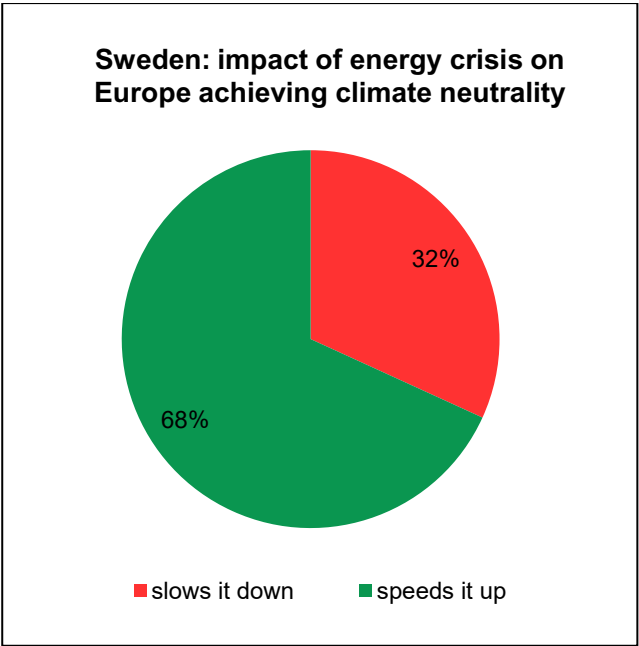
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How often are the positive societal impacts of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") reflected in the public debate in your country?



How do you see the overall impact of the energy crisis on Europe achieving its climate neutrality target?



Annex 2: EEW5 survey questionnaire



ENERGY EFFICIENCY WATCH SURVEY



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

It is carried out in the framework of the LIFE 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?

- 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

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

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

3. How do you see the **improvements in the actual implementation** (scale/rate) in your country in the last 3 years in the following fields?

	no progress	a bit of progress	quite some progress	good progress
Building renovation				
Energy efficiency in industry				
Availability of public transport				
E-mobility				
Energy efficiency in public buildings				
Availability of funding for energy efficiency				
Development of the energy service market (e.g. energy performance contracting)				



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Combating energy poverty				
Investments in district heating/cooling				

4. How big is **the positive impact** of the following policy instruments in your country?

	not implemented	no impact	a bit of impact	quite some impact	high impact
Energy requirements for buildings					
Energy certification of buildings					
Inspection of heating and air-conditioning systems					
Public funding for energy efficiency investments					
Energy audits for companies					
Energy savings obligations (e.g. for energy companies)					
Smart meter roll-out					
Energy labelling of products					
Programmes for local energy planning and investments					

Energy crisis and Green Deal - public debate, perceptions and effects

5. Independent of energy and climate, how important are the following topics **in the general public debate in your country (media, politicians - 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		
Independence from other countries (e.g. economic, energy)		
Economic competitiveness of your country and your industry		
Air quality		
Cost of living and housing		
Development of economically disadvantaged regions		
Modernisation and infrastructure investments		
International image of your country		
Others:		

6. In the **general public debate in your country** (media, politicians), is a connection being made between the energy price crisis and the following energy cost reduction measures?

	not linked	sometimes linked	often linked	usually linked
Energy saving "tips" (no- or low-investment measures)				
Investments in energy efficiency in the residential sector				
Investments in energy efficiency in the public sector				
Investments in energy efficiency in the business sector				
Investments in renewable energy				

7. Overall, do you observe an **increase in investments in energy efficiency** (or at least the preparation of such investments) in your country?

- no increase
- a small increase
- quite an increase
- significant increase

8. In your household, are you **benefitting from public support measures** to decrease your energy bills (e.g. price caps, support payments)?

- no
- yes, a bit
- yes, significantly

9. In your opinion, are your **government's actions against high energy prices** overall positive or negative for energy efficiency and renewable energy?

	for energy efficiency	for renewable energy
overall, rather positive		
overall, rather negative		
about equally positive and negative impacts		

10. How do you see the **overall impact of the energy crisis** on Europe achieving its climate neutrality target?

- speeds it up
- slows it down

11. In general, do the following **actor groups in your country support or oppose** the Green Deal and its climate targets?

	position on the Green Deal and Climate Neutrality		
	rather supportive	rather opposed	not known
Trade Unions			
Associations of large industry			
Chambers of Commerce			
Farmers Organisations			
Other groups, which			

12. How often are the **positive societal impacts** of the Green Deal ("transforming the EU into a modern, resource-efficient and competitive economy") **reflected in the public debate** in your country?

- ☐ never
☐ sometimes
☐ often
☐ usually

13. In your personal opinion, which of the **following mid-term strategies is best** to keep industry in your country?

- ☐ no matter what we do, in the mid-term, industry will leave Europe
☐ support fossil fuel energy costs
☐ support the energy transition, but not too fast in order to protect jobs
☐ support the fastest possible energy transition

14. 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?

- | | | |
|---|--|---------------------------------------|
| <input type="checkbox"/> Austria | <input type="checkbox"/> Germany | <input type="checkbox"/> Poland |
| <input type="checkbox"/> Belgium | <input type="checkbox"/> Greece | <input type="checkbox"/> Portugal |
| <input type="checkbox"/> Bulgaria | <input type="checkbox"/> Hungary | <input type="checkbox"/> Romania |
| <input type="checkbox"/> Croatia | <input type="checkbox"/> Ireland | <input type="checkbox"/> Slovakia |
| <input type="checkbox"/> Cyprus | <input type="checkbox"/> Italy | <input type="checkbox"/> Slovenia |
| <input type="checkbox"/> Czech Republic | <input type="checkbox"/> Latvia | <input type="checkbox"/> Spain |
| <input type="checkbox"/> Denmark | <input type="checkbox"/> Lithuania | <input type="checkbox"/> Sweden |
| <input type="checkbox"/> Estonia | <input type="checkbox"/> Luxembourg | <input type="checkbox"/> other: _____ |
| <input type="checkbox"/> Finland | <input type="checkbox"/> Malta | |
| <input type="checkbox"/> France | <input type="checkbox"/> The Netherlands | |

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 the energy transition efforts in Europe!