

Energy Efficiency Watch Survey Report 2023

Insights from over 1,370 energy efficiency experts

NARRATIVES for the GREEN DEAL in times of populism

Summary



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 intense policy making on European level with many new and challenging policy requirements for Member States. The Ukraine war 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 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. Therefore, it is 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. Their positions can change relatively quickly. While the attitude of farmers associations towards the Green Deal deteriorated in 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 energy efficiency should be prioritised.

- Increasingly, the opposite can be observed with "Anti-Green-Deal" narratives appearing, many of them claiming that the Green Deal weakens 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 them or about 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 are continuously adapted.
- 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 policy development. 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. jobs, 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 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

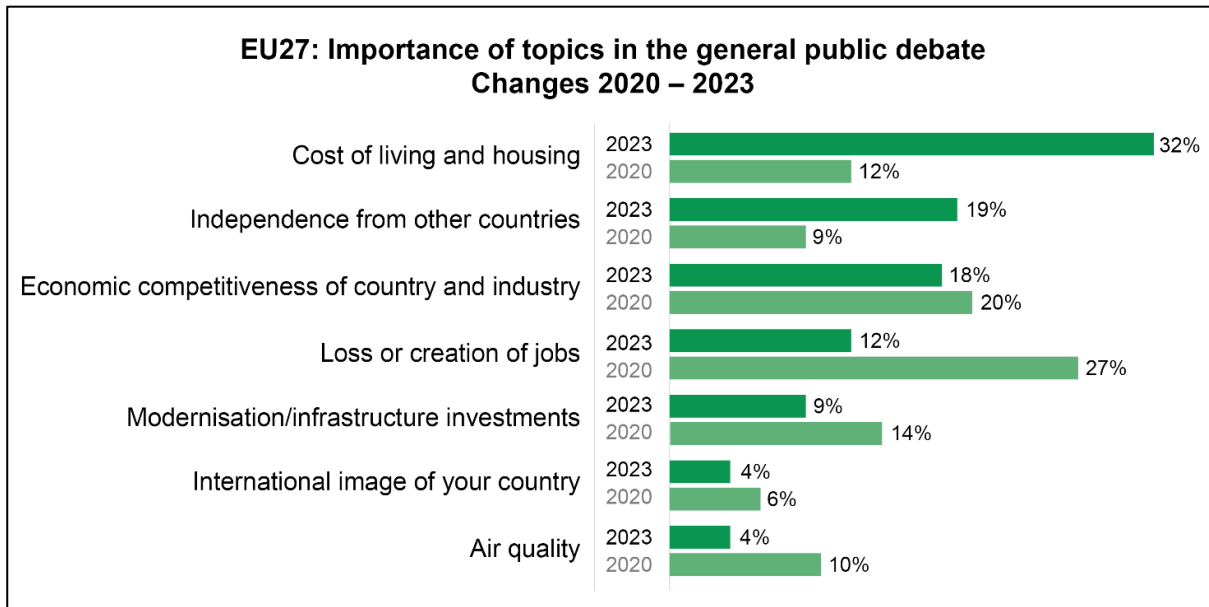
The first part of the survey was dedicated to gathering views on energy efficiency policy progress in the last 3 years. In order to compare the progress across countries and policy fields, a "progress indicator" was calculated. Results are shown in the table below (for details, see the full survey report).

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.



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.

