The Energy Efficiency Watch Survey

The missing WHY for energy efficiency: towards new narratives

Christiane Egger

OÖ Energiesparverband

christiane.egger@esv.or.at, www.esv-en.at

www.energy-efficiency-watch.org

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The Energy Efficiency Watch Project

Overall objective

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

Target groups

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

4 phases

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

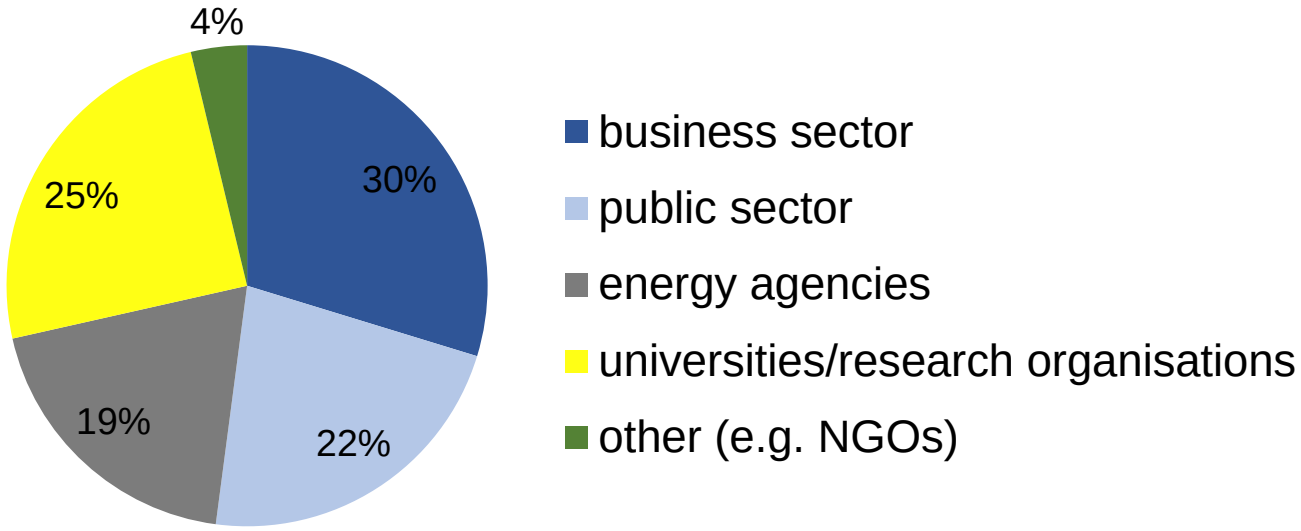
The Energy Efficiency Watch Survey

Objective of the survey:

- views of experts and stakeholders
- on progress "on the ground" in energy efficiency policies in their respective country
- gather insights for narrative development in Member States

More than 1,270 experts from all Member States participated

EU27: Completed questionnaires by sector



Completed questionnaires by Member State

	Austria	61		Italy	85
	Belgium	46		Latvia	31
	Bulgaria	30		Lithuania	27
	Croatia	49		Lux	25
	Cyprus	31		Malta	23
	Czech Rep.	52		NL	36
	Denmark	34		Poland	34
	Estonia	22		Portugal	47
	Finland	48		Romania	43
	France	64		Slovak Rep.	24
	Germany	138		Slovenia	40
	Greece	49		Spain	65
	Hungary	27		Sweden	65
	Ireland	74		**Total**	**1270**

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Conclusions Energy Policy Progress

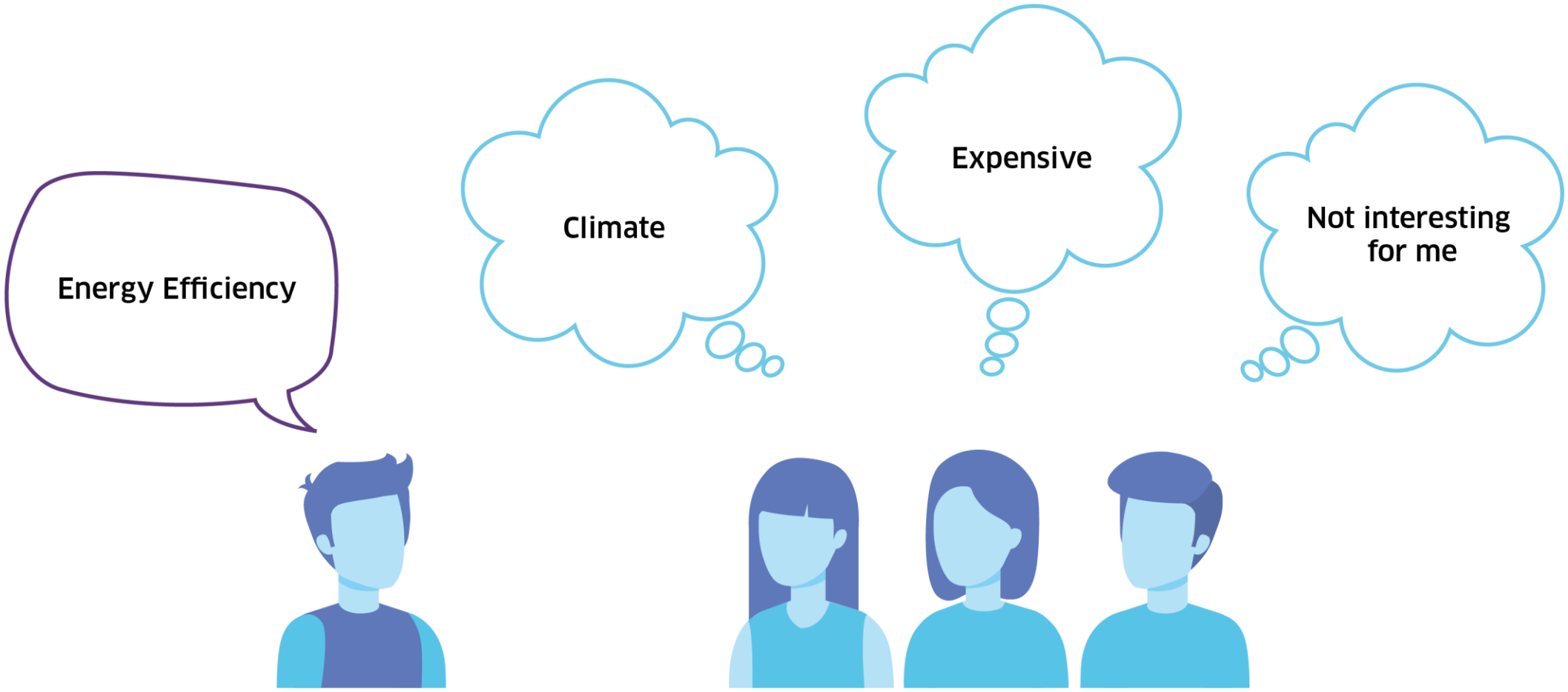
- **More of the same**
  Overall, disappointing levels of improvement across policy fields: We remain too slow, way too slow - new dynamics lacking!

- **Ups and downs continue**
  Levels of ambition in policy development and implementation keep fluctuating in many Member States

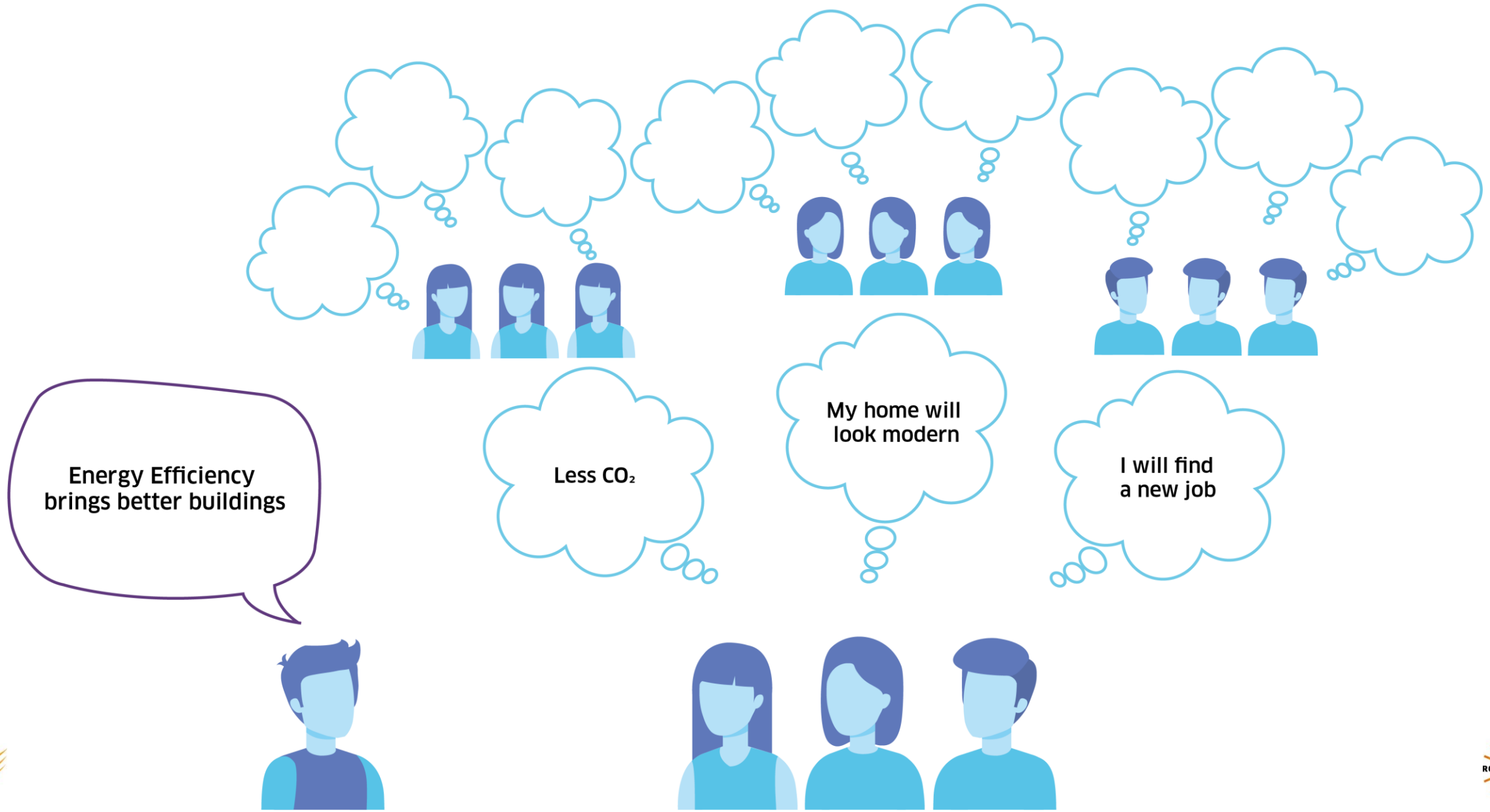
- **The WHY is often missing: lack of strong narratives**
  Policy ambition is maintained in a specific country or region despite political changes where a consensus has been reached on **"WHY"** it should be done (and not "We must because Brussels tells us so")

THE WHY: NARRATIVES

The images in people's minds



Narratives: Gaining buy-in from wider groups in society



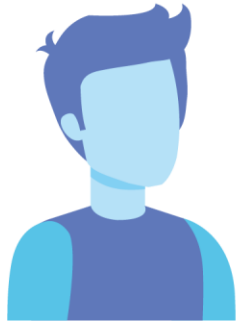
Narratives: We also need to overcome counter-narratives ("killer arguments")

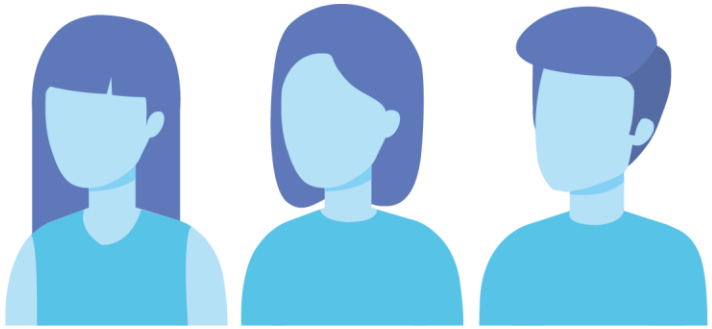
Let's get serious about the energy transition!

Our industry will be less competitive and move away.

Energy prices will rise. The poor will be disadvantaged.

Renovating my home doesn't pay off.





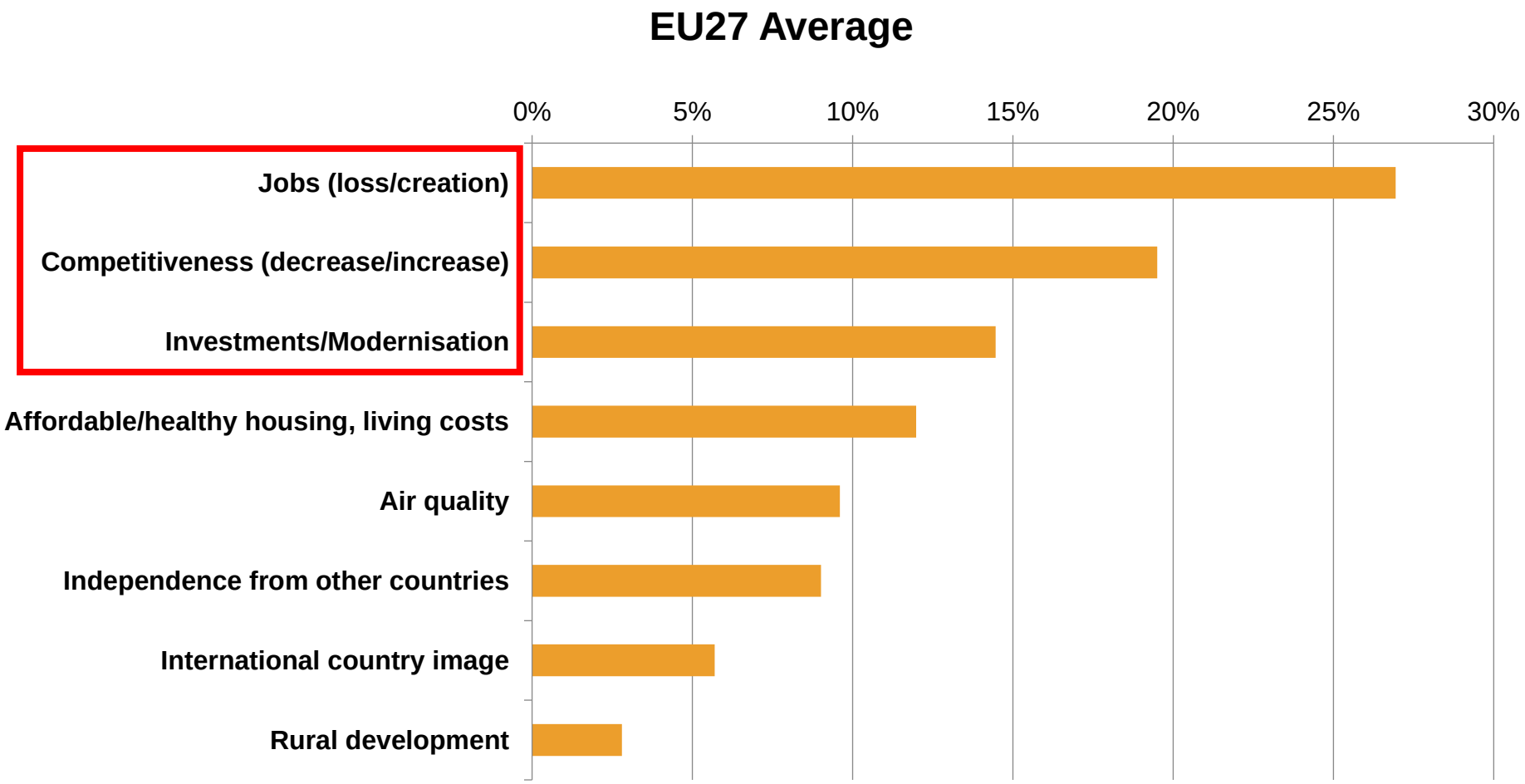
Gathering input for narrative development

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

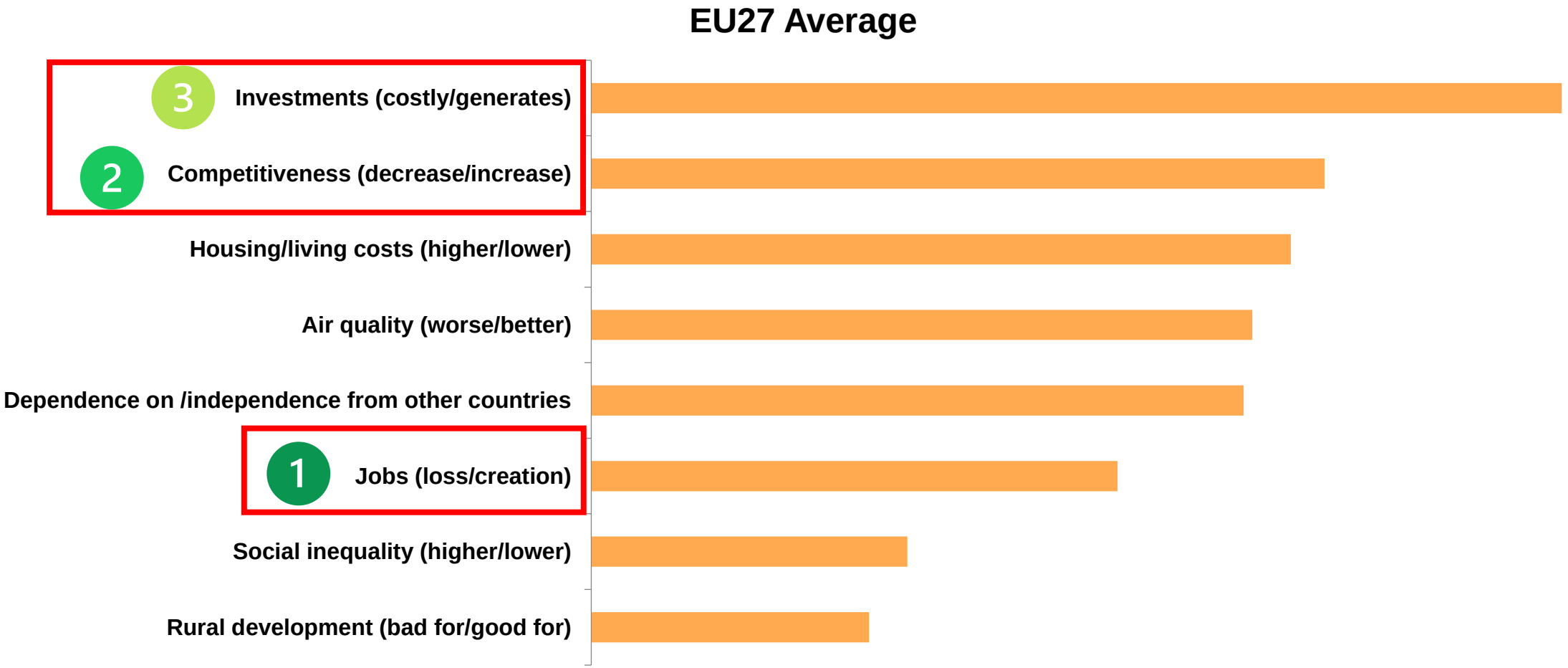
Survey - answers to the following questions:

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

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



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



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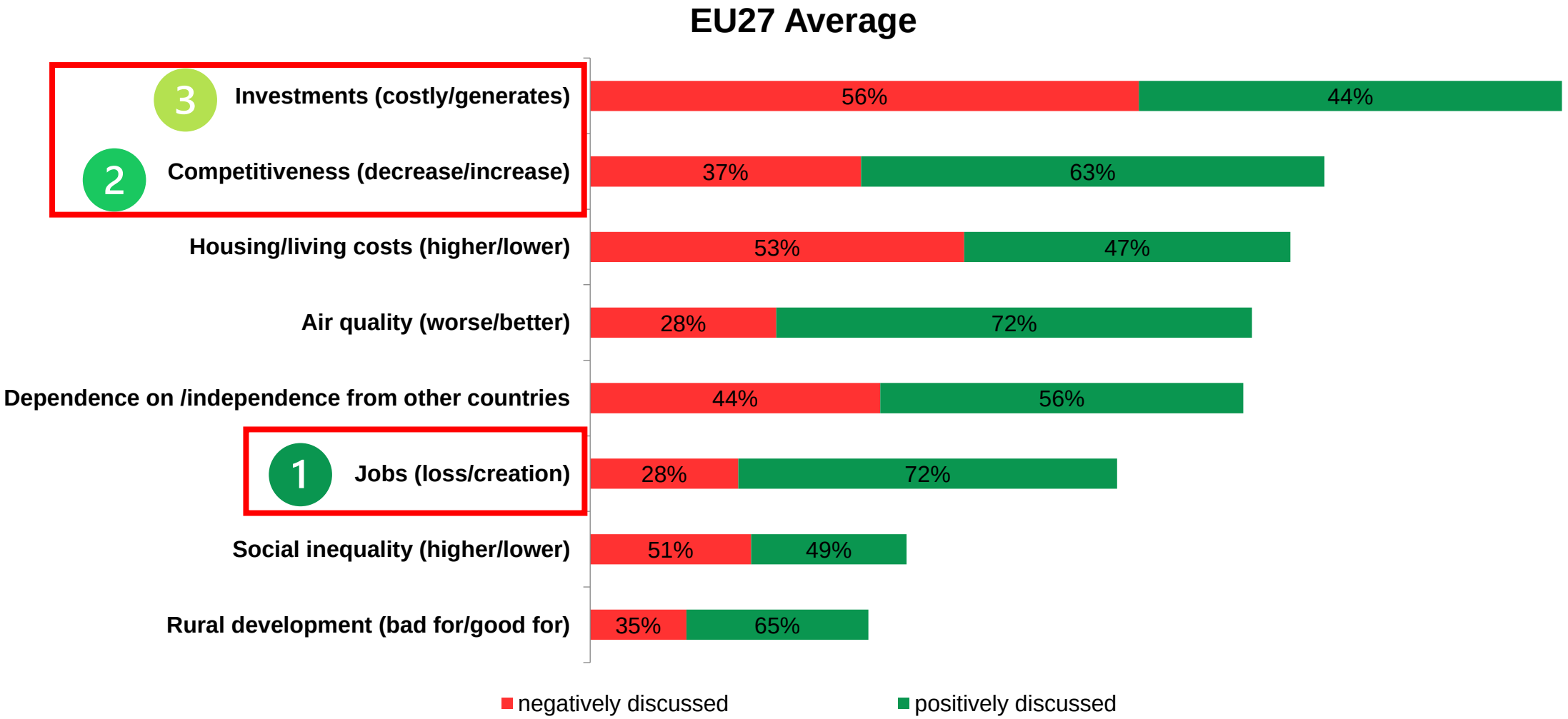
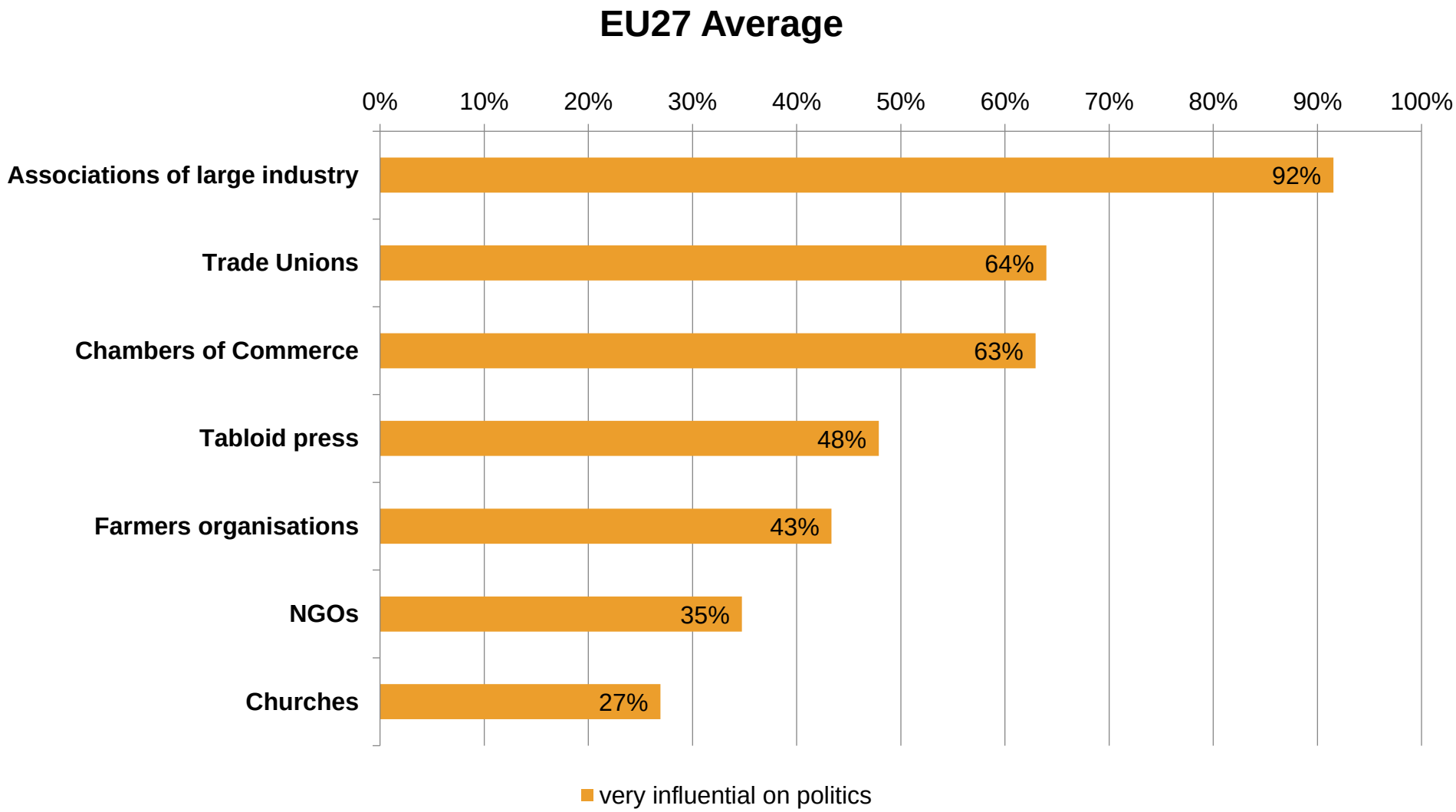


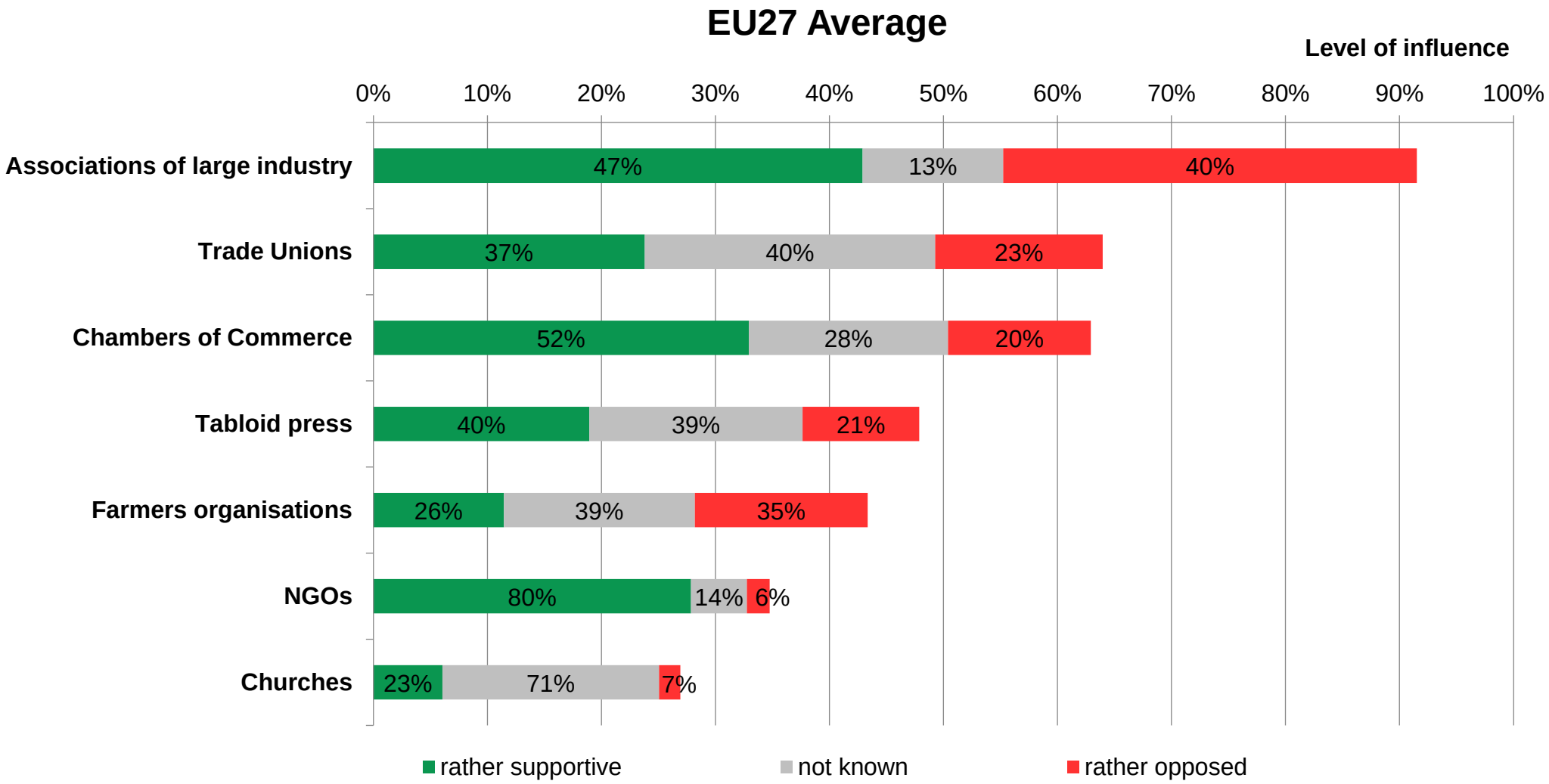
EU27: In general, how influential are these actor groups on politics in your country?



Influence of actor groups on politics – Ranking in Member States

	Large industry associations	Trade Unions	Chambers of Commerce	Tabloid press	Farmers organisations	NGOs	Churches
EU27	1	2	3	4	5	6	7
Austria	1	3	2	4	5	6	7
Belgium	1	2	3	6	4	5	7
Bulgaria	1	4	2	3	6	5	7
Croatia	2	3	4	5	6	7	1
Cyprus	3	2	1	5	6	7	4
Czech R.	1	3	2	5	4	6	7
Denmark	1	2	5	6	3	4	7
Estonia	1	4	2	3	4	4	7
Finland	1	2	4	3	5	6	7
France	1	2	4	5	3	6	7
Germany	1	2	4	5	3	6	7
Greece	1	4	5	3	7	6	2
Hungary	1	5	2	4	6	6	3
Ireland	1	3	4	5	2	6	7
Italy	1	2	5	3	6	7	4
Latvia	2	4	1	6	3	4	7
Lithuania	1	5	3	4	2	6	7
Lux	1	3	2	5	5	4	7
Malta	2	1	3	4	7	5	5
NL	1	4	6	5	2	3	7
Poland	1	3	7	4	5	5	2
Portugal	1	3	4	2	7	5	6
Romania	1	2	6	3	7	5	4
Slovak R.	1	2	2	6	6	5	4
Slovenia	1	2	3	5	6	4	7
Spain	1	3	4	2	6	7	5
Sweden	1	2	3	6	5	4	7

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



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EU27: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed
Jobs	1	6	72 %	28 %
Industrial competitiveness	2	2	63 %	37 %
Modernisation / investments	3	1	44 %	56 %
Housing / living costs	4	3		
Air quality	5	4		
Independence from other countries	6	5		
Rural development	7	7		

Actor group	Influence on politics (ranking)	Supportive of energy transition	Opinion not known	Opposed to energy transition
Associations of large industry	1	47 %	13 %	40 %
Trade Unions	2	37 %	40 %	23 %
Chambers of Commerce	3	52 %	28 %	20 %
Tabloid press	4			
Farmers organisations	5			
NGOs	6			
Churches	7			

Are we talking about the right things?

And to the right people?

Conclusions: narratives - the missing WHY

- **"It's the economy, stupid"! (quote Bill Clinton)**
  More attention needed for the positive economic impacts of energy efficiency on **jobs, industry and competitiveness**

- **Buy-in from important stakeholder groups**
  Lack of Member State ambition is often due to **opposition of key stakeholder groups**

- **Are we talking about the right things? And to the right people?**
  New messages and new stakeholder interactions are needed to **speed up acceptance and participation**

- **Need for better data on benefits beyond climate protection and cost savings**
  EU data, indicators and quantification of **job and competitiveness impacts** of energy efficiency and the energy transition are needed to help shape the debate

- **Never waste a good crisis!**
  Unique opportunity to reposition energy efficiency as a key recovery strategy ("the fastest recovery is the green recovery") – but this requires much better **NARRATIVES!**

Communicating the EED ☺ ☺

Energy efficiency and the EED bring competitiveness and climate leadership

My factories will be more profitable

Industry
Nils S. Andersen, CEO, AkzoNobel/Unilever

There will be many new jobs

Trade Union
Laurent Berger, President, EU Trade Union

We will sell more energy efficiency products

Commerce
Christoph Leitl, President, Eurochambre

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The Energy Efficiency Watch Survey 2020

Thank you!

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