

The Energy Efficiency Watch Survey

The missing WHY for energy efficiency: towards new narratives



ENERGY EFFICIENCY WATCH



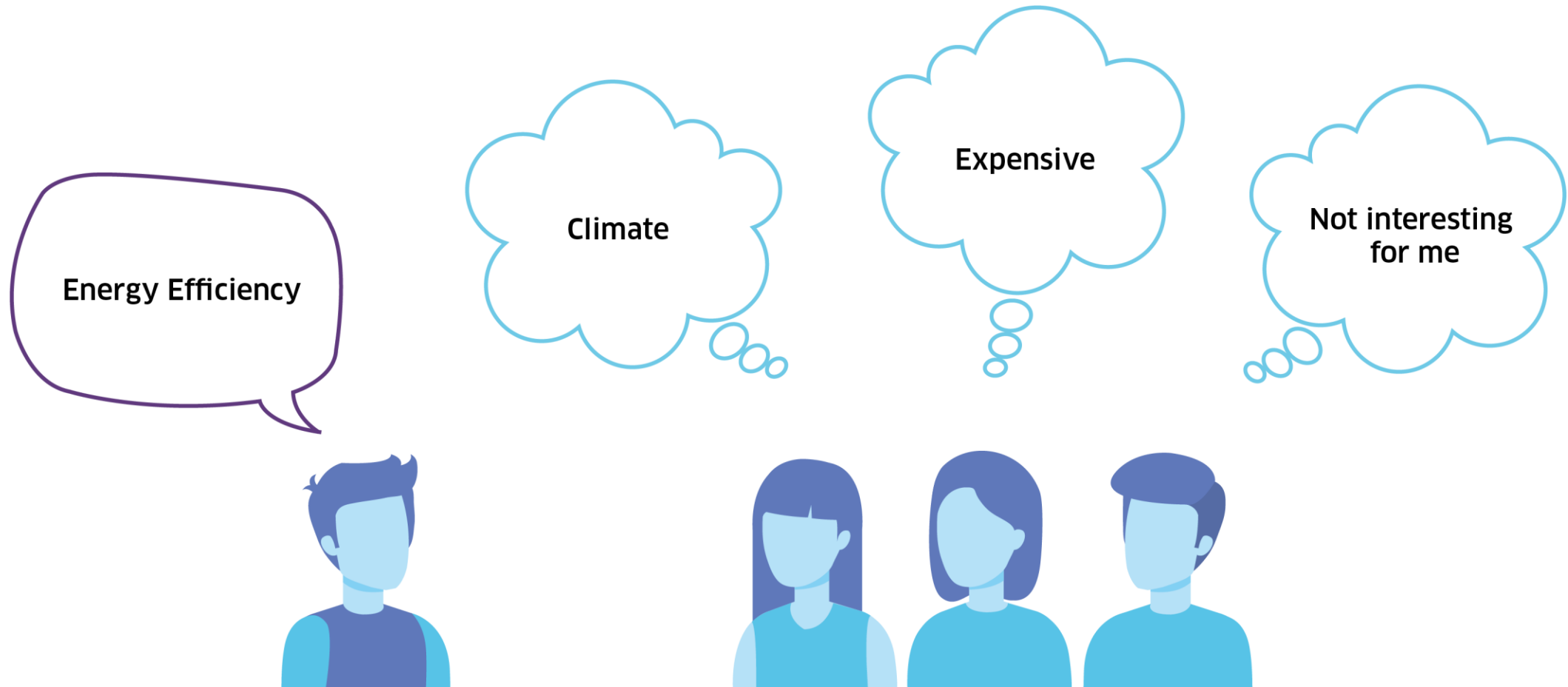
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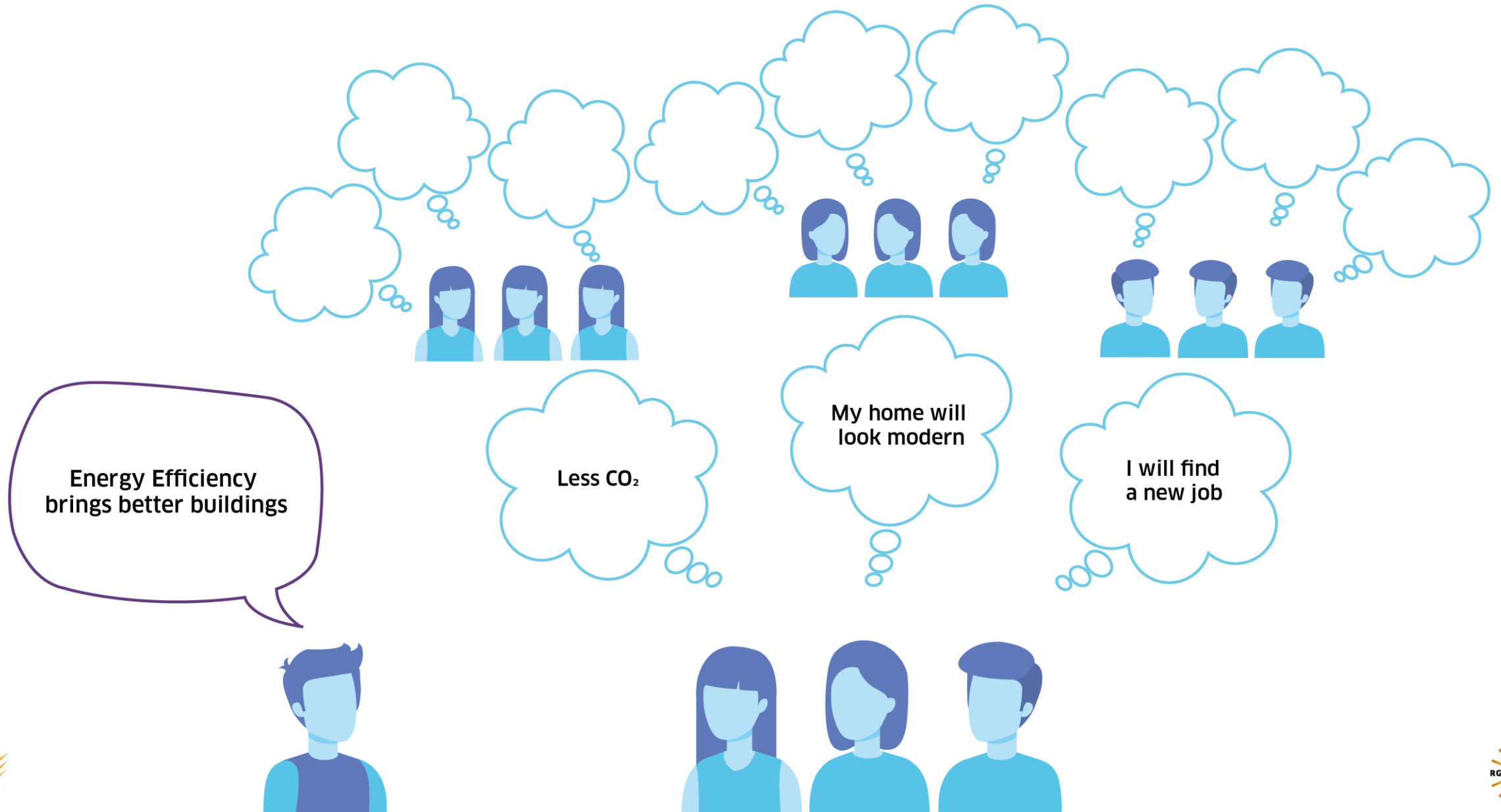
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The images in people's minds



Narratives: Gaining buy-in from wider groups in society



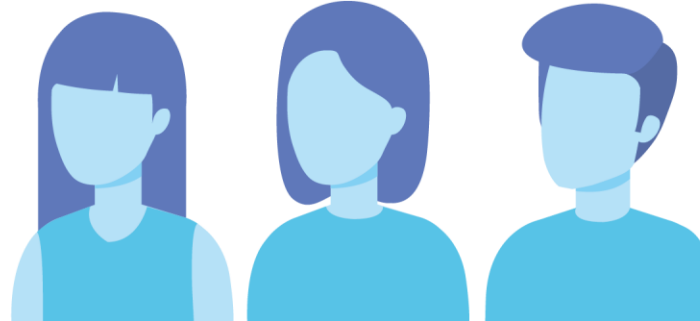
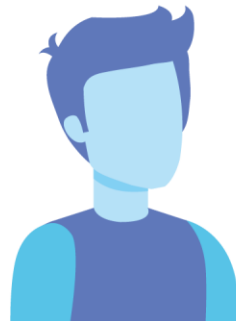
Narratives: We also need to overcome counter-narratives ("killer arguments")

Let's get serious about the energy transition!

Our industry will be less competitive and move away.

The poor will be disadvantaged as costs will increase.

Renovating my home doesn't pay off. And it is messy!



The Energy Efficiency Watch Project

Overall objective

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

Partners

Eufores, Navigant, OÖ Energiesparverband

3 networks: FEDARENE, Energy Cities, ECEEE (Borg & Co)

Target groups

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

4 phases

EEW1: 2006-2009, EEW2: 2009-2013, EEW3 2014-2017, **EEW4 2019-2022**, EEW5 approved😊

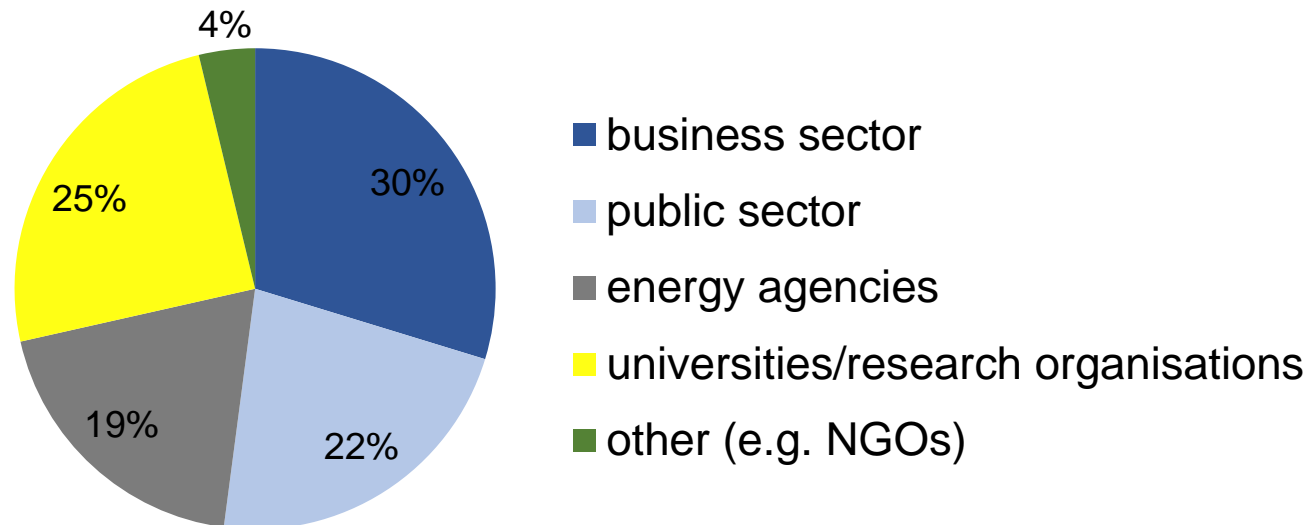
The Energy Efficiency Watch Survey

Objective of the survey:

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

More than 1,270 experts from all Member States participated (thanks!!)

EU27: Completed questionnaires by sector



Conclusions Energy Policy Progress

- **More of the same**

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

- **Ups and downs continue**

Levels of ambition in policy development and implementation keep fluctuating in many Member States

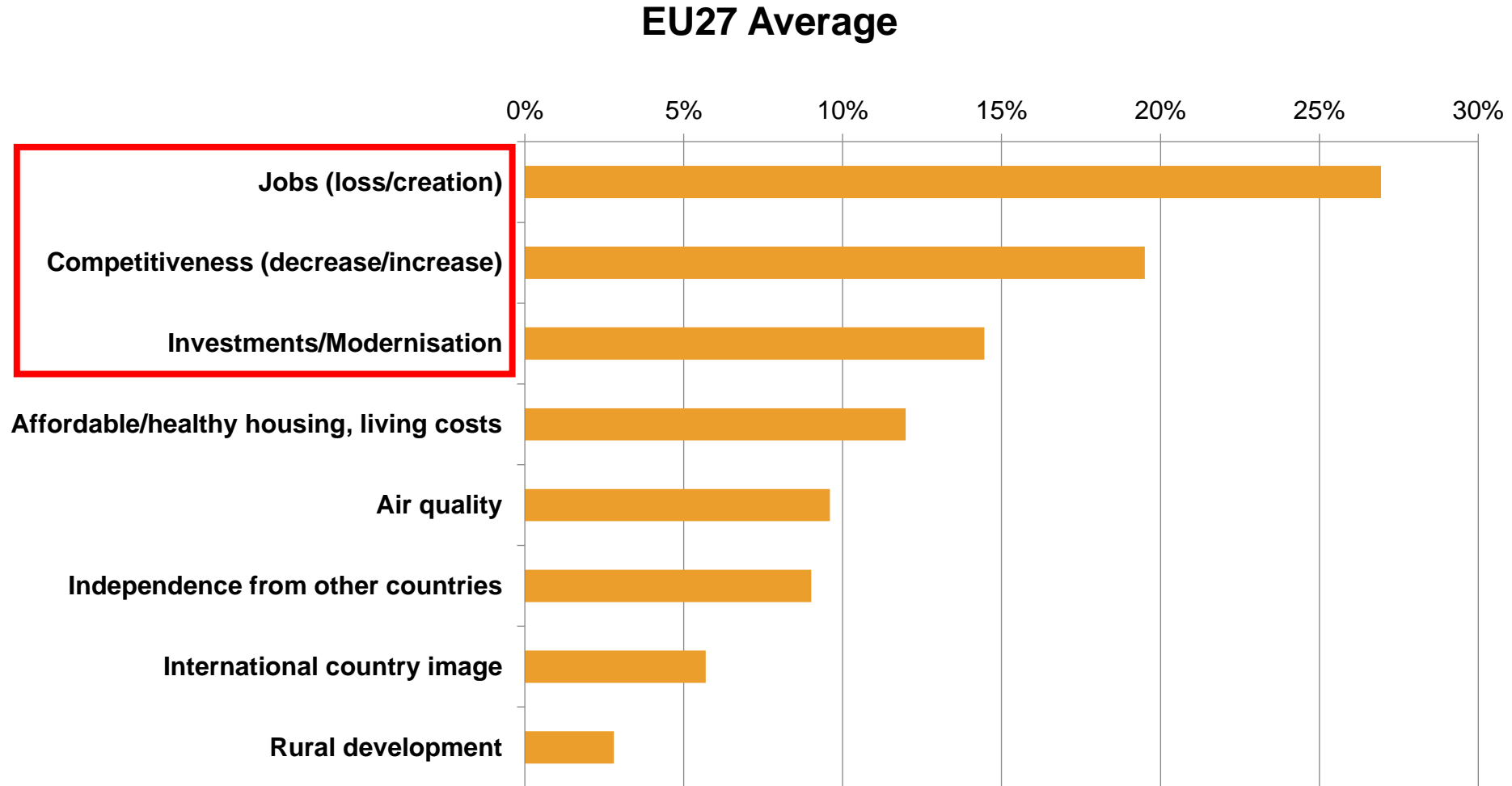
- **The WHY is often missing: lack of strong narratives**

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



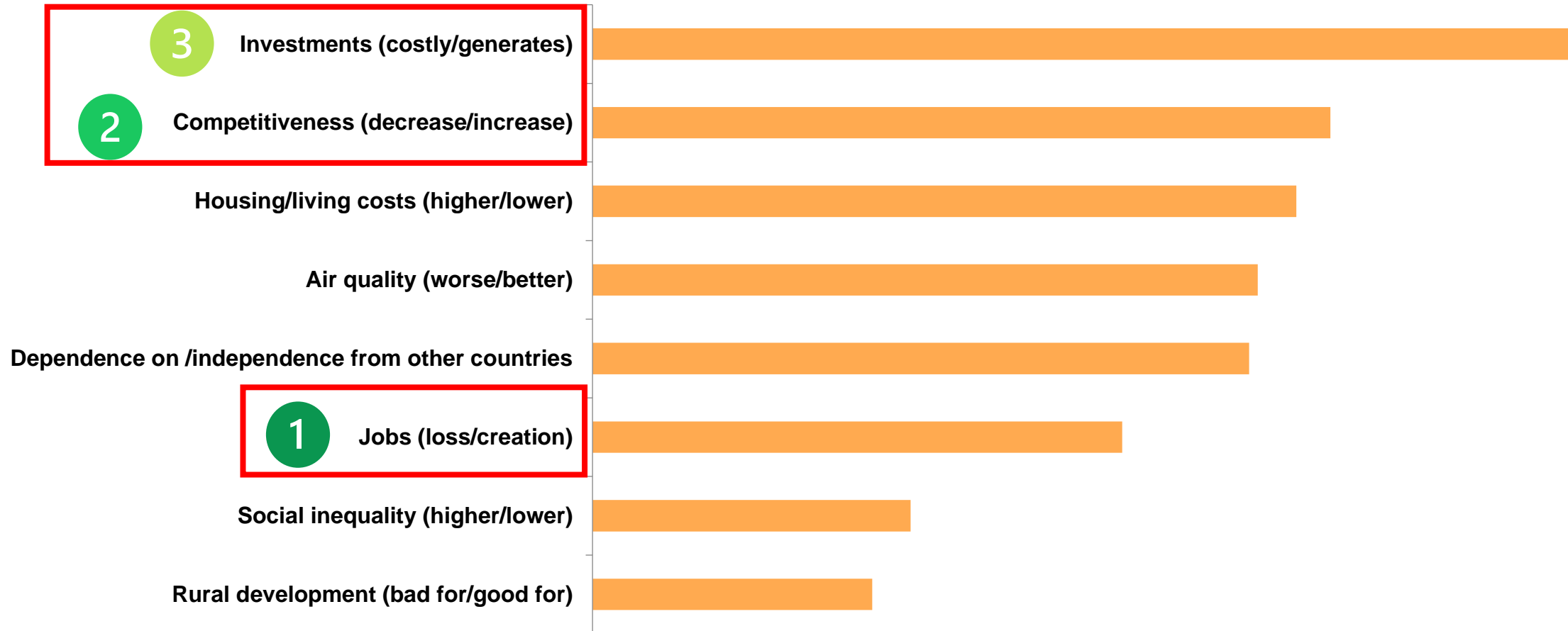
THE WHY: NARRATIVES

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



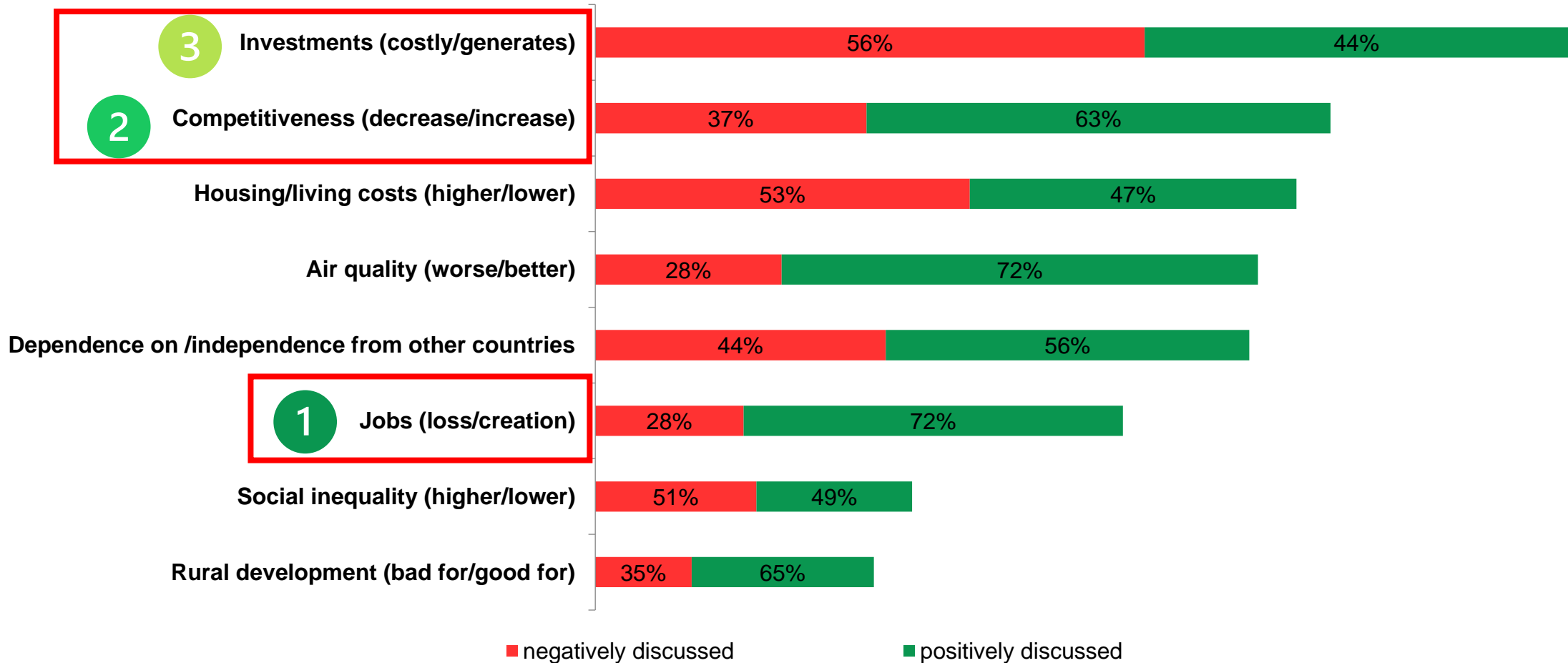
EU27: In the public debate in your country (media, politicians), is energy efficiency linked to the following arguments?

EU27 Average

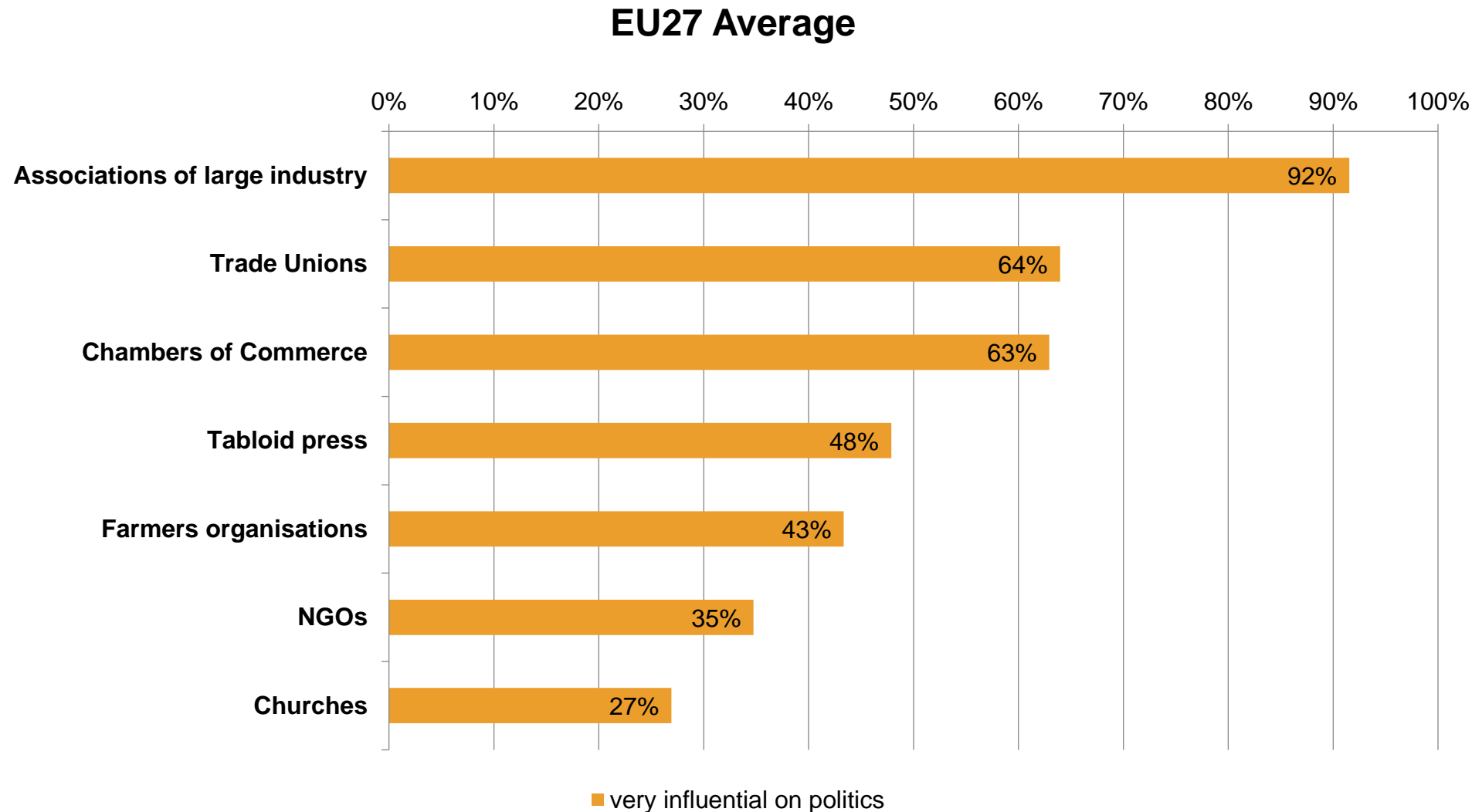


EU27: In the public debate in your country (media, politicians), is energy efficiency linked to the following arguments?

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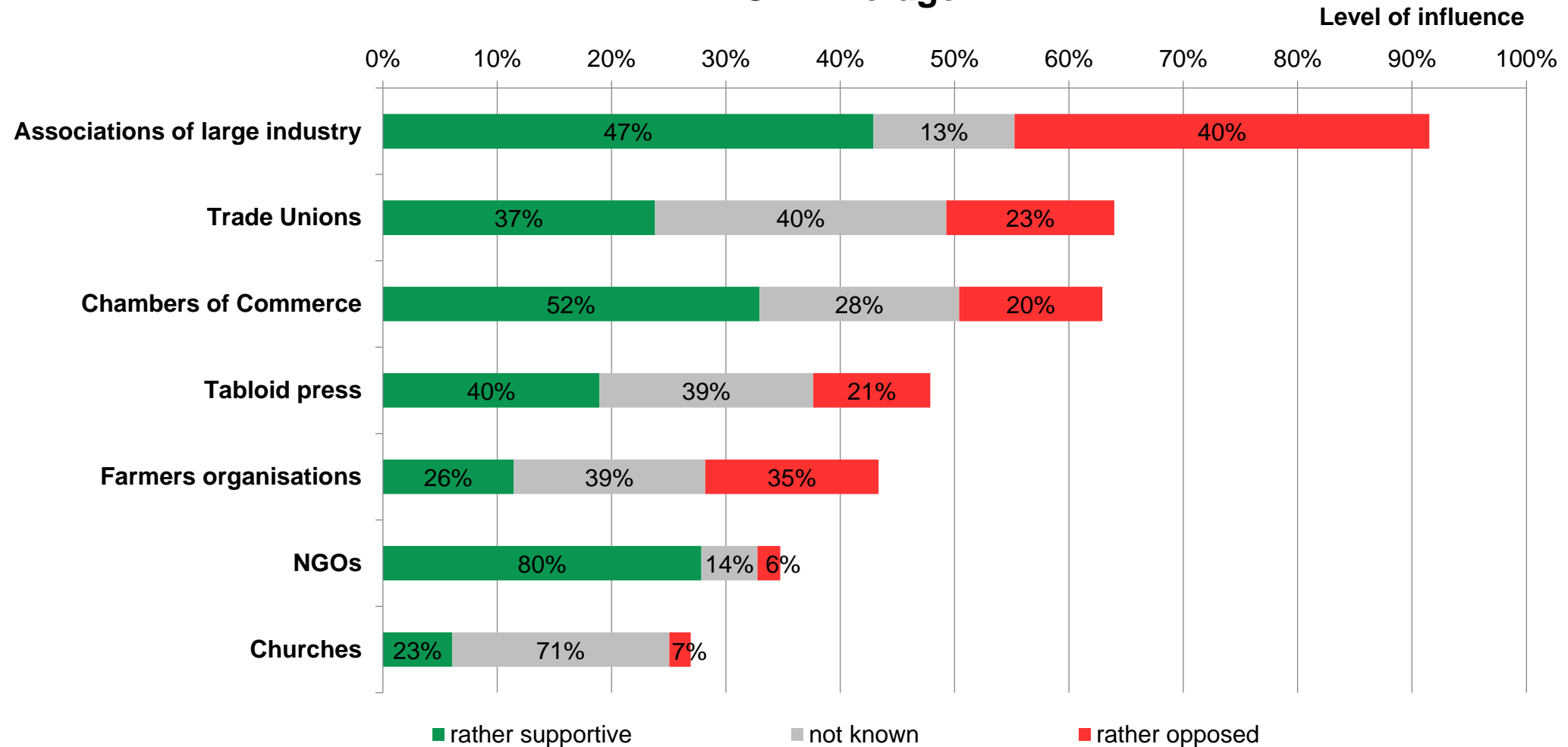


EU27: In general, how influential are these actor groups on politics in your country?



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

EU27 Average



EU27: Key input factors for narrative development

Topic	Importance in the public debate (ranking)	Topics linked to energy efficiency (ranking)	Positively discussed	Negatively discussed	Actor group	Influence on politics (ranking)	Supportive of energy transition	Opinion not known	Opposed to energy transition
Jobs	1	6	72 %	28 %	Associations of large industry	1	47 %	13 %	40 %
Industrial competitiveness	2	2	63 %	37 %	Trade Unions	2	37 %	40 %	23 %
Modernisation / investments	3	1	44 %	56 %	Chambers of Commerce	3	52 %	28 %	20 %
Housing / living costs	4	3			Tabloid press	4			
Air quality	5	4			Farmers organisations	5			
Independence from other countries	6	5			NGOs	6			
Rural development	7	7			Churches	7			

Are we talking about the right things?

And to the right people?

Conclusions: narratives - the missing WHY

- **"It's the economy, stupid"!** (quote Bill Clinton)

More attention needed for the positive economic impacts of energy efficiency on **jobs, industry and competitiveness** - and now **energy security**

- **Buy-in from important stakeholder groups**

Lack of Member State ambition is often due to **opposition of key stakeholder groups**

- **Are we talking about the right things? And to the right people?**

New messages and new stakeholder interactions are needed to **speed up acceptance and participation**

- **Need for better data on benefits beyond climate protection and cost savings**

EU data, indicators and quantification of **job and competitiveness impacts** of energy efficiency and the energy transition are needed to help shape the debate

- **Never waste an opportunity!**

Reposition energy efficiency (to REPowerEU) - but this requires much better **NARRATIVES!**

Thoughts on the implications of the Ukraine crisis

What should energy efficiency policies AND relevelated narratives look like in times like these?

- Current price crisis is also the result of insufficient attention to energy security (also ranked low in the survey) and also to energy efficiency
 - Public debate still very much focussed on supply options (clean and less clean ones☹), energy efficiency insufficiently perceived as a pillar of diversification in public debate
 - High fossil fuel prices will drive energy efficiency to a certain extent. But how sustainable will this impetus be? How far will it bring us? Certainly not the full potential!
 - What should new narratives for energy efficiency look like in times like these? Clear need for updating existing ones and remain flexible for new developments!
 - How can we – as the energy efficiency community - support such new narratives as one instrument in filling the "Energy Efficiency First" principle with life in all policy areas and for all energy consumers?
- > Focus of the Energy Efficiency Watch 5 project (please keep supporting us!)

The Energy Efficiency Watch Survey 2020

Thank you!



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