FONDAZIONE MAIRE

MAIRE

# CLIMATE GOALS

Winning the challenge of climate goals through the creation of skills and competences worldwide

## ADDENDUM 3: FOCUS NETHERLANDS

2026 Edition

Ipsos Doxa

# INDEX

# 1 INTRODUCTION
## to CLIMATE GOALS research 2026

By Ilaria Catastini, General Manager of Fondazione MAIRE - ETS

With the “Climate Goals” research, Fondazione MAIRE – ETS has been scouting, since 2023, at a worldwide level, public awareness and attitude towards the energy transition and people’s perception around the importance and urgency of training skills and competences for the energy transition.

2026 (the fourth) edition of the “Climate Goals” research conducted with IPSOS, has added three more countries – Germany, Poland and the Netherlands - to the previous twelve ones – Italy, UK, Turkey, Algeria, KSA, UAE, India, China, USA, Chile, Azerbaijan, Kazakhstan, Qatar and Argentina – improving the focus on Europe, that now has five countries under the lens, including Italy and UK, sounded in 2023.

You will find in the next chapter of this report the executive summary focusing on the Netherlands and the complete research comparing data across 17 countries that cover 4 continents. The study involved since the beginning more than 2,850 individuals, selected for their extensive knowledge in the field of environmental sustainability. This target was chosen for its advanced level of education and active engagement with environmental matters. The main goal in focusing on such individuals was to obtain responses that explore the finer details, going beyond the surface-level understandings that often come with complex issues. This approach was used to learn more about the details and different viewpoints that shape energy transition strategies.



## 1.1 Considerations on the global results

Looking at which of the 17 Country has major **awareness** on the energy transition processes and which has less, according to results of all our interviews, the “champion” is Germany, with 64% of the respondents being very familiar with this concept, followed by India, with 63%, and then by Italy (60%) and by UK and the Netherlands (both 59%) while the last ones are Poland, with only 39% of respondents resulting very familiar with the energy transition, Argentina, with 36% and, last, Kazakhstan, with 29%.

The climate agenda is competing with other topics and issues but the energy transition remains a priority for 70% of the respondents in India and Turkey, followed by 67% of Qatar and 65% of UAE. The three European Countries included in this edition of the survey have surprisingly set the energy transition among the lowest priorities; the lowest rate is in Poland, with only 20% of the sample giving it top priority (lower than Argentina and Kazakhstan) and 66% recognizing priority on par with other themes.

Algerians are the most convinced about the **opportunities** that the energy transition offers both for having a cleaner environment, better health and job opportunities. India and Saudi Arabia see a potential in energy transition to help increase women inclusion in the energy sector. China is the country that most recognizes the value of Energy Transition for the creation of new jobs and new occupation. Germany, The Netherlands and Poland see the creation of new jobs as the main benefit of the Energy Transition.

India, with 71% of respondents, and Saudi Arabia, with 62%, are the countries that better evaluate positively the **commitment of their Governments** in the Energy Transition as a priority. The lower evaluation comes from Kazakhstan with 15% and Argentina with 23%. Chinese respondents are the most convinced of their own country being ahead of other countries in the Energy Transition. India, Saudi Arabia, Qatar and the Emirates are the countries where Energy Transition seems to be at the same level of priority both for the respondents themselves and, in their perception, for the Governments, with levels varying between 60 and 70%. Germany and Poland are below the average rate among the 17 countries, while the Netherlands are slightly above it.

**Raising public awareness** about energy and environmental issues is a challenge manly for Algeria and China. **Engaging private companies** in renewable energy adoption is a particular challenge for Chile. Ensuring the **active involvement of all stakeholders** in energy transition process is a challenge mainly for China. Development and **implementation of new infrastructures** is very much considered in the UAE and in the USA. **Training of professionals** in the energy transition process is a key goal in particular in Azerbaijan, while Qatar is the country that results more sensible to the risk of **Job losses** in traditional sectors that do not embrace sustainable solutions for the environment and climate. Government development of **energy and environmental policies** is considered especially significant in Turkey, Algeria, the USA, and the UK. Germany pays attention at the energy transition for the creation of **new jobs** in the green sector, while the Netherlands look with interest at the creation of international **networking and cooperation**.

Saudi Arabia is the country where respondents consider more appropriate the **efforts of the Institutions** in comparison with those of the private companies. The country where both engagement of Institutions and of the private companies is valued as more appropriate is China, while the country where they are both valued as more inappropriate is Kazakhstan. In Germany and Poland private companies and politicians are considered the key players for the energy transition, while in the Netherlands the Government is considered the key player.

Kazakhstan has the highest share of respondents concerned that energy transition **costs** will exceed benefits, with 57% fearing this in the short term and 34% in the long term. Germany, Poland and the Netherlands come soon after Kazakhstan, with half of the sample in the Netherlands considering costs outweighing benefits over the short term. In Saudi Arabia, on the contrary and surprisingly, 50% of respondents believes that benefits of the energy transition will outweigh the costs in the short period while in the long period costs and benefits will balance out.

In China almost half of respondents give a high value to **sustainable innovation**, of production processes, products and services and 68% of them consider **technology** as a relevant area of the energy transition. In Italy the propensity is lower, as also the perception of relevance of education and culture among the energy transition areas. Germany recognizes the potential of research and investment in new technologies to boost energy transition, leveraging on the excellence of its energy and E&C industry and of its university paths on energy engineering and science and environmental science, while the Netherlands relies on industries to innovate processes and products and on its Energy and Green Chemistry sectors to improve the Energy Transition.

The **need for training** on the energy transition is diffused everywhere, with very high rates almost in all countries, as also high almost everywhere is the belief that it is important to develop educational programs. Anyway, the country where the preparation is considered sufficient is India, with 28% of respondents saying they do no need to improve it, while the country with the highest rate of people considering not prepared on the emerging transition is Poland, across the 17 countries. **Perception of urgency** of training is higher in Germany, China and Chile and lower in Italy, Poland and Kazakhstan.

The equal importance of **technical and soft skills**, in the energy transition sector is commonly recognized. In Germany, Azerbaijan and other countries there is a wide awareness of problem solving as most important soft skill, while critical thinking, creativity and innovation are among the most required soft skills in this sector. Understanding environmental issues and analyse and assess their environmental impact is a technical skill which is highly required in Azerbaijan, while knowledge of various renewable energy sources is mainly required in Germany, the Netherlands, as also in Algeria and knowledge of alternative renewable raw materials and recycled materials to substitute traditional materials is highly required in Algeria, Qatar, China and USA.

**Availability of skilled professionals** for the energy transition is considered inappropriate in Kazakhstan (82% of respondents) and mostly appropriate in China and India.

As a result of this analysis, data seem to confirm that the engine of the energy transition has moved from western countries to emerging countries. This may contribute to significant changes in geo-economy and geo-politics. Some countries might get from the energy transition more opportunities than others to compete. Some countries will invest more than others in new technologies and processes to abate emissions, in renewable or circular feedstocks, in low carbon products. Some countries will provide more training for skilling and reskilling of workforce in shorter terms and will be earlier enablers of a radical change of paradigm in terms of production and distribution models capable to mitigate climate change, and in terms of capability of public administration and civil society to develop adaptation models.

## 1.2 Next steps

Across countries, there is a strong, unified recognition of the need for both soft and hard skills to develop well-rounded professionals, which is essential for advancing the energy transition. Technical expertise in renewable energies and sustainable technologies is crucial for fostering innovation and implementation, while soft skills such as problem-solving, adaptability, and critical thinking are vital for navigating the dynamic challenges of energy transitions. Governments, Institutions, business and society should do more, invest more, for providing this kind of training. Fondazione MAIRE – ETS is strongly committed to this goal and is carrying on several training projects for developing soft skills together with technical competence for the energy transition, dedicating a special effort to fill the gap of educational poverty and gender disparity, to make the transition more inclusive and to offer equal opportunities to all.

Fondazione MAIRE – ETS will go on spreading these data and information all over the world, as a matter of discussion and debate, that on our view should bring more attention to the investment that needs to be done to grow skills and competences for the energy transition worldwide.



# 2 KEY FINDINGS FROM RESEARCH WITH FOCUS ON THE NETHERLANDS

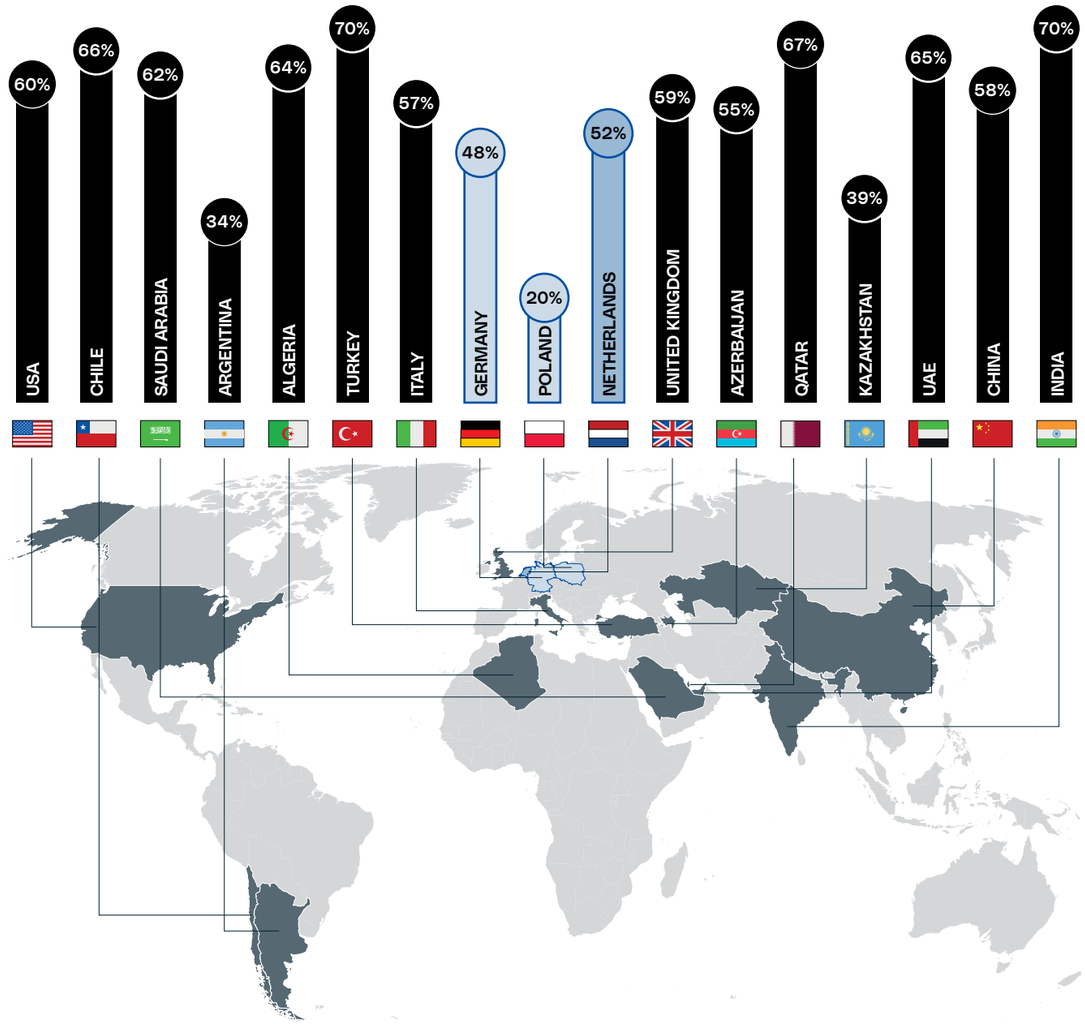
## 2.1 Overview

### How countries' respondents look at the energy transition as a priority

***Q.2.2*** *In your opinion, how important is energy transition? % It is a priority*

*Source: Ipsos Global Advisor*

Countries covered  Countries surveyed in 2025  Focus



# Perception of energy transition benefits across countries: awareness of occupational benefits and opportunity for the inclusion of women

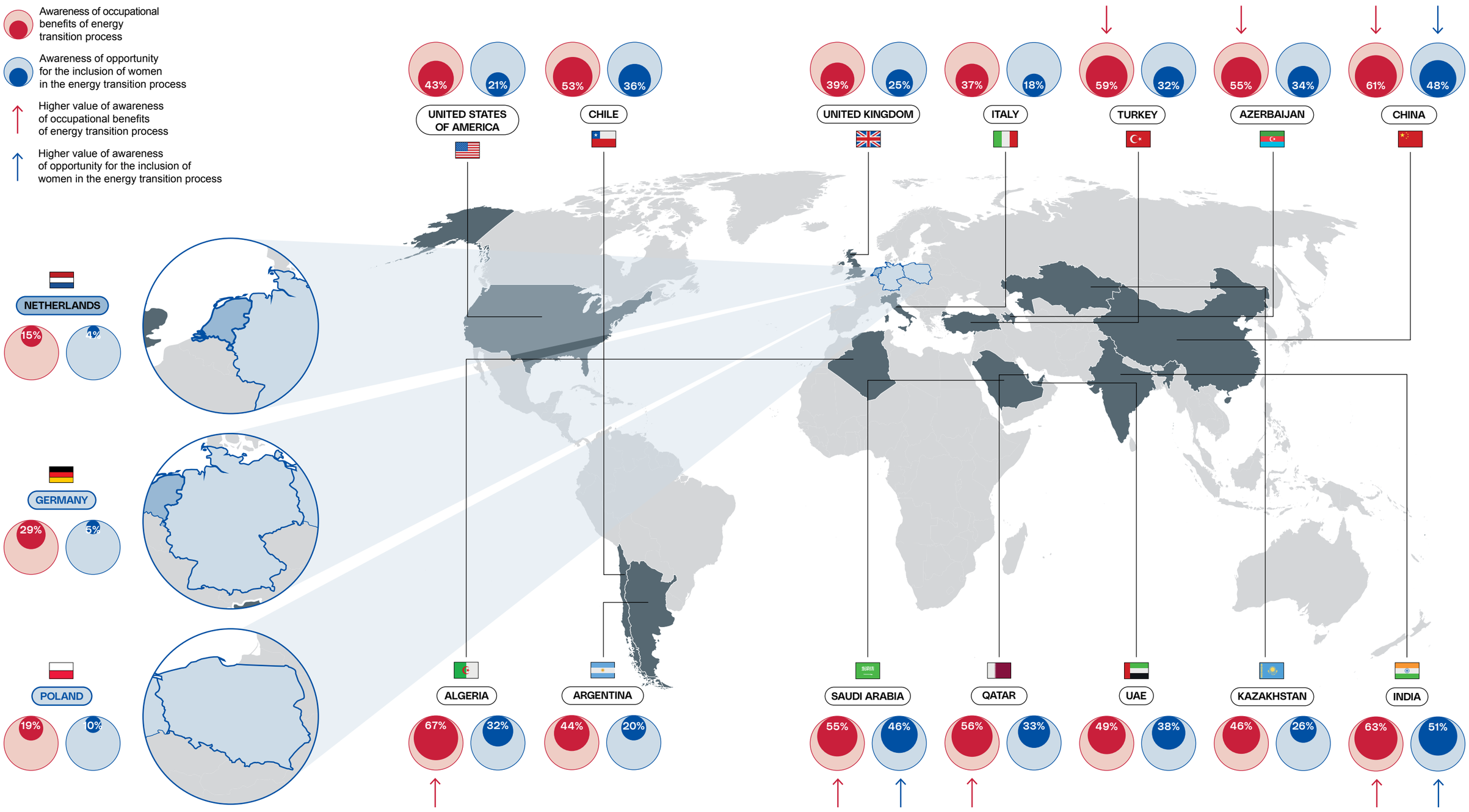
***Q.3A*** *How much do you agree or disagree with each of the following statements? Energy transition…*
Countries covered | Countries surveyed in 2025 | Focus

Awareness of occupational benefits of energy transition process

Awareness of opportunity for the inclusion of women in the energy transition process

Higher value of awareness of occupational benefits of energy transition process

Higher value of awareness of opportunity for the inclusion of women in the energy transition process



# Key skills and competences prioritized for energy transition

***Q9_1.*** *What are the most important personal skills for those involved in energy transition?*
***Q8_2.*** *What are main technical knowledge requirements for those involved in energy transition?*
Countries covered  Countries surveyed in 2025  Focus

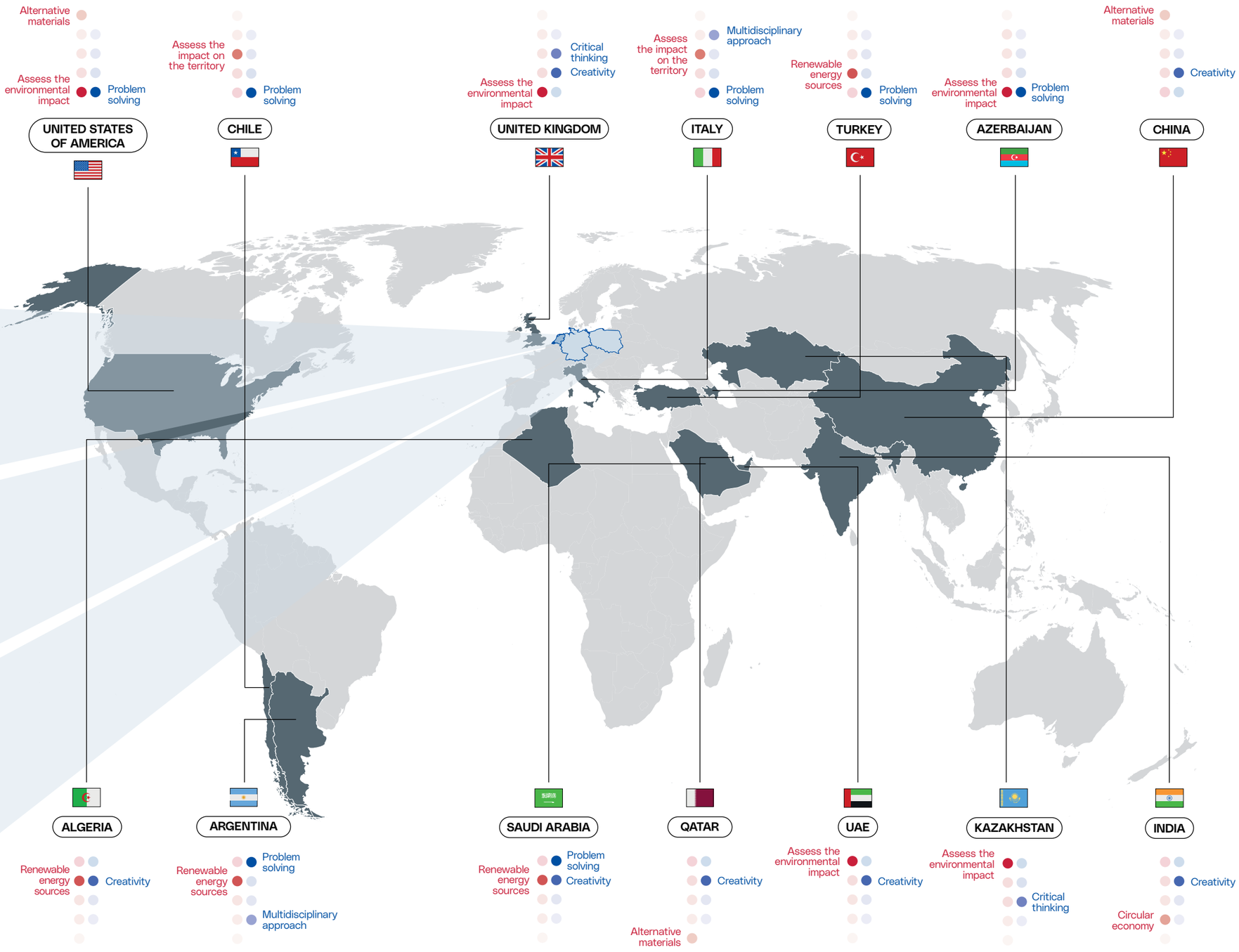
Alternative materials
Circular economy
Assess the impact on the territory
Renewable energy sources
Assess the environmental impact
Multidisciplinary approach
Critical thinking
Creativity
Problem solving

HARD SKILLS  SOFT SKILLS

**NETHERLANDS**
Renewable energy sources
Problem solving
Critical thinking
Alternative materials

**GERMANY**
Renewable energy sources
Problem solving

**POLAND**
Assess the environmental impact
Critical thinking



**UNITED STATES OF AMERICA**
Alternative materials
Assess the environmental impact
Problem solving

**CHILE**
Assess the impact on the territory
Problem solving

**UNITED KINGDOM**
Assess the environmental impact
Critical thinking
Creativity

**ITALY**
Assess the impact on the territory
Multidisciplinary approach
Problem solving

**TURKEY**
Renewable energy sources
Problem solving

**AZERBAIJAN**
Assess the environmental impact
Problem solving

**CHINA**
Alternative materials
Creativity

**ALGERIA**
Renewable energy sources
Creativity

**ARGENTINA**
Renewable energy sources
Problem solving
Multidisciplinary approach

**SAUDI ARABIA**
Renewable energy sources
Problem solving
Creativity

**QATAR**
Creativity
Alternative materials

**UAE**
Assess the environmental impact
Creativity

**KAZAKHSTAN**
Assess the environmental impact
Critical thinking

**INDIA**
Creativity
Circular economy

# 2.2 Executive summary: focus on the Netherlands

In the Netherlands, the energy transition has evolved beyond a simple engineering goal into a complex and systemic economic restructuring, demanding a sophisticated, corporate-led strategy anchored in financial innovation and circular models. This perspective positions the Netherlands as one of the most mature and committed markets in the 2025 European cohort, yet also one of the most demanding and critical. This national maturity is rooted in a near-universal awareness of the topic (98%), which is also remarkably deep, with a solid majority of the population (59%) feeling very familiar with its complexities [TAB1]. The Dutch are profoundly convinced of the environmental necessity of the shift, with 35% seeing it as vital for combating climate change and 30% for improving health benefits [TAB3]. Furthermore, they recognize the creation of new jobs in sustainable sectors as one of the key expected benefits (33%), viewing the transition as an engine for modernising the labour market [TAB7]. However, this optimism is balanced by a stark and sober realism about immediate hurdles. In fact, the Dutch are the most cautious among all Western economies regarding the short-term financial impact, with half the population believing that the costs will outweigh the benefits in the next 1-3 years, a clear signal that the transition is felt as a significant upfront investment [TAB13]. Their vision for navigating this challenge relies heavily on the private sector, with companies identified by a clear majority as the key players (57%) [TAB10], tasked with executing a uniquely Dutch industrial strategy that prioritises its strengths in Green Chemistry (43%) and production and innovation in the photovoltaic and wind sectors (42%) [TAB15.2]. The ideal professional to lead this charge is a "hybrid" thinker, a profile demanded by a staggering 75% of the population [TAB21], who must combine deep technical knowledge of renewable sources (47%) and, crucially, recycled materials (47%) [TAB23] with superior cognitive skills like critical thinking (57%) and problem-solving (56%) [TAB22].

Within the broader European landscape, the Netherlands solidifies its position as one the committed leaders by setting the pace for public conviction while simultaneously embodying the continent's shift towards a more realistic and practical approach. Its population shows a level of personal commitment that is unmatched in the 2025 cohort, with 52% viewing the transition as a top priority, placing it ahead of the more cautious Germany (48%) and far beyond Poland (20%), which lags at the bottom of the European ranking. This high level of personal commitment brings the Netherlands close to the levels shown by other mature Western economies like the UK (59%) and Italy (57%) in the 2023 data [TAB2], and it is paired with a distinctly sober self-assessment of its global standing in the energy transition process. For instance, despite the Netherlands' high ETI score, only a small minority (21%) believe their country is "ahead." Instead, the dominant feeling is one of being merely "on par" with other nations (57%), a sentiment of critical realism that closely mirrors the perspective in Germany (56%). This shared modesty, a belief in keeping pace rather than leading the charge, starkly contrasts with the "laggard anxiety" seen in Poland, where a majority (52%) feels the country is falling behind [TAB5]. These different self-perceptions are rooted in distinct national industrial identities, which become clear when examining what citizens demand from their governments. While the German public looks to its traditional engineering prowess, urging the state to focus on building more renewable plants (32%), the Dutch vision is distinctly financial. Their citizens demand that the government act as a market enabler, prioritizing the funding of new technologies (33%) and offering subsidies and incentives (31%) to unlock private capital [TAB15.1]. This strategic divergence reflects their perceived industrial strengths: Germany leans on its world-class Energy (44%) and Automotive (32%) sectors, whereas the Dutch strategy is powered by its excellence in Green Chemistry (43%), Energy (42%) and, uniquely, ICT/Digital solutions (33%). Poland, in contrast, charts a third course entirely, one focused on energy security and its natural assets, prioritizing Bioenergy and Sustainable Agriculture (35%) and showing the highest support in the cohort for nuclear power (24%) as a key part of the mix [TAB15.2]. Despite these different strategic paths, these mature economies are united by a shared, palpable realism about the immediate financial burden. A striking 50% of the Dutch population believes costs will outweigh benefits in the short term, a sentiment of heavy, upfront investment that is also deeply felt in Germany (33%), confirming that for all of them, the transition has moved beyond the phase of optimistic ambition and into a more challenging and costly period of execution [TAB13].

Globally, the Dutch data highlights a fundamental divide, painting a picture of a two-speed world where a cautious Western realism, shared by the Netherlands, stands in stark contrast to the confident, top-down dynamism of emerging markets. This divergence begins with national ambition and self-perception. While the Netherlands and its European peers engage in sober debates about costs and see themselves as merely keeping pace, nations like China, India, and the Gulf countries are driving forward with the conviction of a national mission. Their populations perceive them as global leaders in the transition, with a significant portion in China (52%) and India (43%) believing their country is "ahead" of others—a level of confidence far exceeding that of the Dutch (21%) [TAB5]. This difference in outlook is most pronounced in the approach to governance and human capital.

The Netherlands exhibits the strongest reliance on the private sector in Europe (57%) [TAB10], viewing the transition as a corporate-led endeavor. However, this reliance is fraught with tension; a substantial 43% of the Dutch public deems the current efforts of private companies "inappropriate," signaling a demanding and frustrated population that expects faster, more decisive results from its business leaders [TAB11]. This dynamic contributes to a broader confusion on talent. While the Dutch have a clear and sophisticated vision of the specific academic disciplines needed to succeed, such as Energy Engineering (47%), Environmental and Energy Sciences (45%) and Circular Economy and Sustainability (45%) [TAB18.1], there is profound uncertainty about the current availability of these professionals. A significant portion of the Dutch public (25%) admits they “don’t know” if the right skills exist in the country. This level of ambiguity is entirely absent in the monolithic confidence of emerging giants like China, where 96% of the population believes the availability of skilled professionals is appropriate, and India (89%), which shows similar self-assurance [TAB24].

This human capital dimension reveals the core strategic choice facing the Netherlands. An overwhelming majority of the Dutch population (70%) recognizes the need for upskilling, confirming that developing human capital is central to their long-term transition strategy [TAB17]. However, their approach to this upskilling is defined by a different temporal outlook that sets them apart. Unlike Germany, which demands an immediate (within the next 6-12 months) training sprint to close perceived skill gaps (53%), the Netherlands views workforce development as a more structural evolution. The largest group of Dutch respondents (41%) favors a 2-3 year timeline for implementation, suggesting a methodical, deliberate plan to integrate new competencies deeply into the workforce [TAB20]. This measured timeline does not signal a lack of priority, but rather a strategic preference for building sustainable, long-term capabilities that align with the complexity of their goals. The content of this structural evolution is also distinct and reflects the country's unique challenges and strengths. The ideal Dutch professional is not just a problem-solver, but a critical thinker. They are prized for their ability to innovate (42%) and, crucially, to apply a multidisciplinary approach (49%), the highest in the European cohort for this skill. In a country constrained by space and resources, the transition is not a linear engineering problem but a complex puzzle requiring out-of-the-box thinking to integrate disparate systems like chemistry, energy, and logistics into a coherent, circular whole [TAB22].

The Netherlands represents the advanced frontier of the European energy transition. It has moved beyond the foundational "why" and is now deeply entrenched in the complex, and often costly, "how." The Dutch view the transition as a capital-intensive, high-tech evolution centered on the sophisticated principles of green chemistry and a circular economy. The primary challenge for the Netherlands is no longer about waking up an unaware public, but about satisfying a critical, exceptionally well-informed population that demands financial clarity, corporate accountability, and truly innovative solutions. This makes their journey a testament to a uniquely Dutch realism: they are navigating a transition they know is essential for survival, not for the promise of an immediate economic boom, but with a clear-eyed determination to manage the high costs and complex realities of building a sustainable future.

# 2.3 Results of the research

## Table 1 Awareness on energy transition process

***Q1A.** Have you ever heard of **energy transition**?*

Base: Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| TOTAL AWARENESS | 97% | 95% | 98% | 97% | 98% | 90% | 96% | 97% | 95% | 96% | 93% | 98% | 95% | 96% | 99% | 96% | 97% |
| I am **very familiar with it** | **60** | **59** | **64** | **39** | **59** | **47** | 55 | 50 | **63** | **43** | **29** | **44** | **47** | 56 | **42** | **58** | **36** |
| I **have heard of it**, but I only have a vague idea | 37 | 36 | 34 | 58 | 39 | 43 | 41 | 47 | 32 | 53 | 64 | 54 | 48 | 40 | 57 | 38 | 61 |
| I have **never heard of it** | 3 | 5 | 2 | 3 | 2 | 10 | 4 | 3 | 5 | 4 | 7 | 2 | 5 | 4 | 1 | 4 | 3 |

**Focus**

**Countries surveyed in 2025**

Higher values

Lower values

Based on the results from Table 1 regarding the awareness of the energy transition process, the data reveal that while general awareness is nearly universal across all surveyed countries, the depth of that understanding varies significantly. Among the European countries surveyed in 2025, Germany stands out as the clear leader in terms of competence, with 64% of respondents stating they are very familiar with the process, suggesting that the topic is deeply embedded in public discourse. The Netherlands follows a pattern typical of mature economies, reporting a solid 59% familiarity rate, which indicates a well-informed population. In stark contrast, Poland presents a different scenario where, despite 97% of respondents having heard of the energy transition, the quality of this awareness is largely superficial. Only 39% feel very familiar with the topic, while the majority, 58%, admit to having only a vague idea.

> *As regards education for the general public, it is very adequate. I think the general public is aware there are spots, grants, stimulation measures.*
>
> **Academic, Netherlands**

Considering the European context, the data align Germany and the Netherlands closely with the major Western European economies. Specifically, Italy and the UK, which were surveyed in 2023, recorded familiarity levels of 60% and 59% respectively. This consistency suggests a homogenous level of high understanding across Western Europe, where roughly six out of ten informed citizens feel confident in their knowledge of the transition. Consequently, Poland's lower familiarity score highlights a distinct regional gap, positioning it significantly behind its Western counterparts and indicating a specific need for deeper educational engagement in that market.

Expanding the analysis to the global stage, the United States mirrors the Western European profile with a 58% familiarity score, confirming that the informed population in the US is as knowledgeable as their peers in the Netherlands. In contrast to the solid knowledge base observed in Western economies, China and Argentina (surveyed in 2025 as well) reveal a less positive landscape characterized by superficial awareness. Despite China's industrial leadership in the sector, the depth of public understanding is comparatively low, with 44% of respondents feeling very familiar with the transition process. The situation is even more pronounced in Argentina, which recorded the lowest familiarity score of the entire 2025 cohort at just 36%. This data strongly aligns Argentina with the profile observed in Poland, as both nations see a clear majority of their populations admitting to having only a vague idea of the concept.

## Table 2 Perceived importance of the energy transition process

***Q2_2.** In **your opinion**, how important is energy transition?*

Base:
Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| It's a **priority** | 57 | 59 | 48 | **20** | 52 | **70** | **62** | **65** | **70** | 55 | **39** | 58 | **67** | **64** | **66** | **60** | **34** |
| It is important, but **on par with other areas of commitment** | 41 | 40 | 44 | 66 | 45 | 28 | 35 | 34 | 29 | 39 | 55 | 40 | 31 | 35 | 31 | 37 | 62 |
| It is of **secondary importance** | 2 | 1 | 8 | 14 | 3 | 2 | 3 | 1 | 1 | 6 | 6 | 2 | 2 | 1 | 3 | 3 | 4 |

**Focus**

**Countries surveyed in 2025**

Higher values

Lower values

The results for Europe uncover a significant divergence in how the energy transition is prioritized across the continent, clearly indicating that the climate agenda is currently competing with other pressing priorities. The Netherlands emerges as the most committed nation, with over half of the respondents viewing the process as a top priority. Germany follows closely but displays a slightly more divided sentiment; while nearly half of the population considers it a priority, and 44% view it as important as other commitments, reflecting a balanced but cautious approach. The most striking outlier, however, is Poland, where the sense of urgency is the lowest. Only one in five Polish respondents classifies the transition as a priority, with the vast majority relegating it to a status on par with other national concerns (66%). This trend makes it evident that across the region, the energy transition is increasingly being weighed against other critical domestic priorities, making it difficult to elevate the climate agenda above other immediate socio-economic challenges.

> *I think it is a priority and that it is also clear from the policies from the European Commission.*
>
> **Institution, Netherlands**

The Gulf and Asian markets, including Saudi Arabia (62% in 2023), the United Arab Emirates (65% in 2023), India (65% in 2023), Qatar (67% in 2025), and Turkey (70% in 2023), consistently show remarkably high levels of perceived importance for the energy transition, often surpassing European averages. These nations demonstrate that their populations perceive the energy transition as a strategic imperative driven by an increasing awareness of climate change impacts and governmental strategies for economic diversification and investment in renewable energy. China also reinforces this trend of high engagement, reporting a 58% priority score in 2025. The United States shows a high sense of urgency as well, with 60% of respondents rating the transition as a priority. In stark contrast, Argentina offers a much more subdued perspective that mirrors the Polish scenario; with only 34% of respondents viewing the transition as a priority, the energy agenda in Argentina is struggling to gain traction against other immediate socio-economic demands.

## Table 3 The energy transition perception across countries

*Q3_A. To what extent do you agree or disagree with each of the following statements? Energy transition...*

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| It is crucial for **combating climate change and global warming** | **38** | **52** | **37** | 21 | **35** | | **65** | **62** | **61** | **62** | **64** | **53** | **68** | **62** | **74** | **65** | **49** | **48** |
| It **creates new job opportunities** in the renewable energy and clean technology sectors | 37 | 39 | 29 | 19 | 15 | | **59** | **55** | 49 | **63** | **55** | 46 | **61** | **56** | **67** | 53 | 43 | **44** |
| It **reduces dependence on imported energy sources** and the risk of **supply disruptions** | 36 | 39 | 34 | **24** | 24 | | 49 | 53 | 47 | **61** | 43 | 43 | **61** | 48 | 52 | 52 | 35 | 35 |
| It significantly **benefits human health and the environment** by reducing greenhouse gas emissions and air pollution | 36 | **42** | **43** | **23** | **30** | | **59** | **58** | **58** | **65** | **58** | **61** | **66** | **57** | **79** | **66** | **49** | **47** |
| It **leads to better energy efficiency**, reducing long-term costs | 35 | 38 | 28 | 18 | 15 | | **57** | 52 | 51 | **61** | **52** | 40 | **61** | **53** | **62** | **56** | 41 | **38** |
| Investment in energy transition **is a priority over other areas** | 25 | 29 | 15 | 12 | 13 | | 41 | **55** | 49 | **58** | 40 | 32 | 53 | 43 | 45 | 37 | 28 | 21 |
| It **represents an opportunity for more female participation** and provides **new employment opportunities for women** | 18 | 25 | 5 | 10 | 4 | | 32 | **46** | 38 | **51** | 34 | 26 | 48 | 33 | 32 | 36 | 21 | 20 |

**Focus**

**Countries surveyed in 2025**

Higher values are highlighted

The detailed perception of the energy transition, as shown in Table 3, reveals varying attitudes regarding its benefits, particularly concerning its role in combating climate change and improving health and the environment.

In Germany, the perception of benefits is anchored in environmental and health factors: 43% of respondents recognize significant advantages for human health, and 37% acknowledge its crucial role in combating global warming.

In the Netherlands, respondents similarly prioritize fighting global warming (35%) and health benefits (30%). Poland records generally lower scores, with one in five respondents for each prioritizing benefits to human health and the environment, and its crucial role in combating global warming.

Broadening the analysis beyond the Europe, the sentiment is more optimistic, particularly in Gulf and Asian countries. These regions consistently show a strong endorsement of the energy transition's environmental and health benefits. For instance, China stands out with a remarkable 68% of respondents believing the transition is crucial for combating climate change and global warming, and 66% seeing significant benefits for human health and the environment. Qatar also reflects this optimism, with 62% for combating climate change and 57% for health and environmental benefits.
The United States also displays a more positive outlook than its European counterparts, with nearly half of the population recognising the crucial role of the transition in combating climate change and improving health. Even Argentina and Chile maintain a high perception of its benefits regarding combating climate change and improving health, aligning closer to the USA.

## Table 4 Countries' commitment to the energy transition

ENERGY TRANSITION is the shift from traditional fossil-based energy sources and raw materials to renewable, recycled, and sustainable energy sources and raw materials to reduce greenhouse gas emissions and address climate change

*Q2_1. Which of the following statements best describes the level of commitment in your country?*

Base: Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| It's a **priority** | **53** | **51** | 41 | **21** | 47 | **37** | **62** | **55** | **71** | **31** | **15** | **57** | **57** | **38** | 48 | 48 | **23** |
| It is important, but **on par with other areas of commitment** | 40 | 42 | 47 | 66 | 48 | 42 | 34 | 40 | 26 | 50 | 58 | 41 | 36 | 43 | 41 | 38 | 53 |
| It is of **secondary importance** | 7 | 7 | 12 | 13 | 5 | 21 | 4 | 5 | 3 | 19 | 27 | 2 | 7 | 19 | 11 | 14 | 24 |

Focus

Countries surveyed in 2025

Higher values

Lower values

## Table 5 Country positioning on the energy transition

*Q13. In your opinion, how would you rank **your country's level in the energy transition process**?*

Base: Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| **Ahead** of other countries | **8** | **29** | **16** | **5** | **21** | **14** | **41** | **44** | **43** | **16** | **2** | **52** | **26** | **1** | **20** | **33** | **3** |
| **On par** with other countries | 47 | 46 | 56 | 43 | 57 | 26 | 46 | 42 | 46 | 29 | 12 | 44 | 51 | 41 | 29 | 32 | 30 |
| **Behind** other countries | 45 | 25 | 28 | 52 | 22 | 60 | 13 | 14 | 11 | 55 | 86 | 4 | 23 | 58 | 51 | 35 | 67 |

Focus

Countries surveyed in 2025

Higher values

Lower values

**RANK BY ETI SCORE***

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| 2023 | **38°** | **13°** | 11° | 40° | 9° | **65°** | **57°** | **63°** | **67°** | 32° | 76° | 17° | 59° | **86°** | **30°** | 12° | 85° |
| 2024 | 41° | 13° | 11° | 31° | 10° | 59° | 58° | 52° | 63° | **38°** | **98°** | 17° | 50° | 91° | 20° | 19° | 82° |
| 2025 | 36° | 16° | **9°** | 43° | **8°** | 50° | 60° | 48° | 71° | 42° | 94° | **12°** | **75°** | 89° | 21° | **17°** | **57°** |

# Perceived importance vs Country positioning on the energy transition

***Q2_2.** In **your opinion**, how important is energy transition?*

***Q2_1.** Which of the following statements best describes the level of commitment in your country?*

***Q13.** In your opinion, how would you rank **your country's level in the energy transition process**?*

Base:
Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Priority for **ME** | 57 | 59 | 48 | 20 | 52 | 70 | 62 | 65 | 70 | 55 | 39 | 58 | 67 | 64 | 66 | 60 | 34 |
| Priority for **COUNTRY** | 53 | 51 | 41 | 21 | 47 | 37 | 62 | 55 | 71 | 31 | 15 | 57 | 57 | 38 | 48 | 48 | 23 |
| Country's level in the energy transition process: **BEHIND** other countries | 45 | 25 | 28 | 52 | 22 | 60 | 13 | 14 | 11 | 55 | 86 | 4 | 23 | 58 | 51 | 35 | 67 |

**Focus**

**Countries surveyed in 2025**

Higher values

Lower values

The assessment of national commitment and positioning among the European nations reflects a pervasive sense of critical realism. The Netherlands maintains the most balanced outlook, with nearly half of the respondents (47%) perceiving the transition as a national priority and believing the country is keeping pace with its peers (57%) or even being ahead (21%). Germany, despite its global reputation as a leader in green technology, reveals a surprisingly modest self-image; fewer than half of the citizens view the transition as a top national priority, and only a small minority consider the country to be ahead of others (16%) while 28% view Germany as lagging behind other countries, suggesting that high internal standards are driving a critical self-reflection. Poland, consistent with previous indicators, presents the most negative scenario, where only one in five respondents sees the transition is seen as a priority, and a clear majority of the population (52%) explicitly acknowledges that the country is lagging behind other nations.

> *I think our positioning is [ed. note] ahead of other countries. At the point that our advantage is starting to work against us, more or less.*
>
> **Academic, Netherlands**

Beyond the European borders, the data reveal a dichotomy between perceived leadership and perceived backwardness. China, along with India and the Gulf nations (Saudi Arabia and the UAE), displays a robust confidence wherein the majority not only views the transition as a top national priority but also firmly believes that the country is ahead of the rest of the world, confirming a strong alignment between national narrative and public perception. The United States presents a more complex, conflicted narrative; while nearly half of the population asserts that the transition is a priority, 35% of respondents believe that the country is falling behind, highlighting frustration regarding the gap between ambition and perceived progress. Argentina sits at the opposite end of the spectrum, mirroring the pessimism found in Poland but with even greater intensity, as two-thirds of respondents feel that the country is behind, reflecting a deep scepticism about the nation's ability to keep up with the global shift.

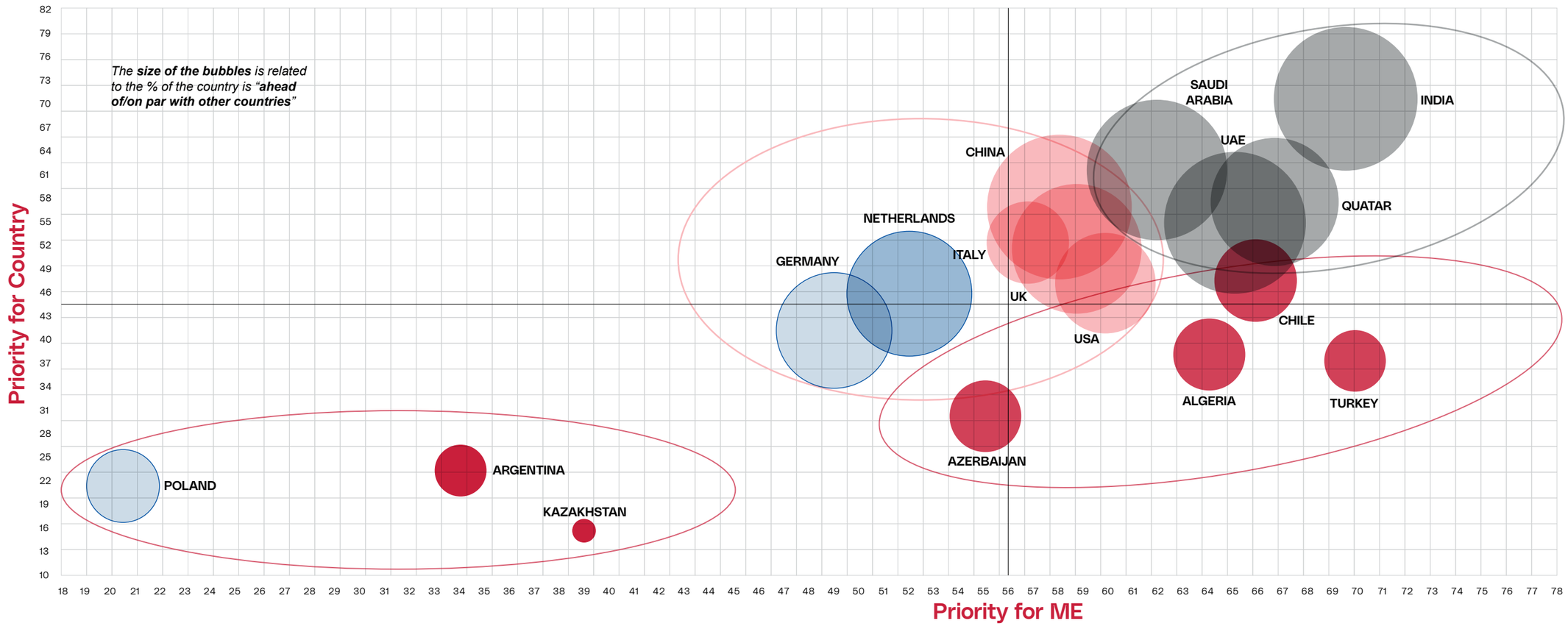
# Table 6 Positioning map

***Q2_2.*** *In* ***your opinion****, how important is energy transition?*

***Q2_1.*** *Which of the following statements best describes the level of commitment in your country?*

***Q13.*** *In your opinion, how would you rank* ***your country's level in the energy transition process****?*

Base:
Total Sample - % Values




The positioning map visually reinforces the fragmentation observed in the previous data points, placing Germany and the Netherlands in a central zone of moderate alignment. In these countries, the level of personal priority is matched by a respectable, though not outstanding, perception of national commitment, suggesting a mature but somewhat static equilibrium. Poland, however, isolates itself in the lower-left quadrant of the map, characterised by both low personal urgency and low perceived state engagement. This distinct positioning highlights a systemic detachment in Poland, where the energy transition fails to gain traction either as a grassroots demand or a top-down government directive, effectively placing the country in a zone of inertia compared to its western neighbours.

> *I would say the Netherlands is in the group of countries, ahead. I wouldn't say it is leading. But we have to be really keen on keeping that speed and position.*
>
> **Institution, Netherlands**

The distribution of the remaining global powers creates a striking contrast between the "optimistic leaders" and the "frustrated" populations. Emerging economic powerhouses such as India, the UAE, Saudi Arabia, and Qatar firmly dominate the upper-right territory, representing a virtuous cycle where high personal priority aligns seamlessly with perceived national progress. The positioning of Turkey, Algeria, Azerbaijan highlights contexts where citizens' personal priority is far ahead of the perceived country's attention towards the energy transition.

Finally, Argentina drifts towards the lower-left corner alongside Poland, illustrating a scenario where structural and economic headwinds effectively suppress both personal enthusiasm and the perception of national advancement.

# Table 7 Main opportunities and benefits of the energy transition

***Q5_1.*** *Which are main opportunities and benefits of energy transition?*

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Ensuring the **active involvement of all stakeholders** in the energy transition process | **32** | 21 | 16 | 19 | 13 | | 21 | 21 | 19 | 16 | 18 | 22 | **27** | 21 | 16 | **27** | 12 | 24 |
| Creation of **new jobs** in sectors focused on sustainability and climate solutions | 27 | **35** | **35** | **31** | **33** | | **36** | **37** | **33** | **39** | **31** | **31** | **43** | **35** | **37** | **32** | **34** | **32** |
| Development of energy and **environmental policies by the government** | 24 | 29 | 19 | 19 | 25 | | 27 | **32** | **29** | 23 | 32 | 19 | **27** | 26 | **30** | **32** | 23 | **31** |
| **Engagement of private companies** to adopt renewable energy | 24 | 19 | 17 | 18 | 15 | | 23 | 20 | 23 | 26 | 20 | 20 | 14 | 20 | 17 | 25 | 26 | **29** |
| Development and **implementation of new infrastructures** | 21 | 23 | 25 | 25 | 26 | | 21 | 21 | 22 | 25 | 25 | 25 | 24 | 25 | **27** | 26 | 26 | 27 |
| **International collaboration** for sharing knowledge, resources, and experiences | 19 | 19 | 22 | 15 | 22 | | 17 | 19 | 18 | **29** | 19 | 22 | 23 | 25 | 25 | 16 | 24 | 17 |
| **Training of professionals** in the energy transition process | 18 | 12 | 18 | 19 | 14 | | 11 | 17 | 17 | 13 | 25 | 19 | 15 | 14 | 14 | 21 | 16 | 21 |
| **Raising public awareness** about energy and environmental issues | 17 | **35** | 17 | 27 | 24 | | **29** | 25 | **31** | **29** | 23 | **26** | **27** | **31** | **32** | 18 | **30** | 13 |
| *None of these* | *5* | *2* | *9* | *9* | *9* | | *2* | *1* | - | - | *1* | *3* | - | *1* | *1* | - | *4* | *3* |

**Focus**

**Countries surveyed in 2025**

The most mentioned options for each country are highlighted

The perception of opportunities reveals a pragmatic mindset (Table 7). Across Germany, the Netherlands, and Poland, the narrative is remarkably consistent, with the creation of new jobs in sustainable sectors emerging as the single most anticipated benefit. This suggests that for Northern and Eastern Europe, the energy transition is primarily viewed as an economic engine capable of revitalising the labour market and driving infrastructure development. These countries place significantly less value on the “social” dimension of the process (ensuring the active involvement of all stakeholders in the energy transition process), focusing instead on the tangible economic returns of infrastructure and employment.

Data confirm that the promise of "green employment" has become the universal selling point of the energy transition, transcending economic and political boundaries. China, the United States, Argentina, and the Gulf and South Asian markets, including India, Saudi Arabia, Qatar, and the UAE, all mirror the European trend by ranking job creation in sustainable sectors as a top opportunity, solidifying the view that the shift to sustainability is fundamentally an industrial opportunity. However, distinct regional priorities emerge in the secondary benefits. While the United States, China, the UAE and Qatar place significant emphasis on the need for raising public awareness to drive cultural change, Argentina aligns more closely with a statist approach, prioritising the development of government policies as a critical driver for success along with the engagement of private companies to adopt renewable energy. This desire for stronger institutional guidance is also evident in Saudi Arabia (32%) and Chile (32%).

> *When thinking about energy transition, I think also about educating and reskilling workforce and about the balance with the raw material transition. But we are only at the beginning.*
>
> **Institution, Netherlands**

# Table 8 Main challenges of the energy transition

***Q5_2.*** *In your opinion, what are the main challenges with energy transition process?*

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| **Raising public awareness** about energy and environmental issues | **27** | 17 | 20 | **27** | **29** | | **27** | **32** | 31 | 23 | 22 | 17 | **37** | 25 | **39** | 27 | 23 | 21 |
| **Engagement of private companies** to adopt renewable energy | **26** | **30** | 19 | 19 | 27 | | 17 | 17 | 14 | 26 | 17 | 21 | 20 | **27** | 22 | **40** | **30** | **30** |
| Ensuring the **active involvement of all stakeholders** in the energy transition process | **25** | **27** | 25 | 23 | 25 | | **28** | 25 | 23 | **32** | 21 | **31** | **35** | 23 | 15 | 32 | 22 | **27** |
| Development and **implementation of new infrastructures** | 23 | **33** | **32** | **27** | **31** | | **29** | **29** | **36** | **33** | **27** | **35** | 19 | **27** | 27 | 17 | **35** | **27** |
| **International collaboration** for sharing knowledge, resources, and experiences | 23 | 18 | 24 | 15 | **28** | | 16 | 27 | 21 | 17 | 22 | 14 | 21 | 20 | 24 | 14 | 18 | 21 |
| **Training of professionals** in the energy transition process | 21 | 17 | 18 | 15 | 14 | | 21 | 19 | 23 | 29 | **28** | 25 | 17 | 23 | 21 | 23 | 15 | 21 |
| **Job losses** in traditional sectors that do not embrace sustainable solutions for the environment and climate | 21 | 17 | 22 | **25** | 14 | | 20 | 21 | 20 | 15 | 20 | 17 | 18 | **27** | 19 | 12 | 15 | 19 |
| Development of **energy and environmental policies by the government** | 20 | **31** | 22 | **26** | 16 | | **33** | 21 | 22 | 25 | **27** | **27** | **28** | 24 | **31** | 31 | **32** | **26** |
| *None of these* | *2* | *2* | *4* | *7* | *2* | | *1* | *1* | *1* | - | *3* | *3* | *1* | - | - | - | *3* | *2* |

**Focus**

**Countries surveyed in 2025**

The main challenges for each country are highlighted

The analysis of the main challenges reveals a pragmatic focus on the structural complexities of the transition, moving beyond abstract concerns (Table 8). For Germany and the Netherlands, the primary hurdle is the tangible implementation of new infrastructures, which ranks as the top concern in both countries. Poland introduces a distinct layer of economic anxiety; while it shares the concern for infrastructure, it stands out with a significant fear regarding job losses in traditional sectors. This specific apprehension, which is far less pronounced in the Dutch context, highlights the unique socio-economic friction in Poland as it attempts to pivot away from its heavy reliance on conventional energy industries.

> *I think about reliable infrastructure, especially with regard to electrification and also, I think about $CO_2$ levies. But [ed. note.] they have to go hand in hand with upscaling infrastructures.*
>
> **Institution, Netherlands**

China presents a complex scenario where the primary obstacle is cultural, with 37% of respondents citing the need to raise public awareness as the main hurdle. Crucially, China also records a very high concern for the active involvement of all stakeholders (35%), a figure that surpasses those found in Western economies, indicating a challenge that spans both social and participatory fronts. In the USA 30% of respondents believe that the engagement of private companies is the main challenge, while 35% point to the need for new infrastructures development, suggesting a perceived gap between business execution and physical capacity. This is followed by the difficulty of developing government energy and environmental policies (32%). Argentina shares this scepticism towards the private sector, which ranks as its top challenge (30%), but presents a more fragmented landscape that also includes significant anxiety regarding stakeholder involvement. This effectively places the country at a crossroads, balancing the governance concerns seen in Asia with the structural needs of the West.

# Table 9 Opportunities vs challenges of the energy transition

***Q5_1.*** *Which are main opportunities and benefits of energy transition?*

***Q5_2.*** *In your opinion, what are the main challenges with the energy transition process?*

*Difference % of total mention Q5_1 vs Q5_2*

Base:
Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Development of **energy and environmental policies** by the government | 4 | -2 | -4 | **-8** | **9** | -6 | **11** | 7 | -2 | 5 | -8 | -1 | 2 | -1 | 1 | **-9** | 5 |
| Development and implementation of **new infrastructures** | -2 | **-10** | -7 | -2 | -5 | -8 | -8 | **-14** | -8 | -2 | **-10** | 5 | -2 | 0 | 9 | **-9** | 0 |
| **International collaboration** for sharing knowledge, resources, and experiences | -4 | 1 | -2 | 0 | -6 | 1 | **-8** | -3 | **12** | -3 | 8 | 2 | 5 | 1 | 2 | 6 | -4 |
| **Engagement of private companies** to adopt renewable energy | -2 | **-11** | -2 | -1 | **-12** | 6 | 3 | **9** | 0 | 3 | -1 | -6 | -7 | -5 | **-15** | -4 | -1 |
| **Raising public awareness** about energy and environmental issues | **-10** | **18** | -3 | 0 | -5 | 2 | -7 | 0 | 6 | 1 | 9 | **-10** | 6 | -7 | -9 | 7 | **-8** |
| **Training of professionals** in the energy transition process | -3 | -5 | 1 | 4 | 0 | **-10** | -2 | -6 | **-16** | -3 | -6 | -2 | **-9** | -7 | -2 | 1 | 0 |
| **Job creation** in traditional sectors that do not embrace sustainable solutions for the environment and climate* | **6** | **18** | **13** | **6** | **19** | **16** | **16** | **13** | **24** | **11** | **14** | **25** | **8** | **18** | **20** | **19** | **13** |
| Ensuring the **active involvement of all stakeholders** in the energy transition process | 7 | -6 | **-9** | -4 | **-12** | -7 | -4 | -4 | **-16** | -3 | **-9** | -8 | -2 | 1 | -5 | **-10** | -3 |

**Change in wording for Q5_2 "Job losses in traditional sectors that do not embrace sustainable solutions for the environment and climate"*

**Focus**

**Countries surveyed in 2025**

Negative/ positive differences are highlighted

The data shown in Table 9 reinforces the narrative that the energy transition is universally perceived as a labor market booster, yet the bottlenecks to achieving this potential vary dramatically. China and the United States share a robust optimism regarding employment, with net positive scores of +25 and +19 respectively, confirming that the industrial promise of the transition is its strongest global asset. However, the friction points reveal distinct systemic frustrations. China records a significant negative balance regarding public awareness (-10), suggesting that the primary battle is perceived as winning over the public mind to ensure social buy-in. Conversely, the United States struggles more with the development of environmental policies by the government and implementation of new infrastructures, indicating that in the American context, the priority lies in establishing robust regulatory frameworks to discipline the market.

Across Germany, the Netherlands, and Poland, the labor market remains the primary area where optimism decisively outweighs concern, with the Netherlands recording a particularly high positive net score (+19) regarding job creation. However, this economic hope is counterbalanced by significant structural skepticism. The Dutch view the involvement of stakeholders and particularly private companies as major challenges rather than opportunities, showing a striking negative gap (-12). Poland, meanwhile, directs its skepticism toward the government, recording a notable negative balance regarding policies (-8), suggesting that while the prospect of green jobs is attractive, the political roadmap is viewed with mistrust.

> *[…] there have been many measures from the Dutch government in order to stimulate both companies and private persons households to participate in the energy transition.*
>
> **Academic, Netherlands**

# Table 10 Key players in the energy transition

***Q7.** In your opinion, who are the key players in the energy transition in your country?*

*Ranked on Italy*

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Public entities/ government | **48** | 37 | 23 | 24 | **43** | | **57** | **34** | **39** | **39** | **66** | **53** | **55** | **55** | **42** | **57** | **36** | **47** |
| Private companies | **45** | **45** | **37** | **37** | **57** | | 37 | **39** | **43** | 32 | **29** | **34** | **42** | **37** | **41** | **56** | **42** | **45** |
| Citizens | 37 | 39 | **35** | 27 | 26 | | 37 | **37** | **35** | **36** | **47** | **38** | 28 | **40** | 30 | **45** | **38** | **45** |
| Scientists and experts | 27 | 31 | 29 | 21 | 28 | | 31 | 31 | 31 | **36** | 17 | 27 | **36** | 29 | **43** | 29 | 32 | 29 |
| Politicians from your country | 23 | **43** | **36** | **36** | **40** | | 37 | 13 | 16 | 27 | 18 | 13 | 27 | 21 | 25 | 33 | **37** | 29 |
| Engineers and technicians | 20 | 19 | 26 | 17 | 17 | | 13 | 20 | 24 | 19 | 21 | 33 | 31 | 15 | 11 | 12 | 23 | 18 |
| International organizations | 17 | 20 | 13 | 14 | 22 | | 15 | 26 | 27 | 25 | 23 | 14 | 16 | 22 | 14 | 16 | 15 | 19 |
| Politicians from other countries | **9** | 15 | 22 | 19 | 9 | | **7** | 13 | **9** | 13 | **7** | **3** | **6** | 9 | **4** | 6 | 9 | 5 |
| NGOs, non-profit organizations | **8** | **9** | 10 | **8** | **3** | | 17 | 22 | 17 | 18 | 17 | 11 | 9 | 19 | 16 | 11 | 12 | 11 |
| Journalists | **8** | **5** | **6** | **9** | **5** | | **5** | 13 | **6** | **5** | **7** | **3** | **5** | **7** | 21 | **4** | **6** | **3** |
| Climate change activists | **7** | 16 | 11 | 13 | **7** | | 12 | 21 | 22 | 27 | 11 | 31 | 14 | 13 | 30 | **7** | 15 | 10 |
| Celebrities and influencers | **7** | **5** | **5** | **6** | **5** | | **7** | 13 | 14 | 11 | 8 | 3 | 17 | 16 | 10 | **5** | **7** | **2** |

**Focus**

**Countries surveyed in 2025**

The most/least mentioned options for each country are highlighted

The identification of key players highlights the emergence of a model where the responsibility for the transition is increasingly shared between the state and the private sector (Table 10).

> *The contribution by the industry to the energy transition is mainly in adopting it by the different sectors from a user point of view.*
>
> **Academic, Netherlands**

China, while maintaining its traditional top-down structure with a dominant government role (55%), shows a massive expectation of the private sector (42%), indicating that the state provides the directive while companies are the essential engine of implementation. Argentina represents the most striking example of this coexistence, recording a near-perfect parity between public entities (47%) and private companies (45%), portraying the transition as a collective national mission where neither sector can succeed without the other. Additionally, Argentina emphasizes the role of citizens (45%). Even the United States, typically market-oriented, displays a balanced distribution of expectations between private companies (42%) and the government (36%), reinforcing the global consensus that a successful transition requires a hybrid model of public-private cooperation, including citizens (38%) and politicians (37%) as well.

The Netherlands exemplifies this synergistic approach, where the high expectation placed on private companies (57%) coexists with a strong reliance on public entities (43%) and politicians (40%), suggesting a scenario where industrial execution and government direction are seen as complementary forces. Germany and Poland reflect a more nuanced balance; while trust in abstract public entities is lower, the combined weight attributed to private companies and national politicians creates a governance structure where market forces and political leadership are expected to work in tandem to drive the process forward. Germany confirms a vital third dimension to this dynamic: the direct involvement of citizens (35%). This points to a decentralised model where the transition is viewed as a participatory effort, requiring individuals to act alongside the state and private companies rather than simply following top-down directives.

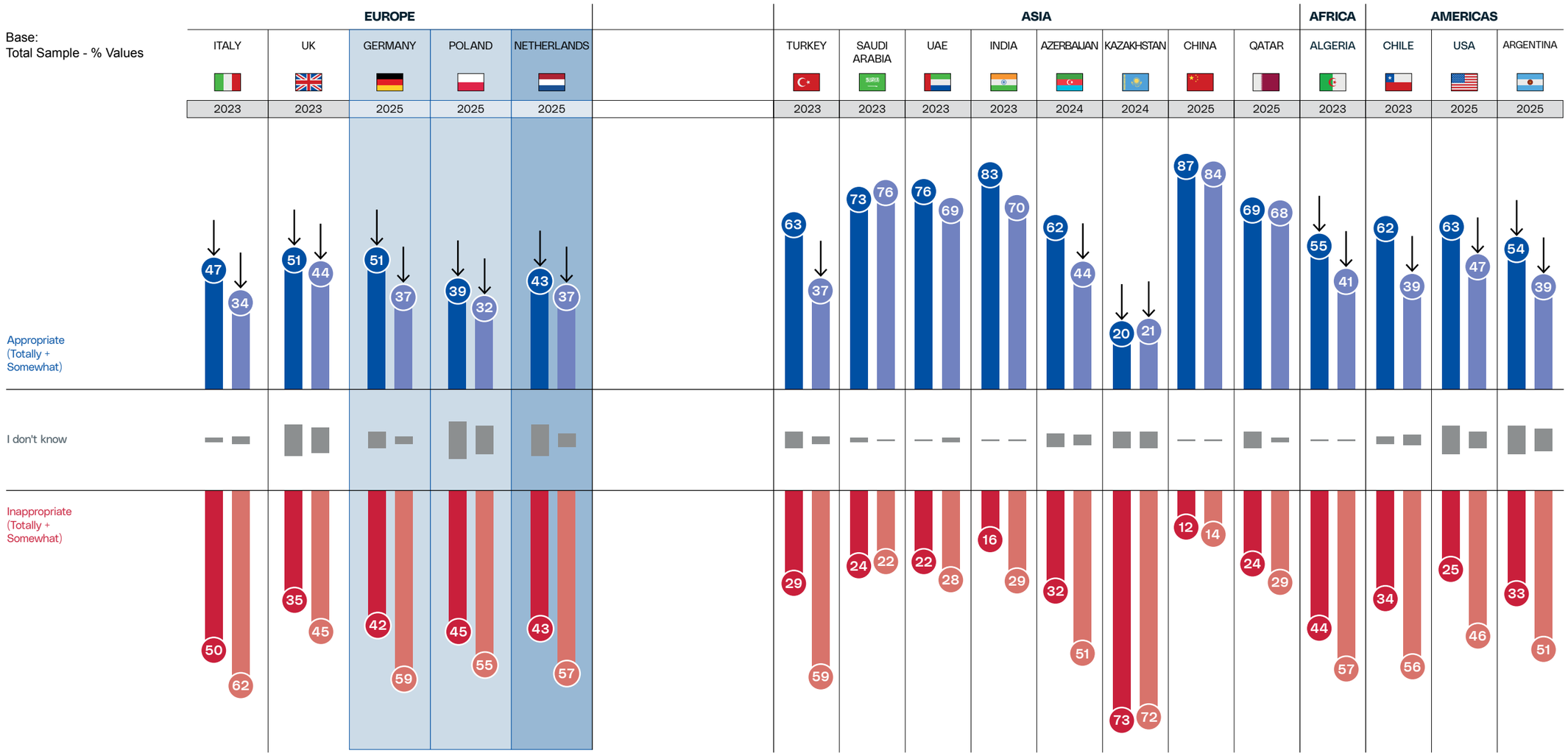
This expectation for active civic engagement is even more pronounced in the Gulf region, which challenges the perception of a purely top-down approach. This confirms a cross-regional consensus where, regardless of the political system, the individual is increasingly seen as a crucial player in the energy shift.

# Table 11 Evaluation of strategies and efforts

***Q15.*** *Thinking about the energy transition challenges in your country, how would you rate the strategies and efforts of...*

Base:
Total Sample - % Values

↓ Lower values




The shared governance models in Europe appear to create a level of stability, though challenges persist. In Germany and the Netherlands, where responsibility is spread across the politicians , and private companies, the efforts are not consistent, highlighting a gap among private companies – acting appropriately – and politicians, who show room for improvement. This indicates that sharing the burden, whether through citizens or other stakeholders builds a foundation of acceptance. Poland remains divided; the lack of a clear leading force has left the country in a state of uncertainty, making population critic about the efforts and strategies of both private companies and politicians. (Table 11).

> *Everyone in the NL has become a mini producer of electricity. At the campus buildings, all the roofs have solar panels with two streams of net congestion. There is not enough electricity at every moment in the day in order to fulfil the demand, that […] will increase. All the companies and households that have these solar panels are delivering electricity towards the electricity grids, which isn't designed for that. There's a two way traffic jam on the electricity net.*
>
> **Academic, Netherlands**

China mirrors the model observed in Saudi Arabia and Qatar, where both private companies and governmental entities play significant roles in driving appropriately the energy transition process. This centralised, collaborative approach correlates with the highest approval rating, demonstrating that a clear top-down directive supported by industrial action is currently seen as the most effective strategy.

Conversely, the Americas face a crisis of confidence that emphasizes the situation in Europe. Both the United States and Argentina show a less optimistic view of the contributions made by both businesses and politicians towards the energy transition, highlighting the need for stronger coordination to match higher level of commitment. This shared scepticism suggests that without a cohesive strategy aligning public and private efforts, these nations struggle to convince their populations that real progress is being made.

# Table 12 Most important actions to ensure a successful transition process

***Q6.*** *Which are most important actions to ensure the energy transition process is a success in your country?*

*Ranked on Italy*

Base:
Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| **Reduction in waste by companies and individuals** | **33** | **37** | **32** | **34** | 26 | 34 | 25 | **35** | 33 | **40** | **49** | 34 | **35** | 34 | **34** | **38** | **37** |
| **Engagement of local communities** in energy transition process | 31 | 30 | 20 | 23 | 21 | 31 | **37** | **35** | **40** | 24 | 26 | **35** | **35** | 36 | 32 | 32 | 31 |
| Adoption of **renewable energy sources** | 30 | **37** | 27 | 27 | 27 | 26 | 26 | 30 | 24 | 18 | **28** | **36** | 29 | 34 | 28 | **37** | 26 |
| Improvement of **energy efficiency in industrial** and transport sectors | 24 | 28 | **30** | 28 | 21 | 20 | 29 | 21 | 25 | 20 | 18 | 16 | 23 | 14 | 26 | 28 | 29 |
| Facilitation of **investments into renewable energies** (public policies and regulations) | 23 | 26 | 22 | 25 | **39** | **41** | 27 | 27 | 23 | **33** | 25 | 19 | 31 | **44** | 33 | 23 | **33** |
| Development of **smart energy grids for efficient energy management** | 23 | 19 | 19 | 16 | **30** | 22 | 21 | 21 | 23 | **29** | 19 | 16 | 25 | 26 | 18 | 18 | 19 |
| Improvement in **companies' production processes** | 21 | 19 | 21 | 21 | 20 | 23 | 23 | 28 | 28 | **28** | 23 | 24 | 29 | 32 | 31 | 24 | 23 |
| Improvement in **energy efficiency in residential buildings** | 20 | 29 | 18 | 27 | 17 | 19 | 18 | 16 | 22 | 19 | 15 | 10 | 13 | 11 | 13 | 19 | 11 |
| **Transition of traditional vehicles** to sustainable mobility | 19 | 14 | 17 | 18 | 15 | 16 | 23 | 25 | 31 | 30 | 14 | **37** | 23 | 21 | 22 | 18 | 14 |
| Energy **technologies innovation** | 17 | 25 | 23 | 21 | 32 | 23 | 23 | 24 | 15 | 25 | 22 | 27 | 24 | 23 | 21 | 21 | 21 |
| **Low-carbon industrial technologies innovation** | 10 | 15 | 17 | 17 | 13 | 12 | 24 | 18 | 20 | 11 | 12 | 30 | 21 | 11 | 21 | 17 | 23 |

**Focus**

**Countries surveyed in 2025**

The most mentioned options for each country are highlighted

Table 12 reveals that while national strategies for achieving a successful energy transition may vary, there is a strong common ground regarding the fundamental actions required.
Germany and Poland share a pragmatic focus on optimisation and behavioural change, identifying the reduction of waste by companies and individuals as the single most important measure. This suggests that in these nations, the path to success is viewed primarily through the lens of efficiency and resource management. In contrast, the Netherlands adopts a distinctly macro-economic stance; Dutch respondents overwhelmingly prioritise the facilitation of investment into renewable energies through public policies (39%) and the development of smart energy grids for efficient energy management (30%), indicating that for them, the key to success lies not just in saving energy, but in unlocking the financial and regulatory frameworks needed to build the new system.

> *The market at the moment is really bad. There is a huge responsability for the companies themselves, but it is not fair to only point towards the private sector.*
>
> **Institution, Netherlands**

China presents a distinct model that combines social and industrial goals; here, the engagement of local communities is central (35%), but it is closely supported by a strong push for the transition of traditional vehicles to sustainable mobility (37%) and the adoption of renewable energy sources (36%). In the Americas, the focus returns to efficiency. Both the United States (38%) and Argentina (37%) align with the European emphasis on waste reduction by companies and individuals as a top priority. However, they diverge on the secondary drivers: the USA places significant weight on the direct adoption of renewable energy sources (37%), while Argentina mirrors the Dutch approach, identifying the facilitation of investment through public policies and regulations as a crucial step to ensure success (33%).

## Table 13 Cost-benefit analysis of the energy transition process

***Q14_1.*** *Over the* ***short-term*** *(1-3 years), what would you say regarding energy transition in your country?*

***Q14_2.*** *Over the* ***medium to long-term*** *(more than 3 years), what would you say regarding energy transition in your country?*

| Base: Total Sample - % Values | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| **OVER THE SHORT-TERM** | | | | | | | | | | | | | | | | | | |
| The **benefits will outweigh** the costs | **37** | **46** | 22 | 19 | 20 | | **26** | **50** | **34** | **45** | **21** | **15** | **28** | **35** | **17** | **34** | **44** | **29** |
| The costs and benefits will **balance out** | **42** | **35** | **45** | **52** | **30** | | **43** | **43** | **55** | **44** | **48** | **28** | **55** | **46** | **57** | **44** | **37** | **43** |
| The **costs will outweigh** the benefits | 21 | 19 | **33** | **29** | **50** | | **31** | 7 | 11 | 11 | **31** | **57** | 17 | 17 | **26** | 22 | 19 | **28** |
| **OVER THE MEDIUM/ LONG-TERM** | | | | | | | | | | | | | | | | | | |
| The **benefits will outweigh** the costs | **51** | **51** | **37** | **15** | **31** | | **39** | **41** | **39** | **45** | **40** | **22** | **53** | **49** | **35** | **47** | **52** | **41** |
| The costs and benefits will **balance out** | **42** | **43** | **38** | **63** | **48** | | **37** | **52** | **55** | **47** | **42** | **44** | **42** | **45** | **46** | **41** | **40** | **44** |
| The **costs will outweigh** the benefits | 7 | 6 | 25 | 22 | 21 | | 24 | 7 | 6 | 8 | 18 | 34 | 5 | 6 | 19 | 12 | 8 | 15 |

**Focus**

**Countries surveyed in 2025**

Higher values

Lower values

The cost-benefit analysis reveals a distinct "short-term pain" mindset. In the short term (1-3 years), the immediate financial challenges are a major concern, particularly in the Netherlands, where half of the population believes the costs will outweigh the benefits, the highest negative figures in the study among Western economies. In Germany and Poland, fewer than one in three respondents share this caution, while the majority (about one in two) believe that costs will balance benefits. However, the outlook shifts over the medium to long term. While Germany and the Netherlands see a rise in optimism, believing benefits will eventually outweigh the costs, Poland remains a significant outlier, demonstrating a neutral approach – expecting that costs and benefits will remain in balance. Even in the long run, only a small minority of Poles believe the benefits will outweigh the costs, suggesting a deep-rooted scepticism about the economic viability of the transition.

Over the medium/ long-term, the perspective is more positive, particularly in the major economies. China and US display more positive optimism, with more than half of respondents believing that benefits will outweigh costs. Argentina presents an interesting middle ground; while it shares the short-term caution seen in Germany, the country projects a strong recovery in confidence over the long term, with 41% of respondents forecasting more benefits than costs (Table 13).

> *Prices of electricity are relatively high because there's a taxation system that exceeds the taxes of our neighbouring countries, which of course negatively influences the business case of energy transition. […] We have had to scale down our efforts because we look at a five years return rate […]. The price of electricity negatively influences the business case of all those measures. In the medium–long term [ed. note.] I'm moderately optimistic, but not very optimistic because of the energy costs in the Netherlands.*
>
> **Academic, Netherlands**

# Table 14 Attention to the energy transition issue

***Q16.*** *Thinking about 2-3 years ago, do the following pay more/less attention to energy transition today?*

Base:
Total Sample - % Values

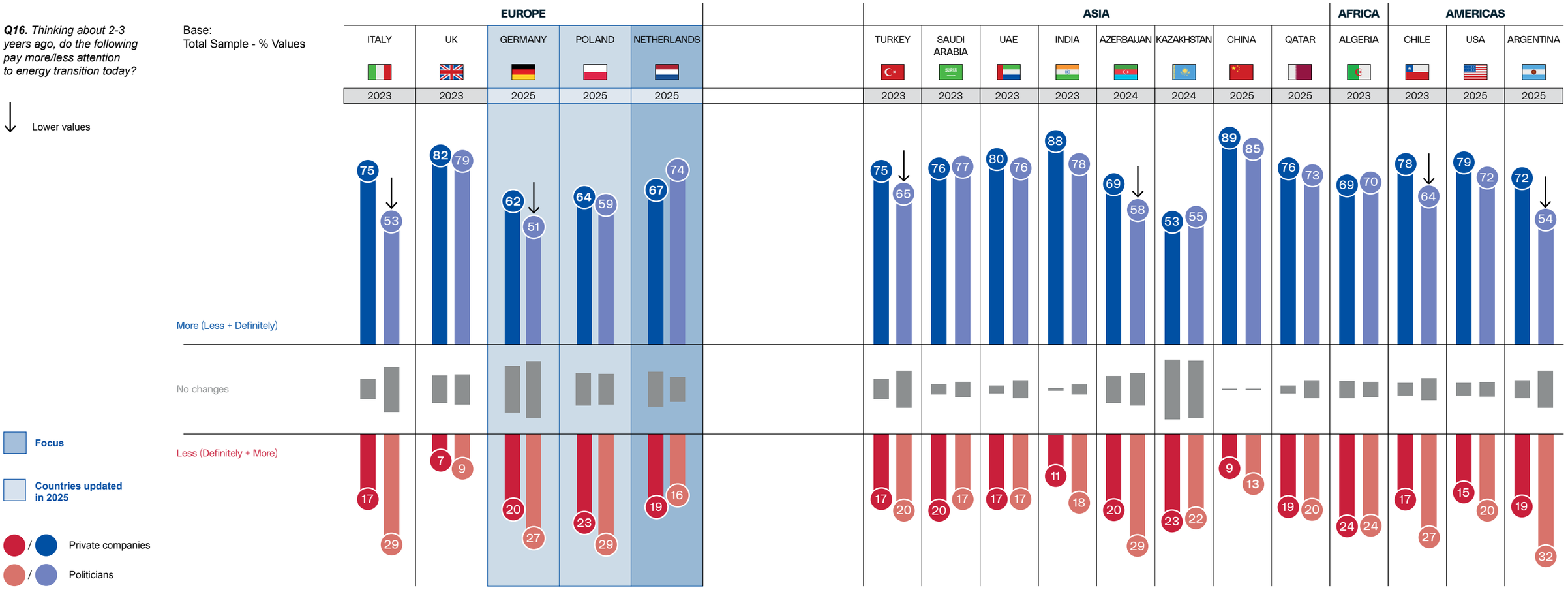



Table 14 provides an overview of how public perception regarding the level of attention paid to the energy transition has evolved over the last few years. In the European landscape of 2025, led by Germany, Poland and the Netherlands, the majority of respondents, especially Dutch respondents, recognise a growing focus on the issue. In Germany, as well as in South American countries (Chile and Argentina), private companies are perceived as taking more positive steps than governments, highlighting a significant difference in the efforts of the corporate and public sectors. In the Netherlands, politicians are viewed as more committed to the energy transition than private companies. In Poland, about six out of ten respondents recognize a greater commitment from both private companies and politicians, compared with 2 or 3 years ago. This suggests that in these nations, the corporate sector is increasingly seen as the primary engine of progress, stepping in to compensate for perceived governmental inertia. In Germany, Poland, Chile and Argentina, about one in three citizens believe that the politicians pay less attention to the energy transition now compared with 2 or 3 years ago.

> *I think the attention is there, but it becomes a little slower than in the past for several reasons. […] Several sectors are struggling with their future […].*
>
> **Academic, Netherlands**

The positive response towards recognising the benefits of the energy transition observed in China, the USA, Qatar, and other advanced economies is mirrored in the perceived increased commitment from both private companies and governments. Unlike the fragmented approach seen in Argentina or Germany, these nations display a more unified front where the high expectations for economic and social gain are matched by a synchronised effort from both the state and the business world, reinforcing a sense of collective momentum (Table 14).

## Table 15 Companies' commitment to the energy transition

***Q17.** Which of the following **actions should companies focus on** most for energy transition?*

Base:
Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Adopting **new production processes** | **34** | **37** | **38** | 29 | 39 | **33** | 25 | 25 | **39** | **35** | **49** | **45** | **39** | 29 | **38** | **38** | **42** |
| Providing **training/ education** for skills development | 28 | 31 | 22 | 23 | 20 | 19 | **29** | **37** | 30 | **39** | 44 | 31 | **38** | **36** | 23 | 24 | 33 |
| **Innovating products and services** in a sustainable way | 25 | **37** | **37** | **36** | **55** | **35** | **31** | **34** | **38** | 17 | 29 | **46** | **37** | **39** | **37** | **39** | **41** |
| Promoting a **cultural shift** | 25 | 23 | 14 | 17 | 17 | 18 | **15** | **14** | **14** | 15 | **7** | **12** | 15 | **11** | 27 | 23 | 26 |
| Implementing **new organizational strategies** with dedicated roles | 23 | 19 | 15 | 21 | 15 | 13 | 21 | 28 | 31 | 15 | 19 | 15 | 19 | 21 | 18 | 20 | 17 |
| Defining **decarbonization plans** | 18 | 15 | 18 | 15 | 20 | 26 | 25 | 20 | 17 | 26 | **9** | 24 | 13 | 21 | 15 | 14 | **9** |
| Undertaking **dedicated outreach activities** | **15** | **10** | 22 | 19 | **5** | **6** | 25 | 17 | **13** | 23 | 18 | **11** | 15 | 19 | **12** | 7 | **8** |
| **Reporting on sustainability** | **14** | 15 | **13** | 22 | **9** | 16 | 21 | **15** | 17 | **12** | 8 | 17 | 17 | 17 | 18 | 19 | **10** |

**Focus**

**Countries surveyed in 2025**

Higher values

Lower values

Overall, Table 15 shows that globally, the most essential actions for companies are adopting new production processes and innovating products and services, a focus particularly mentioned in the Netherlands (55%). These practical steps are widely recognised as the foundation for moving towards sustainable energy.
However, a divide exists regarding the role of human capital. In Europe, specifically Germany and the Netherlands, and the USA, the focus remains strictly on the "hardware" of the transition, prioritising technical upgrades and industrial efficiency while viewing training primarily as a supporting function. In contrast, the emphasis on training and skills development is significantly stronger in the Gulf nations, Azerbaijan and Kazakhstan where upskilling the workforce is valued as a central strategic pillar.

> *In the chemical industry, it's replacing naphta as both feedstock and energy source. So that's electrification and also the recycling of materials.*
>
> **Academic, Netherlands**

Additionally, the countries in South America consider a change in mindset to be important. In Chile and Argentina, promoting a cultural shift towards sustainability is seen as a crucial step by one in four, suggesting that technical progress must go hand-in-hand with a broader societal transformation.

## Table 15.1 Government commitment to the energy transition

Question added in December 2025

***Q18.*** *And thinking about the political class, the government, and the institutions of your country, on which of the following actions should they focus more for the development of the energy transition?*

*Ranked on Germany*

Base: Total Sample - % Values

| | EUROPE | | |
|---|---|---|---|
| | GERMANY | POLAND | NETHERLANDS |
| Surveyed in | 2025 | 2025 | 2025 |
| Enhancing the **spread of photovoltaic, wind, and solar plants** | **32** | 25 | 11 |
| **Funding new technologies** that improve energy efficiency and reduce $CO_2$ emissions *(for example, in the production of low-emission hydrogen)* | **30** | **28** | **33** |
| **Offering subsidies, incentives,** or tax reductions **for companies and individuals** investing in clean energy technologies | 25 | 24 | **31** |
| **Investing in the development of alternative fuels** for sustainable mobility *(biofuels, liquefied natural gas, hydrogen)* | 24 | 22 | 28 |
| **Encouraging collaborations** between the government and private entities to promote sustainable energy projects | 23 | 20 | 25 |
| Supporting the **development of the circular economy** and the waste recycling system | 22 | 26 | **17** |
| Investing in **educational campaigns** to increase public awareness | 16 | **15** | **17** |
| Building **nuclear power plants** | **13** | 24 | 20 |

Focus

Countries surveyed in 2025

Higher values

Lower values

The 2025 survey results regarding the priorities for the government and the institutions reveal a shared European consensus on the importance of innovation, yet they highlight distinct national strategies for achieving it (Table 15.1).
Across Germany (30%), Poland (28%), and the Netherlands (33%), funding new technologies to improve energy efficiency and reduce emissions stands out as a universal priority. However, beyond this shared technological focus, the specific roadmaps diverge significantly.

> *The energy transition really needs stable and long-term policy. That is what the private sector also likes because of the return of investments when longer than 15 years. […] At the end, companies are there to earn money and if they can't earn money with the energy transition, they will not invest. It's as simple as that.*
>
> **Institution, Netherlands**

Germany remains heavily focused on infrastructure expansion (32%), with citizens identifying the spread of photovoltaic, wind, and solar plants as the single most critical government action. This suggests that for Germans, the transition is still largely a matter of building physical generation capacity to replace traditional sources.

In contrast, the Dutch public shows remarkably low interest in simply building more solar or wind plants, likely reflecting a sense of infrastructure saturation (11%); instead, they prioritise financial levers (31%), ranking subsidies and incentives for clean energy investments as a top demand alongside the development of alternative fuels for mobility.
Poland, meanwhile, introduces a distinct focus on structural diversification and resource management. It records the highest support for building nuclear power plants (24%) and supporting the circular economy (26%), indicating that for Polish citizens, the government's role is to ensure energy security through a varied mix of nuclear and recycling strategies rather than relying solely on renewables.



## Table 15.2 Industrial sector excellence to ensure energy transition

Question added in December 2025

***Q19.*** *Which are the excellent industrial sectors of your country that could ensure the development of a successful energy transition process?*

*Ranked on Germany*

Base: Total Sample - % Values

| | EUROPE | | |
|---|---|---|---|
| | GERMANY | POLAND | NETHERLANDS |
| Surveyed in | 2025 | 2025 | 2025 |
| **Energy:** *production and innovation in the photovoltaic and wind sectors* | **44** | 33 | **42** |
| **Engineering and Construction:** *design of zero-energy i mpact buildings* | **37** | 32 | 35 |
| **Green Chemistry** (green chemistry is an approach that aims to minimize the environmental impact of chemical processes and substances produced): *advanced solutions for sustainable production* | 34 | **35** | **43** |
| **Automotive:** *development of electric vehicles and sustainable mobility systems* | 32 | 19 | **13** |
| **Bioenergy and Sustainable Agriculture:** *production of biofuels and innovative agricultural practices* | 28 | **35** | 35 |
| **Materials Technology:** *innovations in sustainable materials and recycling technologies* | 28 | 30 | 33 |
| **ICT and Digital:** *technological solutions for efficient energy management* | **18** | 29 | 33 |
| *I don't know* | *10* | *12* | *9* |

Focus

Countries surveyed in 2025

Higher values

Lower values

The assessment of industrial excellence reveals how each European nation projects its traditional economic strengths onto the energy transition (Table 15.2).
Germany remains true to its reputation as an industrial powerhouse, with citizens identifying the energy sector, specifically production and innovation in photovoltaic and wind, as the primary driver of success (44%). This is complemented by a strong reliance on engineering and construction (37%), and notably, Germany is the only nation in this cohort that still places significant faith in the automotive sector, viewing the development of electric vehicles as a key pillar of the transition (32%).

In contrast, the Netherlands and Poland highlight different strategic assets. The Dutch vision is heavily oriented towards advanced processing and innovation, identifying Green Chemistry (43%) and energy (42%) as leading sectors, likely reflecting the strength of its industrial clusters. Furthermore, the Netherlands distinguishes itself with a high regard for the ICT and Digital sector (33%), viewing technological efficiency as crucial. Poland, meanwhile, looks to its land and resources, ranking Green Chemistry (35%), Bioenergy, and Sustainable Agriculture (35%) as its top capabilities, suggesting that for Polish citizens, the path to a successful transition lies in leveraging the country's agricultural potential alongside industrial adaptation.

> *I think for sure that the clean energy companies may be [ed. note.] the energy providers and the chemical industry. To a certain extent also the biofuel industry. And also clean tech manufacturing is really promising and we see a lot of companies in that direction that have really a huge potential.*
>
> **Institution, Netherlands**

# Table 16 Perceived importance of the energy transition areas

***Q4.*** *Which of the following aspects do you consider most important for energy transition? RANKING*

*Ranked on Italy*

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| ENVIRONMENT | **65** | **69** | **62** | **52** | **65** | | **49** | **54** | **60** | **63** | **59** | **59** | **64** | **62** | **65** | **53** | **65** | **58** |
| ECONOMY | **54** | **56** | **59** | **59** | **55** | | **51** | **49** | **49** | 42 | **46** | **51** | **60** | **49** | 50 | **49** | **51** | **51** |
| TECHNOLOGY | **53** | **61** | **63** | **66** | **69** | | **51** | **50** | **48** | **51** | **59** | **61** | **68** | 44 | **57** | **49** | **55** | **45** |
| REGULATION | 37 | 41 | 36 | 32 | 33 | | 30 | 34 | 27 | 34 | 28 | 31 | 42 | 35 | 24 | 33 | 34 | 39 |
| SOCIETY | 35 | 27 | 44 | 39 | 37 | | 35 | 33 | 35 | 40 | **48** | 37 | 24 | 32 | 25 | 35 | 37 | 31 |
| EDUCATION | 28 | 25 | 29 | 37 | 21 | | **55** | **51** | **47** | 41 | 38 | 39 | 24 | **51** | **54** | **48** | 31 | **47** |
| CULTURE | 27 | 21 | 10 | 17 | 21 | | 29 | 29 | 33 | 30 | 23 | 22 | 19 | 27 | 26 | 34 | 28 | 29 |

% 1st + 2nd + 3rd positions

**Focus**

**Countries surveyed in 2025**

The most mentioned options for each country are highlighted

Table 16 provides a comparative global overview of the strategic pillars supporting the energy transition, emphasizing how nations balance environmental, technological, and economic factors. Technology and the environment emerge as the dominant priorities across Germany, and the Netherlands. Poland shifts the focus: while it identifies technology (66%) as its single most important driver, it places the economy (59%) in second place, prioritizing industrial and financial viability over the immediate environmental focus that characterizes its western neighbors.

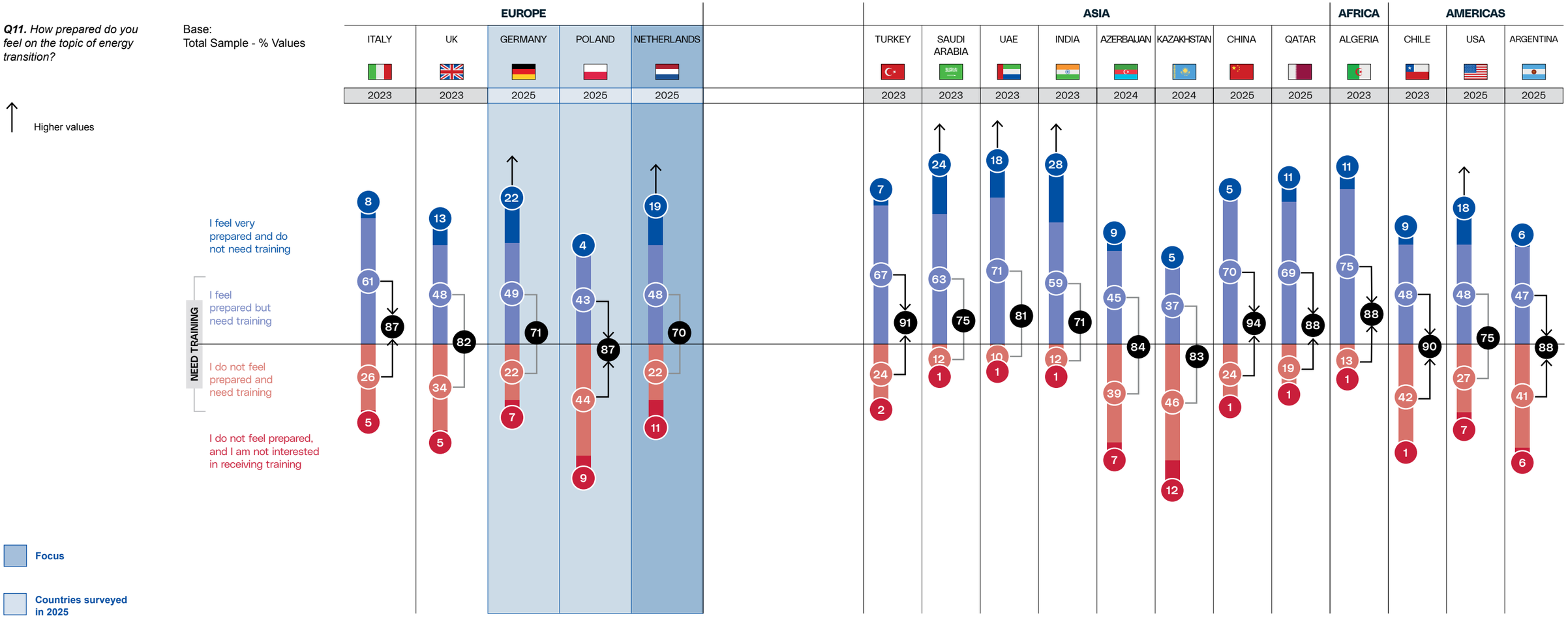
> *Society is important because without taking society with you, without societal support and political support, we will not reach the ambitious goals. […] But I think it is also important to do something on stimulating technology.*
>
> **Institution, Netherlands**

On the global stage, the most striking divergence concerns the value placed on education, revealing a clear "competence divide" between Western economies and emerging markets. Countries in South America, such as Argentina (47%) and Chile (48%), alongside the Gulf countries and Turkey (55%), prioritize training and education as fundamental pillars, with nearly half or more of respondents considering it a top priority. Conversely, the United States and European nations consistently rank Education near the bottom of their list. This suggests that while emerging economies view the creation of new skills as a prerequisite for success, Western nations may be underestimating the urgency of training, assuming their workforce is already prepared despite the structural shifts required.
Finally, the comparison between the major global economies highlights opposing strategic visions regarding the drivers of the transition. China approaches the process primarily as a technological revolution, ranking technology (68%) as its absolute top priority, followed by environment (64%) and the economy (60%). The United States, however, adopts a more traditional perspective where the environment (65%) is the leading driver.

# Table 17 Need for training on the energy transition

*Q11. How prepared do you feel on the topic of energy transition?*

Base:
Total Sample - % Values




The self-assessment of preparedness regarding the energy transition reveals a universal demand for education, yet it exposes a distinct "confidence gap“ (Table 17).

In Europe, Germany stands out as the most self-assured country, with nearly a quarter of respondents feeling fully prepared and stating they do not need further training (22%). The Netherlands mirrors this trend, displaying high levels of confidence (19%) that align closely with the United States (18%). However, Poland presents a starkly different scenario, displaying a much higher level of insecurity. Only a tiny minority of Polish respondents feel fully competent (4%), while a substantial portion of the population explicitly admits to feeling unprepared and in urgent need of training (44%), highlighting a significant skills gap compared to its western neighbors.

> *I think in the Netherlands education has permeated so far into society to be active in energy transition. This is true [ed. note] also when you compare it with other countries. We collaborate with Universities in programs in the field of circular economy, but also on sustainability in society. Kids in secondary schools are taken along with projects on energy transition.*
>
> **Academic, Netherlands**

A universal consensus on the necessity of education emerges across the board, with most respondents in every country expressing a clear desire for further training. This demand becomes significantly more pronounced in nations where the sense of adequate preparation is most limited. In countries like China (94%), Poland (87%), Chile (90%) and Argentina (88%), where only a small fraction of the population feels fully competent, there is a corresponding surge in the number of citizens explicitly declaring a need for training. This dynamic highlights a critical awareness within these specific markets: as the pressure to transition intensifies, the workforce recognizes a widening skills gap and is actively seeking the educational support required to close it.

# Table 18 Importance of developing educational programs on the energy transition

***Q12.** In your opinion, how important is developing educational and training programs for energy transition?*

Base:
Total Sample - % Values

↑ Higher values

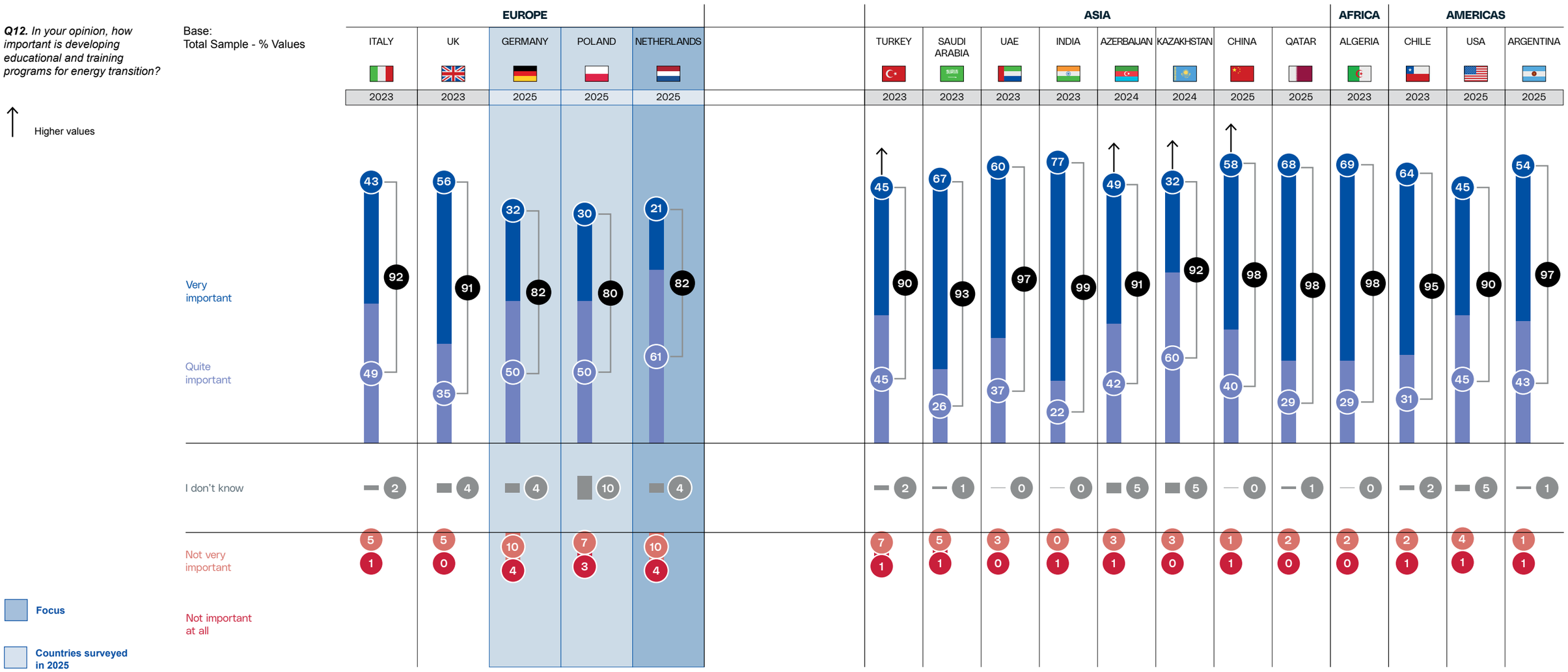



Table 18 confirms that education is considered crucial to support the energy transition process, with a consensus that transcends national borders and economic models. In Europe, specifically Germany, the Netherlands, and Poland, there is a robust agreement on the urgency of this issue, with over 80% of respondents in these nations rating the development of educational programs as important. However, a distinct nuance emerges in the intensity of this sentiment; while around 30% of respondents in Germany and Poland and 21% in the Netherlands classify these programs as "very important," the broad consensus confirms that regardless of the current level of preparedness, European citizens view the implementation of formal training paths as a critical infrastructure requirement essential for maintaining industrial competitiveness.

> *We need to help politicians to prove to citizens that they have a benefit from the energy transition. […] People have to notify in their daily budget and their daily life that there should be an advantage to have contracts for sustainable energy over fossil energy.*
>
> **Institution, Netherlands**

Globally, the intensity of this demand reaches a different level. In countries like China, Chile and Argentina, the percentage of respondents considering these programs "very important" surges significantly higher, approaching more than half of the population. In the USA, 45% believe that educational and training programs are very important. This overwhelming support drives the total approval rates to exceed 90%, reinforcing the global sentiment that the ultimate success of the transition depends entirely on the speed and effectiveness with which the workforce can be upskilled to meet new demands.

# Table 18.1 Excellent training paths to enable energy transition process

Question added in December 2025

***Q20.*** *In your opinion, which are the excellent training paths in your country that can foster the creation of skills and enable a successful energy transition process?*

*Ranked on Germany*

| Base: Total Sample - % Values | EUROPE | | |
|---|---|---|---|
| | GERMANY | POLAND | NETHERLANDS |
| Surveyed in | 2025 | 2025 | 2025 |
| **Energy Engineering** (for example, courses in renewable technologies and energy management) | **56** | **45** | **47** |
| **Environmental and Energy Sciences** (for example, courses in green chemistry, chemical processes reduce environ. impact) | **53** | 36 | **45** |
| **Environmental Sciences** (for example, courses in ecology, conservation, and natural resource management) | **51** | 37 | 37 |
| **Circular Economy and Sustainability** (for example, courses to develop sustainable economic models and circular strategies) | 45 | **40** | **45** |
| **Energy Systems Management** (for example, courses in management and strategies for sustainable energy) | 43 | 36 | 35 |
| **Materials Technology** (for example, courses in innovative and eco-friendly materials) | 38 | 32 | 29 |
| I don't know | 6 | 13 | 22 |

Focus

Countries surveyed in 2025

Higher values

Lower values



The assessment of excellent training paths reveals a striking consensus across the European nations surveyed in 2025, identifying specialized technical education as the cornerstone of a successful energy transition (Table 18.1).

In Germany (56%), Poland (45%), and the Netherlands (47%), Energy Engineering ranks as the absolute top priority. This unified preference underscores a shared belief that the transition is fundamentally an infrastructural and technological challenge that requires a workforce equipped with hard, specialized engineering skills above all else.

> *The boost comes [ed. note] mainly from the public education sector. The private education sector is relatively small because we have a very high quality public education system. […] And in addition, of course, you have the lifelong learning process, where both public and private institutions are involved. […] Lifelong learning is a mix of public institutions and private partners.*
>
> **Academic, Netherlands**

Germany displays a deeply scientific approach, placing a massive emphasis on "Environmental and Energy Sciences" (53%) and "Environmental Sciences," (51%) which rank immediately after engineering. The high percentages associated with these choices, combined with a very low "I don't know" rate, suggest that the German population has a clear and confident understanding of the academic paths required, viewing the transition as a complex interplay of engineering and ecology. In contrast, the Netherlands (45%) and Poland (40%) reveal a strong inclination towards systemic sustainability models. In both nations, courses related to "Circular Economy and Sustainability" rise to become a top-tier priority, ranking second in Poland and tying for second place in the Netherlands. This focus aligns with earlier findings where these countries emphasized waste reduction and resource management, indicating that for the Dutch and Polish populations, the ideal training path must go beyond energy production to teach economic models that minimize waste. Notably, the Netherlands records a significantly higher level of uncertainty (22%) regarding these training paths compared to Germany, suggesting that while the Dutch know they need circular strategies, the specific educational routes to achieve them are less clearly defined in the public eye.

## Table 19 Reliable sources on the energy transition

***P0.*** *Which sources do you consider reliable for information on energy transition?*

Base: Total Sample - % Values

| | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Specialised magazines | **43** | 35 | 54 | **45** | 45 | **19** | **49** | 44 | 55 | **14** | 25 | **53** | 43 | 41 | 44 | 38 | 31 |
| Academic publications/ articles | 37 | **51** | **65** | **47** | **61** | **69** | **47** | 44 | 53 | **45** | **57** | 42 | 53 | **48** | **58** | **57** | **48** |
| TV | 35 | 38 | 31 | 26 | 25 | 24 | **47** | **51** | **73** | **48** | **57** | **57** | **63** | 40 | **51** | 46 | 45 |
| National newspaper | 33 | 42 | 30 | 18 | **50** | **20** | **45** | **47** | **73** | 30 | **10** | **40** | **59** | 29 | 37 | 42 | 26 |
| Websites | 31 | 35 | 18 | 35 | 23 | 36 | 31 | 31 | 59 | **49** | **46** | 47 | **58** | **53** | 43 | 42 | **53** |
| *None of these* | *6* | *11* | *13* | *14* | *9* | *3* | *1* | *0* | *1* | *1* | *1* | *0* | *2* | *0* | *0* | *7* | *4* |

Focus

Countries surveyed in 2025

Higher values

Lower values

Table 19 reveals that across the diverse landscape of surveyed nations, Academic publications and Television generally emerge as the two most trusted pillars of information regarding the energy transition, though their dominance varies significantly by region.

In the European context, credibility is overwhelmingly linked to scientific rigor and expertise rather than mass media. Germany and the Netherlands stand out for their high trust in Academic publications and articles, which are cited as the absolute top source by over 60% of respondents. This preference indicates a discerning public that views the energy transition as a complex technical issue requiring verified, high-level data. However, national nuances exist: while Germany pairs this scientific focus with a strong reliance on Specialized magazines (54%), the Netherlands places significant trust in National newspapers (50%). Poland aligns with the German model, prioritizing Academic sources (47%) and Specialized magazines (45%), while showing markedly lower trust in general news outlets.

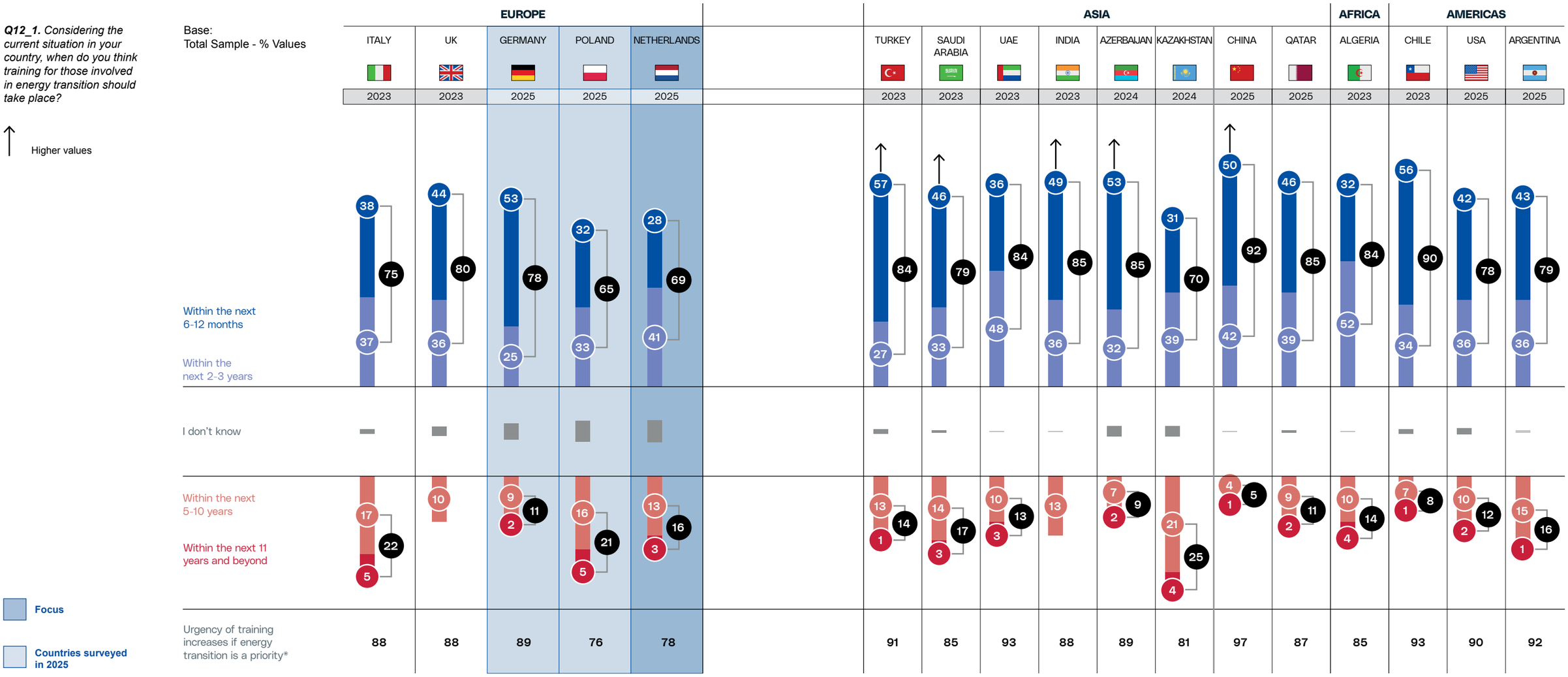
In the Americas, the United States (42%), Chile (43%) and Argentina (53%), signal a transition to a digital-first information ecosystem; in these nations, websites emerge as one of the most important source of reliable information. In the USA and Chile, this digital preference is underpinned by a strong respect for science, as Academic publications remain the first most trusted source (57%, 58% respectively). China, conversely, operates on a completely different model where traditional broadcast media remains dominant; TV is ranked as the most reliable source (57%), along with specialised magazines (53%), reflecting a centralized information environment where official channels retain the highest authority.

# Table 20 Timing of training in the energy transition

***Q12_1.*** *Considering the current situation in your country, when do you think training for those involved in energy transition should take place?*

↑ Higher values

Base:
Total Sample - % Values




*Energy Transition is considered a priority in public's opinion

Table 20 reveals a growing sense of uncertainty and a distinct shift in temporal expectations regarding the training of future energy transition professionals. Unlike the immediate urgency observed in other regions, the European outlook appears more cautious and less defined. In the Netherlands, about one in three respondents believe that training initiatives should be implemented within the short term (the next 6-12 months), and 41% favor a 2-3 year timeline, suggesting that the transition is perceived not as an emergency sprint, but as a structural evolution that requires time to be properly integrated.

> *[…] we need a long-term vision on funding for education and more focus on directing education into those fields with high societal demand.*
>
> **Institution, Netherlands**

Germany stands out with a massive consensus, where nearly 50% of respondents expect training to be implemented within a year, signaling a refusal to delay the development of necessary competencies.
Poland shows a more fragmented view, with one in three citizens emphasizing the urgency of training, another one in three preferring to postpone it to the next 2 or 3 years, and 21% preferring to defer the training to a longer period, to the next 5 years or more.

However, a significantly higher level of perceived urgency drives the agenda in other key markets, contrasting with the more gradual European average. This pressure is equally palpable in China, which records one of the highest demands for immediate action. The United States joins this group of nations pushing for speed; particularly when the transition is recognized as a priority, the demand for rapid upskilling intensifies, distinguishing these industrial giants from the more cautious approach observed in Poland or the Netherlands.

# Table 21 Competence requirements for the energy transition

***Q8_1.*** In your opinion, when it comes to training those involved in energy transition...

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| **Technical knowledge is more important** than personal skills and qualities | 37 | 28 | 17 | 17 | 21 | | 37 | 45 | 48 | 51 | 31 | 23 | 17 | 35 | 25 | 32 | 29 | 33 |
| Technical knowledge and personal skills **are equally important** | 61 | 69 | 83 | 79 | 75 | | 60 | 51 | 49 | 48 | 61 | 75 | 83 | 63 | 73 | 67 | 69 | 63 |
| **Technical knowledge is less important** than personal skills | 2 | 3 | 0 | 4 | 4 | | 3 | 4 | 3 | 1 | 8 | 2 | 0 | 3 | 2 | 1 | 3 | 3 |
| **MOST REQUIRED Technical Knowledge** | Impact on the region | Environmental impact | Renewable energy sources | Environmental impact | Renewable energy sources | | Renewable energy sources | Renewable energy sources | Environmental impact | Recycling/ circular economy | Environmental impact | Environmental impact | Renewable raw materials and recycled materials | Renewable raw materials and recycled materials | Renewable energy sources | Impact on the region | Environmental impact<br>Renewable raw materials and recycled materials | Renewable energy sources |
| **MOST REQUIRED Personal skill** | Problem-solving<br>Multidisciplinary approach | Critical thinking<br>Creativity | Problem-solving | Critical thinking | Critical thinking<br>Creativity | | Problem-solving | Problem-solving<br>Creativity | Creativity | Creativity | Problem-solving | Critical thinking | Creativity | Creativity | Creativity | Problem-solving | Problem-solving | Problem-solving<br>Multidis-ciplinary approach |

**Focus**

**Countries surveyed in 2025**

The most mentioned options for each country are highlighted

The 2025 data confirms and consolidates the trends observed in previous waves of the study, establishing a global consensus on the professional profile required for the energy transition. The view of the transition as a purely engineering challenge has been superseded by a holistic model that places equal weight on technical knowledge and personal skills. This "hybrid" approach finds its strongest validation in in Germany, where the 83% of respondents assert that soft skills are just as crucial as technical expertise. Poland (79%) and the Netherlands (75%) closely follow this trend, reinforcing the consensus that in these mature economies, the transition is understood as a complex systemic challenge requiring adaptability and critical thinking alongside engineering know-how.

> *I noticed that many companies have difficulties to recruit people with those skills. When I speak to companies, they have problems recruiting people on the vocational education level.*
>
> **Institution, Netherlands**

While the hybrid model remains the dominant view, a distinct "technical pragmatism" persists, particularly in the Gulf and South Asian markets. Saudi Arabia (45%), the UAE (48%), and India (51%) stand out with the highest levels of respondents prioritizing technical knowledge over personal skills. This indicates that in these rapidly developing energy economies, the immediate pressure to build infrastructure and deploy complex technologies sustains a strong demand for purely functional, output-oriented expertise, partially overshadowing the focus on soft skills observed elsewhere.

# Table 22 Soft skills for the energy transition

***Q9_1.*** What are the most important personal skills for those involved in energy transition?

*Ranked on Italy*

Base:
Total Sample - % Values

| | EUROPE | | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Problem-solving skills | **46** | **43** | **61** | 40 | **56** | | **59** | **47** | **38** | 37 | **62** | **58** | **52** | **45** | **48** | **50** | **55** | **45** |
| A multidisciplinary approach | **45** | 33 | 43 | 40 | 49 | | 34 | 30 | 27 | 32 | 33 | 34 | **49** | 35 | 31 | **43** | 33 | **46** |
| Critical thinking and analytical skills | **43** | **52** | 53 | **49** | **57** | | 34 | 25 | **38** | **38** | 29 | **68** | 30 | **41** | 27 | 31 | **43** | 39 |
| Creativity and innovation | **37** | **51** | 33 | 42 | 42 | | **47** | **48** | **63** | **43** | **42** | 30 | **60** | **50** | **69** | **45** | **42** | **44** |
| Flexibility and adaptability | 33 | 38 | 29 | 36 | 33 | | 23 | **40** | **36** | **39** | 38 | 33 | 34 | 35 | 39 | 35 | **44** | 27 |
| Teamwork skills | 27 | 30 | 30 | 30 | 21 | | **50** | 37 | 34 | 36 | **45** | 37 | 34 | 37 | **49** | 38 | 28 | 40 |
| Emotional intelligence | 25 | 15 | 21 | 22 | 12 | | 15 | **17** | **17** | 26 | 19 | **9** | **9** | **13** | **5** | 24 | 19 | 19 |
| Communication and networking skills | 23 | 28 | 17 | 24 | 23 | | 25 | 29 | 33 | 32 | 22 | 22 | 24 | 28 | 19 | 25 | 27 | 29 |
| Fluency in the English language | **20** | **10** | **15** | **18** | **7** | | **13** | 27 | 13 | **20** | **11** | **9** | **10** | **15** | 13 | **9** | **10** | **11** |

% 1st+2nd+3rd positions -
Positioning (1st)

**Focus**

**Countries surveyed in 2025**

The most/least mentioned options for each country are highlighted

The analysis of soft skills for the energy transition highlights the absolute dominance of high-level cognitive abilities, with problem-solving, critical thinking, and creativity emerging as the undisputed pillars of the future workforce (Table 22).
Problem-solving stands out as the primary requirement in the most industrially advanced economies; Germany and the Netherlands lead this trend with striking intensity (61% and 56% respectively), viewing the transition as a complex engineering puzzle that demands efficient resolution. This focus on operational execution extends firmly to the Americas, where Chile (50%), the United States (55%), and Argentina (45%) also rank problem-solving as a top priority.

> *We have a very broad education system, and we tend to say we need a basic knowledge in almost any discipline. But I think there is nothing wrong in choosing a bit more in which directions of education you do something extra because society demands it.*
>
> **Institution, Netherlands**

Critical thinking emerges as a specific priority in Poland (49%) and remains very high in Germany (53%), and especially in the Netherlands (57%), indicating the ability to rigorously analyze data and assess complex scenarios is valued just as highly as the ability to solve them.

Meanwhile, creativity and innovation emerge as the decisive factors in the Asian and Gulf markets; China (60%) and the UAE (63%) leads this trend, followed by Qatar (50%), suggesting that these regions are looking beyond mere execution and are seeking visionary thinking to reinvent existing systems and drive the transition forward.

# Table 23 Technical knowledge requirements for the energy transition

***Q8_2.*** What are main technical knowledge requirements for those involved in energy transition?

*Ranked on Italy*

| Base: Total Sample - % Values | EUROPE | | | | | ASIA | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| Analyse and assess the **impact on the region** | **42** | 27 | 29 | 28 | 19 | **35** | 27 | 29 | 27 | 28 | **39** | 29 | 32 | 32 | **39** | 32 | 32 |
| Understanding environmental issues and analyse and assess their **environmental impact** | **37** | **46** | 41 | **44** | 40 | **33** | 29 | **41** | 33 | **53** | **44** | 31 | **41** | **45** | **36** | **41** | 34 |
| Knowledge of various **renewable energy sources** | **37** | **41** | **46** | 33 | **47** | **39** | **39** | **39** | **37** | **37** | 27 | 34 | **39** | **47** | 35 | **39** | **43** |
| Knowledge of alternative **renewable raw materials and recycled materials** to substitute traditional materials | **36** | **38** | 30 | 38 | **47** | **35** | **33** | 29 | **36** | **35** | 27 | **42** | **43** | **44** | **37** | **42** | **37** |
| Knowledge of **regulatory frameworks** | 31 | 19 | 24 | **21** | 24 | **21** | **23** | **11** | 25 | 20 | 26 | **16** | **17** | **8** | 25 | 22 | **20** |
| Knowledge of **sustainability issues**, ESG principles, and sustainable design criteria | 30 | 31 | **19** | 27 | 27 | 27 | **35** | 33 | 33 | **18** | **34** | **37** | 24 | 32 | 26 | 32 | 31 |
| Knowledge of techn. issues related to **recycling and circular economy** | 23 | 33 | 32 | 35 | 37 | 27 | **33** | 30 | **40** | **39** | **36** | **35** | 31 | 25 | 26 | 28 | 27 |
| Manage the **economic sustainability of projects** | 22 | 27 | 32 | 23 | 21 | 24 | 31 | 33 | **23** | 24 | 25 | 26 | 24 | 26 | 25 | 22 | 29 |
| Manage **economic resources** in a fair and inclusive manner | 22 | **16** | 25 | 24 | **18** | 31 | 28 | **35** | 25 | 29 | 23 | 22 | 28 | 27 | 25 | 24 | 25 |
| Sensitivity to **social issues** and the ability to analyse and assess their impact on society | **21** | 22 | 25 | 30 | 21 | 27 | **22** | 19 | 25 | **18** | **19** | 30 | 22 | **13** | 27 | **18** | **22** |

% 1st+2nd+3rd positions - Positioning (1st)

**Focus**

**Countries surveyed in 2025**

The most/least mentioned options for each country are highlighted

The assessment of technical knowledge requirements reveals a global consensus centered on three fundamental pillars: the mastery of renewable energy sources, the management of sustainable materials, and the ability to assess environmental impact (Table 23). However, the hierarchy of these skills varies significantly, reflecting the specific industrial challenges of each nation.
In Europe, Germany and the Netherlands champion a "production-first" mindset, where knowledge of various renewable energy sources is the primary requirement (46% and 47% respectively). Yet, the Netherlands distinguishes itself by placing an equal and massive emphasis on knowledge of renewable raw materials and recycled materials (47%), aligning with the United States (42%), Qatar (43%), and China (42%) in viewing the transition as a materials science challenge as much as an energy generation one.

> *I think more and more we have a concern on vocationally educated people who actually do the technical applications at home in society of applying sustainable technologies.*
>
> **Institution, Netherlands**

Poland stands out with a profound focus on consequences rather than just inputs, prioritizing environmental assessment over energy sources (44%).

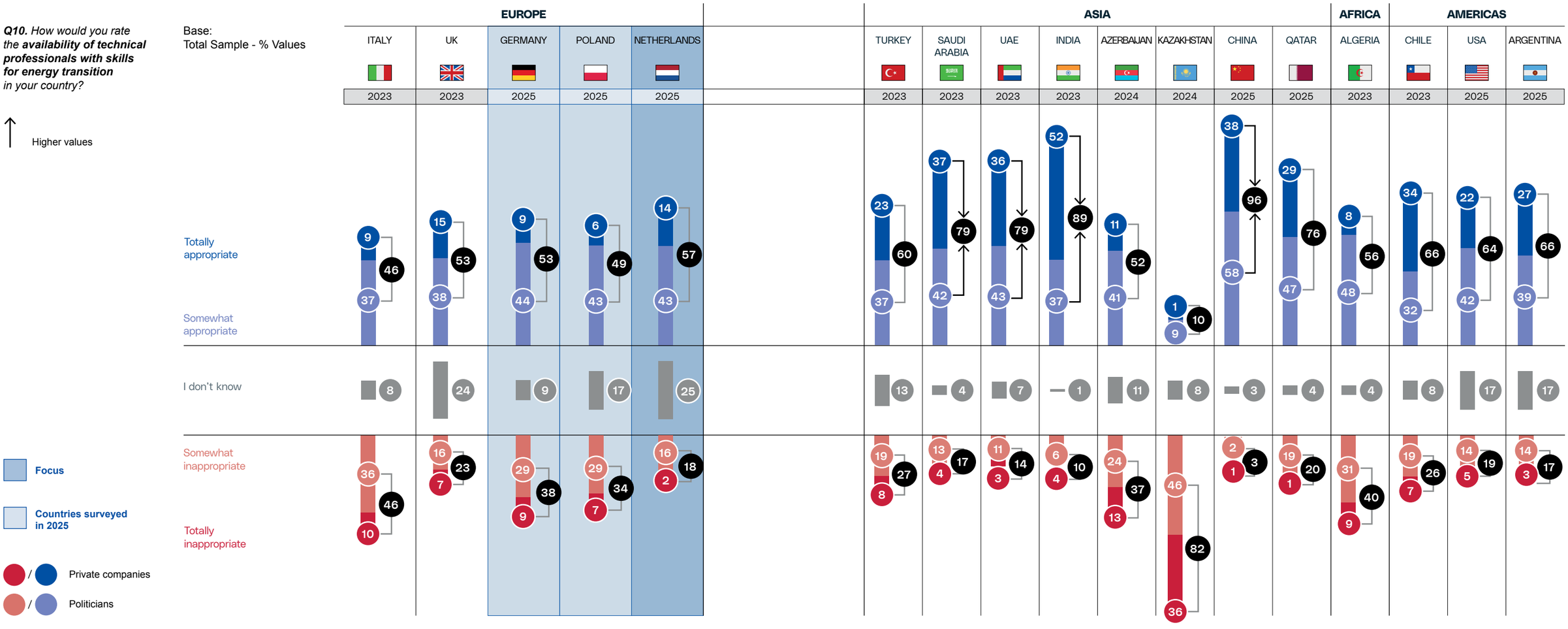
Argentina aligns with the German model, ranking knowledge of renewable energy sources as its top priority (43%), confirming that for these nations, the immediate technical hurdle remains the deployment and management of clean energy infrastructure.

# Table 24 Availability of the energy transition professionals

***Q10.*** *How would you rate the* ***availability of technical professionals with skills for energy transition*** *in your country?*

Base:
Total Sample - % Values

↑ Higher values




The assessment of the labor market highlights that Western economies and the American countries are facing significant difficulties in evaluating the availability of necessary competencies (Table 24).

The assessment of the labor market reveals a recurring scenario across all European nations, the United States, and South America, where a significant difficulty in evaluating the availability of necessary skills emerges. In Germany, the Netherlands, Poland, as well as in the USA and Argentina, the situation is strikingly similar: the perception of the workforce is critically fragmented, with the population effectively split between those who see adequacy and those who perceive a shortage or don't know. This widespread uncertainty confirms a shared struggle to identify and secure the specialized professionals required for the energy transition across the entire Western world and South America.

> *Well, we currently see a stress on the labour market. So, specifically in the field of technical professions, there's a lack of skilled workforce.*
>
> **Academic, Netherlands**

Analyzing more in depth the EU countries, about one in two respondents evaluate positively the availability of technical professionals, especially in the Netherlands. On the opposite side, there are more than one in three respondents in both Germany and Poland who view availability of human capital as inadequate. Notably, in the Netherlands, one in four respondents cannot assess the availability of technical professionals in their country.

In stark contrast, the emerging economic of Asia and the Gulf operate with a profound sense of confidence regarding their human capital. India (52%), Saudi Arabia (37%), and the UAE (36%) record positive ratings, with near-total consensus that their nations possess a "totally appropriate" supply of technical professionals. China (38%) and Qatar (29%) reinforce this regional optimism, reporting strong majorities who feel equipped for the shift, though they do not reach the near-unanimous levels seen in India (52%). However, this confidence is not uniform across the entire continent; nations like Kazakhstan (1%), Azerbaijan (11%), and Turkey (23%) face greater challenges, aligning more closely with the concerns found in the West. Nevertheless, a "two-speed" global landscape remains evident: while the West grapples with a perceived competence deficit that necessitates urgent training, the major Asian and Gulf markets feel equipped with a ready-to-deploy workforce capable of executing their ambitious energy goals.

# 3 METHODOLOGICAL NOTE

## 3.1 Questionnaire structure and flow

This report presents the key findings from the fourth wave of the Maire Foundation's global research, "Climate Goals: Winning the Challenge through the Creation of Competences Worldwide," with a specific focus on the European landscape as represented by Germany, Poland, and the Netherlands.

Across these three nations, the data reveal a shift in public sentiment compared to previous studies, namely, a generalized lower level of interest in the energy transition along with an overall positive perception of the transition itself. This trend suggests that the current global uncertainty, marked by economic instability and geopolitical tensions, is causing the climate agenda to compete with more immediate domestic priorities, and sometimes loses ground to them. However, despite this cooling of public enthusiasm, it is crucial not to overlook the study's fundamental insight regarding the path forward. The data confirm that while the emotional momentum may have slowed, the structural necessity of the transition remains undeniable. The "competence gap" persists as the central challenge, and the demand for specialized training and education continues to be a critical priority. Therefore, even in this period of uncertainty, the creation of technical and soft skills remains the essential lever to reignite progress and ensure that the energy transition evolves from a debated concept into a successful industrial reality.

The surveys for the informed population* were self-completed through the IPSOS online panel (Computer Assisted Web Interviews), while the opinion leader interviews were conducted via phone or web call, based on a discussion guide.For more information, please refer to the methodological note at the end of the report. The IPSOS research team was led by Nando Pagnoncelli, President of IPSOS Italy, and included Andrea Alemanno, Head of Corporate Reputation and Public Affairs, Ilaria Ugenti, Corporate Reputation Leader, and Paola Simonetta, Senior Researcher. The survey was conducted from November 2025 to March 2026.

* Population with a high level of education, employed, concerned and engaged for environment



## 3.2 Sample and methodology November 2025: target population

During wave 4, a total of 550 interviews were conducted across 3 countries: Germany, Poland and Netherlands.

The target population was chosen based on socio-demographic characteristics, with a focus on those employed and having a high level of education. In addition, attitudinal characteristics were also considered. The aim is to identify individuals who were the most active and aware of environmental sustainability issues. This was done through profiling questions related to sustainability clusters (see the following paragraph). The sampling was carried out based on quotas for gender, age groups, geographical macro-areas, education levels, and employment status. The interviews were conducted using the online CAWI (Computer Assisted Web Interviewing) methodology via Ipsos' proprietary panel, IIS (Ipsos Interactive Services). The average length of an interview was approximately 15 minutes. The interviews were conducted in November 2025 (see Table 1).

**Table 1** Population target, sample, methodology and period of fieldwork November 2025

| TARGET INFORMED POPULATION | METHODOLOGY | NUMBER OF INTERVIEWS | PERIOD OF FIELDWORK |
|---|---|---|---|
| **Population** with a **high level of education**, **employed**, **concerned and engaged** for environement* | Online quantitative survey (**CAWI**) | **3 countries, 550 interviews** GERMANY POLAND NETHERLANDS | 20-28 November 2025 |

* People who feel the urgency to combat climate change and have already adopted virtuous behaviours (IPSOS cluster)

## 3.3 Sample and methodology November 2025 – March 2026: target opinion leaders

Alongside the quantitative phase (involving 550 interviews with a highly educated population), 6 individual interviews were conducted in Germany, Poland and Netherlands with Key Opinion Leaders among sustainability and energy transition experts, selected from different targets: academics, institutions, and top managers of private companies. The interviews were conducted via telephone and the online platform Teams by qualified psychologists. The average duration of the interviews was approximately 60 minutes, and they took place in November 2025 and March 2026 (see Table 3).

**Table 3** KOL target, sample, methodology and period of fieldwork November 2025 – March 2026

| TARGET KOL | METHODOLOGY | NUMBER OF INTERVIEWS | PERIOD OF FIELDWORK |
|---|---|---|---|
| **Private companies** specialized on topics related to energy transition and **Institutions** | Telephone qualitative interviews (**CATI**) | **3 countries 6 in depth interviews** GERMANY POLAND NETHERLANDS | November 2025 - March 2026 |

# 3.4 Sample and methodology 2023 – 2026

| | EUROPE | | | | | ASIA | | | | | | | | | | AFRICA | AMERICAS | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | ITALY | UK | GERMANY | POLAND | NETHERLANDS | TURKEY | SAUDI ARABIA | UAE | | INDIA | AZERBAIJAN | KAZAKHSTAN | CHINA | QATAR | ALGERIA | CHILE | USA | ARGENTINA |
| Surveyed in | 2023 | 2023 | 2025 | 2025 | 2025 | 2023 | 2023 | 2023 | | 2023 | 2024 | 2024 | 2025 | 2025 | 2023 | 2023 | 2025 | 2025 |
| **Cases** | 150 | 150 | 200 | 200 | 150 | 150 | 150 | 150 | | 200 | 150 | 150 | 200 | 150 | 200 | 150 | 200 | 150 |

| TARGET INFORMED POPULATION | METHODOLOGY | | NUMBER OF INTERVIEWS | PERIOD OF FIELDWORK |
|---|---|---|---|---|
| **Population** with a **high level of education**, **employed**, **concerned and engaged** for environement* | Online quantitative survey (**CAWI**) | | **17 countries, 2.850 interviews**<br>ITALY, UK, GERMANY, POLAND, NETHERLANDS, TURKEY, SAUDI ARABIA, UAE, INDIA, AZERBAIJAN, KAZAKHSTAN, CHINA, QATAR, ALGERIA, CHILE, USA, ARGENTINA | **WAVE 1**: 22 September – 9 October 2023<br>**WAVE 2**: 15 - 31 July 2024<br>**WAVE 3**: 7 - 20 May 2025<br>**WAVE 4**: 20 - 28 November 2025 |

| TARGET KOL | METHODOLOGY | | NUMBER OF INTERVIEWS | PERIOD OF FIELDWORK |
|---|---|---|---|---|
| **Private companies** specialized on topics related to energy transition and **Institutions** | Telephone qualitative interviews (**CATI**) | | **15 countries, 25 in-depth interviews**<br>ITALY, UK, GERMANY, POLAND, NETHERLANDS, TURKEY, SAUDI ARABIA, UAE, INDIA, AZERBAIJAN, KAZAKHSTAN, CHINA, QATAR, USA, ARGENTINA | **WAVE 1**: 9 October – 10 November 2023<br>**WAVE 2**: September 2024<br>**WAVE 3**: May-September 2025<br>**WAVE 4**: November 2025 - March 2026 |

* People who feel the urgency to combat climate change and have already adopted virtuous behaviours (IPSOS cluster)

# 4 CLOSING REMARKS

***Fondazione MAIRE – ETS will increase the perimeter and view of the research every year, including in the panel new countries in different continents. Countries are being monitored with sample-proof surveys, to observe and measure the change in attitudes and opinions over time.***

Year by year we will exend our global reach and the comparison among countries and geographical areas.

This effort will bring consistency to the commitment of Fondazione MAIRE – ETS in promoting initiatives to support the creation of skills and competence in the energy transition worldwide. As suggested by SDG17, these will be promoted both directly and through partnerships with universities, schools, institutions ans and specialized NGOs.

We believe that a stronger effort needs to be made at an international level to promote new courses on these themes in schools and universities, to increase opportunities for scholarships for students, to develop initiatives that involve younger students on this topic starting from high schools, and strive to attract more and more women into the energy sector.

Fondazione MAIRE – ETS is supporting several projects in the area of education, including a particular focus on educational poverty and gender inclusion.

We can help the countries where we operate to train and build those skills that the countries themselves are requiring, such as problem solving and creative thinking. We can solve problems that have not yet been solved; to create economically feasible engineering solutions to environmental issues; to anticipate issues that are not yet so clear; we can deal with complexity, are all aspects that we can help develop, in partnership with universities and through cooperation with local energy and chemical companies.

New professional profiles - such as hydrogen industries architect and production engineers, material recycling and circular economy engineers, carbon capture and utilization engineers, data analyst and financial modeling engineers, regulatory and international sustainability engineers - are required by the market to help energy transition develop. Competences and skills that make it possible to “engineer ideas” for a sustainable future are what we at Fondazione MAIRE – ETS and MAIRE Group are advocating and helping to create.

The view deriving from this research will also support the MAIRE Group’s worldwide commitment to raise awareness and promote the diffusion of sustainable technology solutions for decarbonization and circularity, increasing the penetration of enabling technologies for the manufacture of low carbon and circular products in the sectors of agriculture, mobility and plastics, in an increasing number of geographies.

Helping the growth of a skilled portion of industry and society on the themes related to the energy transition and promoting the growth of the number, scale and effectiveness of enabling technologies available for the reduction of GHG emissions and mitigation of climate change and for the switch from a linear to a circular economy: this is what the Fondazione MAIRE – ETS, together with the MAIRE Group believe being a concrete way to give a solid contribution to this enormous challenge.

Let’s make climate goals happen!

FONDAZIONE MAIRE

Fondazione MAIRE is the corporate foundation of MAIRE Group. Established in 2021 as a non-profit organization, it was registered within RUNTS in 2024, acquiring the additional qualification of “Ente del Terzo Settore”. The Fondazione MAIRE – ETS has defined as its own mission to foster the training of tomorrow’s “*humanist engineers*”, individuals capable of contributing to the evolution of humanity by providing economically sustainable technological solutions of excellence and able to interpret social, ethical, and environmental needs in the era of energy transition. The Foundation carries out projects to combat educational poverty, to ensure equal access to education opportunities, with particular attention to contexts of social marginalization and female inclusion in STEM sectors. It promotes awareness of issues related to sustainability, including through the promotion of studies and research.
The Foundation manages the MAIRE Group's historical archives, a valuable documentary heritage of Italian engineering and architecture projects, ensuring their preservation and promoting their awareness and use by an increasingly wider audience.

For further information: www.fondazionemaire.com

MAIRE

MAIRE is a leading technology and engineering group focused on advancing the energy transition. Thanks to its extensive know-how in technologies, the Group implements solutions giving new life to waste and developing new processes from non-fossil feedstocks. In particular, *NEXTCHEM* has adopted a new organization featuring three business lines, designed to address energy transition challenges: *Sustainable Fertilizers* leverages global leadership in urea technologies to advance nitrogen-based solutions; *Low Carbon Energy Vectors* builds on NEXTCHEM’s expertise in hydrogen production and sulfur recovery, focusing on developing technologies to produce low-emissions clean fuels and chemicals; *Circular Solutions* focuses on advancing circularity by providing technological solutions transforming waste into valuable chemical resources. The *IE&C* business unit, led by TECNIMONT, provides cutting-edge solutions for complex natural resource processing plants, from the early stages of project development to Engineering, Procurement and Construction, leveraging the business synergies of Group companies and the know-how of its engineering centers in Milan, Rome, Sittard (Netherlands), Houston (USA), Mumbai (India) and Braunschweig (Germany).

With operations across 50 countries, MAIRE employs nearly 10,800 people involved in its projects worldwide. MAIRE is listed on the Milan Stock Exchange (ticker “MAIRE”).

For further information: www.groupmaire.com



FONDAZIONE MAIRE

# Discover more about *Climate goals* researches

***Climate goals: Winning the challenge of climate goals through the creation of skills and competences worldwide***

This is our multi-year research project, which every year investigates new countries around the world in order to examine the global scenario regarding the perception of the importance of implementing the energy transition and the training of new professional skills.

In 2023, 10 countries were surveyed: Italy, United Kingdom, Turkey, Saudi Arabia, United Arab Emirates, China, India, Algeria, United States and Chile;

in 2024, we added Azerbaijan and Kazakhstan;

in 2025, we added Argentina and Qatar, and we updated the data for China and USA;

in 2026, we added a European focus, which includes Germany, the Netherlands and Poland.

Globally, we are investigating 17 countries on 4 continents with more than 2,850 individual interviews.

To browse all the papers and read our insights, visit the studies page of the Foundation's website:

FONDAZIONE MAIRE

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**Fondazione MAIRE – Ente del Terzo Settore**
Headquarters: Piazzale Flaminio 9, 00196, Rome – Italy
T +39 06 4122 35300
Tax Code 96477180580

**E-mail**
secretary@fondazionemaire.com