FONDAZIONE MAIRE

MAIRE

CLIMATE GOALS

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

ADDENDUM 3: FOCUS GERMANY, POLAND AND THE NETHERLANDS

WITH AN UPDATED FOCUS ON TURKEY

2026 Edition

Ipsos Doxa

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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 doxa, has added three more countries – Germany, Poland and the Netherlands –, to the previous fourteen ones – Italy, UK, Turkey, Algeria, KSA, UAE, India, China, USA, Chile, Azerbaijan, Kazakhstan, Qatar and Argentina – improving the focus on Europe, and has reviewed 2023 data for Turkey, updating them in the comparison tables.
In the next chapter of this report you will find an executive summary cross countries, the executive summaries focusing on Germany, The Netherlands and Poland, and an abstract focusing on the main changes noticed observing the differences between 2023 and 2026 results of the survey in Turkey. In the following chapter you will discover the complete results of the research comparing data across 17 countries that cover 4 continents.
The study involved since the beginning more than 2,900 individuals, selected for their extensive knowledge in the field of environmental sustainability. This target has been 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 has been 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 Countries 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, 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 mainly 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 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**. In Poland, the concern for job losses in the traditional sectors is counterbalanced by the recognition of the opportunity of job creation in sustainable sectors.

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 (although in Poland criticism is shown on strategies and efforts both of private companies and of politicians) 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 and Poland showing a cautious and rational demand for a well-managed, evidence-based transition. 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. In Poland, experts view the transition as a mean to ensure both security of supply and protection of key sectors like the chemical industry.

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 not 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. In Poland, prioritized skills are critical thinking and deep understanding of environmental impact assessment. **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 NEW FINDINGS FROM 2026 RESEARCH

2.1 Executive summary cross countries

The energy transition is widely recognised as a strategic environmental, economic and industrial priority. Yet evidence from the 17 countries included in the Fondazione MAIRE – ETS's research reveals substantial differences in national commitment, perceived progress and implementation capacity. Taking stock of the situation today therefore means looking beyond general awareness to assess whether countries have the policies, infrastructure, investment and skills required to translate ambition into action.

Since 2023, the Fondazione MAIRE – ETS's research, conducted in collaboration with Ipsos Doxa, has examined the factors enabling or constraining the energy transition, with a particular focus on education and skills. Across five survey waves, the study has involved 2,900 respondents with high levels of education and employment, as well as awareness of and engagement with environmental sustainability. As the waves were conducted in different years and mainly covered different countries, they provide a broad international overview of the conditions in which the transition is taking place, highlighting common expectations, recurring barriers and variations in national preparedness, with the fifth wave providing updated evidence for Turkey.

Awareness, National commitment and perceived progress of the energy transition

Awareness of the energy transition is widespread, although the depth of knowledge varies. Respondents in the United Kingdom, Germany and the Netherlands more frequently report an in-depth understanding, while knowledge is more often general in Poland, Argentina, Turkey and China. Strengthening familiarity with the transition remains important given the technological, economic, employment and social dimensions examined throughout the study. [Table 1]

The transition is also widely regarded as an important issue, but the priority assigned to it differs across countries. India and the Gulf countries show the strongest alignment between personal priority and perceived national commitment, together with greater confidence in their relative progress. China is closer to the United Kingdom, Italy, the United States, Germany and the Netherlands, where the transition is considered relevant at both personal and national level, although assessments of progress vary. In Turkey, Chile, Algeria and Azerbaijan, personal priority exceeds the commitment attributed to the country. This difference is particularly marked in Turkey, where 62% consider the transition a personal priority, compared with 43% who regard it as a priority for the country, while 52% believe that Turkey is behind other countries in the transition process. Poland, Argentina and Kazakhstan record lower levels of both personal and national priority. Additionally, in Argentina and Kazakhstan the assessments of national progress are particularly critical.

The overall picture points to a central finding: recognition of the importance of the energy transition does not necessarily translate into confidence in national commitment or progress. The international landscape is characterised by broad support for the direction of the transition, but by uneven confidence in countries' capacity to deliver it. [Tables 2-4-5- 6]

Expected benefits and economic expectations

The economic outlook is characterised by short-term caution, with concerns that costs may outweigh benefits particularly evident in several European and Central Asian markets. Expectations improve over the medium to long term in most countries, particularly in the Gulf countries and several major economies. Poland and Kazakhstan remain notable exceptions, with only 15% and 22%, respectively, expecting benefits to outweigh costs over the longer term. [Table 13]

Despite this, respondents recognise a broad range of potential benefits. The contribution of the transition to tackling climate change remains central, together with benefits for human health and the environment, improved energy efficiency and reduced dependence on imported energy sources. At the same time, the creation of new jobs in renewable energy, clean technologies and other sustainable sectors emerges as one of the most widely recognised opportunities. The transition is therefore perceived not only as an environmental necessity, but also as a source of economic and employment opportunities. [Tables 3-7]

The prevailing view is therefore one of cautious optimism. The transition is expected to generate positive economic returns, but these will take time to emerge and will require significant initial investment in infrastructure, technology, organisational transformation and workforce development.

National challenges and stakeholder responsibilities

The barriers to realising these opportunities differ across national contexts. The development of new infrastructure is particularly relevant in Germany, the Netherlands, the United Arab Emirates, Kazakhstan and the United States. Raising public awareness and involving stakeholders are more prominent concerns in China, Algeria and Saudi Arabia, while greater private-sector engagement is considered particularly important in Chile, the United States, the United Kingdom and Argentina. In Turkey, the main challenge is the development of effective energy and environmental policies. [Table 8]

Addressing these barriers requires the involvement of different actors, although the balance of responsibility varies across countries. Public institutions are assigned the leading role in Azerbaijan, Turkey and Kazakhstan, and also rank first in China and Qatar. Private companies take the lead most clearly in the Netherlands and, to a lesser extent, in the United Kingdom, Germany, Poland and the United States. In Italy, Saudi Arabia, the United Arab Emirates, Algeria, Chile and Argentina, expectations are more evenly distributed between the public and private sectors. Chile stands out for the near parity attributed to the two, while in India responsibility is spread more broadly across public institutions, citizens, scientists and experts, and businesses. [Table 10]

The prominent role assigned to governments and businesses is not always reflected in equally positive assessments of their current efforts. Respondents in China, Saudi Arabia and Qatar tend to evaluate both political institutions and businesses more favourably, while opinions are more critical or divided in several European and American countries. Turkey provides a particularly clear example: although government is identified as the main actor responsible for advancing the transition, political strategies receive less favourable assessments than business efforts. The actors expected to lead are therefore not always perceived as fulfilling that role effectively. [Tables 10-11]

National priorities and industrial capabilities

The long-term credibility of the transition will depend on the ability of institutions and businesses to manage its costs while delivering visible and broadly distributed benefits. Against this background, the actions considered necessary reflect countries' different economic structures, energy systems and starting points. Waste reduction by businesses and individuals is widely identified as a priority, alongside renewable-energy development, greater energy efficiency, local community involvement and public policies supporting clean-energy investment.

Government priorities reflect different national approaches: Germany focuses on expanding renewable-energy capacity, the Netherlands and Poland on technology funding and incentives, and Turkey on low-emission technologies and public-private cooperation.

Industrial strengths also vary, with energy leading in Germany, green chemistry in the Netherlands, a stronger focus on green chemistry and bioenergy in Poland, and a more diversified profile in Turkey. [Table 12-15.1-15.2]

Education, training and workforce preparedness

Within this framework, education and training emerge as critical enabling factors. Strategic cooperation between governments, educational institutions and businesses will be central to this effort. Public institutions can provide long-term direction and align education and employment policies with national transition strategies. Universities and training providers can adapt curricula and learning models, while businesses can identify evolving professional needs and provide opportunities for practical skills development. Closer cooperation can help ensure that training remains relevant and responsive to current and future labour-market demand.

A majority of respondents in every country report a need for further training. Demand is especially strong in China and Chile but remains substantial elsewhere. In Turkey, 71% report a need for additional training, while 99% consider the development of dedicated education and training programmes important. These findings indicate that existing qualifications alone are not sufficient to support the transition. Education and training cannot be treated as secondary interventions or introduced only once skills shortages have become critical. They need to be embedded in energy, industrial and labour-market policies from the outset, allowing human-capital development to progress alongside technological investment and the evolution of production systems. [Tables 17-18]

Confidence in the current availability of qualified professionals remains uneven. India, China and the Gulf countries express relatively strong confidence in their national skills base. Assessments are more fragmented across much of Europe and the Americas, while respondents in Turkey, Azerbaijan and Kazakhstan also express greater concern about the availability of appropriate expertise. [Table 24]

The expected timing of training reinforces this urgency. Across most countries, respondents believe that new initiatives should be introduced within the next three years. Demand for rapid action is particularly strong in China, Chile and several Asian and Gulf countries, while some European markets, particularly Italy, Poland and the Netherlands, indicate a more gradual timeframe. Workforce preparation is therefore viewed not as a long-term complement to the transition, but as an immediate condition for its implementation. [Table 20]

Professional skills and educational pathways

The required professional profiles combine technical expertise with transversal capabilities. In most countries, neither dimension is considered sufficient in isolation. Problem-solving, critical thinking, creativity, teamwork and a multidisciplinary approach are among the most valued transversal skills, reflecting the need to work across technologies, industries, institutions and stakeholder groups. [Tables 21-22]

Priority technical competencies include knowledge of renewable-energy sources, environmental impact assessment, sustainable and recycled materials, circular-economy processes, and the ability to evaluate effects on territories and communities. India and some Gulf countries place comparatively greater emphasis on technical knowledge, but creativity, teamwork and problem-solving remain important in these markets. The profile emerging from the research is therefore hybrid: technically grounded, but also able to interpret complex situations, collaborate across disciplines and respond to changing economic and social requirements. [Tables 21-22-23]

Preferred educational pathways reflect the same need for integration. Energy Engineering is considered particularly relevant in Germany, Poland, the Netherlands and Turkey, alongside Environmental and Energy Sciences, Circular Economy and Sustainability, and Energy Systems Management. The findings point towards an educational ecosystem rather than reliance on a single academic discipline, combining engineering and scientific expertise with environmental awareness, resource management, economic understanding and the capacity to assess social and territorial impacts. [Table 18.1]

Political ambition and technological investment will be insufficient if countries lack professionals capable of designing, managing and implementing the necessary changes.

Education, vocational and professional training, continuous reskilling and international knowledge exchange will therefore be essential, both to address current shortages and to anticipate emerging needs.

Priorities for effective implementation

The current state of the transition therefore calls for a shift in emphasis from recognition to implementation. Progress will depend on aligning public policy with industrial action, directing investment towards the infrastructure and technologies appropriate to each national context, involving citizens and local communities, and embedding education and continuous reskilling in national strategies.

Taken together, the five survey waves reveal broad consensus on the direction of the energy transition, but uneven capacity to implement it. The environmental and economic case is widely recognised, and the transition is associated with opportunities for employment, innovation and greater resilience.

Yet this support is not always matched by confidence in national commitment, infrastructure, policies or professional capabilities.

Methodological note

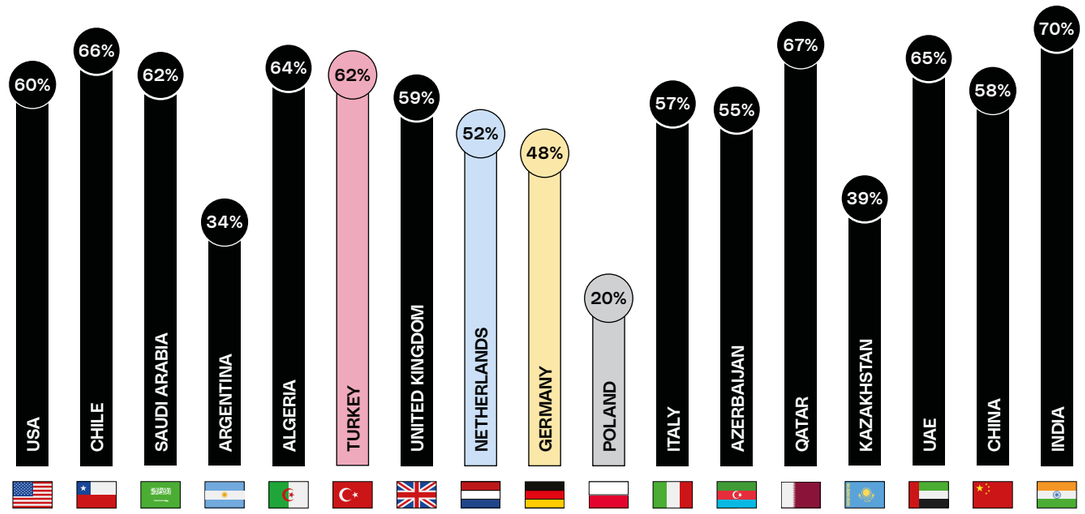
The cross-country evidence combines survey waves conducted between 2023 and 2026, covering 17 countries and 2,900 interviews. As countries were surveyed in different years and under different national conditions, the findings should be interpreted as a cumulative international overview rather than as a longitudinal measurement of change. Turkey was included in the fifth wave, based on 200 interviews conducted in July 2026.

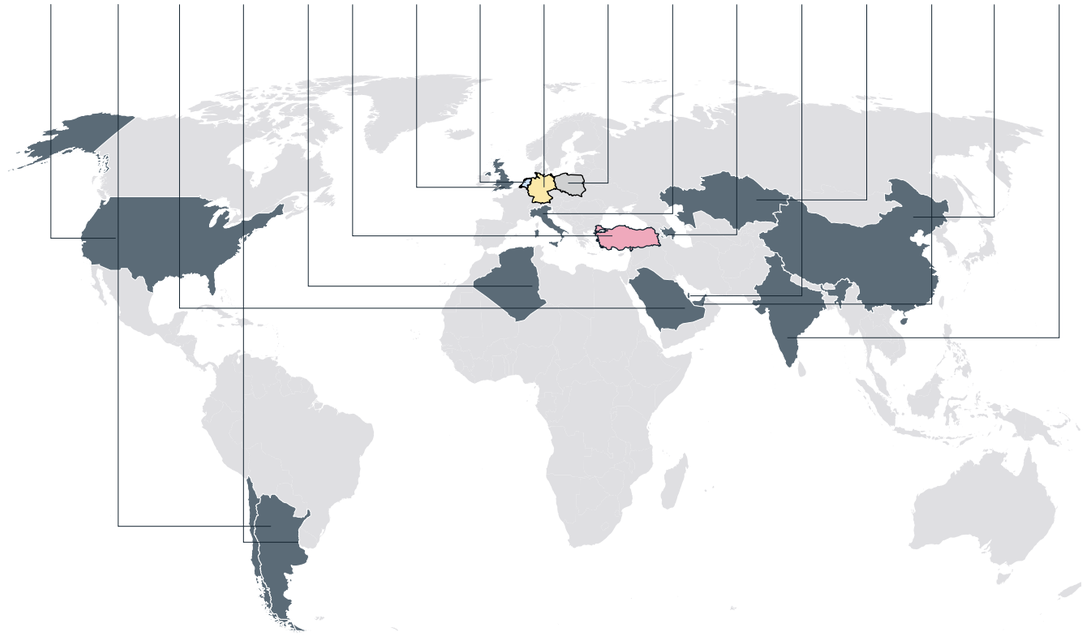
How countries' respondents look at the energy transition as a priority

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

Source: Ipsos Global Advisor

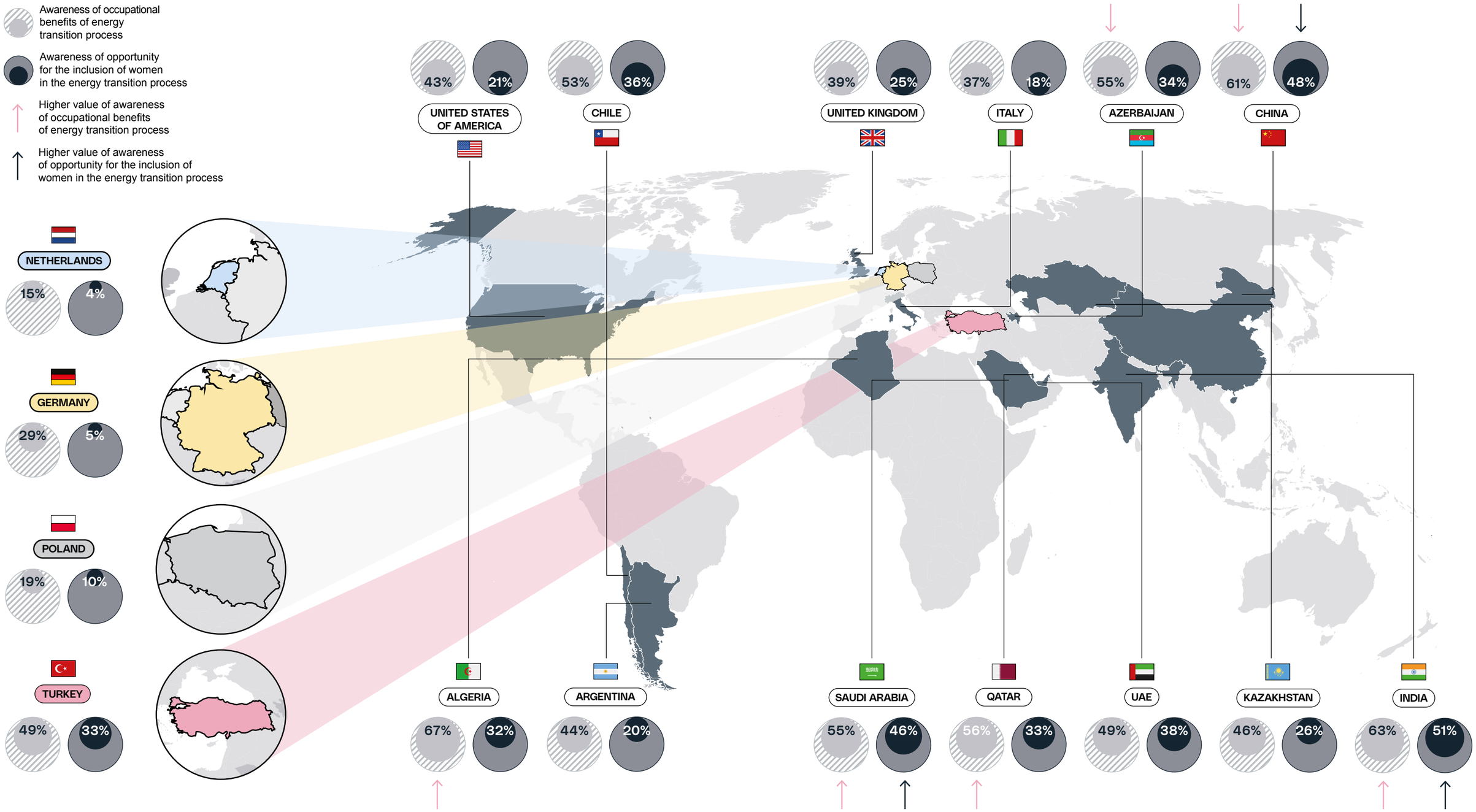
Countries covered Countries surveyed in 2025 Focus





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

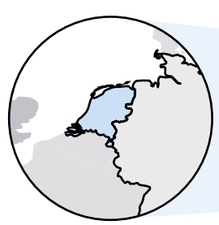


Key skills and competences prioritized for energy transition

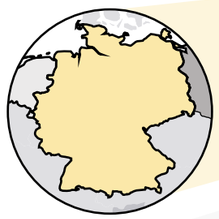
Q9_1. *What are the most important personal skills for those involved in energy transition?*
Q8_2. *What are main technical knowledge requirements for those involved in energy transition?*
Countries covered Countries surveyed in 2025 Focus

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

HARD SKILLS SOFT SKILLS



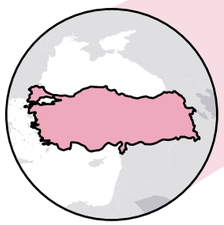
NETHERLANDS
Renewable energy sources
Problem solving
Critical thinking
Alternative materials



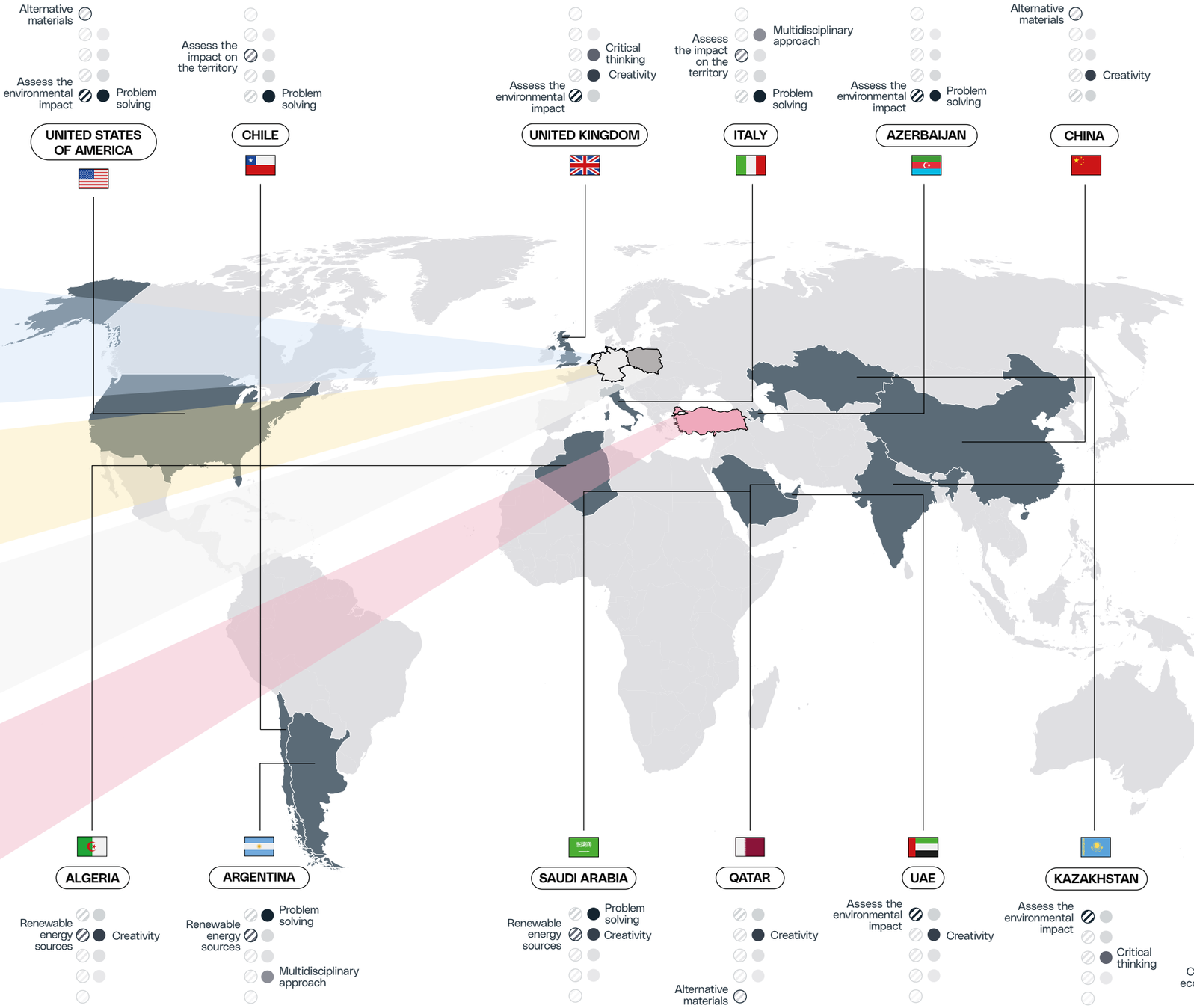
GERMANY
Renewable energy sources
Problem solving



POLAND
Assess the environmental impact
Critical thinking



TURKEY
Assess the environmental impact
Circular economy
Problem solving



2.2 Focus on Germany

The 2025 data of Germany, reflecting the views of a highly qualified "Informed Population" characterized by high education, active employment, and strong environmental engagement, portray a country characterized by a high level of maturity in public awareness, distinguishing itself from emerging markets through a pragmatic perspective on the energy transition. With nearly universal awareness (98%) and a deep familiarity (64%) embedded in public discourse, the German public views the shift not merely as an economic boom, but as a necessary environmental and industrial evolution TAB1. However, the German public appears aware that the political and social focus has shifted, diluting the urgency of the climate agenda amidst other domestic and geopolitical concerns (44% view it as important as other commitments) TAB2. This broader perception of disinvestment, where the transition is recognized as a reality rather than a singular priority, translates into a sentiment of cautious optimism and a pragmatic outlook. While the benefits for health and climate are recognized (43%) TAB3, there is a clear understanding that it involves significant challenges. The transition is perceived as a demanding process that requires immediate effort to unlock future potential. Consequently, public attention is shifting toward the tangible structural and infrastructural hurdles (32%) that must be overcome to complete the process TAB8. This vision is supported by a "tripartite" governance model that demands a decentralized effort shared between politicians (36%), private industry (37%), and citizens (35%) TAB10, though private companies are increasingly perceived as the primary drivers of operational progress (51%) TAB11. Consequently, the path forward is viewed as a strict technical endeavor, anchored in the excellence of the energy (44%), engineering and construction (37%) and automotive (32%) sectors TAB15_2, that requires the immediate upskilling of the workforce to create "hybrid" professionals capable of balancing technical engineering with critical problem-solving skills (61%) TAB22.

Placing Germany within the broader European landscape reveals a continent moving at three distinct speeds, where Germany occupies a complex middle ground. Germany stands as the bridge in a fragmented Europe: technically advanced and more secure than the East, but currently less dynamic and optimistic than the most committed Western European players. In the current 2025 cohort, the Netherlands emerges as the most dynamic nation, viewing the transition through a sophisticated financial and circular lens, yet it grapples with a sense of isolation, identifying international scientific collaboration as one of the major challenges (28%) TAB8. In stark contrast, Poland trails significantly behind, ranking last not only among its European neighbors but across all 17 countries analyzed in the research. This position reflects a nation distracted and paralyzed by more contingent problems which effectively push the energy transition to the background of the national agenda.
Regarding the strategic direction the government should take, Germany's vision is distinct and technically specific. Unlike the Netherlands (20%) and Poland (24%), where there is a higher openness on nuclear power, though not a priority, Germany shows a low orientation toward this energy source (13%). Instead, the German public strongly directs the government toward the development of new technologies (30%), specifically low-carbon hydrogen and the expansion of renewables like photovoltaic and wind (32%). TAB15_1, This confirms that Germany sees its path forward through technological innovation, relying on its established areas of industrial excellence such as energy sector (44%) and engineering construction (37%) rather than a shift to the green chemistry, which leads in the Netherlands (43%) and bio-economy favored by Poland (35%). TAB15_2

Unlike the enthusiastic mobilization seen in emerging markets, these Western nations are acutely aware of the “disinvestment" in the climate agenda. In Germany, like in the UK and Italy, people perceive that the energy transition is losing ground to other geopolitical and domestic priorities, resulting in a shared frustration where these nations feel they are merely "keeping pace" rather than leading the global charge. Beyond the universally recognized benefits for the environment and public health, the narrative of "Green Growth" is evolving. While Italy previously viewed the transition through a lens of social participation (prioritizing the "active involvement of all stakeholders" as its top opportunity in 2023), the current German, Dutch, and Polish sentiment reveals a pragmatic mindset. The creation of new jobs in sustainable sectors emerges as a benefit, suggesting that for Northern and Eastern Europe, the energy transition can revitalize the labor market and driving infrastructure development TAB7. However, this economic hope is tempered by reality. Furthermore, the financial outlook is dominated by caution; a striking 50% of the population in the Netherlands and 33% in Germany believe that costs currently outweigh benefits, indicating that for these mature economies, the transition is increasingly felt as a heavy cost rather than an industrial opportunity in the short term (1-3 years) TAB13.

The most critical insight from the 2025 data is the confirmation that the true engine of the energy transition has shifted away from Europe. Germany lags the dynamism of emerging markets. The Gulf nations (UAE, Saudi Arabia, Qatar) have surpassed Germany in prioritizing the transition, viewing it as a top-down national mission driven by high investment and public confidence. Similarly, the emerging giants of China and India show a much higher commitment in developing educational and training programs for energy transition and a stronger belief in the benefits of the shift. TAB18, While Germany debates the costs, these nations are aggressively upskilling their workforce. Consequently, Germany shares a "Western confusion" with the United States, where views on the availability of skills appears less straightforward compared to the unified fronts seen in Gulf countries, China and India.

The human capital dimension reveals a profound difficulty within Western economies to accurately define their internal maturity regarding skills. Germany, despite its historic reputation for technical excellence, exemplifies this Western difficulty in assessing workforce maturity; responses regarding the availability of specialized professionals are fragmented, with a slim majority (53%) deeming it appropriate. This sentiment aligns closely with the Netherlands (57%), suggesting that even the most dynamic European markets feel under pressure and unsure of their capacity to meet new demands. The uncertainty becomes more acute in Poland (49%), where less than half of the population believes the country possesses the necessary human capital, highlighting a perceived "talent bottleneck" that contrasts sharply with the monolithic confidence of the Asian giants (96% China, 89% India). TAB24

In addition, while emerging markets like India (77%), Qatar (68%), and Saudi Arabia (67%) rank training as an absolute top priority, Germany and its European neighbors adopt a much more moderate stance, with only 32% of Germans classifying it as "very important." TAB18, This gap in priority is mirrored by a lack of confidence; unlike the self-assurance seen in Asia and the Middle East, the German workforce remains divided on its readiness, though it fares significantly better than Poland, where a staggering 87% demand training and only 4% feel prepared. TAB17, However, when analyzing the timing of this necessary upskilling, Germany breaks away from the cautious European average. While the Netherlands views the transition as a structural evolution (with 41% favoring a 2-3 year timeline) and Poland remains fragmented, with a significant 21% willing to defer training beyond five years, Germany demands “speed”. Nearly 50% of German respondents expect training to be implemented within the next year. This specific demand for immediate action aligns Germany less with its hesitant European neighbors and more with the aggressive urgency observed in China (50%) and India (49%), where the transition is treated as an industrial sprint requiring rapid and immediate workforce adaptation. TAB20

Despite these regional differences in strategy, a global consensus has solidified regarding the type of professional required. The era of the one-dimensional engineer is over. The data confirms a universal demand for multidimensional profiles, where deep technical knowledge, specifically regarding renewable sources and environmental impact, must be strictly paired with high-level soft skills. Regarding the specific soft skills required, a distinct regional specialization emerges. Problem-solving has solidified as the dominant requirement in industrial heavyweights like Germany, reflecting a pragmatic focus on operational efficiency and execution. In contrast, Poland and the Netherlands emphasize Critical Thinking, suggesting a demand for a workforce capable of rigorous analysis and strategic evaluation. Finally, the dynamic economies of China, India, and the Gulf nations place a premium on Creativity, indicating that for these markets, the transition is viewed as an opportunity for innovation rather than just technical adaptation. This confirms that regardless of geography, the energy transition is no longer seen just as a technical task, but as a complex systemic challenge requiring adaptability and cognitive flexibility. TAB22

Facing aggressive competition from Asian markets and a domestic context of economic skepticism, Germany is pivoting towards a strictly pragmatic approach where industrial survival outweighs ideology. The focus has shifted from political promises to the urgent need for operational efficiency. Ultimately, Germany's ability to retain its global leadership now depends entirely on a race against time to upgrade its human capital. Success lies not in setting new targets, but in empowering a new generation of professionals capable of navigating this complex, multi-speed global market.

2.3 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.

2.4 Focus on Poland

The 2025 findings for Poland indicate that the energy transition must share the national stage with other pressing issues. This perspective is drawn from the “Informed Population”: a select group of citizens who are already educated, professionally active, and predisposed to care about sustainability. As the country's most engaged and aware stakeholders, their views show that immediate anxieties over economic stability and security are now a dominant part of the conversation. Poland's journey into the energy transition is shaped by a careful balancing of national priorities, where socio-economic stability is weighted alongside climate objectives. Its approach is uniquely defined by a defensive posture, born from the weight of its industrial heritage and a clear prioritization of socio-economic stability over ambitious climate targets. This evidence is strongly confirmed by industry experts, who emphasize that the transition must ensure both security of supply and affordability to protect the competitiveness of key sectors like the chemical industry. This concern is amplified by the awareness of the enormous costs of decarbonization, which represent a significant portion of the national GDP, making industrial competitiveness a non-negotiable priority. This cautious, analytical mindset permeates every aspect of the national sentiment, from the low priority assigned to the transition to the profound concern for the stability of its “traditional” workforce. The national vision is therefore one of pragmatic adaptation relying on a managed partnership between the public and private sectors to leverage existing industrial strengths. Consequently, the very skills it prizes most (critical thinking) reflect a national need to question, analyze, and control the path forward [TAB22]. This analytical mindset is further evidenced by the public’s trusted sources of information: unlike countries that rely on mass media, Poles place their highest trust in Academic Publications (47%) and Specialised Magazines (45%) [TAB19, P0], confirming the importance of understanding before acting.

Poland's defensive approach is ambivalent: it combines caution and skepticism with a concrete focus on real opportunities and a strong demand for accountability of politicians and private companies. This is contextualized by how Poles assign responsibility: with no single actor seen as the clear leader, the public distributes accountability almost equally between Private Companies (37%) and Politicians (36%), and citizens themselves (35%) [TAB10], fueling the right to demand competence from all sides. This caution is best understood through the lens of the labor market, where a profound concern for job losses in traditional sectors (25%) [TAB8] is counterbalanced by a significant recognition of the opportunity for new job creation in sustainable sectors (31%) [TAB7], a figure that represents one of the highest observed across countries and over time.

This focus on the economic trade-offs is reflected in the broader public sentiment. While awareness of the transition is widespread (97%), it is often superficial (58% have a vague idea) [TAB1], which helps explain why the topic ranks as the lowest priority in Europe (20%) [TAB2]. This critical stance, however, is not passive, but translates into an active and demanding attitude. Public criticism of the strategies put in place by both private companies (45% inappropriate) and politicians (55% inappropriate) [TAB11] is the very force that fuels a clear set of demands. Expert interviews suggest the criticism of politicians is less about a lack of effort and more about structural challenges. A perceived lack of unified strategic direction, combined with slow bureaucratic processes for investment permits, is seen as a key risk that could slow private investment and undermine the transition's overall momentum. From companies, people expect tangible innovation in products and services (36%) [TAB15]; from the government, they seek a pragmatic mix of funding for new technologies (28%) and a strong focus on energy security, evidenced by the highest support in the cohort for nuclear power (24%) [TAB15.1]. This practical mindset is a strength, further confirmed by the actions deemed most critical for success, which are concrete measures of efficiency: reducing waste (34%) and improving energy efficiency in industries and transport (28%) [TAB12].
Even the skills prioritized for the ideal hybrid professional (a profile demanded by a strong 79% of the population [TAB21]) reflect this mature realism. The emphasis on Critical Thinking (49%) [TAB22] and a deep understanding of environmental impact assessment (44%) [TAB23] is a sign of a demand for a

well-managed, evidence-based transition. Before acting, Poland wants to understand the full consequences, a hallmark of a cautious but ultimately responsible stakeholder.

When set against its European peers, Poland's defensive and pragmatic approach reveals a distinct strategic logic. This cautious stance, born from the national context, contrasts sharply with the high levels of personal commitment seen in the Netherlands (52%), Germany (48%), and even the UK (59%) and Italy (57%) from the 2023 data [TAB2]. This difference in urgency also shapes national self-perception. While the mature economies of Germany, the Netherlands, and the UK feel they are "on par" with global progress, Poland is defined by a pronounced preoccupation, with a majority of its citizens feeling the country is falling behind (52%), a sentiment more acute than that seen in Italy [TAB5]. The most divergence, however, lies in their strategic roadmaps. While Germany's public calls for an engineering-led build-out of renewables and the Dutch demand a finance-driven market enablement through subsidies, Poland's strategy is fundamentally one of energy security and asset-based pragmatism. This is most clearly demonstrated by its unique support for nuclear power (24%) as a cornerstone of its future [TAB15.1] a path not prioritized by its neighbors, and its focus on leveraging national strengths in Bioenergy and Sustainable Agriculture (35%) [TAB15.2]. However, this pragmatic approach does not shield Poland from the shared European perception of high costs. The key difference lies in the nature of this concern: while its neighbours focus on the financial cost of investment, Poland is primarily concerned with the potential social cost (job losses), a perspective that confirms its unique, defensive starting point. Poland is the most pessimistic country in the European cohort about the long-term economic payoff, with only 15% believing the benefits will outweigh the costs [TAB13], explaining the intense demand for evidence and control.

On the global stage, Poland's position as a cautious follower reveals a set of challenges that become clear when compared to other international countries. Unlike the emerging leaders, such as China, India, and the Gulf nations, where high personal priority is matched by a strong belief in national progress, or the Western economies like the USA, Germany and the Netherlands, which are defined by a more moderate alignment, Poland finds itself in a different group. Its closest parallel is Argentina and Kazakhstan, forming a cluster of nations characterized by a challenging combination of low personal urgency and a weak perception of national commitment. This is proven by the data: Poland, Argentina, and Kazakhstan all show low personal priority for the transition (20%, 34%, and 39% respectively) [TAB2], low perceived priority from their country (21%, 23%, and 15%) [TAB4], and a strong sense of being "behind" other nations (52%, 67%, and 86%) [TAB5]. This is further confirmed by their objective positioning in the Energy Transition Index, which places all three outside the top leadership ranks [TAB5].

Poland's position on the global stage is best understood through the core paradox of its approach to human capital: a low national strategic priority for education [TAB16] clashes with one of the world's most acute individual demands for training. This demand is fueled by a profound sense of unpreparedness. Only 4% of Poland's informed population feel fully prepared to face the transition, a strikingly low figure compared to the higher confidence shown in Germany (22%), the Netherlands or The USA (18%). The demand for training reflects the need to modernise an educational system perceived as not fully aligned with the transition's requirements. Experts point to a gap between traditional university programmes, often still focused on fossil fuels, and the market's growing need for practical, modern skills—such as process safety for new technologies, advanced digital skills, and a life-cycle thinking approach.
This insecurity translates into 87% of Polish respondents stating they need training, aligning the country with nations like China (94%), Qatar (88%) and Argentina (88%) [TAB17]. However, this individual urgency does not translate into a demand for immediate national action. Regarding the timeline for implementing this training, Poland's opinion is fragmented and cautious. While nearly half of Germans, China, India, Gulf countries and a significant portion of Americans push for immediate action (within 6-12 months), only a third of respondents in Poland share this urgency. Another third prefers to postpone training to the next 2-3 years, and a significant 21% defers it to a horizon of 5 or more years [TAB20]. This long-term view contrasts with the pressure for immediate acceleration seen in other key markets. When it comes to the content of this training, the demand reflects the nation's analytical mindset. The specific skills required are particularly revealing: when it comes to personal skills, Poland prioritizes critical thinking and analytical skills (49%), unlike Western economies, which focus on problem-solving [TAB22]. The most requested technical knowledge is the ability to understand environmental issues and assess their impact (44%), which surpasses even the knowledge of renewable raw and recycled materials to substitute traditional materials (38%) [TAB23].

This entire dynamic culminates in the final bottleneck: a deep uncertainty about the current availability of talent. Public opinion on the availability of professionals is deeply fragmented. While a plurality (49%) views the country's human capital as appropriate, a significant bloc of 34% deems it inappropriate, and a notable 17% is unable to provide an answer [TAB24]. This perceived "talent bottleneck" explains the country's reactive stance and its profound sense of deficit, standing in stark contrast to the confidence of Asian giants like China (96% consider availability of technical professionals appropriate) and India (89%) [TAB24].

Poland's journey in the energy transition is that of a nation at a crossroads, suspended between the legacy of its industrial past and the inevitable challenges of the future. The success of Poland's transition will depend on its ability to transform its population's demand for skills into a coherent national strategy. The country's cautious approach is a pragmatic demand for a well-governed transition based on analysis and control. If Poland can meet this need, it can evolve from a "cautious follower" to a "responsible implementer", defining a unique model founded on energy security, industrial efficiency, and a human capital prepared to govern complexity.

2.5 Abstract on updated data from Turkey

In 2026, we decided to conduct a new survey in Türkiye, the host country of COP31, to assess whether there were any significant differences compared with the data collected in the first edition of the research in 2023. Comparing the latest data (used for the tables on the previous pages) with the 2023 results highlights how perceptions among our target audience appear to have changed over the past three years:

- Overall awareness of the transition has increased most notably. In 2026, the share of respondents who have at least heard about it rises significantly (90% vs. 98%), while high familiarity remains broadly stable, from 47% to 49%.

- The perception of the importance attributed to the transition by the country increases (37% vs. 44%), while the personal relevance decreases (70% vs. 62%). Environmental, energy and employment benefits continue to be recognized, but less strongly than in 2023.

- Among the opportunities, the development of new infrastructure and the training of professionals gain greater prominence. Among the challenges, greater importance is placed on defining effective energy and environmental policies and on international collaboration. Overall, attention is shifting from more "generic" benefits to the concrete conditions needed to make the transition happen.

- Confidence in personal skills and in the availability of trained professionals is strengthening, without reducing the demand for training. The share of respondents who consider the availability of technical professionals in Turkey adequate increases significantly (from 60% to 72%), as does the share of those who feel prepared to address the transition (74% vs. 87%). At the same time, 91% continue to consider the development of dedicated training programs important.

- In this context, transversal skills are becoming increasingly important, such as communication and networking (+11 p.p., with significant growth compared with 2023), as well as critical thinking (+3 p.p.) and the ability to integrate different disciplines (+5 p.p.). Among the technical skills required, demand is increasing particularly for expertise related to recycling and the circular economy (+10 p.p.).

- Governments are primarily expected to support innovation and create the conditions for investment. The main priority is funding new technologies to improve energy efficiency, followed by promoting collaboration between government and private-sector stakeholders, investing in alternative fuels, and providing financial incentives for clean technologies.

- Green chemistry and renewables lead the sectors considered most important for the energy transition. They are followed by bioenergy and sustainable agriculture (36%), and technologies for sustainable materials and recycling (34%).

- Perceptions of the political leadership's actions improve (37% vs. 48%), while private companies' strategies continue to be viewed more positively (65%); however, doubts are increasing about the continuity of both actors' future commitment.

3 KEY FINDINGS FROM 2026 RESEARCH

3.1 Results of the research

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.
Considering the European context, the data align Germany

> *There was a strong awareness both in culture and in society towards everything that concerns the climate.*
>
> **Institution, 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 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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
TOTAL AWARENESS	97%	95%	98%	97%	98%	97%	96%	97%	95%	96%	93%	98%	95%	96%	99%	96%	97%
I am **very familiar with it**	**60**	**59**	**64**	**39**	**59**	**49**	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	48	41	47	32	53	64	54	48	40	57	38	61
I have **never heard of it**	3	5	2	3	2	3	4	3	5	4	7	2	5	4	1	4	3

Higher values

Lower values

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		2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
It's a **priority**	57	59	48	**20**	52		**62**	**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		33	35	34	29	39	55	40	31	35	31	37	62
It is of **secondary importance**	2	1	8	14	3		5	3	1	1	6	6	2	2	1	3	3	4

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.

> *Also, for the general public I think it is a priority, it is considered to be very important.*
>
> **Institution Germany**

The Gulf and Asian markets, including Turkey (62% in 2026), Saudi Arabia (62% in 2023), the United Arab Emirates (65% in 2023), India (65% in 2023) and Qatar (67% in 2025), 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		2026	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**		**60**	**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		**49**	**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**		**53**	**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		**55**	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		44	**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		33	**46**	38	**51**	34	26	48	33	32	36	21	20

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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
It's a **priority**	**53**	**51**	41	**21**	47	**43**	**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	45	34	40	26	50	58	41	36	43	41	38	53
It is of **secondary importance**	7	7	12	13	5	12	4	5	3	19	27	2	7	19	11	14	24

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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Ahead of other countries	**8**	**29**	**16**	**5**	**21**	**15**	**41**	**44**	**43**	**16**	**2**	**52**	**26**	**1**	**20**	33	**3**
On par with other countries	47	46	56	43	57	33	46	42	46	29	12	44	51	41	29	32	30
Behind other countries	45	25	28	52	22	52	13	14	11	55	86	4	23	58	51	35	67

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°**
2026	63,9°	68,2°	69,6°	61,3°	67,4°	60,1°	57,4°	59,1°	54,9°	58,3°	53,6°	66,9°	56,6°	50,7°	65,8°	65,9°	57,4°

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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Priority for **ME**	57	59	48	**20**	52	**62**	**62**	**65**	**70**	55	**39**	58	67	**64**	**66**	60	**34**
Priority for **COUNTRY**	53	51	41	**21**	47	43	**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	52	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 as a priority, and a clear majority of the population (52%) explicitly acknowledges that the country is lagging behind other nations.

> *Certainly, at the global level Germany is among the most advanced countries in the energy transition.*
>
> **Institution Germany**

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.

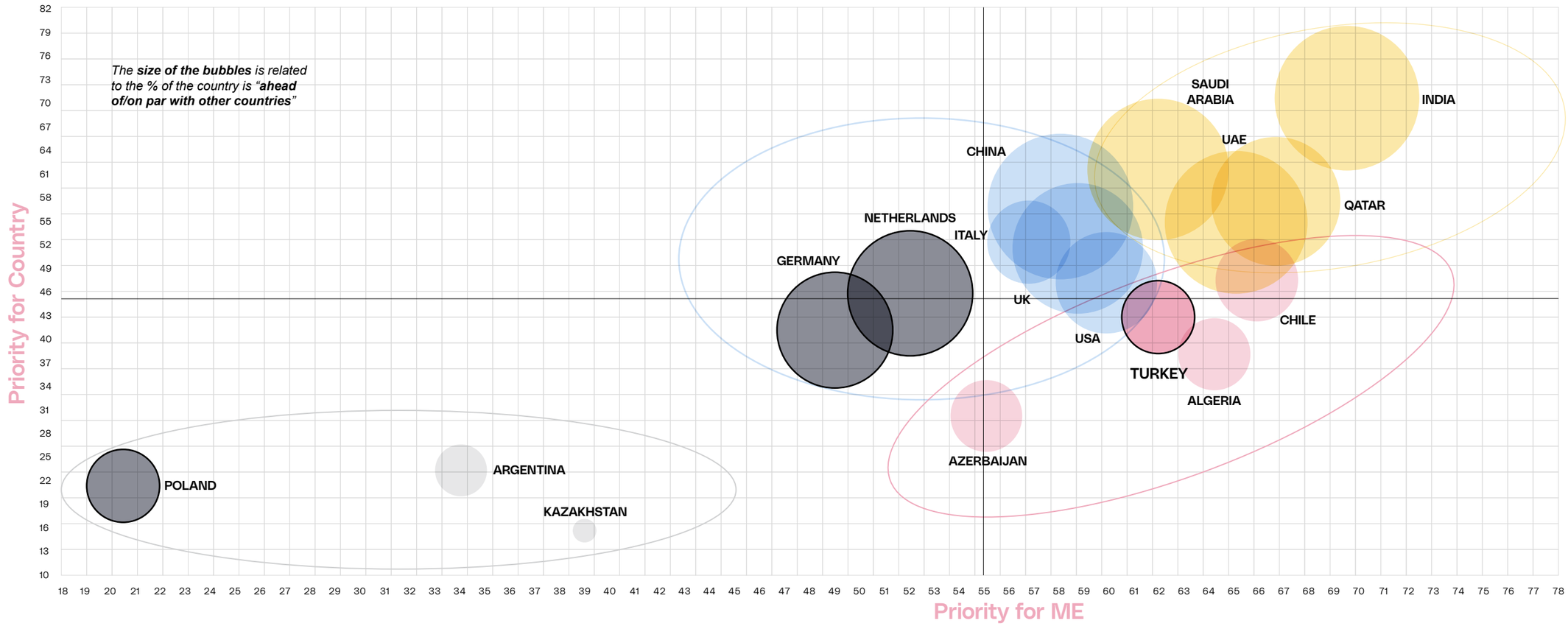
Table 6 Positioning map

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.

> *We are a bit ahead. But there are some countries like Denmark or Sweden or Norway which are quicker than we are. But finally, I would say on par with other.*
>
> **Institution Germany**

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		2026	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		23	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**		**34**	**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		19	20	23	26	20	20	14	20	17	25	26	**29**
Development and **implementation of new infrastructures**	21	23	25	25	26		25	21	22	25	25	25	24	25	**27**	26	26	27
International collaboration for sharing knowledge, resources, and experiences	19	19	22	15	22		15	19	18	**29**	19	22	23	25	25	16	24	17
Training of professionals in the energy transition process	18	12	18	19	14		18	17	17	13	25	19	15	14	14	21	16	21
Raising public awareness about energy and environmental issues	17	**35**	17	27	24		**31**	25	**31**	**29**	23	**26**	**27**	**31**	**32**	18	**30**	13
None of these	*5*	*2*	*9*	*9*	*9*		*1*	*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%).

> *There's too much emotion in the public discussion and it would be helpful to concentrate more on real facts and how to get from a point to another point.*
>
> **Institution, Germany**

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		2026	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		19	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		26	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**		21	27	21	17	22	14	21	20	24	14	18	21
Training of professionals in the energy transition process	21	17	18	15	14		16	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		16	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		**38**	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 most mentioned options 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.

> *For example, in Germany there is the Wasserstoff-Kernnetz, a network for the distribution of hydrogen. These investments in distribution must be made.*
>
> **Institution, Germany**

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	2026	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**	-11	**11**	7	-2	5	-8	-1	2	-1	1	**-9**	5
Development and implementation of **new infrastructures**	-2	**-10**	-7	-2	-5	-4	-8	**-14**	-8	-2	**-10**	5	-2	0	9	**-9**	0
International collaboration for sharing knowledge, resources, and experiences	-4	1	-2	0	-6	-6	**-8**	-3	**12**	-3	8	2	5	1	2	6	-4
Engagement of private companies to adopt renewable energy	-2	**-11**	-2	-1	**-12**	0	3	**9**	0	3	-1	-6	-7	-5	**-15**	-4	-1
Raising public awareness about energy and environmental issues	**-10**	**18**	-3	0	-5	4	-7	0	6	1	9	**-10**	6	-7	-9	7	**-8**
Training of professionals in the energy transition process	-3	-5	1	4	0	**2**	-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**	**18**	**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**	-3	-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.

> *We have in the chambers of Commerce and Industry a special education offer to educate energy engineers. This is an additional training for people who are working already to become expert in the energy efficiency field.*
>
> **Institution, Germany**

Table 10 Key players in the energy transition

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

% Scores 10-9
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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Public entities/ government	**48**	37	23	24	**43**	**63**	**34**	**39**	**39**	**66**	**53**	**55**	**55**	**42**	**57**	**36**	**47**
Private companies	**45**	**45**	**37**	**37**	**57**	**40**	**39**	**43**	32	**29**	**34**	**42**	**37**	**41**	**56**	**42**	**45**
Citizens	37	39	**35**	27	26	**36**	**37**	**35**	**36**	**47**	**38**	28	**40**	30	**45**	**38**	**45**
Scientists and experts	27	31	29	21	28	23	31	31	**36**	17	27	**36**	29	**43**	29	32	29
Politicians from your country	23	**43**	**36**	**36**	**40**	29	13	16	27	18	13	27	21	25	33	**37**	29
Engineers and technicians	20	19	26	17	17	15	20	24	19	21	33	31	15	11	12	23	18
International organizations	17	20	13	14	22	17	26	27	25	23	14	16	22	14	16	15	19
Politicians from other countries	**9**	15	22	19	9	**5**	13	**9**	13	**7**	**3**	**6**	9	**4**	6	9	5
NGOs, non-profit organizations	**8**	**9**	10	**8**	**3**	24	22	17	18	17	11	9	19	16	11	12	11
Journalists	**8**	**5**	**6**	**9**	**5**	**6**	13	**6**	**5**	**7**	**3**	**5**	**7**	21	**4**	**6**	**3**
Climate change activists	**7**	16	11	13	**7**	10	21	22	27	11	31	14	13	30	**7**	15	10
Celebrities and influencers	**7**	**5**	**5**	**6**	**5**	**8**	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 energy transition is a very complex project and it is necessary to have an idea of how the different parts really fit together.*
>
> **Institution, Germany**

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.

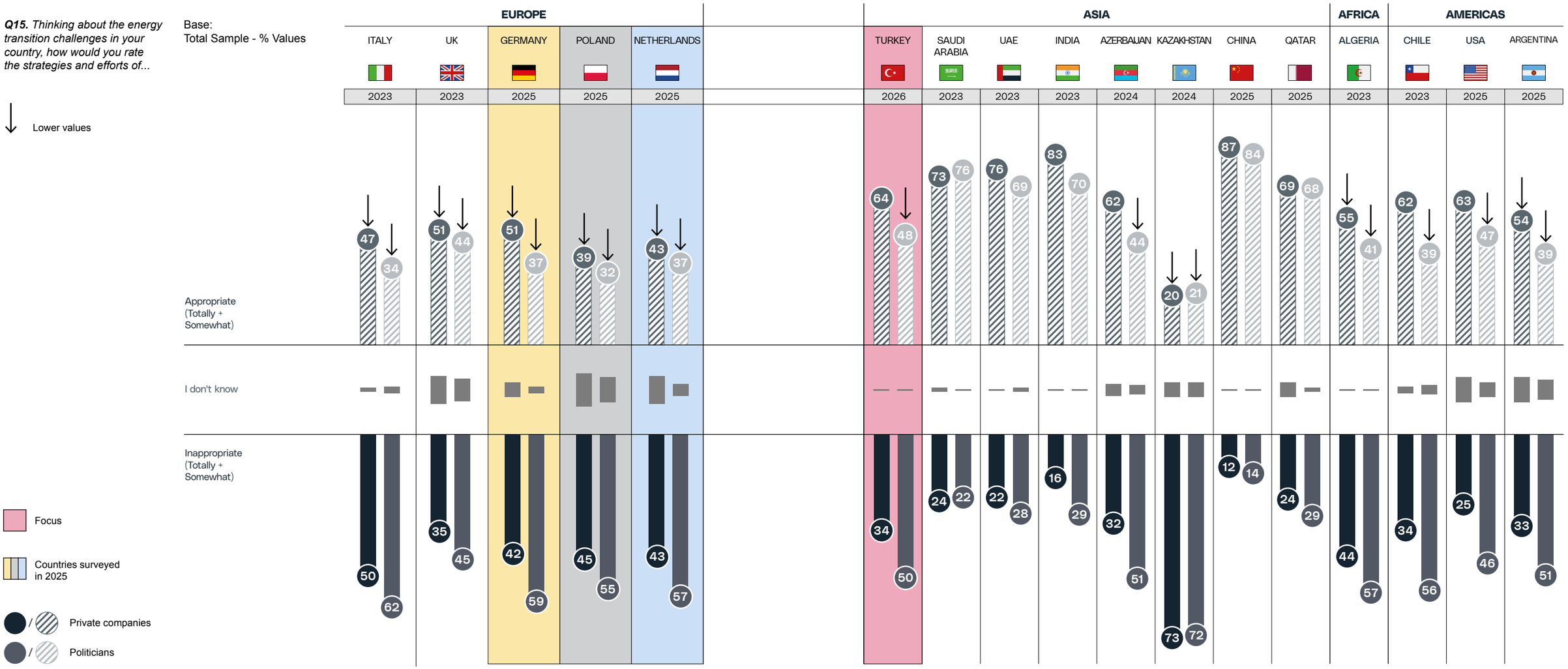
The Netherlands exemplifies this synergistic approach, where the high expectation placed on private companies (57%) coexists with a strong reliance on public entities (43%) and politicians (40%), suggesting a scenario where industrial execution and government direction are seen as complementary forces. 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



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).

> *[…] the energy transition is a big effort for industries because they need energy for high temperature processes and it is difficult to replace the gas, and what we use at the moment, with electricity or, later, with hydrogen.*
>
> **Institution, Germany**

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		2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Reduction in waste by companies and individuals	**33**	**37**	**32**	**34**	26		**36**	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		27	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		22	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**		**32**	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**		26	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		20	18	16	22	19	15	10	13	11	13	19	11
Transition of traditional vehicles to sustainable mobility	19	14	17	18	15		17	23	25	31	30	14	**37**	23	21	22	18	14
Energy **technologies innovation**	17	25	23	21	32		20	23	24	15	25	22	27	24	23	21	21	21
Low-carbon industrial technologies innovation	10	15	17	17	13		17	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.

> *I think that the businesses have the skills to know what is necessary to replace the fossil energies.*
>
> **institution, Germany**

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		2026	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		**27**	**50**	**34**	**45**	**21**	**15**	**28**	**35**	**17**	**34**	**44**	**29**
The costs and benefits will **balance out**	**42**	**35**	**45**	**52**	**30**		**50**	**43**	**55**	**44**	**48**	**28**	**55**	**46**	**57**	**44**	**37**	**43**
The **costs will outweigh** the benefits	21	19	**33**	**29**	**50**		**23**	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**		**40**	**41**	**39**	**45**	**40**	**22**	**53**	**49**	**35**	**47**	**52**	**41**
The costs and benefits will **balance out**	**42**	**43**	**38**	**63**	**48**		**42**	**52**	**55**	**47**	**42**	**44**	**42**	**45**	**46**	**41**	**40**	**44**
The **costs will outweigh** the benefits	7	6	25	**22**	21		18	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)

> *Certainly, in the short run the costs exceed the benefits because there is the need of a lot of economic efforts, of the implementation of new structures, technologies, training. So initially there are very important investments to be made. In the medium and long term there are more benefits also for the whole economy including the development of new technologies. In the long run it is also a matter of economy of scale, so once the different technologies are implemented in different sectors, etc., obviously there will be more benefits.*
>
> **Institution, Germany**

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

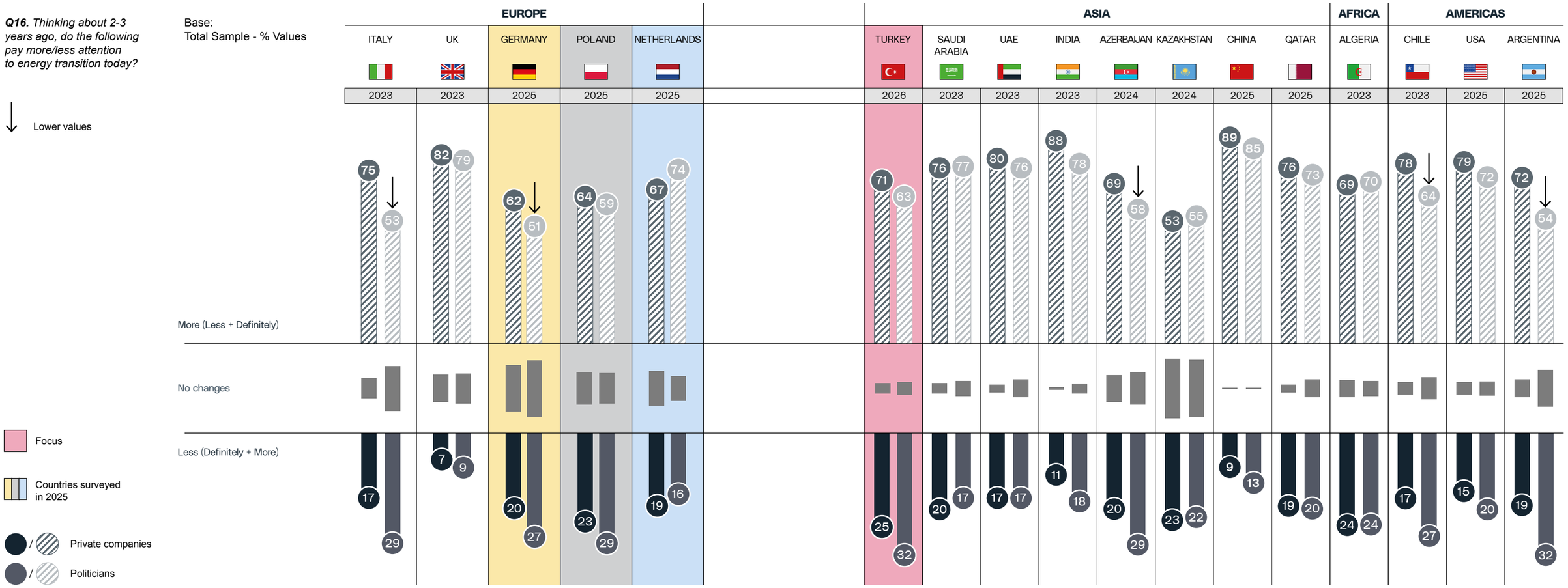


Table 14 provides an overview of how public perception regarding the level of attention paid to the energy transition has evolved over the last few years. In the European landscape of 2025, led by Germany, Poland and the Netherlands, the majority of respondents, especially Dutch respondents, recognise 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.

> *[…] Compared to the European average the energy price in Germany is still very high, and this is a problem of competitive disadvantage, so for that reason private companies in my opinion are focusing a lot on the energy transition, not only to have more renewable sources that generate the energy, but also to obtain a greater energy efficiency*
>
> **Institution, Germany**

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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Adopting **new production processes**	**34**	**37**	**38**	29	39	**39**	25	25	**39**	**35**	**49**	**45**	**39**	29	**38**	**38**	**42**
Providing **training/ education** for skills development	28	31	22	23	20	17	**29**	**37**	30	**39**	44	31	**38**	**36**	23	24	33
Innovating products and services in a sustainable way	25	**37**	**37**	**36**	**55**	**42**	**31**	**34**	**38**	17	29	**46**	**37**	**39**	**37**	**39**	**41**
Promoting a **cultural shift**	25	23	14	17	17	20	**15**	**14**	**14**	15	**7**	**12**	15	**11**	27	23	26
Implementing **new organizational strategies** with dedicated roles	23	19	15	21	15	14	21	28	31	15	19	15	19	21	18	20	17
Defining **decarbonization plans**	18	15	18	15	20	21	25	20	17	26	**9**	24	13	21	15	14	**9**
Undertaking **dedicated outreach activities**	**15**	**10**	22	19	**5**	**11**	25	17	**13**	23	18	**11**	15	19	**12**	7	**8**
Reporting on sustainability	**14**	15	**13**	22	**9**	22	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.

> *[Private companies] need more energy efficiency, but what they really have is an idea on how to replace the gas. They use the gas and the oil and some still use coal, but they have to find ways to replace it or to get it out of the emissions of carbon and store it.*
>
> **Institution, Germany**

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			ASIA
	GERMANY	POLAND	NETHERLANDS	TURKEY
Surveyed in	2025	2025	2025	2026
Enhancing the **spread of photovoltaic, wind, and solar plants**	**32**	25	11	19
Funding new technologies that improve energy efficiency and reduce CO_2 emissions *(for example, in the production of low-emission hydrogen)*	**30**	**28**	**33**	**38**
Offering subsidies, incentives, or tax reductions **for companies and individuals** investing in clean energy technologies	25	24	**31**	27
Investing in the development of alternative fuels for sustainable mobility *(biofuels, liquefied natural gas, hydrogen)*	24	22	28	27
Encouraging collaborations between the government and private entities to promote sustainable energy projects	23	20	25	28
Supporting the **development of the circular economy** and the waste recycling system	22	26	**17**	20
Investing in **educational campaigns** to increase public awareness	16	**15**	**17**	20
Building **nuclear power plants**	**13**	24	20	10

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.

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.

> *[…] We need more grips. We need the grips for electricity, and we need the grips for hydrogen. And second, we need to get quicker the government processes and planning and agreeing on plans. It's too slow now, it takes too much time.*
>
> **Institution, Germany**

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			ASIA
	GERMANY	POLAND	NETHERLANDS	TURKEY
Surveyed in	2025	2025	2025	2026
Energy: *production and innovation in the photovoltaic and wind sectors*	**44**	33	**42**	**40**
Engineering and Construction: *design of zero-energy impact buildings*	**37**	32	35	26
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**	**43**
Automotive: *development of electric vehicles and sustainable mobility systems*	32	19	**13**	33
Bioenergy and Sustainable Agriculture: *production of biofuels and innovative agricultural practices*	28	**35**	35	36
Materials Technology: *innovations in sustainable materials and recycling technologies*	28	30	33	34
ICT and Digital: *technological solutions for efficient energy management*	**18**	29	33	26
I don't know	*10*	*12*	*9*	*3*

Focus

Countries surveyed in 2025

Higher values

Lower values

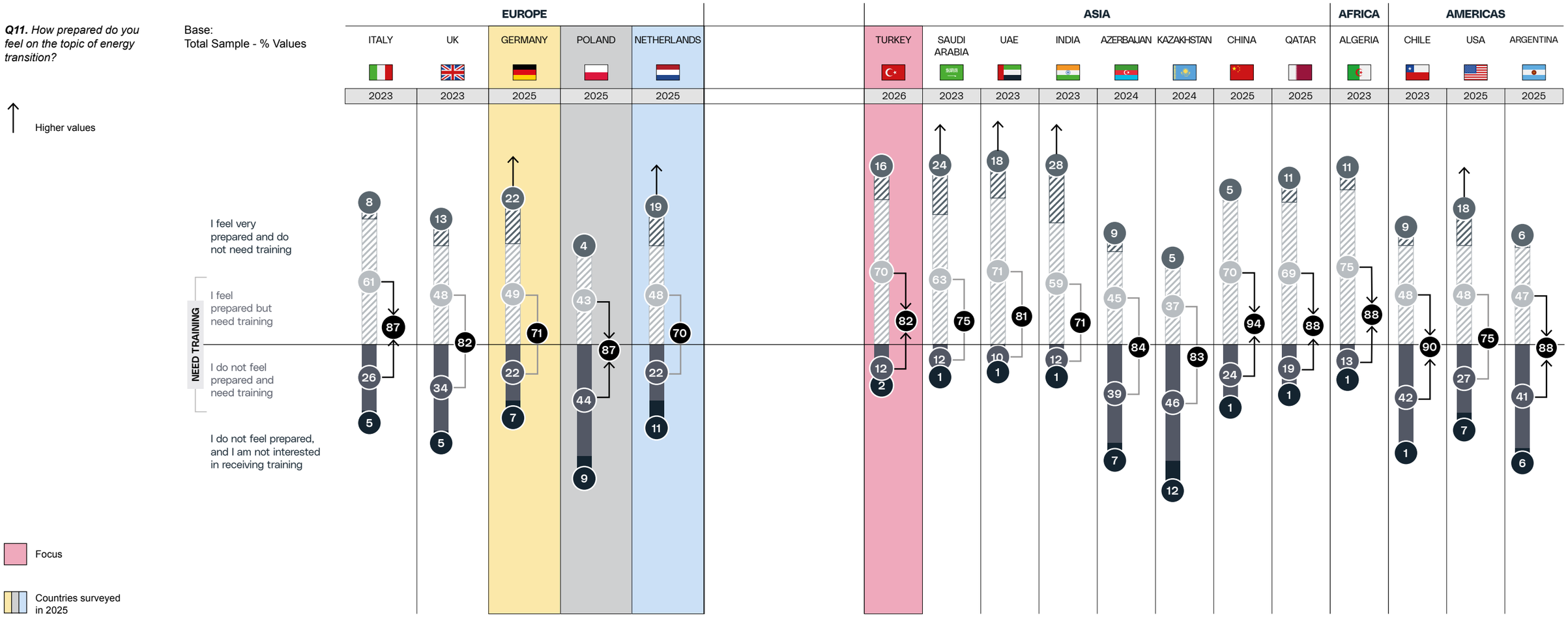
The assessment of industrial excellence reveals how each European nation projects its traditional economic strengths onto the energy transition (Table 15.2).
Germany remains true to its reputation as an industrial powerhouse, with citizens identifying the energy sector, specifically production and innovation 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%).

> *[…] There is still more to be done in one of the key sectors in Germany which is the automotive one. For many years, perhaps due to a lack of conviction and also to a lack of clear regulation, the German automobile companies - which are also important at a global level - have slowed down a lot on the development of renewable sources for engines.*
>
> **Institution, Poland**

> *[…] In general Germany is almost taking a step back with this respect. The industrial sector that still must push a lot towards the energy transition in the country is the automotive one. […] we need to look at the technologies we have, at how quickly we can adapt them and above all how many technologies we need according to the market needs.*
>
> **Institution, Poland**

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.

Table 17 Need for training on the energy transition



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.

> *The education is offered by universities and by our dual training system […] What is missing? I would say we are not well in the basic training in schools. So, the education in schools on mathematical, engineering, and natural sciences is not good enough.*
>
> **Institution, Germany**

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

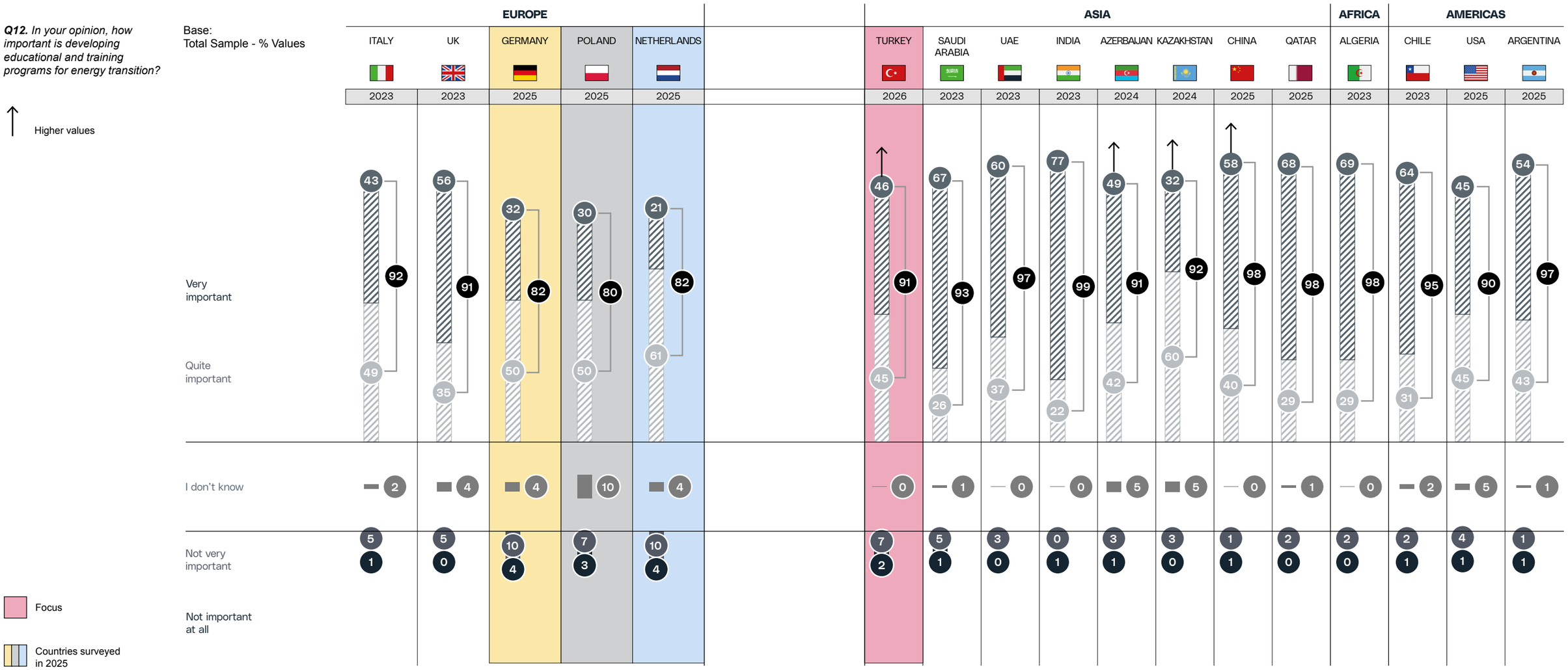


Table 18 confirms that education is considered crucial to support the energy transition process, with a consensus that transcends national borders and economic models. In Europe, specifically Germany, the Netherlands, and Poland, there is a robust agreement on the urgency of this issue, with over 80% 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.

> *[…] In the reskilling of the existing workforce where too, in my opinion, we are at least fairly adequate. In the end, where there is still more to be done is in the education and training of young people.*
>
> **Institution, Germany**

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			ASIA
	GERMANY	POLAND	NETHERLANDS	TURKEY
Surveyed in	2025	2025	2025	2026
Energy Engineering (for example, courses in renewable technologies and energy management)	**56**	**45**	**47**	**54**
Environmental and Energy Sciences (for example, courses in green chemistry, chemical processes reduce environ. impact)	**53**	36	**45**	**49**
Environmental Sciences (for example, courses in ecology, conservation, and natural resource management)	**51**	37	37	45
Circular Economy and Sustainability (for example, courses to develop sustainable economic models and circular strategies)	45	**40**	**45**	**49**
Energy Systems Management (for example, courses in management and strategies for sustainable energy)	43	36	35	**50**
Materials Technology (for example, courses in innovative and eco-friendly materials)	38	32	29	39
I don't know	6	13	22	1

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.

> *On the University education side, there are various masters especially on renewable energy and on sustainable energy as for example those run in Kassel or in Hamburg. Regarding photovoltaics and solar energy, the University education is at the forefront also thanks to the Fraunhofer Institute that deals with this topic in Freiburg. […] I would say that the same applies also for retraining of the existing workforce. In this field companies, research institutes, including the Fraunhofer Academy, and chambers of commerce offer different courses. I would also mention the energy agency, Dena. Therefore, there are many actors operating with this respect.*
>
> **Institution, Germany**

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		2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Specialised magazines	**43**	35	54	**45**	45		**17**	**49**	44	55	**14**	25	**53**	43	41	44	38	31
Academic publications/ articles	37	**51**	**65**	**47**	**61**		**64**	**47**	44	53	**45**	**57**	42	53	**48**	**58**	**57**	**48**
TV	35	38	31	26	25		36	**47**	**51**	**73**	**48**	**57**	**57**	**63**	40	**51**	46	45
National newspaper	33	42	30	18	**50**		**32**	**45**	**47**	**73**	30	**10**	**40**	**59**	29	37	42	26
Websites	31	35	18	35	23		40	31	31	59	**49**	**46**	47	**58**	**53**	43	42	**53**
None of these	*6*	*11*	*13*	*14*	*9*		*6*	*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.

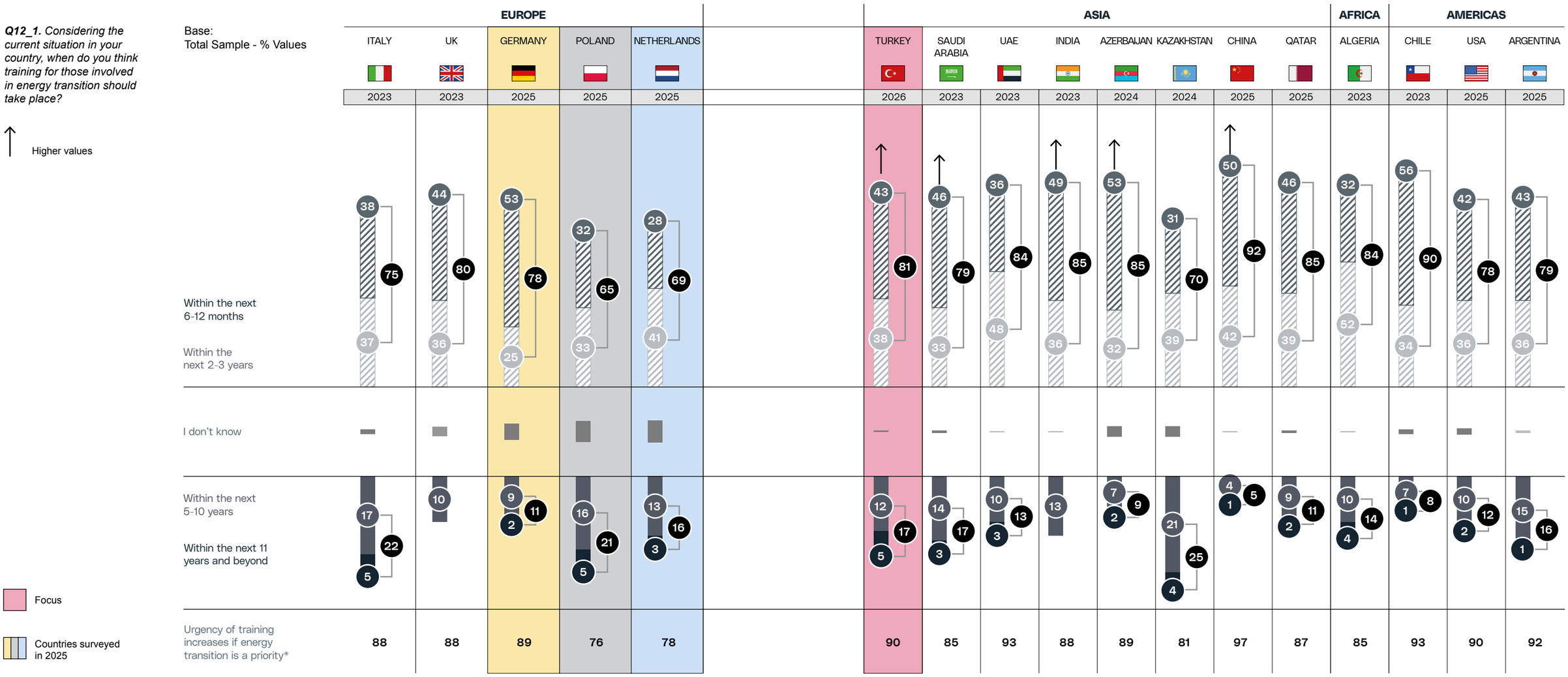
In the Americas, the United States (42%), Chile (43%) and Argentina (53%), signal a transition to a digital-first information ecosystem; in these nations, websites emerge as one of the most important source of reliable information. In the USA and Chile, this digital preference is underpinned by a strong 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.

> *Realistically we would certainly need more time like 5-10 years.*
>
> **Institution, Germany**

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		2026	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		41	**45**	**48**	**51**	31	23	17	35	25	32	29	33
Technical knowledge and personal skills **are equally important**	**61**	**69**	**83**	**79**	**75**		**57**	**51**	**49**	**48**	**61**	**75**	**83**	**63**	**73**	**67**	**69**	**63**
Technical knowledge is less important than personal skills	2	3	0	4	4		2	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 Renewable raw materials and recycled materials	Renewable energy sources
MOST REQUIRED Personal skill	Problem-solving Multidisciplinary approach	Critical thinking Creativity	Problem-solving	Critical thinking	Critical thinking Creativity		Problem-solving	Problem-solving Creativity	Creativity	Creativity	Problem-solving	Critical thinking	Creativity	Creativity	Creativity	Problem-solving	Problem-solving	Problem-solving 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 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.

> *Of course, it would be helpful to have an idea about economics because in the end we need the means for the energy transition, we need the money. Probably in the end, psychology would be helpful too to understand how to get the knowledge to the people.*
>
> **Institution, Germany**

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		2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Problem-solving skills	**46**	**43**	**61**	40	**56**		**50**	**47**	**38**	37	**62**	**58**	**52**	**45**	**48**	**50**	**55**	**45**
A multidisciplinary approach	**45**	33	43	40	49		39	30	27	32	33	34	**49**	35	31	**43**	33	**46**
Critical thinking and analytical skills	**43**	**52**	53	**49**	**57**		37	25	**38**	**38**	29	**68**	30	**41**	27	31	**43**	39
Creativity and innovation	37	**51**	33	42	42		**48**	**48**	**63**	**43**	**42**	30	**60**	**50**	**69**	**45**	**42**	**44**
Flexibility and adaptability	33	38	29	36	33		22	**40**	**36**	**39**	38	33	34	35	39	35	**44**	27
Teamwork skills	27	30	30	30	21		**44**	37	34	36	**45**	37	34	37	**49**	38	28	40
Emotional intelligence	25	15	21	22	12		14	**17**	**17**	26	19	**9**	**9**	**13**	**5**	24	19	19
Communication and networking skills	23	28	17	24	23		37	29	33	32	22	22	24	28	19	25	27	29
Fluency in the English language	**20**	**10**	**15**	**18**	**7**		**11**	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.

> *[…] With the implementation of various transversal skills in the professional profiles, Germany has already taken an important step forward. So, skills such as raising awareness among young people on how to use materials and on the green transition in general are certainly useful. Moreover, problem solving in complex context and the knowledge of different languages are also important.*
>
> **Institution, Germany**

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%) lead 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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Analyse and assess the **impact on the region**	**42**	27	29	28	19	**31**	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	**37**	29	**41**	33	**53**	**44**	31	**41**	**45**	**36**	**41**	34
Knowledge of various **renewable energy sources**	**37**	**41**	**46**	33	**47**	**30**	**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**	**31**	**33**	29	**36**	**35**	27	**42**	**43**	**44**	**37**	**42**	**37**
Knowledge of **regulatory frameworks**	31	19	24	**21**	24	**26**	**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	22	**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	**37**	**33**	30	**40**	**39**	**36**	**35**	31	25	26	28	27
Manage the **economic sustainability of projects**	22	27	32	23	21	27	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	30	**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.

> *In my opinion among the hard skills the engineering, physical and chemical engineering skills are the most important ones. In addition, I would also say digital skills, because one side there is the development of new technologies but on the other side there is the need of digitalisation to help to increase energy efficiency.*
>
> **Institution, Germany**

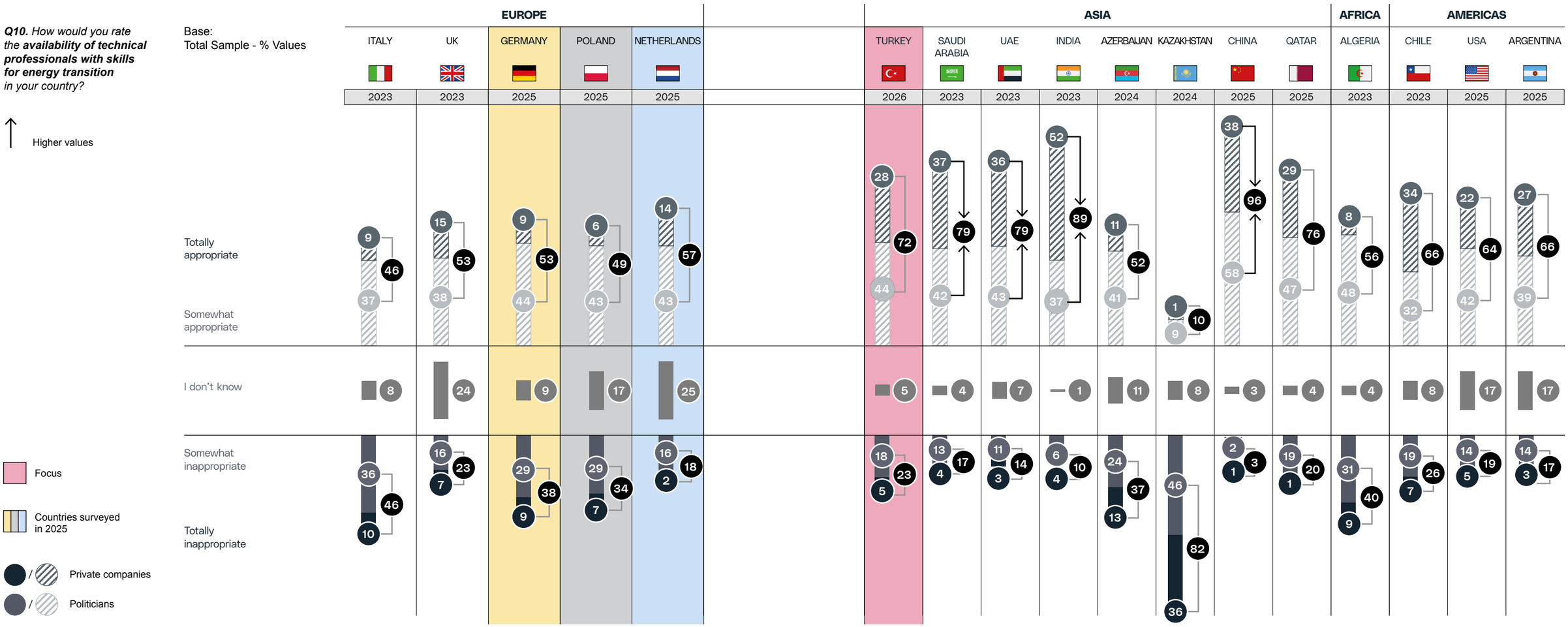
Poland stands out with a profound focus on consequences rather than just inputs, prioritizing environmental assessment over energy sources (44%).

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



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.

> *We need more skilled people from abroad. So, the ways to come to Germany it is too closed and too difficult. We need experts from other countries.*
>
> **Institution, Germany**

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%) and Azerbaijan (11%) 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.

4 METHODOLOGICAL NOTE

4.1 Questionnaire structure and flow

This report presents the findings of the fifth wave of “Climate Goals: Winning the Challenge through the Creation of Competences Worldwide”, the international research promoted by the Maire Foundation to monitor perceptions, expectations and skills needs related to the energy transition across different countries and regions.
Conducted in July 2026, this edition provides an updated assessment of Turkey, originally surveyed in 2023, offering the opportunity to explore how perceptions of the energy transition have evolved over time in a country that plays a strategic role between Europe, Asia and the Mediterranean region. The findings confirm that the energy transition continues to be widely regarded as an important priority, although its perceived urgency, opportunities and challenges vary across national contexts. Despite these differences, a consistent message emerges throughout the analysis: the success of the transition depends on the availability of the skills and competencies required to support technological innovation, industrial transformation and sustainable growth. Developing these capabilities remains a critical enabler for turning ambition into concrete and long-term progress.

The multi-wave nature of the research enables the monitoring of how perceptions and priorities related to the energy transition evolve over time. To reflect the changing landscape of the transition, the questionnaire has been progressively expanded to include new topics and areas of investigation. Consequently, some indicators presented in this report are available only for countries surveyed following the introduction of these modules. Comparative analyses for these measures are therefore limited to Germany, Poland, the Netherlands and Turkey.

The survey among the informed population (*) was conducted through the IPSOS online panel using the CAWI methodology, while qualitative interviews with Key Opinion Leaders were carried out through telephone or web calls based on a structured discussion guide. Further methodological details are provided in the final section of the report. The IPSOS research team was led by Nando Pagnoncelli, President of IPSOS Italy, and included Andrea Alemanno, Ilaria Ugenti and Paola Simonetta.

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

4.2 Sample and methodology July 2026: target population

During wave 5, a total of 200 interviews were conducted in Turkey.
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 10 minutes. The interviews were conducted in July 2026 (see Table 1).

Table 1 Population target, sample, methodology and period of fieldwork July 2026

TARGET INFORMED POPULATION	METHODOLOGY	NUMBER OF INTERVIEWS	PERIOD OF FIELDWORK
Population with a **high level of education**, **employed**, **concerned and engaged** for environment*	Online quantitative survey (**CAWI**)	**1 country, 200 interviews** TURKEY	20 - 24 July 2026

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

4.3 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

4.4 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	2026	2023	2023	2023	2024	2024	2025	2025	2023	2023	2025	2025
Cases	150	150	200	200	150	200	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, 2.900 interviews** 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 **WAVE 2**: 15 - 31 July 2024 **WAVE 3**: 7 - 20 May 2025 **WAVE 4**: 20 - 28 November 2025 **WAVE 5**: 20 - 24 July 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**)	**15 countries, 26 in-depth interviews** ITALY, UK, GERMANY, POLAND, NETHERLANDS, TURKEY, SAUDI ARABIA, UAE, INDIA, AZERBAIJAN, KAZAKHSTAN, CHINA, QATAR, USA, ARGENTINA	**WAVE 1:** 9 October – 10 November 2023 **WAVE 2:** September 2024 **WAVE 3:** May-September 2025 **WAVE 4:** November 2025 - March 2026

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

5 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 extend 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 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.
MAIRE operates through two business units. Sustainable Technology Solutions, headed by *Nextchem*, is organized into three business lines designed to address energy transition challenges: *Sustainable Fertilizers & Nitrogen-Based Fuels* 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 technologies to produce low-emissions clean fuels and chemicals; *Sustainable Materials & Circular Solutions* advances circularity by providing technological solutions that transform waste into valuable chemical resources. To accelerate the path from research to industrial scale, *Nextchem relies on* NODE (*Nextchem Operating Research & Development Excellence*), its international network of six applied research centers in Europe, located in Rome, Milan, Brescia, Basel, Sittard and Frankfurt. *Integrated E&C Solutions*, anchored 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.
With operations in around 50 countries, MAIRE employs nearly 11,500 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, and we updated the data for Turkey.

Globally, we are investigating 17 countries on 4 continents with a total of 2,900 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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