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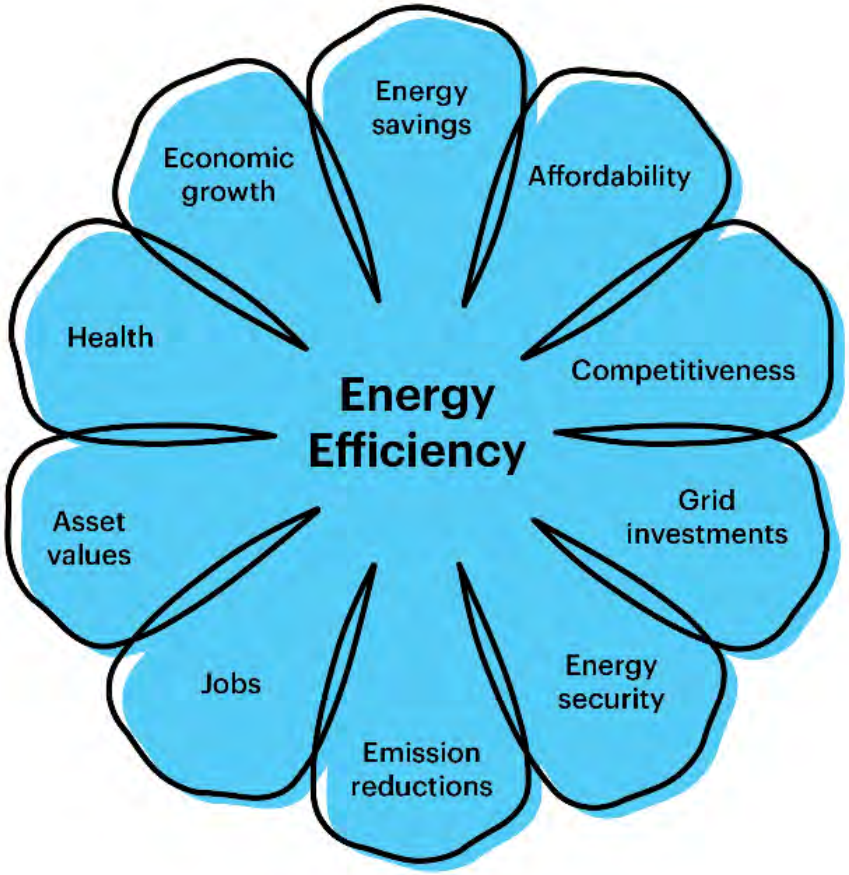
International Energy Agency

Energy Efficiency Progress Trends

Ornella Dellaccio (ornella.dellaccio@iea.org)

eceee, 1 June 2026

Energy efficiency plays a key role in energy and economic policy



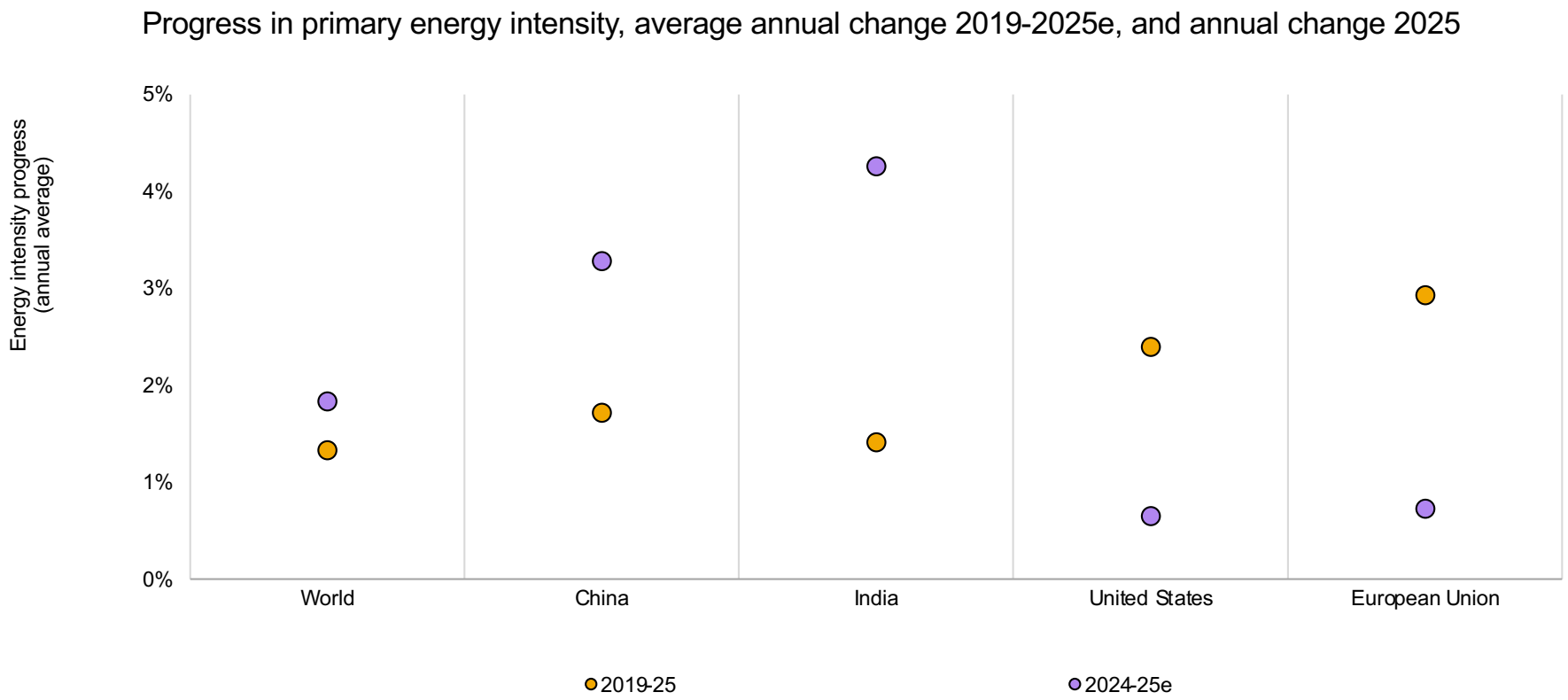
What happened in recent years?

COP28 marked a historic milestone for energy efficiency globally



Countries agreed to collectively contribute to double the global average annual rate of efficiency progress by 2030

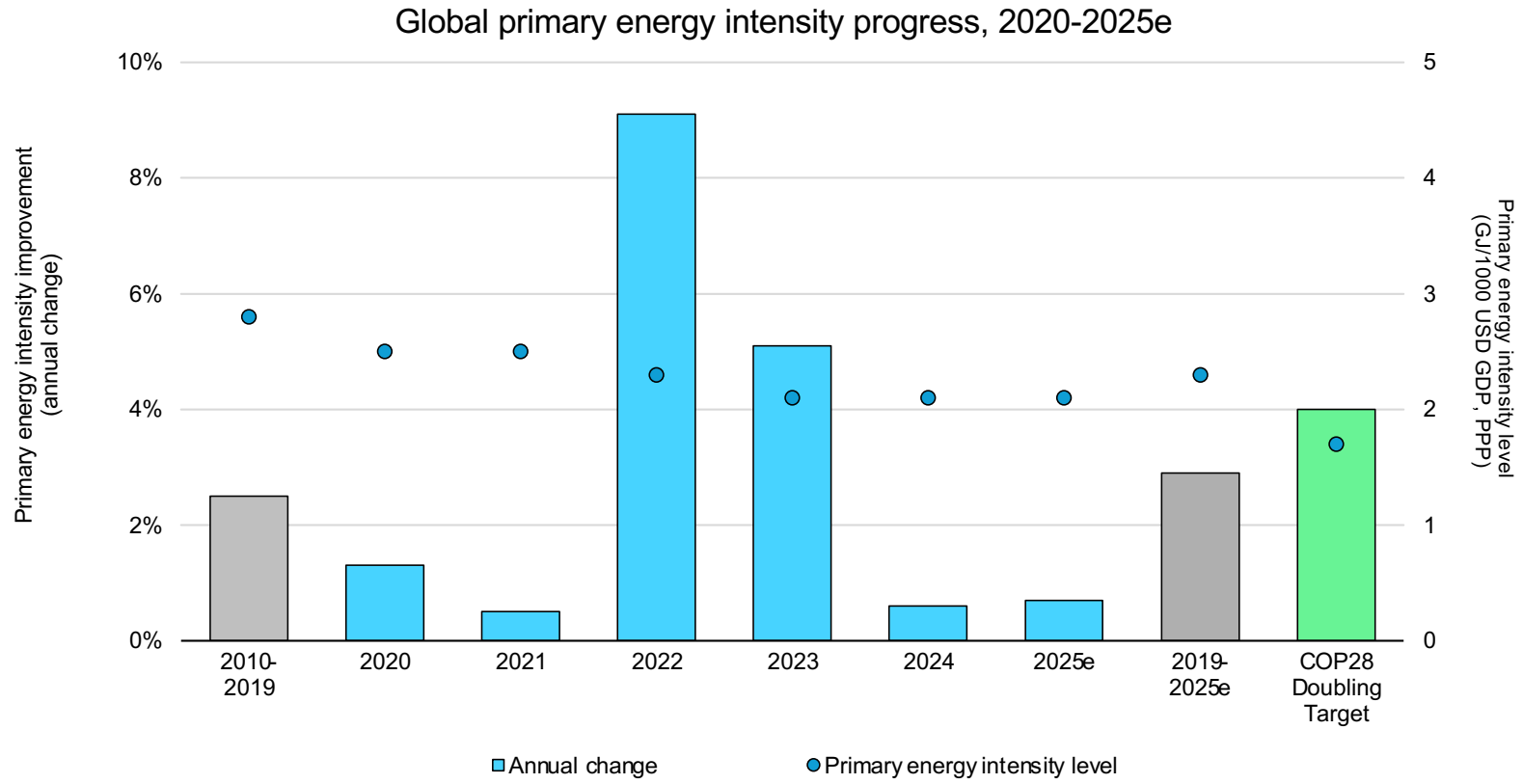
Global energy efficiency progress sees improvement in 2025



Estimates for 2025 suggest recovery compared with the post-2019 average in China and India, alongside some global improvement, but progress remains well off track to meet COP28 ambitions.

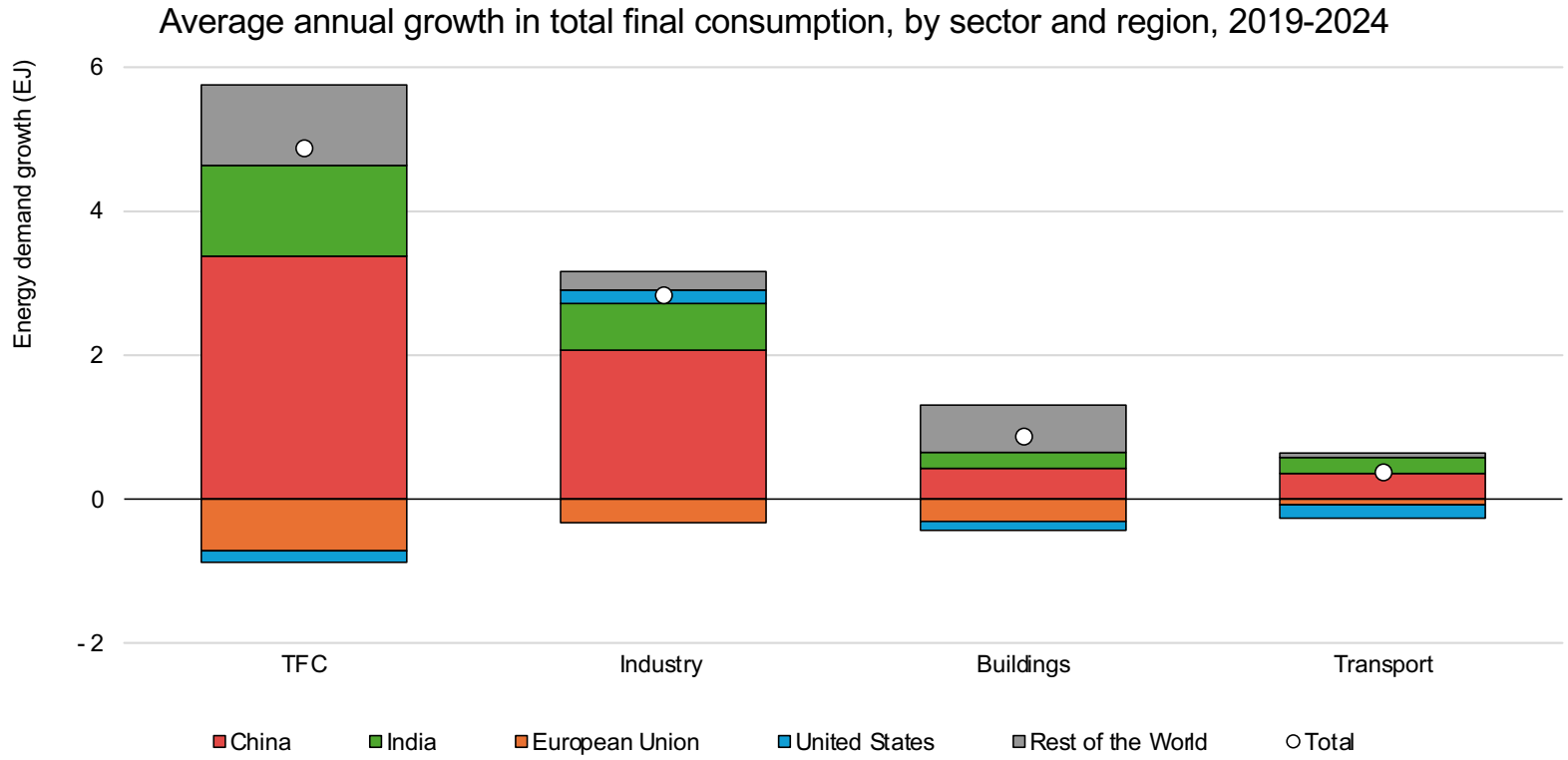
IEA 2026

EU efficiency progress remained modest compared with 2022



Estimates for 2025 show an improvement rate of 0.6%, compared to 0.7% in 2024, but remained moderate compared to 2022 and 2023.

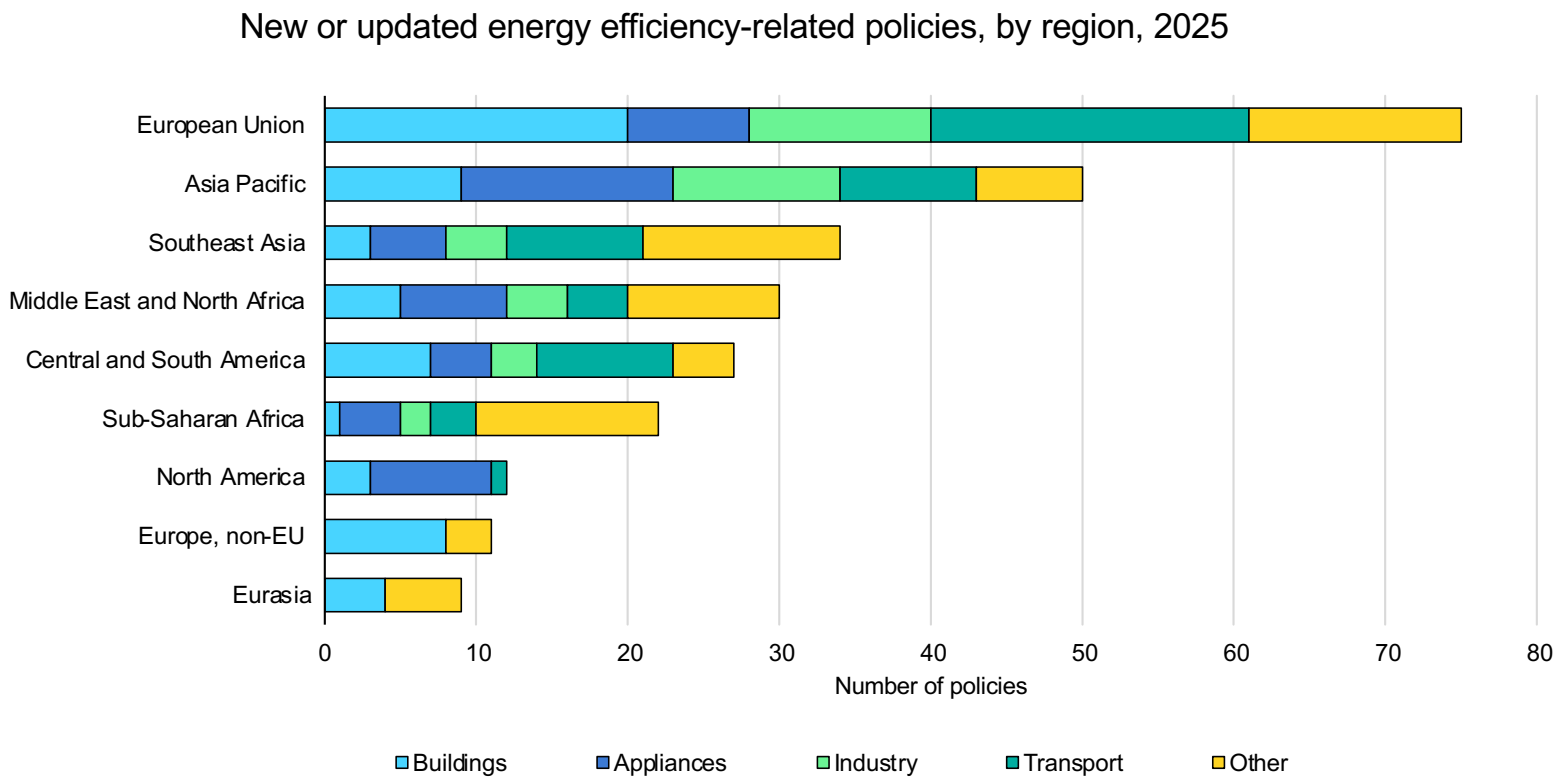
Energy consumption is falling in the EU, but rising elsewhere



Global final energy demand rose by nearly 25 EJ in 2019, with industry — especially in China and India — driving most of the growth, while the EU stands out for consistently declining final consumption.

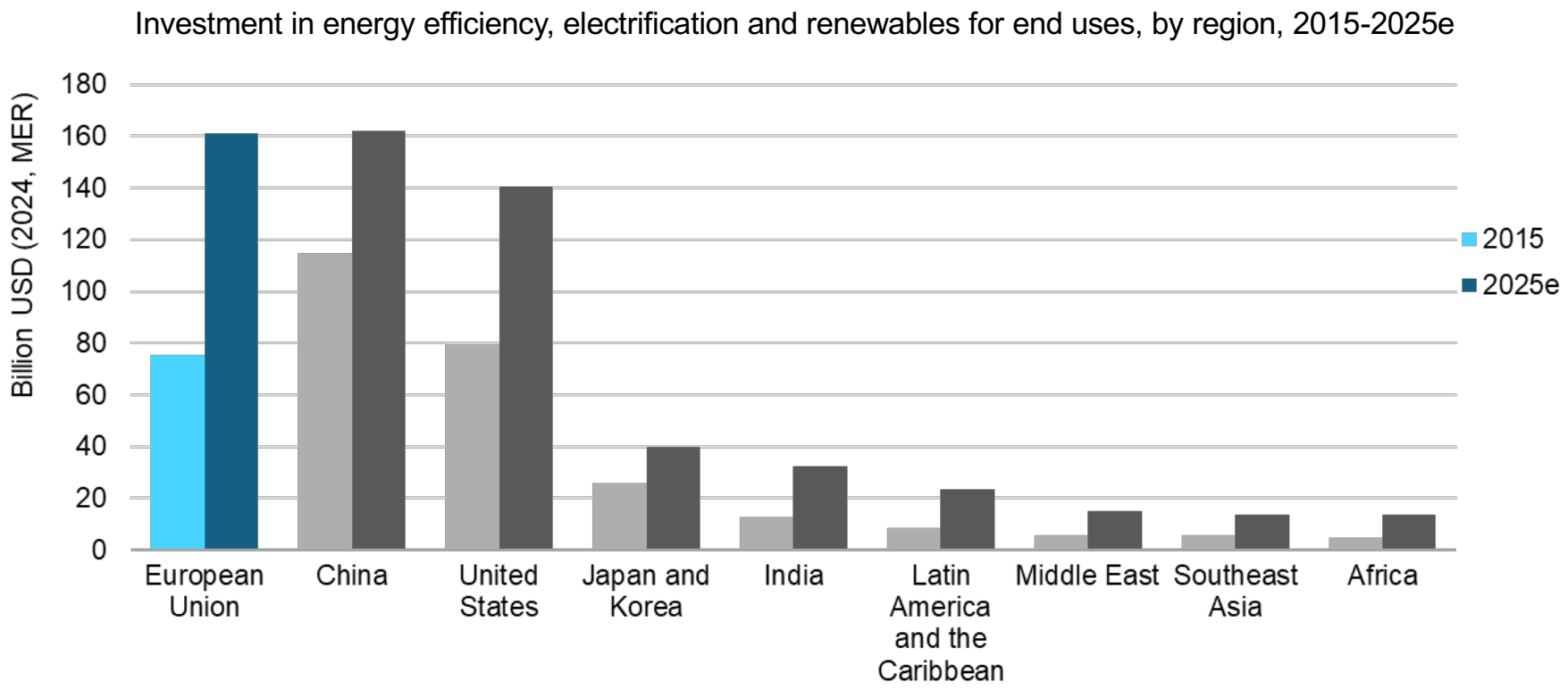
Is Europe maintaining momentum?

The European Union led on energy efficiency policy in 2025



The IEA has tracked over 70 new or updated energy-efficiency-related policies across the European Union in 2025

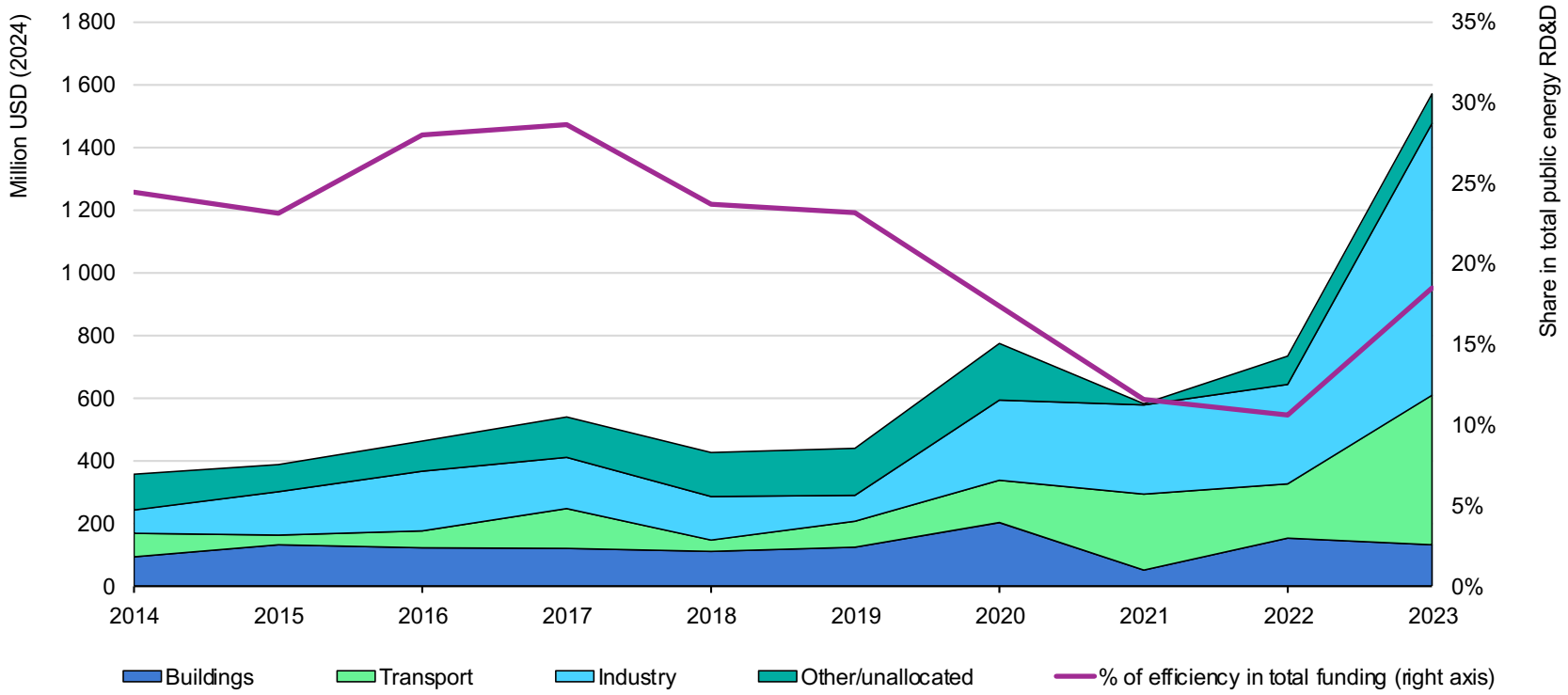
The EU stands as a global leader in efficiency spending



Two-thirds of global end-use spending happens in the European Union, China and the United States.

Nearly USD 1.6 billion spent on RD&D for efficiency technologies

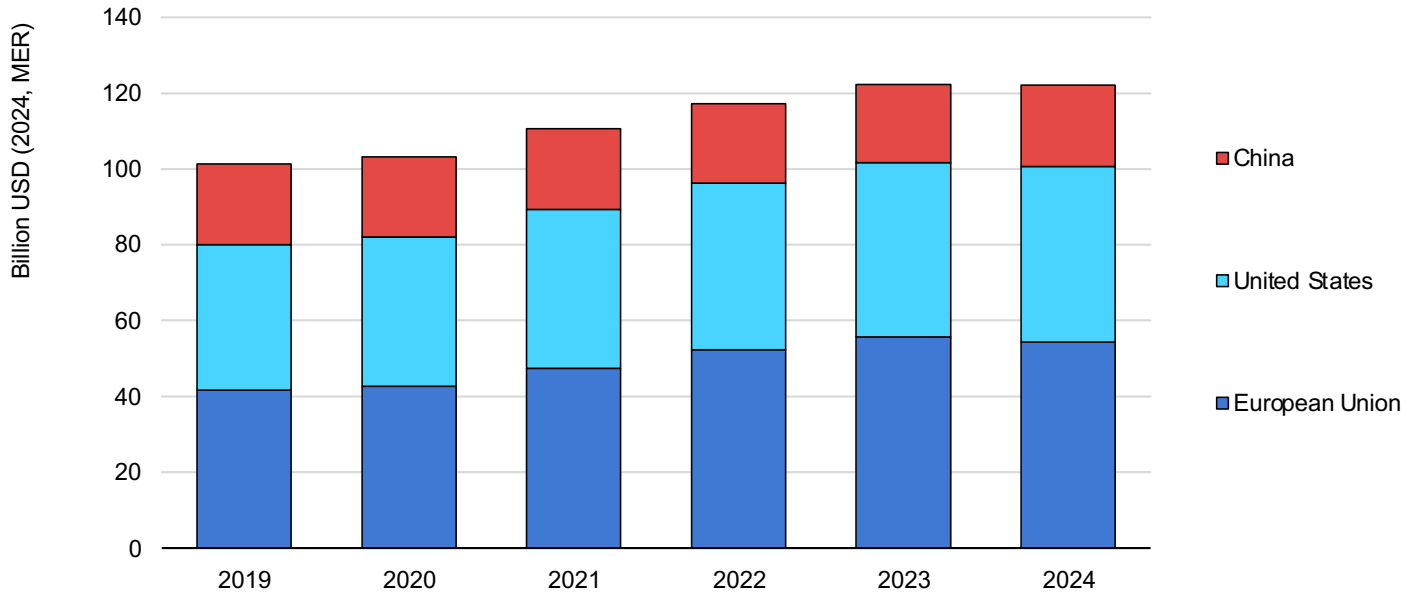
EU public spending on research, development and demonstration projects in energy efficiency-related fields, 2010-2024e



Around 18% of the EU public spending on the research, development and deployment (RD&D) of energy technologies was spent on energy efficiency (new technological innovations in buildings, industry and transport…).

Spending on building retrofits and envelopes is highest in the EU

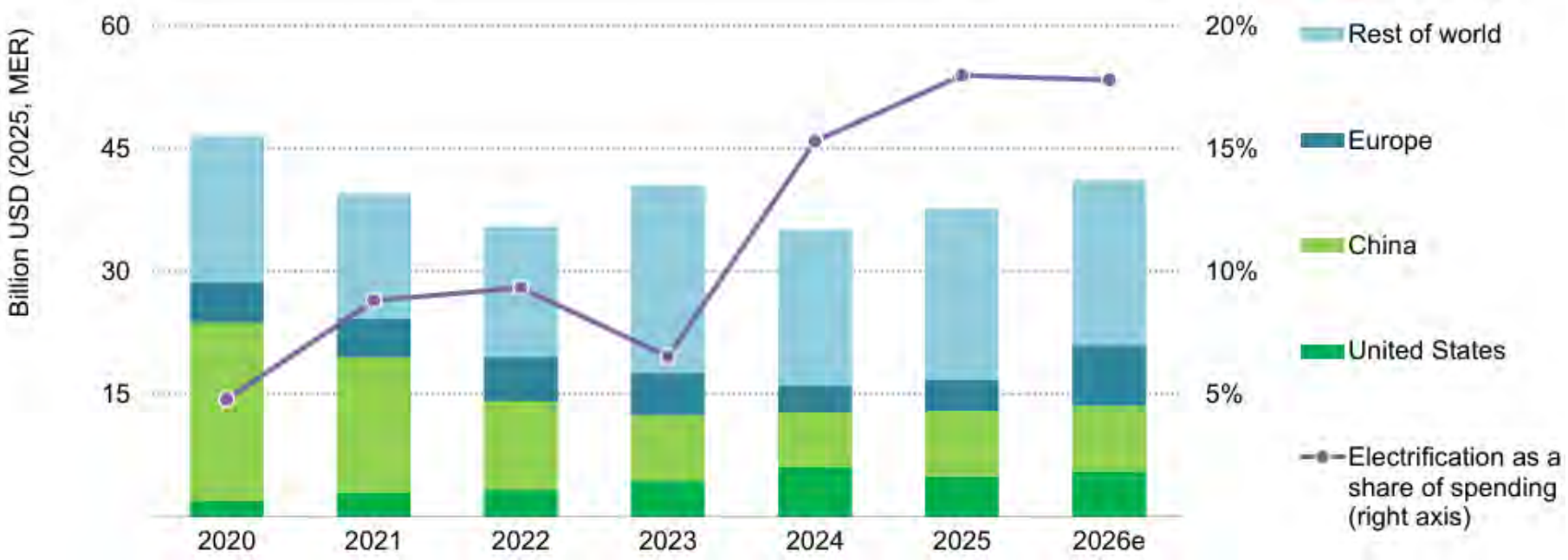
Estimated spending on building retrofits and envelopes in selected regions, 2019-2024



Investment in building energy retrofits and envelopes in major markets is over 20% higher than in 2019, with the European Union consistently leading.

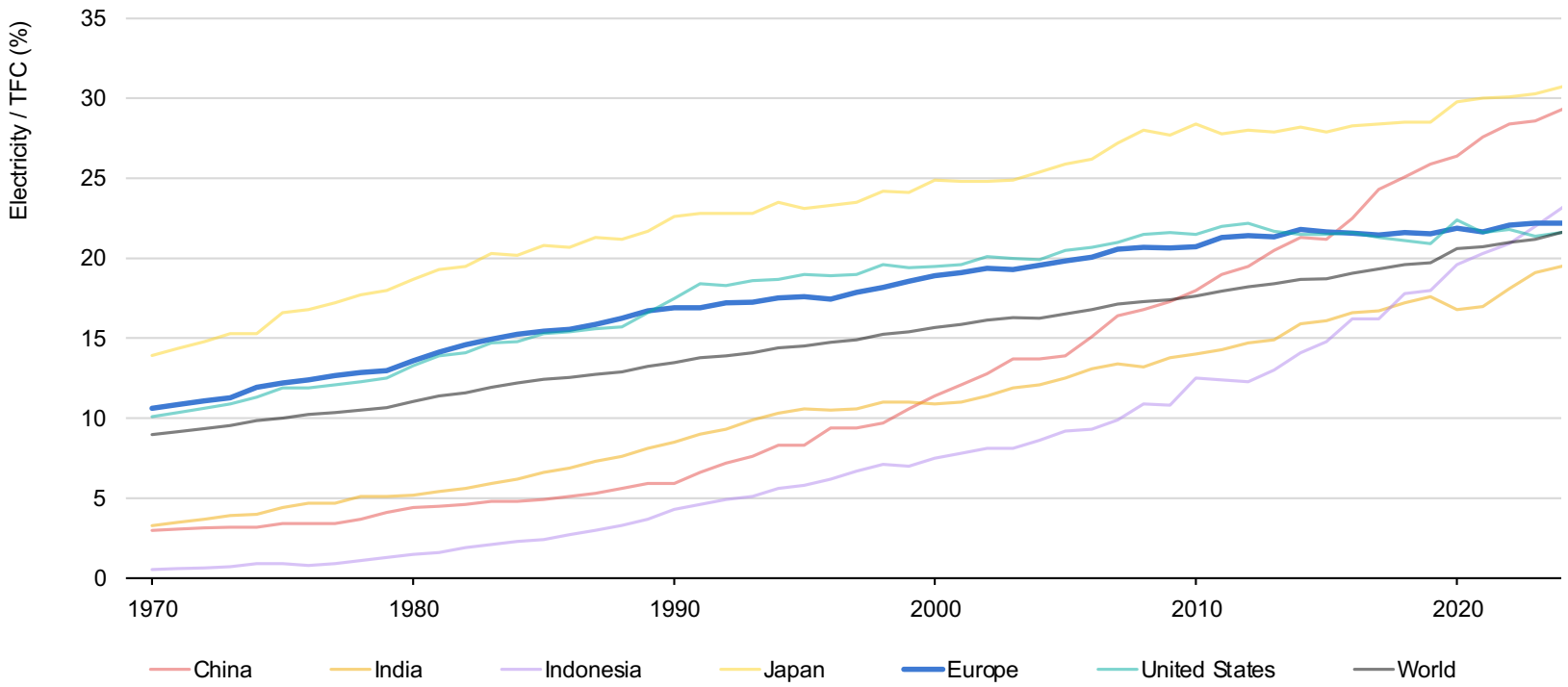
Industrial efficiency investments rebound in 2026

Investment spending on energy efficiency and electrification in the industry sector by region, 2020-2026e



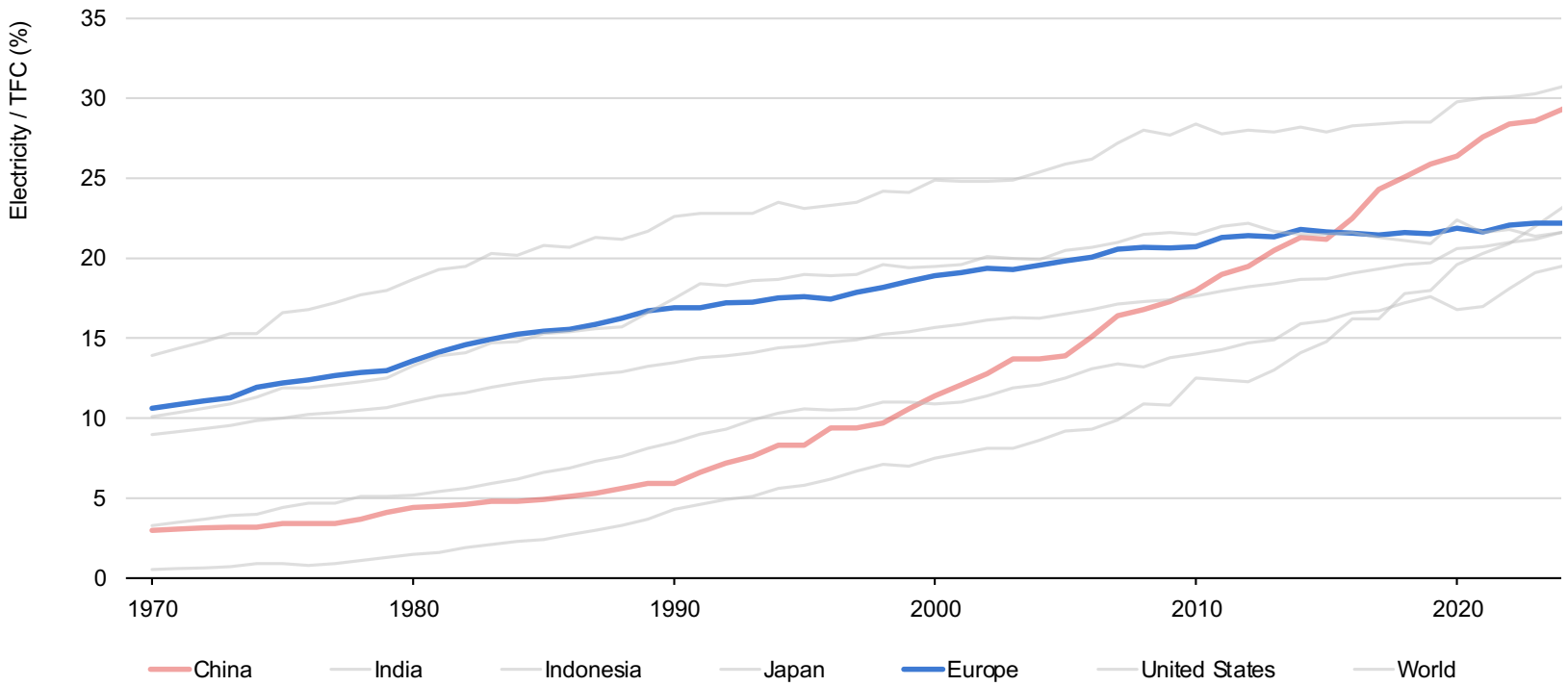
While absolute spending on electrification is rising across all regions, Europe accounts for most of the increase, while absolute spending on electrification is rising across all regions.

The world has entered the Age of Electricity



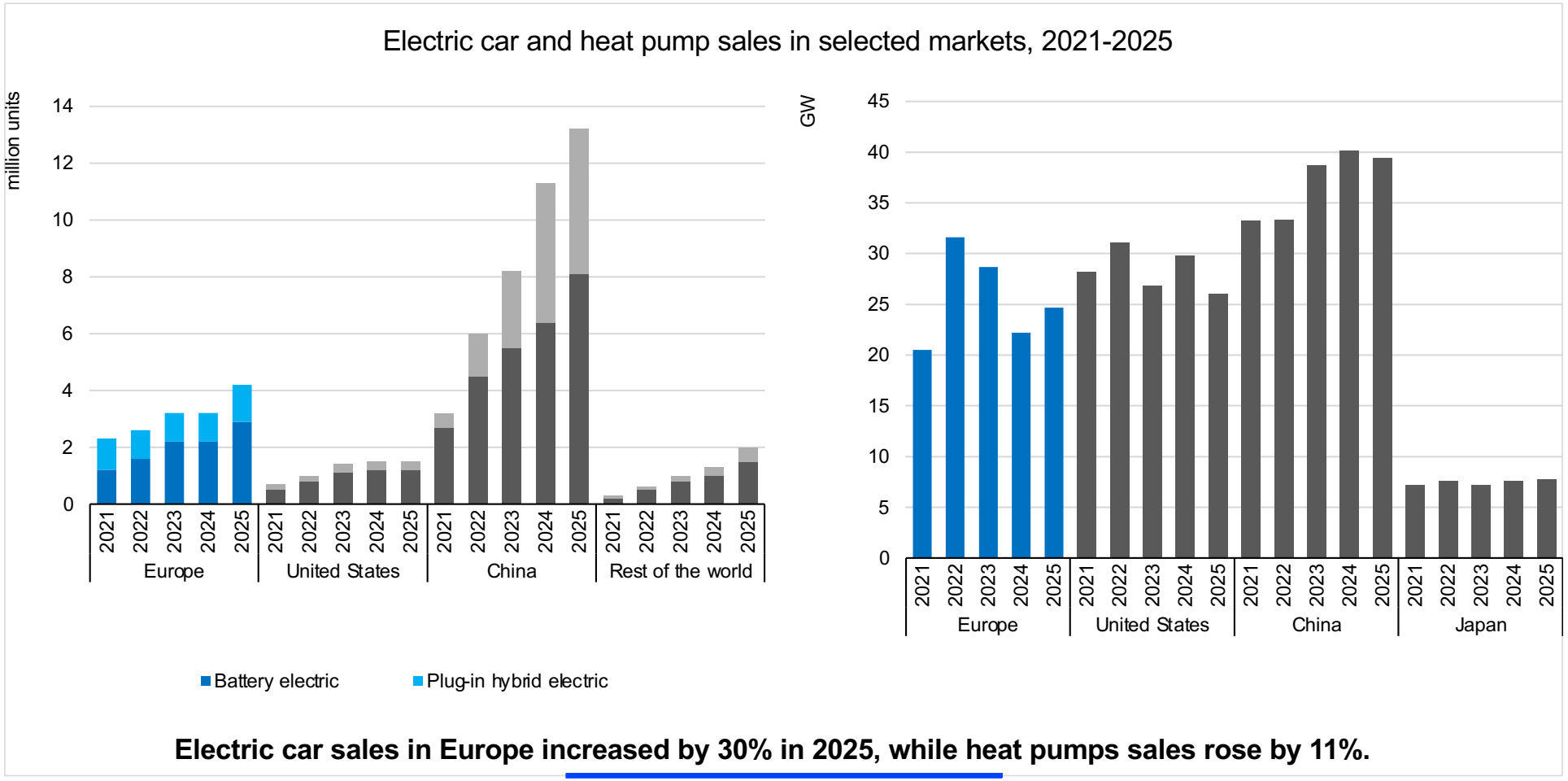
The share of electricity in final energy demand has reached just under 22% in 2025.

The world has entered the Age of Electricity



The share of electricity in final energy demand has reached just under 22% in 2025, but is flattening out in Europe compared to other regions.

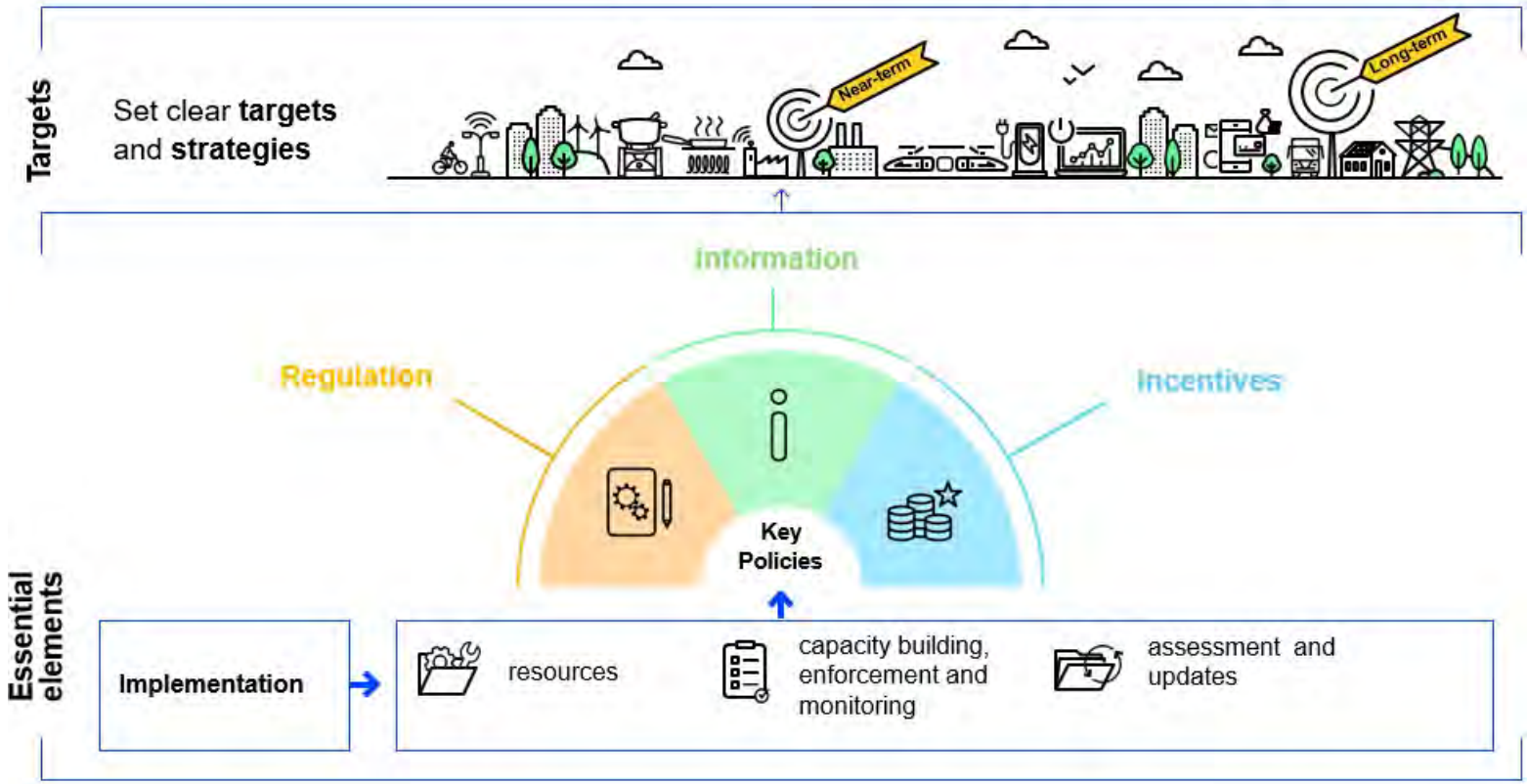
Uptake of efficient technologies in Europe continues to rise



Electric car sales in Europe increased by 30% in 2025, while heat pumps sales rose by 11%.

IEA activities to support governments

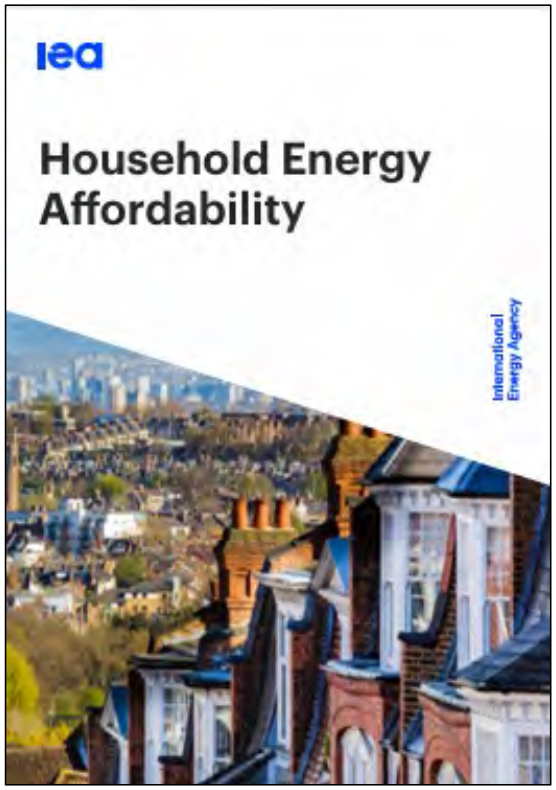
IEA policy toolkit provides practical advice for policy implementation



As part of the launch, the IEA added over 100 case studies for energy efficiency policy in the online database

Energy Efficiency 2026 – stay tuned








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2026 ECEEE Summer Study

Update on energy efficiency policies

Mathieu Daloze, DG ENER.B2, Policy Officer (Energy Efficiency Financing)
Bunthan Iea, DG ENER.B3, Policy Officer (Buildings)

1st June 2026

European Commission

Table of content

Global context and AccelerateEU

Implementation of the 2026 Work Programme

- Post 2030 Energy Efficiency Framework
- Energy Electrification Action Plan, and Heating and Cooling

Other initiatives…

- Data Centre Energy Efficiency Package
- European Energy Efficiency Financing Coalition

Implementation of Energy Performance of Buildings Directive (EPBD)

Global context and AccelerateEU

Affordable and secure energy through accelerated action



1st June 2026

European Commission

What is our overarching objective?

An Energy Union that delivers:

- Energy security;
- Clean energy (and homegrown);
- Competitiveness;
- Affordability.

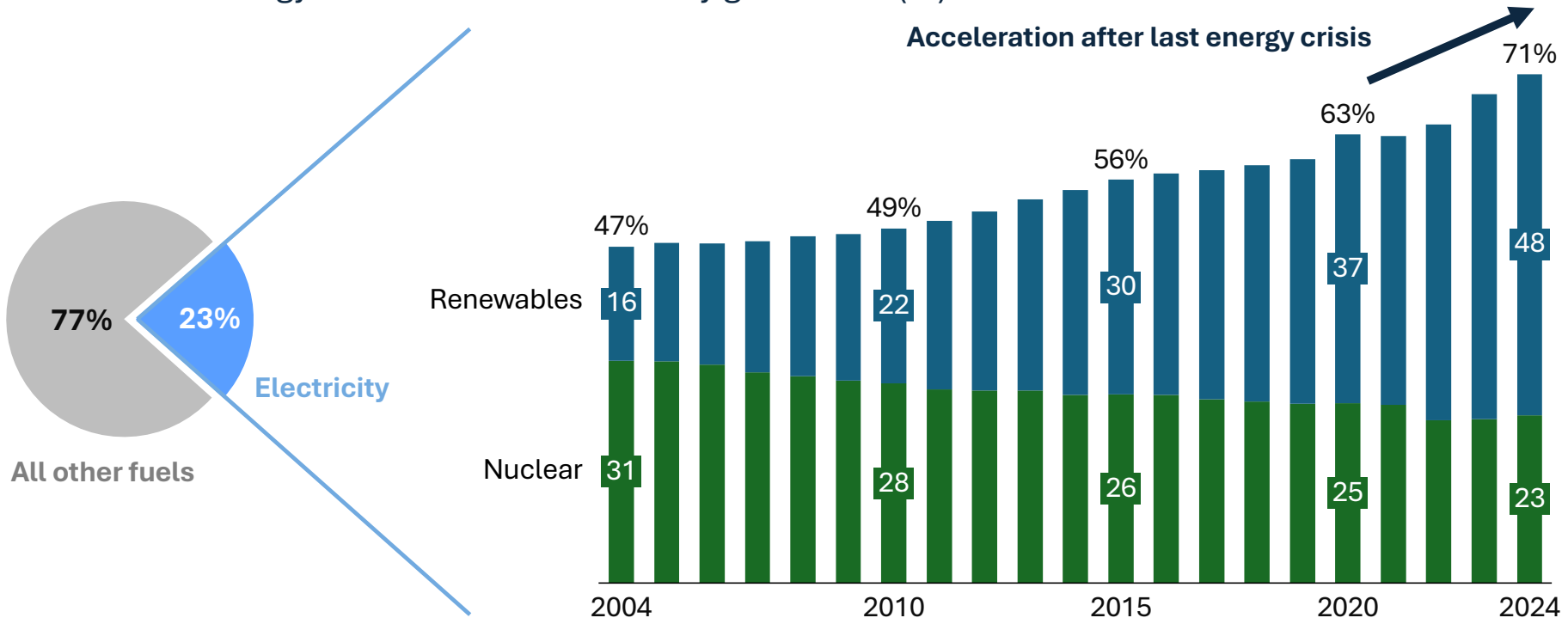
Current context

With the Middle East conflict, the World and **Europe** faces an **unprecedented energy crisis**, driven by instability, volatile fossil fuel markets, and rising costs.

EUR 22 bn additional spending on fossil fuel imports in first 44 days following the start of Middle East conflict.

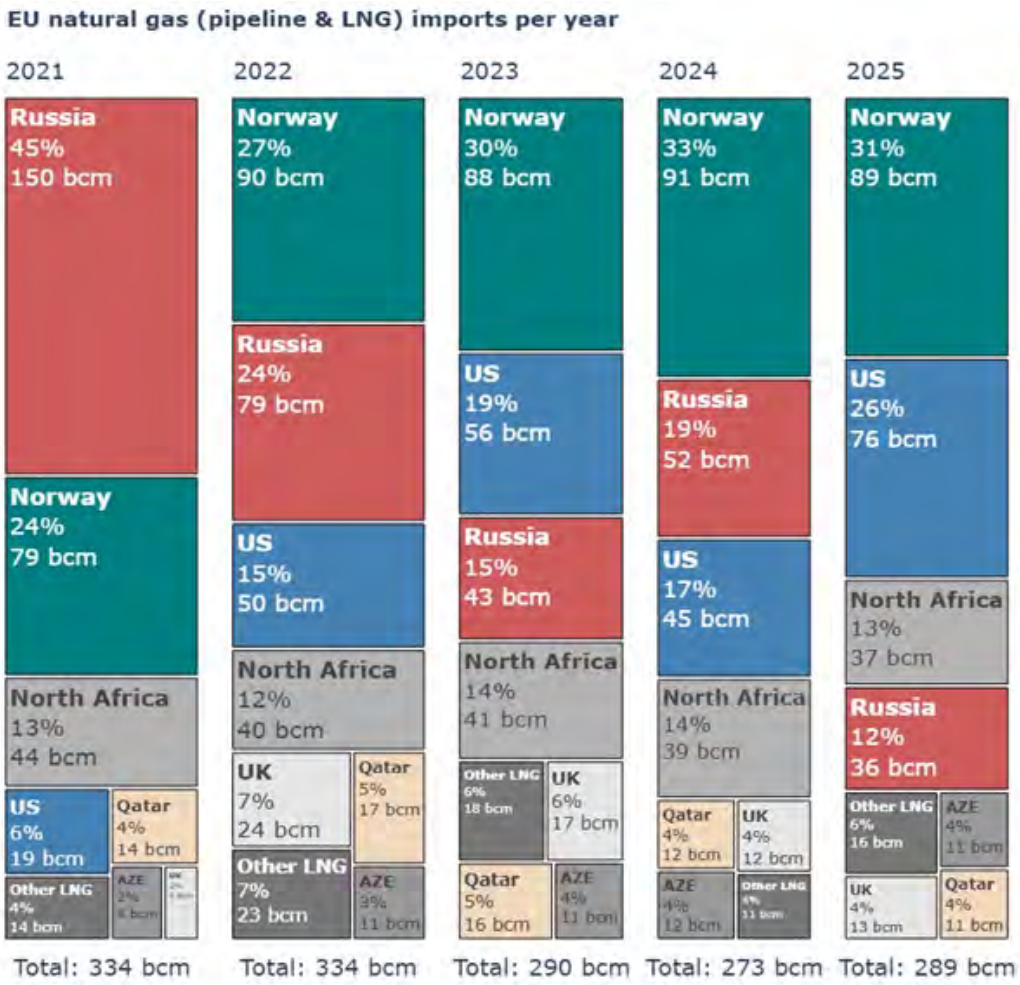
While we are pushing **fossil fuels out of electricity** production

Fuel share of energy demand and of electricity generation (%)



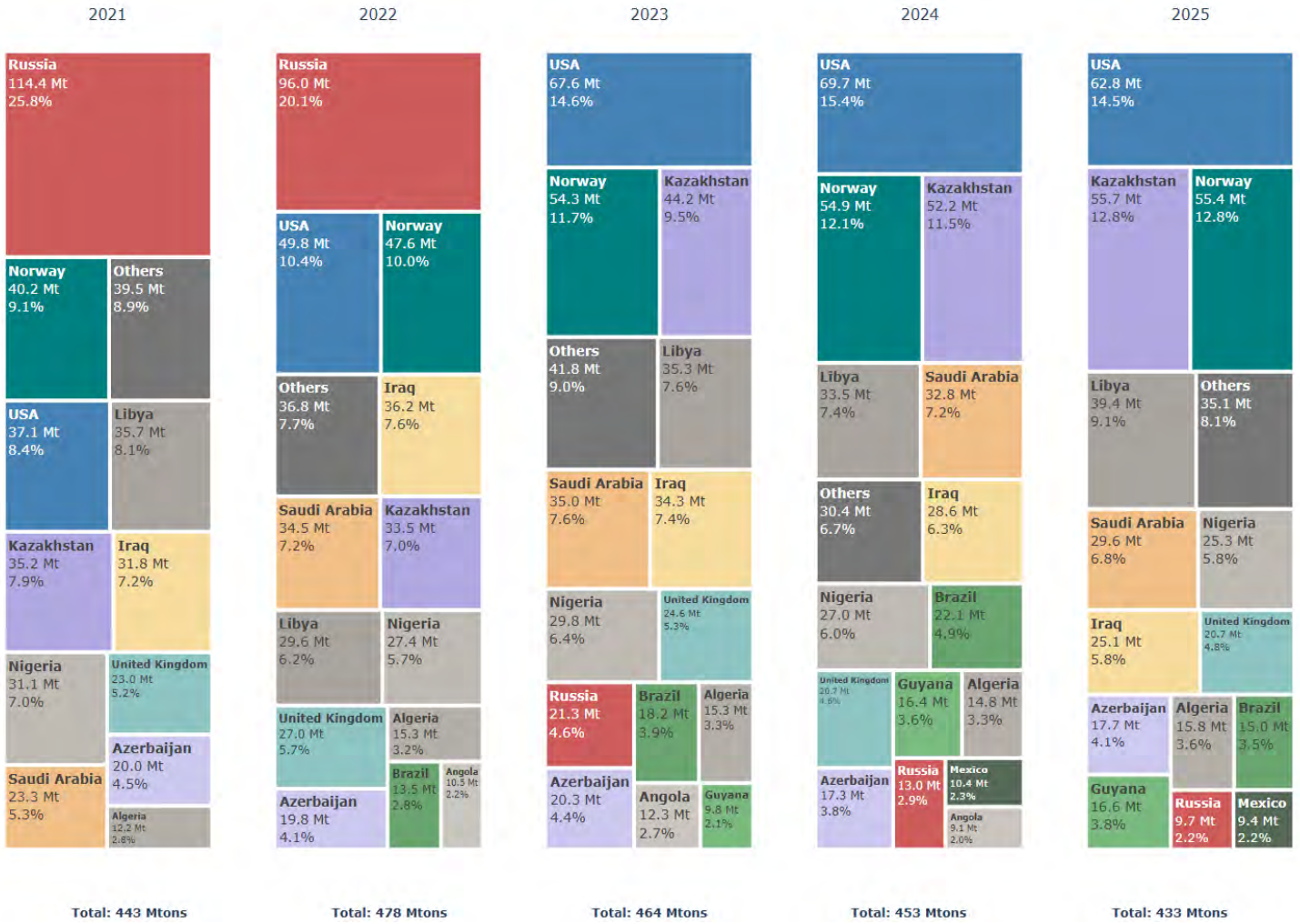
Source: Eurostat

But our system still relies on imported gas…



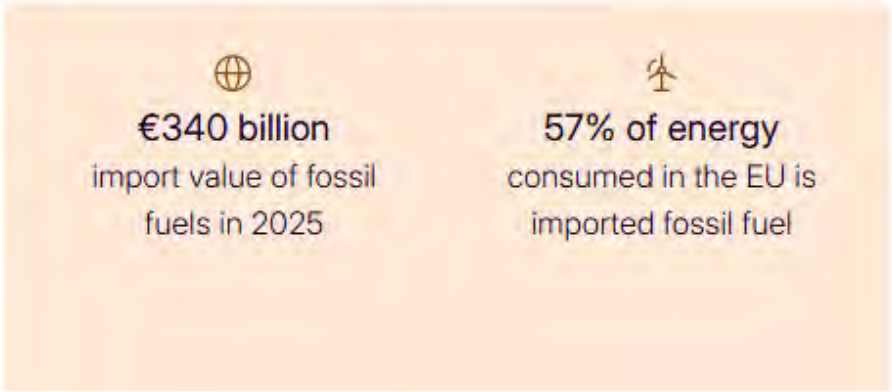
[32] *Source: DG ENER Chief Economist Unit based on ENTSO-G, LSEG*

… and oil


2021
Russia 114.4 Mt 25.8%
Norway 40.2 Mt 9.1%
Others 39.5 Mt 8.9%
USA 37.1 Mt 8.4%
Libya 35.7 Mt 8.1%
Kazakhstan 35.2 Mt 7.9%
Iraq 31.8 Mt 7.2%
Nigeria 31.1 Mt 7.0%
United Kingdom 23.0 Mt 5.2%
Azerbaijan 20.0 Mt 4.5%
Saudi Arabia 23.3 Mt 5.3%
Algeria 12.2 Mt 2.8%
Total: 443 Mtons
2022
Russia 96.0 Mt 20.1%
USA 49.8 Mt 10.4%
Norway 47.6 Mt 10.0%
Others 36.8 Mt 7.7%
Iraq 36.2 Mt 7.6%
Saudi Arabia 34.5 Mt 7.2%
Kazakhstan 33.5 Mt 7.0%
Libya 29.6 Mt 6.2%
Nigeria 27.4 Mt 5.7%
United Kingdom 27.0 Mt 5.7%
Algeria 15.3 Mt 3.2%
Azerbaijan 19.8 Mt 4.1%
Brazil 13.5 Mt 2.8%
Angola 10.5 Mt 2.2%
Total: 478 Mtons
2023
USA 67.6 Mt 14.6%
Norway 54.3 Mt 11.7%
Kazakhstan 44.2 Mt 9.5%
Others 41.8 Mt 9.0%
Libya 35.3 Mt 7.6%
Saudi Arabia 35.0 Mt 7.6%
Iraq 34.3 Mt 7.4%
Nigeria 29.8 Mt 6.4%
United Kingdom 24.6 Mt 5.3%
Russia 21.3 Mt 4.6%
Brazil 18.2 Mt 3.9%
Algeria 15.3 Mt 3.3%
Azerbaijan 20.3 Mt 4.4%
Angola 12.3 Mt 2.7%
Guyana 9.8 Mt 2.1%
Total: 464 Mtons
2024
USA 69.7 Mt 15.4%
Norway 54.9 Mt 12.1%
Kazakhstan 52.2 Mt 11.5%
Libya 33.5 Mt 7.4%
Saudi Arabia 32.8 Mt 7.2%
Others 30.4 Mt 6.7%
Iraq 28.6 Mt 6.3%
Nigeria 27.0 Mt 6.0%
Brazil 22.1 Mt 4.9%
United Kingdom 20.7 Mt 4.6%
Guyana 16.4 Mt 3.6%
Algeria 14.8 Mt 3.3%
Azerbaijan 17.3 Mt 3.8%
Russia 13.0 Mt 2.9%
Mexico 10.4 Mt 2.3%
Angola 9.1 Mt 2.0%
Total: 453 Mtons
2025
USA 62.8 Mt 14.5%
Kazakhstan 55.7 Mt 12.8%
Norway 55.4 Mt 12.8%
Libya 39.4 Mt 9.1%
Others 35.1 Mt 8.1%
Saudi Arabia 29.6 Mt 6.8%
Nigeria 25.3 Mt 5.8%
Iraq 25.1 Mt 5.8%
United Kingdom 20.7 Mt 4.8%
Azerbaijan 17.7 Mt 4.1%
Algeria 15.8 Mt 3.6%
Brazil 15.0 Mt 3.5%
Guyana 16.6 Mt 3.8%
Russia 9.7 Mt 2.2%
Mexico 9.4 Mt 2.2%
Total: 433 Mtons

Yet without two decades of **energy efficiency improvements…**

EU's energy consumption would be **30% higher.**

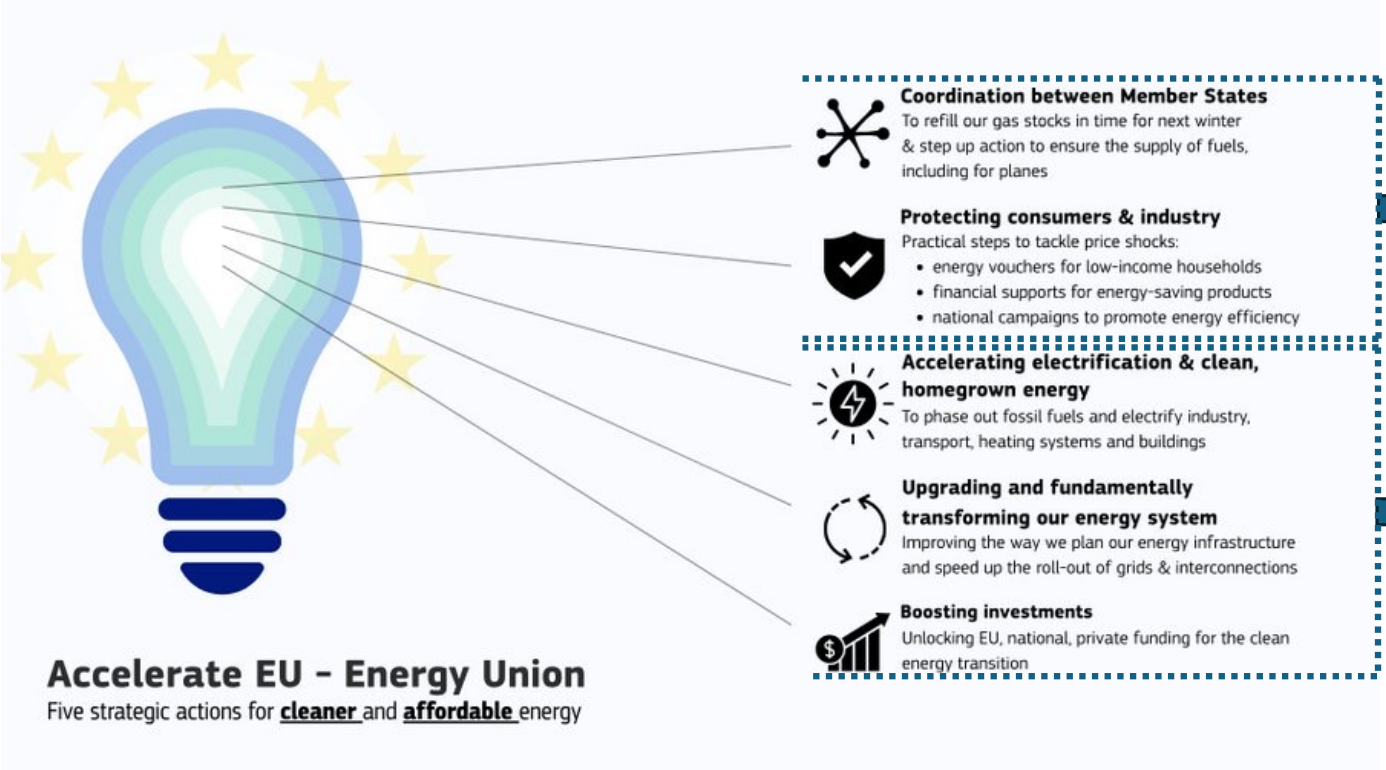


In today crisis, we would have to import **2 oil tankers** and **5 LNG carriers** more every day.

⇒**Call to… accelerate the Clean Energy Transition**, and need for targeted immediate actions that make our energy system long-term resilient.

AccelerateEU – Energy Union

The Communication **addresses EU's rising energy costs** on volatile fossil fuel markets and **aims to accelerate the clean energy transition and strengthen our energy resilience.**



Immediate actions:

With rapid benefits - to protect European citizens and small enterprises.

With long-term impact - to make our energy system resilient, via homegrown clean energy and energy efficiency.

Post 2030 Energy Efficiency Framework

1st June 2026

European Commission

Consultation strategy



Clean heating and cooling

1st June 2026

European Commission

Heating and cooling in the EU

- Almost **half of all EU energy** is used for heating and cooling.
- **Renewable energy sources** increased to **23% in 2023** and reached **26.7% by 2024**.
- Electrification, through **heat pumps**, is driving the shift to renewable heating in last years, notably due to energy security concerns.
- **Solid biomass** dominates the renewable heat mix (80%), creating challenges due to sustainability and environmental concerns.
- **District heating** systems decarbonise steadily with share of fossil fuel sources dropping from70% to 53% in the past 10 years (with increase of renewables and waste heat recovery).

Action Plan on Electrification and Clean Heating and Cooling

Integration of H&C into the Electrification Action Plan to foster the potential of **energy efficiency** and **clean heating and cooling** towards **electrification-ready smart energy system** in Europe:

- Support **integrated planning at local level** for the transition to clean heating and cooling (energy-efficient and locally-sourced).
- Accelerate the deployment of **smart and efficient clean heating solutions** (mass deployment of heat pumps and heat recovery systems).
- Increase **system smartness and efficiency** through **urban networks** integrating available **waste heat and renewable heat sources** and dynamically using their **flexibility** for the electricity system.

Data centre energy efficiency package

1st June 2026

European Commission

Rationale for the package

The **Information and Communication Technology** (ICT) sector is one of the **fastest-growing** sectors in Europe.

This expansion poses **challenges** in terms of **energy consumption**, carbon **emissions**, environmental resources such as **water** and for electricity **grids**.

Energy-efficient and sustainable data centres can **reduce the energy consumption and environmental footprint** of data centres but also **improve the sector's competitiveness**.

This package is one of the key deliverables of the **Roadmap** announced by Commissioner Jørgensen in June 2025, aiming at **accelerating energy efficiency** in Europe.

Adoption: Soon/in the coming weeks

Objectives and deliverables

	1. Provide more transparency on the data centre sector	2. Promote best technologies and practices	3. Phase out inefficient behaviours
How ?	By assessing the **first set of data reported** by data centres to the Commission on their **energy consumption and sustainability performance**	By enabling **comparisons** between data centres on their energy and sustainability performance and inform **better policy making** and **procurement** of digital assets and services.	By ensuring that all new and retrofitted data centres meet a **minimum performance level** for energy efficiency, water use etc.
Deliverable ?	Report on the **energy efficiency of data centres in the EU**	Delegated Regulation establishing a **common Union rating scheme for data centres**	Launch of a **public consultation** on establishing **minimum performance standards** for data centres in the EU

European Energy Efficiency Financing Coalition

1st June 2026

European Commission

Objectives and members

Initiated by Commissioner Simson & 27 Member States

Led by DG ENER with **support** of a secretariat & UNEP-FI



High-level & three-party initiative

☞ enhancing cooperation on energy efficiency financing between Commission, Member States, financial institutions and industry.

☞ creating a favourable market & regulatory environment for mobilising investments + private financing.

27 Member States

67 Financial Institutions

41 Industry Organisations

Main features

3 levels of activities

- General Assembly
- Expert Platform (-> Working Groups)
- National Hubs

WG 1 – Renovation
WG 2 – SMEs
More to be launched soon

17 National Hubs

Launched
- AT, BE, CZ, DK, EE, EL, ES, FI, HU, IT, NL, PL

Preparation
- CY, FR, PT, RO, SE



Energy Performance of Buildings Directive (EPBD)



ECEEE 2026 Summer Study

European Commission – DG ENERGY
Unit B3 - Buildings and Products
Bunthan IEA, Ph.D., Policy Officer

European Commission

EPBD implementation phase is ongoing



EPBD recast: timeline



8 May 2024
Publication in Official Journal - entry into force: **28 May 2024**

1 January 2025
Transposition deadline for Article 17(15) on phasing out financial incentives for the installation of boilers powered by fossil fuels

30 June 2025
EPBD implementation support package

31 Dec. 2025
EU countries submit their draft national building renovation plans

29 May 2026
Transposition date (24 months after EPBD entry into force)

31 Dec. 2026
EU countries submit their final national building renovation plans

EPBD implementation support package

OBJECTIVE

To help EU countries **transpose and implement** pragmatically the directive into national law

Developed in close cooperation with Member States, considering the input from stakeholders

CONSISTS OF

Secondary legislation package	• **Delegated Regulation** revising the methodological framework for calculating **cost-optimal levels** and accompanying **guidelines** • **Implementing regulation** on the transfer of information from national databases to the **EU Building Stock Observatory** • **Delegated regulation** setting out a Union framework for national calculations of life-cycle Global Warming Potential
Guidance package	• **13 annexes** dedicated to specific topics • Provides **interpretative and practical** guidance on new or updated provisions
Templates	• Supporting the preparation of the **National Building Renovation Plans**

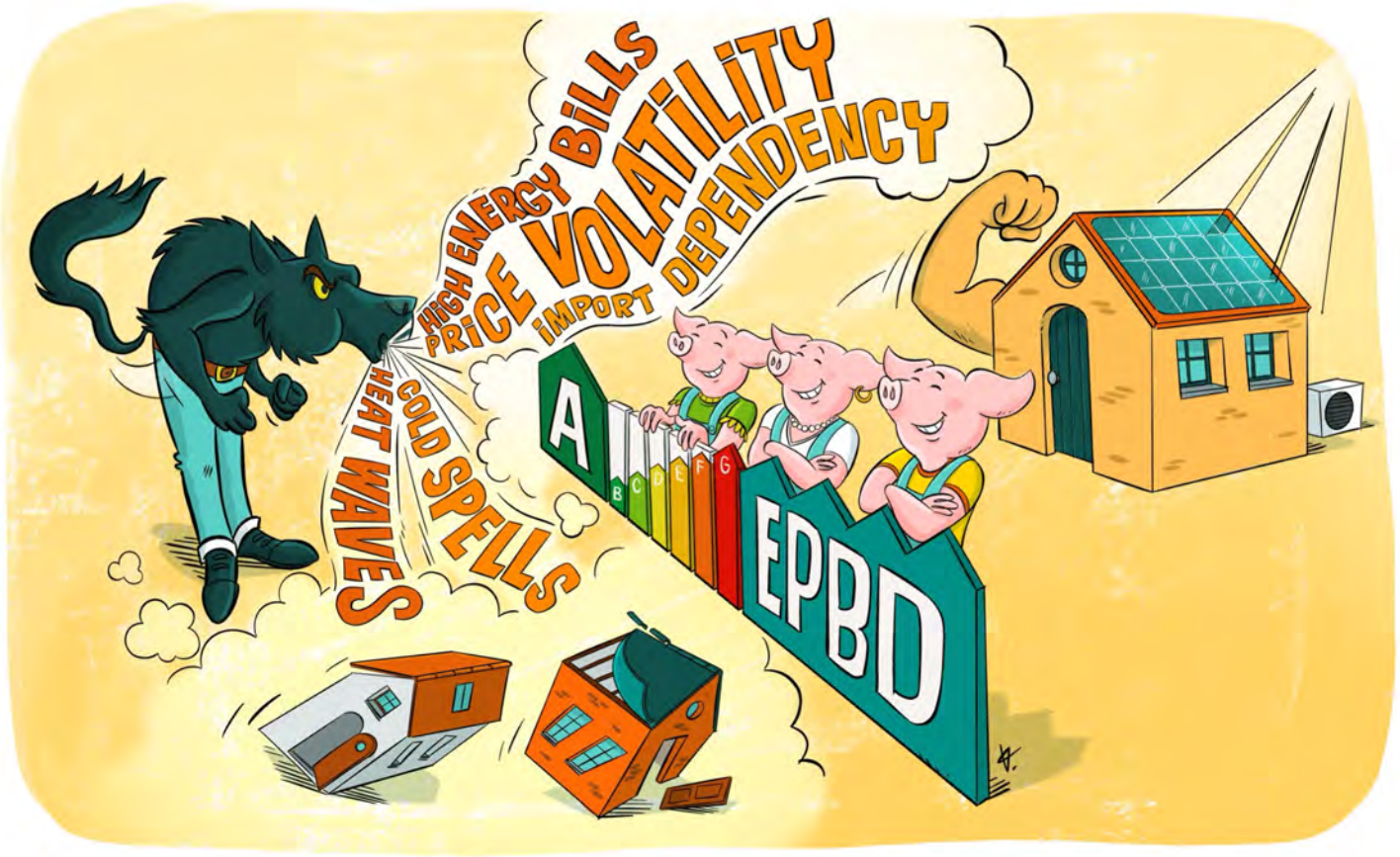
For more information go to: Energy Performance of Buildings Directive

EPBD guidance package

- Minimum energy performance standards for non-residential buildings and trajectories for progressive renovation of residential buildings
- Financing and one-stop shops
- Energy performance certificates and independent control systems
- Renovation passports
- Energy performance databases
- Data exchange

- Zero-emission buildings
- Solar energy in buildings
- Sustainable mobility
- Technical building systems, indoor environmental quality and inspections
- Fossil fuel boilers
- Energy performance calculation methodology
- Global warming potential

- Phasing out incentives for fossil fuel boilers *(guidance adopted in October 2024)*



What's next on EPBD?

Secondary legal acts and Reports

- Delegated regulation establishing a voluntary portfolio framework for financial institutions, in order to increase lending volumes for energy renovations [~Q1 2027]
- Report on the testing and implementation of the Smart Readiness Indicator scheme **[Q4 2026]**
- Guidance on fire safety linked to the electrification and renovation of buildings **[Q1 2027]**

Review of the EPBD

- Date: by 31 December 2028

- **Other Initiatives**:
  - Better Homes Partnerships

On financing:

- **AccelerateEU**: "develop standardised financial products for clean heating and renovation"
- Joint Working Group under the Pan-European Investment Platform (PEIP) and the European Energy Efficiency Financing Coalition (EEEFC) – 'Financing of Sustainable and Affordable Housing'

EPBD transposition

- General transposition deadline : 29 May 2026
- The EPBD **has to be transposed by MS** at national level, **completely** and **correctly**, by the transposition deadline.
- As Guardian of the Treaties, the Commission monitors the complete and correct transposition of Directives.
- The Commission will closely monitor, in two distinct phases, the **completeness** and then the **conformity** of national transposition and implementing measures with the EPBD provisions, following **their adoption and notification to the Commission**.



National Building Renovation Plans

Article 3, Annex II

- Replace Long-Term Renovation Strategies
- Use a common template and align with National Energy and Climate Plans **(NECPs)** cycles
  - an overview of the **national building stock**
  - a **roadmap** with targets and progress indicators
  - **policies and measures**
  - **investment needs** for implementation
- **2 stage-submission:**
  - **draft plan** due in December 2025
  - Assessment and feedback from the Commission
  - **final plan** due in December 2026

State of play and next steps

15 **complete** draft NBRPs submitted (published under the NBRP webpage)

- 6 by the deadline : ES, Wallonia, HR, BG, FI, RO.
- 9 after : LT, SI, DK, CY, AT, NL, FR, SE, PT.

The European Commission (DG ENER + JRC) is assessing them and will publish the assessment and feedback for this **1st batch** : tentatively late **June 2026**

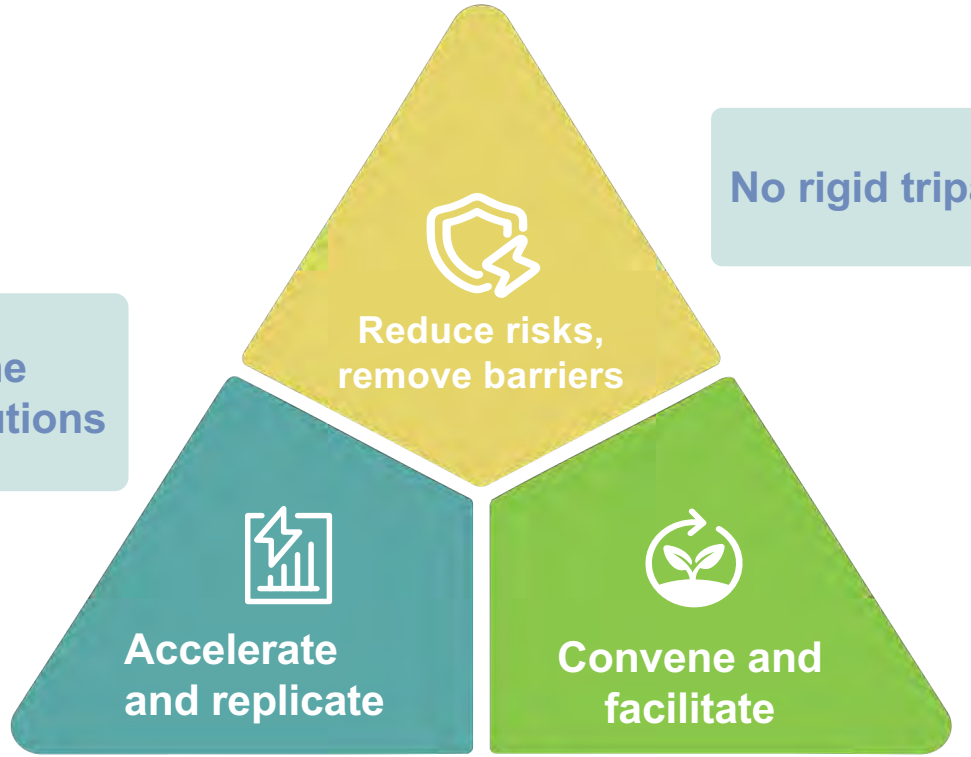
The 13 assessed draft plans (so far) are mostly complete despite a few gaps

- Compared to LTRS, improved completeness, homogeneity, consistency with other reporting exercises (NECP, NECP R, national cost-optimal reports)
- Generally, the roadmap aligns with Energy-efficient and decarbonised building stock by 2050, other EPBD requirements (esp. Article 9), NECP commitments

Better Home Partnerships



Better Homes Partnerships: a new tool for delivering together



No rigid tripartite structures

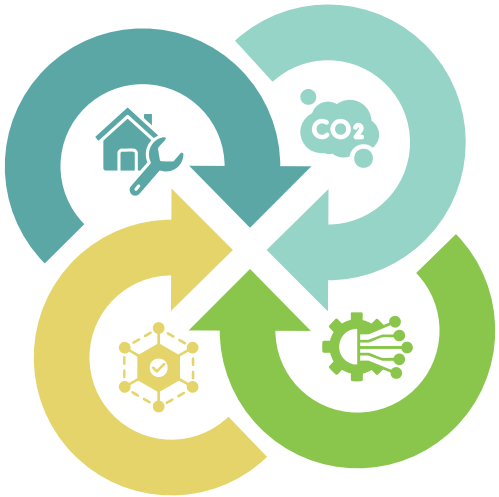
Focus on projects on the ground and market solutions

OBJECTIVE: convening key stakeholders from fragmented renovation value chains and facilitate the alignment of their agendas to deliver concrete projects

Focus areas

Demand flexibility through building renovation

Stimulate and simplify renovations



Financial instruments

Efficient heating and cooling solutions



Next steps

- Upcoming Call for Expression of interest (e.g. for ongoing projects to replicate, projects under development, market solutions to uptake/upscale)
- Engagement with interested parties to help matching needs, outreach at national and local levels.
- Develop models of partnerships to be endorsed and replicated
- Take stock at the Housing Summit (timing TBC)

Thank you!

#EPBD

LinkedIn EU Energy
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https://energy.ec.europa.eu/
DG Energy newsletters


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What's the Story?
Narratives for the Energy Transition



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This project has received funding from the European Union's LIFE Programme under Grant Agreement No. 101076918

OÖ Energiesparverband
The Energy Agency of Upper Austria

Our work

energy transition
climate neutrality

energy efficiency
renewables
e-mobility

Services
for
households
companies
public sector

Advice
Information
Funding
Networking
Training
Research



The region of Upper Austria



Capital: Linz
Population: 1.5 million



Industrial heartland of Austria
>25 % of Austrian exports



91 % renewable electricity
71 % space heating from renewables/waste h.
61 % GHG reduction in buildings in 20 years
800 Energy Communities



4.7 billion Euro
annual investments
in the energy transition

European Energy Efficiency Conference, 3-5 March 2027

Part of the WSED, an international conference with 600+ participants from 50+ in Wels/Austria

Events:

- **Energy Policy Efficiency Conference**
- **Young Energy Efficiency Researchers Conference**
- **Instrial Energy Transition Conference**
- **Large tradeshow on sustainable energy**

Call for Papers: 9 October 2026

www.wsed.at

ENERGY EFFICIENCY WATCH

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Energy Efficiency Watch Survey, Parliamentary Events and Stakeholder Workshops

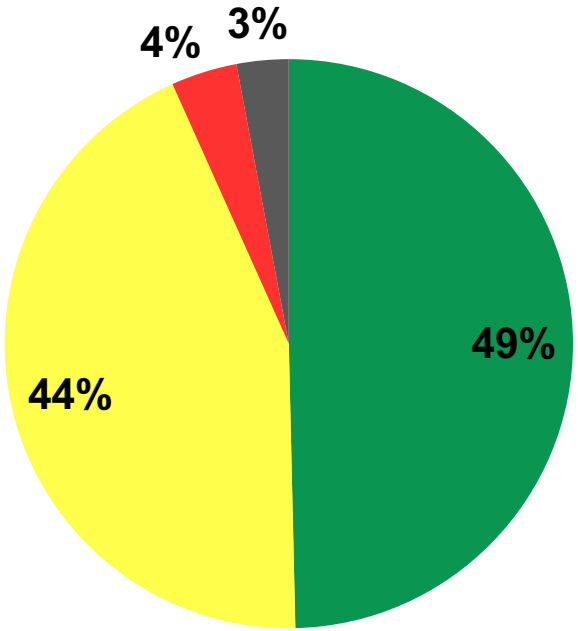
- accompanied EU sustainable policy since 2007
- views of experts and stakeholders
- on progress "on the ground" in energy efficiency policies in their respective country
- gather insights for narrative development in Member States
- perceptions of experts on the progress in their **own country**

Survey: More than 1,370 experts from all Member States participated

Stakeholder Workshops: 10 in 10 countries, participating over 15 countries

Parliamentary Events: 25+ events with 200+ MP/MEPs and 600+ stakeholders

In your personal opinion, which of the following mid-term strategies is best to keep industry in your country?



- Support the fastest possible energy transition
- Support the energy transition, but not too fast in order to protect jobs
- Support fossil fuel energy costs
- No matter what we do, in the mid-term, industry will leave Europe

NARRATIVE INPUTS: The Clean Industrial Deal in the public debate

Green Deal & Clean Industrial Deal:

"Decarbonisation is a
powerful driver of growth"

Green Deal & Clean Industrial Deal:

"Decarbonisation is a
powerful driver of growth"

Are enough people truly convinced of this?

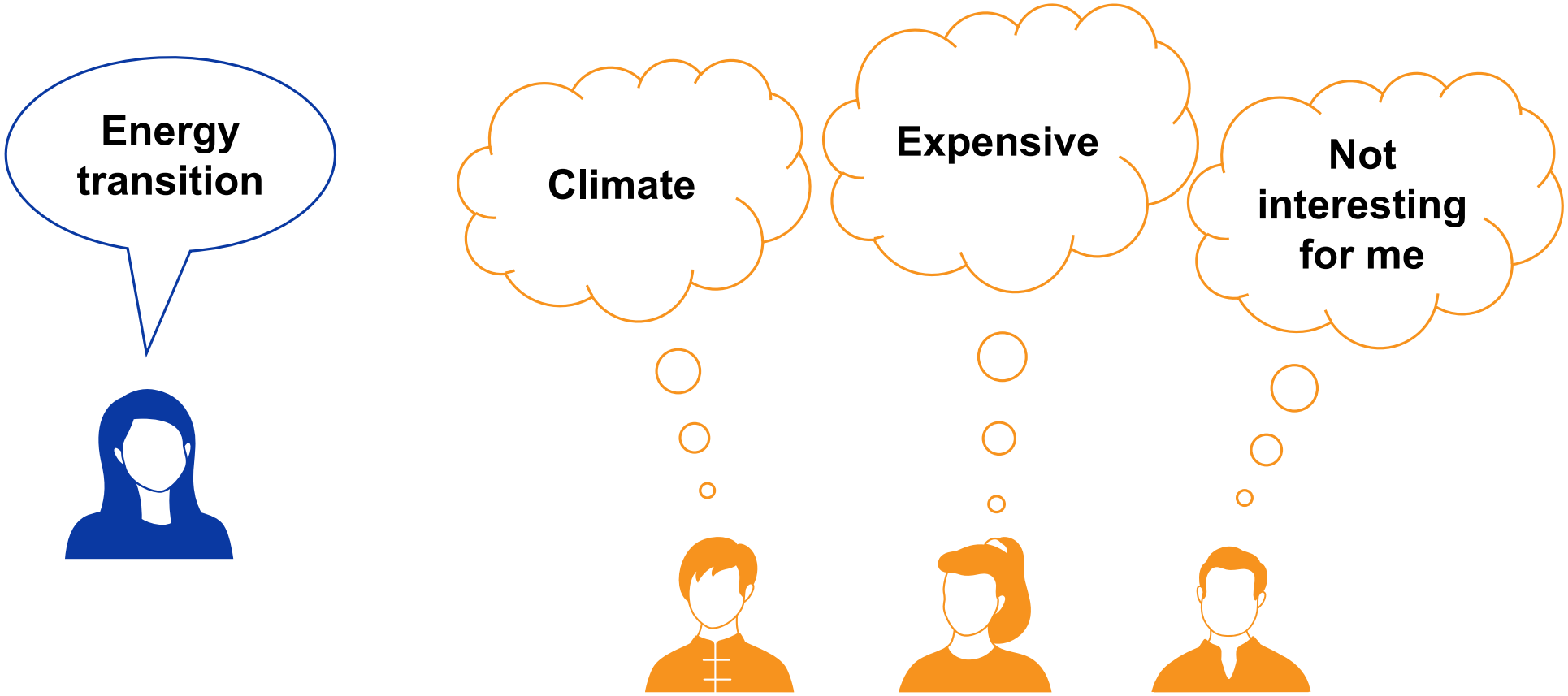
Are you truly convinced?

Green Deal & Clean Industrial Deal:

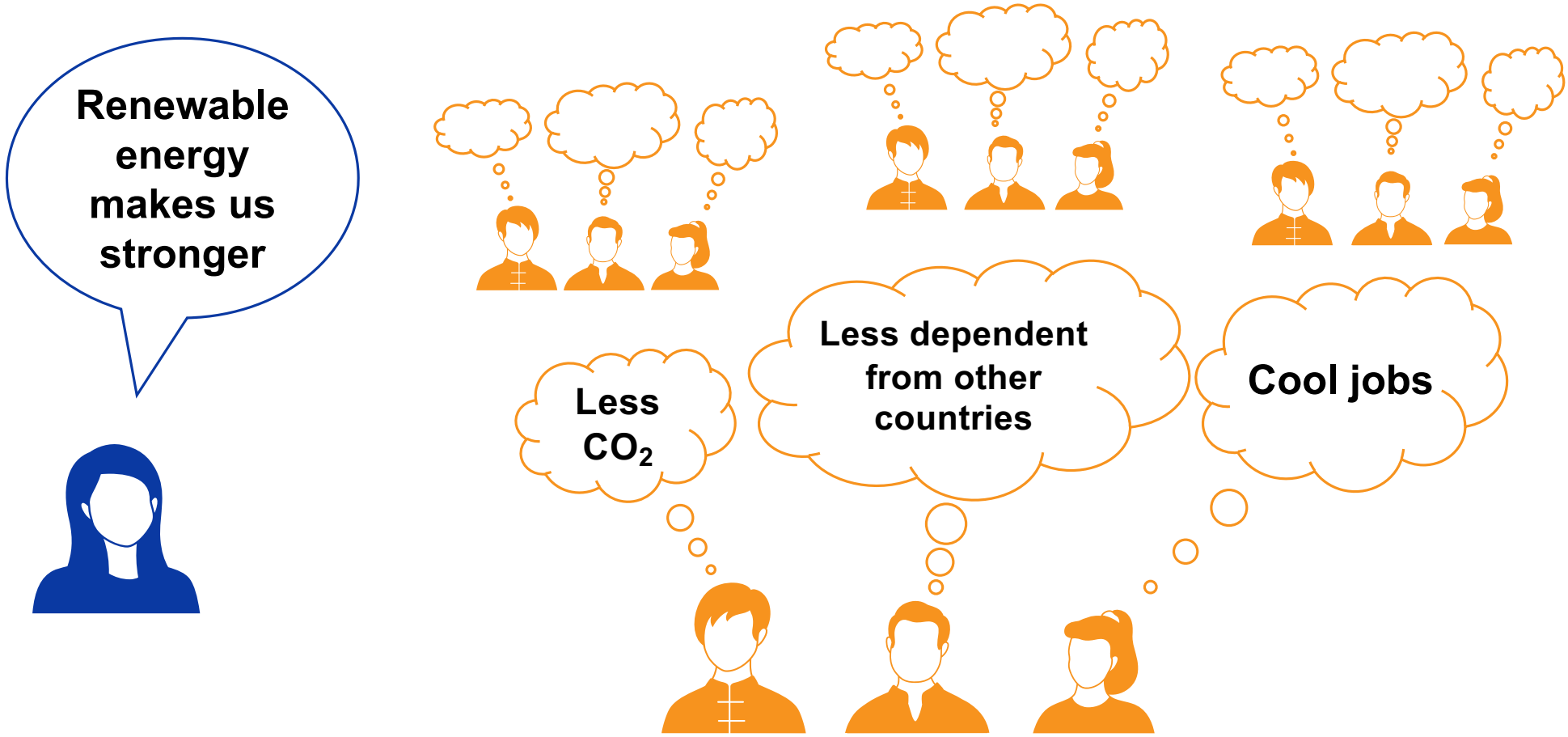
"Decarbonisation is **a powerful driver** of growth"

New narratives are needed!

The images in people's minds



Narratives: Gaining buy-in from wider groups in society



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



WHY

is climate neutrality a good deal for citizens, businesses and for countries?

Why decarbonisation for competitiveness?

- Energy security, lower risks
- Stable energy costs
- Cleantech innovation
- Investments and jobs
- Modernisation and productivity increase
- Climate protection

How develop successful narratives?

Language matters!

"Change" is often not positively connotated in the public - preceived as risky, destablisation, loss of economic and social status

-> Creating trust - positive examples

-> By not acting, we may lose control, let's use our strengths

-> Perserving competitiveness, prosperity, stability

-> Avoid technocratic terminoloy (except when speaking to technocrats☺)

How develop successful narratives?

It is the economy, stupid!

Economic arguments foster societal acceptance - beyond simplistic pay-back

- maintain economic stability and increase security
- provide resilience against price shocks and control of energy cost
- maintain and create jobs and investments
- stay internationally competitive by using our innovation potential
- preserve the value of buildings through ensuring good energy performance

-> quantify **benefits of action**

-> show **impacts of inaction**, compared to costs of transformation

-> illustrate by **economic data**

How develop successful narratives?

Know your target groups to create buy-in!

A successful energy transition needs a multitude of stakeholders and all society groups!

-> "the bait must please the fish, not to the fisher!"

-> listen to what is important to different groups

-> putting people at the center

-> people have short term questions, long-term answers will not work

-> yesterday's narratives may not work today

How develop successful narratives?

Take a strategic approach!

New policies need to be accompanied with a communication strategy (beyond a press release!)

-> quantified benefits for your audience and put risks into perspective

-> explain intention of measures (why transformation is the better alternative?)

-> build positive and clear narratives, illustrated by data

- preserving stability and increasing resilience
- maintaining and fostering competitiveness
- providing security and freedom
- enabling growth, investments and innovation
- using economic assets smartly
- communicate success, not the struggle
- putting people's interests in the focus




Let's start with
better narratives
today!


Innovation
Independence
Let's start with better narratives today!
Security
Stable energy costs
Productivity
Jobs
Climate
Modernisation
Investments

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