Perspectives on the German Energy Transition: A Global Survey

June 2025

Perspectives on the German Energy Transition: a Global Survey

The World Energy Council – Germany is pleased to present the results of its most recent global survey, Perspectives on the German Energy Transition. With this initiative, we aim to capture how Germany's energy transition is viewed globally—from its objectives and achievements to its challenges and broader role within international energy debates. Our goal is to contribute to a more transparent and inclusive dialogue between Germany and its partners on the path to a sustainable, secure and climate-neutral energy future.

Energy security as a key driver

This year's survey underscores a notable shift: across the EU, energy security has become the leading driver of energy transitions, alongside climate protection. Outside the EU, climate protection continues to stand out as the primary motivator, reflecting differing regional priorities shaped by recent geopolitical and market dynamics.

More visibility, less approval

Respondents report that the visibility of the German energy transition has increased in recent years. At the same time, its international perception has grown more critical, with concerns pointing in the direction of policy coherence, cost-effectiveness and implementation speed.

Call for stronger regional coordination

A recurring theme, particularly among EU neighbours, is the need for deeper and more consistent coordination between Germany and surrounding countries to better align efforts and share responsibilities.

We sincerely hope that the insights offered in this survey can help inform ongoing discussions and foster stronger cooperation for a resilient and forward-looking energy transition.

Sincerely,
Carsten Rolle
Executive Director of the World Energy Council – Germany

Who we are

The World Energy Council – Germany serves as the national member committee of the global World Energy Council, bringing together key players from across the German energy sector. We are committed to fostering long-term, cross-border exchange on energy policy and market developments. With offices in Berlin, over 69 companies, associations and agencies are members.

Methodology

This year's survey, *Perspectives on the German Energy Transition*, represents an adapted continuation of what was previously known as the Blueprint Survey, or "*German Energy Transition – A Blueprint for the World?*". In light of evolving political and policy contexts, we chose to update both the title and the wording of several questions to reflect current priorities and nuances in global energy discussions.

Responses were collected via an online questionnaire using the SurveyMonkey platform. In addition to digital outreach, the survey team conducted in-person collection during the Berlin Energy Transition Dialogue (BETD), one of the most prominent events on the international energy policy calendar. As a result, responses from BETD participants may be more strongly represented in the dataset. Furthermore, our digital outreach was targeted in large part towards the WEC network worldwide, which may be heavily represented as well.

In total, 107 valid responses were received. These responses may reflect either individual views or the collective position of a company, association, or institution; in most cases, it is not possible to distinguish between the two. Therefore, while 107 responses were submitted, a greater number of perspectives may be represented in the overall analysis.

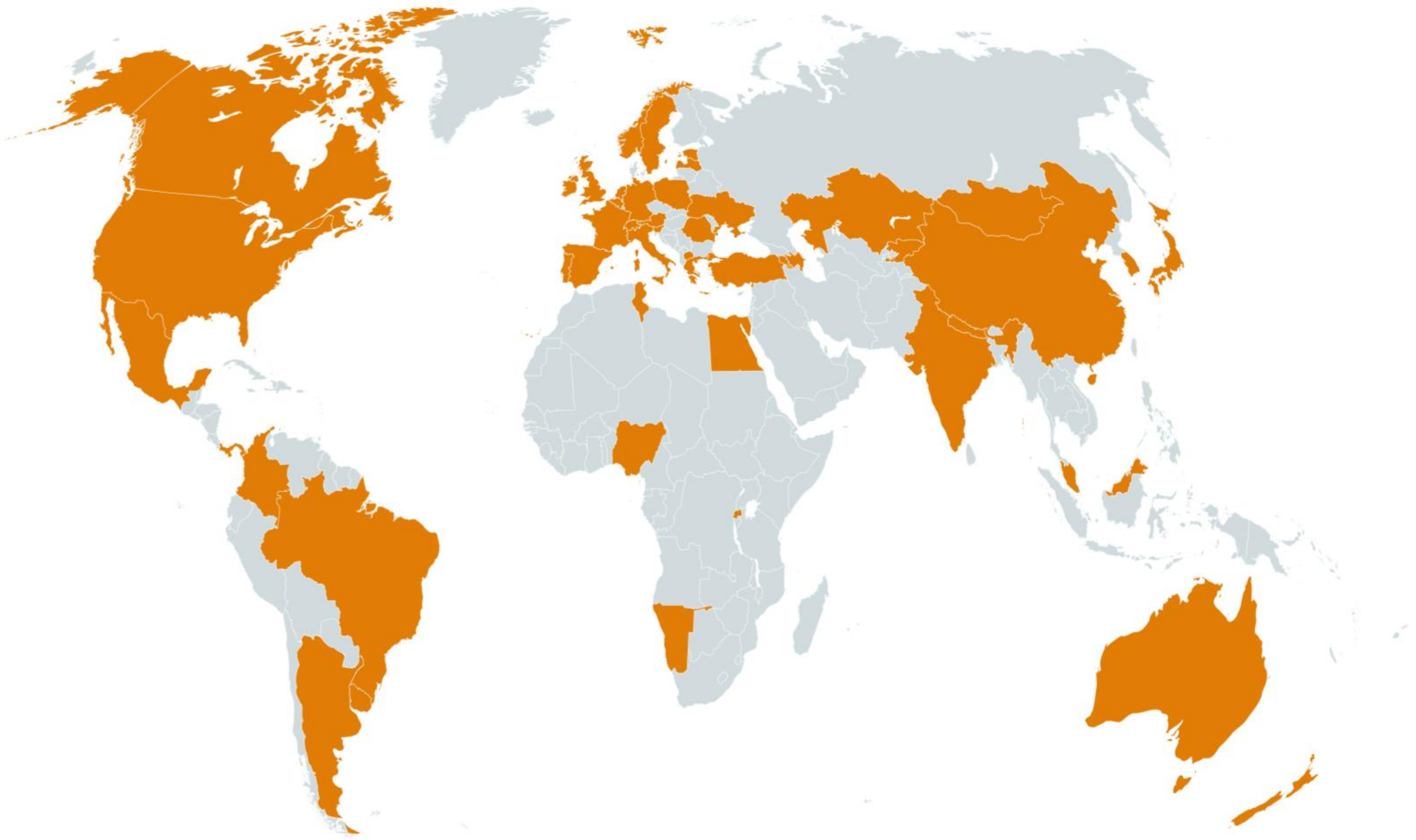
All percentage results shown in this report are based on the number of respondents who answered each specific question, not the total number of survey participants. This ensures that the data reflects only those who provided input on the respective topic.

Qualitative data—particularly open-ended responses—were evaluated through keyword analysis. Word clouds presented in this report are based on the manual identification and categorization of frequently used terms by respondents, providing an illustrative overview of recurring themes. Additionally, some quotes are edited for clarity or length.

Due to changes in both the survey design and the respondent base over time, direct comparison with previous survey editions is not possible. As such, the results should be interpreted as a snapshot of global expert opinion at this moment in time, rather than as a longitudinal trend analysis.

Methodology

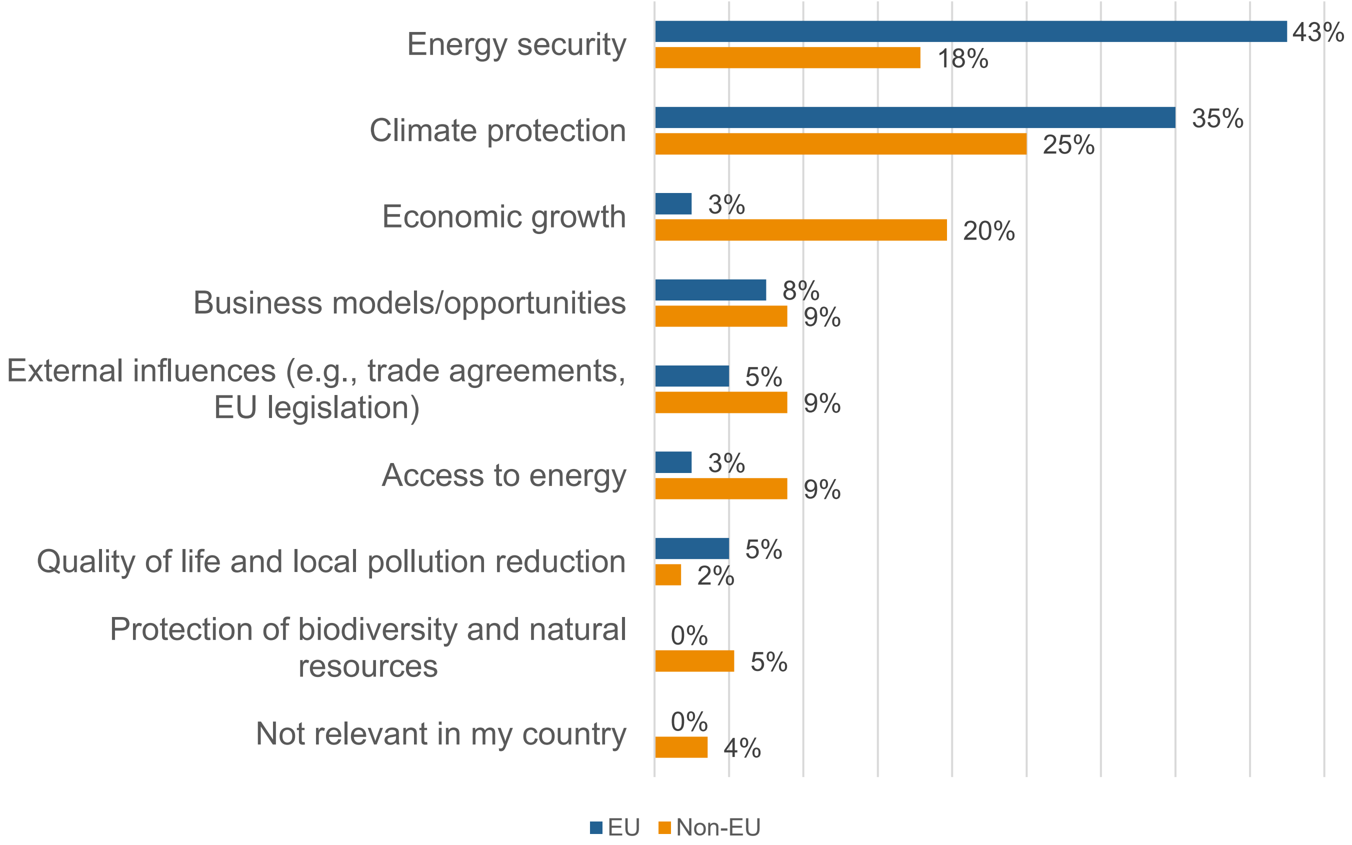
- This survey gathered +100 responses from almost 50 countries through a global network of WEC members representing the whole energy system
- Regions represented:
  - North America
  - South America
  - East and South Asia
  - Africa
  - Oceania
  - Europe
  - Middle East



Energy transition is pursued for differing reasons within and outside the EU

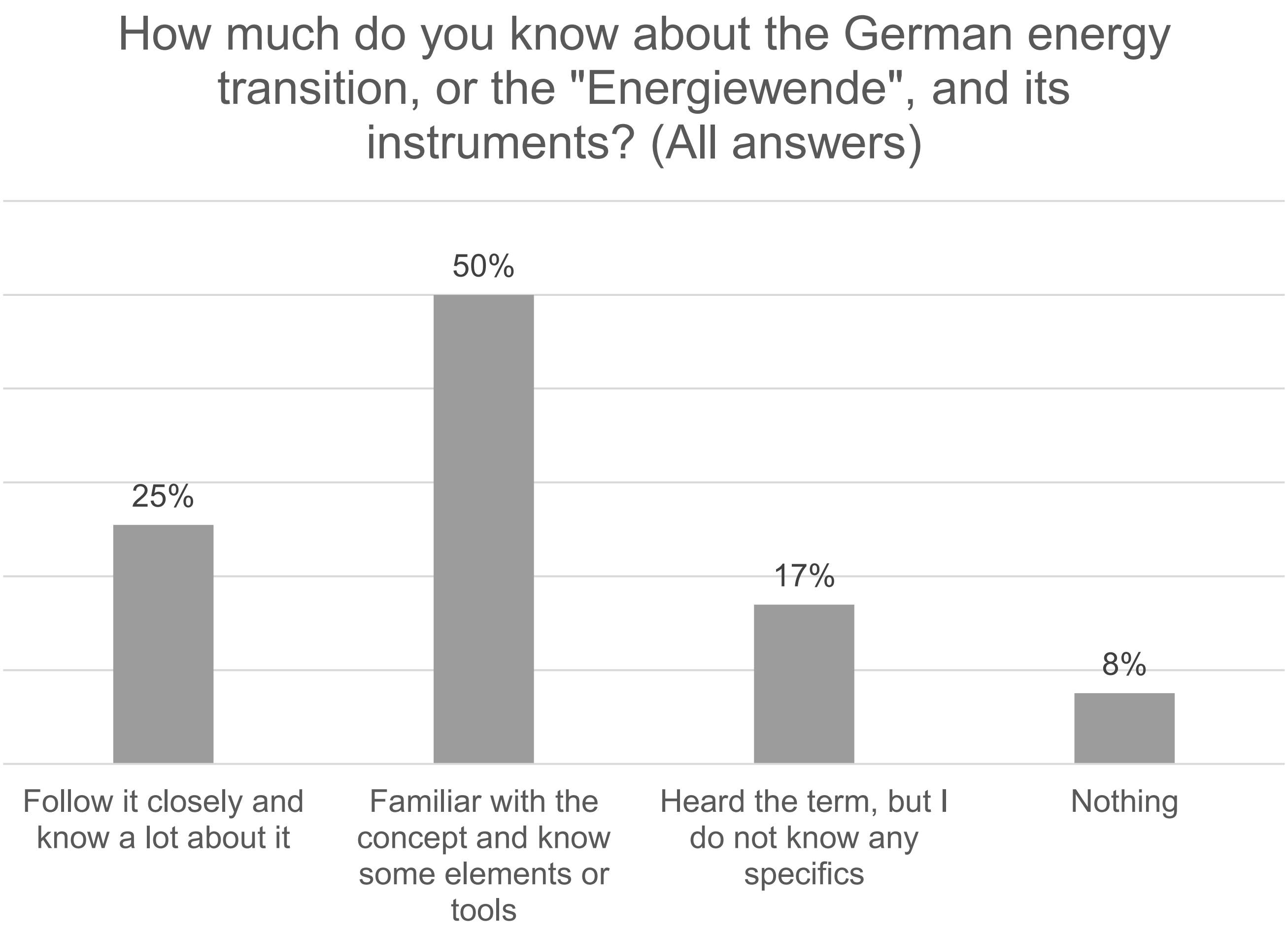
- The vast majority of EU respondents cite **energy security and climate protection** as the primary drivers of energy transition. Meanwhile, non-EU respondents also cite **economic growth** and include other reasons such as **protection of biodiversity and natural resources** and **access to energy.**

In your country, what is the main driver of energy transition?



The visibility of the German Energiewende has increased

- **75% of respondents** say they either follow the Energiewende closely or are familiar with the concept, up 4 percentage points from 2021.
- A higher share of respondents report that they follow the Energiewende closely and know a lot about it, up 6 percentage points since 2021.*



* Recognising this could be influenced by a different respondent base; see: Methodology

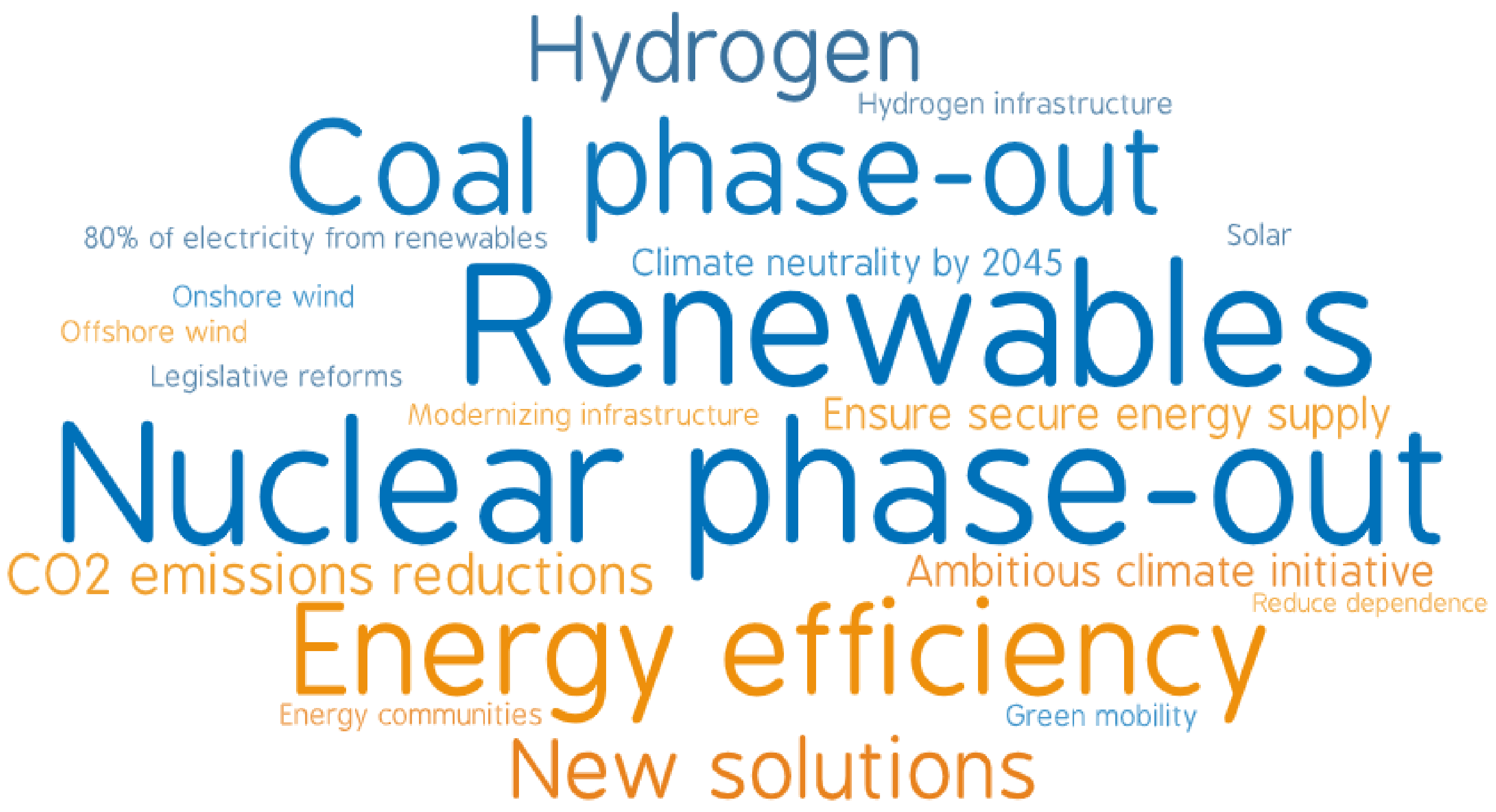
Nuclear phase-out is the most recognizable aspect of the German energy transition

- **Renewables**, **nuclear phase-out**, **energy efficiency**, **coal phase-out**, and the **usage of hydrogen** are perceived as the main elements of the German energy transition policy.

"Nuclear closure. Renewable development. Objective to close coal power plants. Rely on gas and objective to develop hydrogen." – France

"To attain carbon neutrality by 2045 through systematic adoption of renewable energy and energy efficiency." – Nigeria

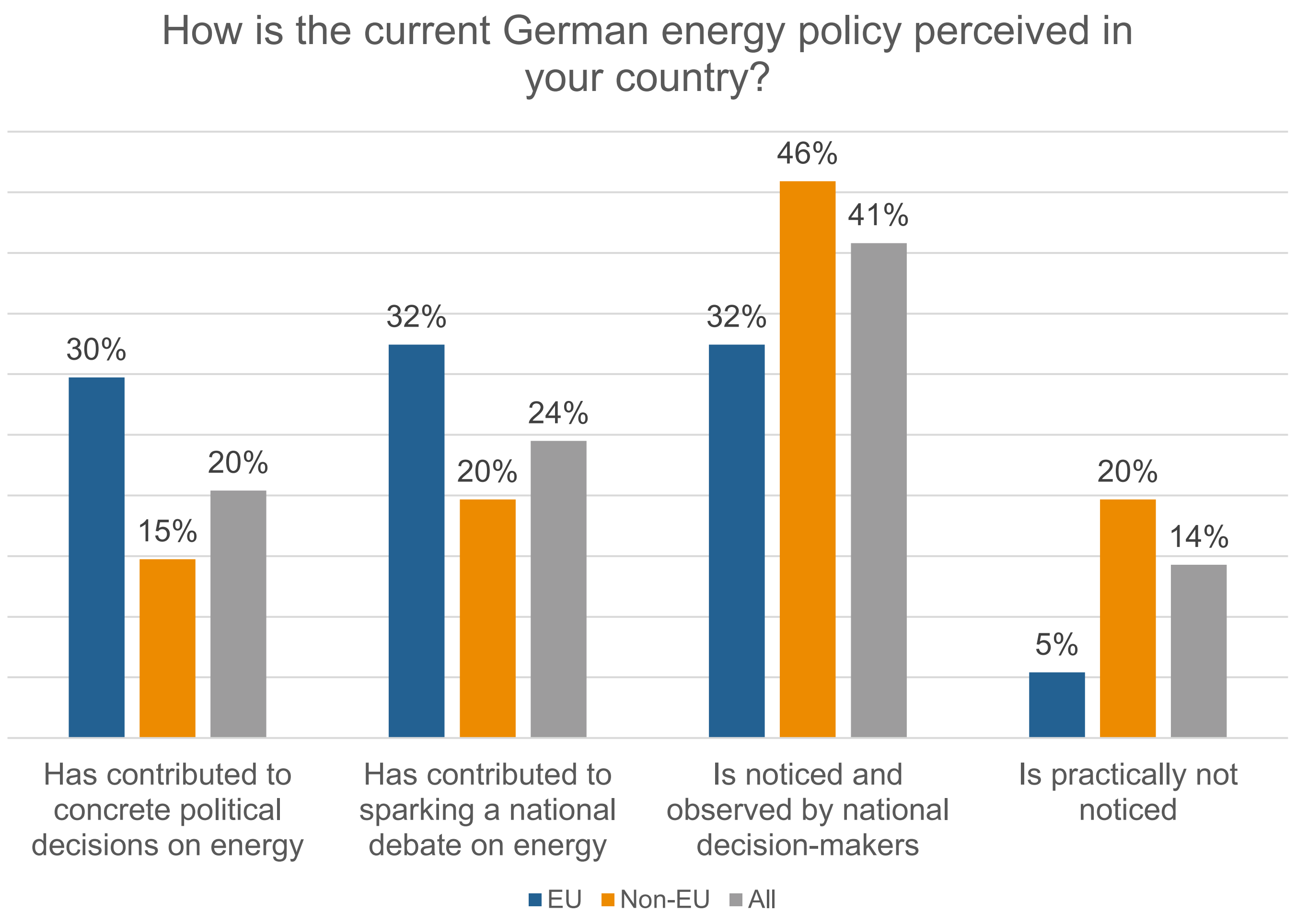
What are in your perception the main elements of the German energy transition?*



* see: Word cloud based on key word analysis of qualitative answers

The influence of the Energiewende has increased too…

- The share of respondents who say that German energy policy has contributed to concrete political decisions on energy increased significantly from those who reported that German energy policy had "led to concrete political decisions on energy", **up to 20% in 2025 from 2% in 2021**.*
- For EU respondents, this figure rose from **0% to 30%.**
- The share of non-EU respondents who report that German energy policy is practically not noticed **fell from 44% in 2021 to 20% in 2025**.



* Recognising this could be influenced by a different respondent base; see: Methodology

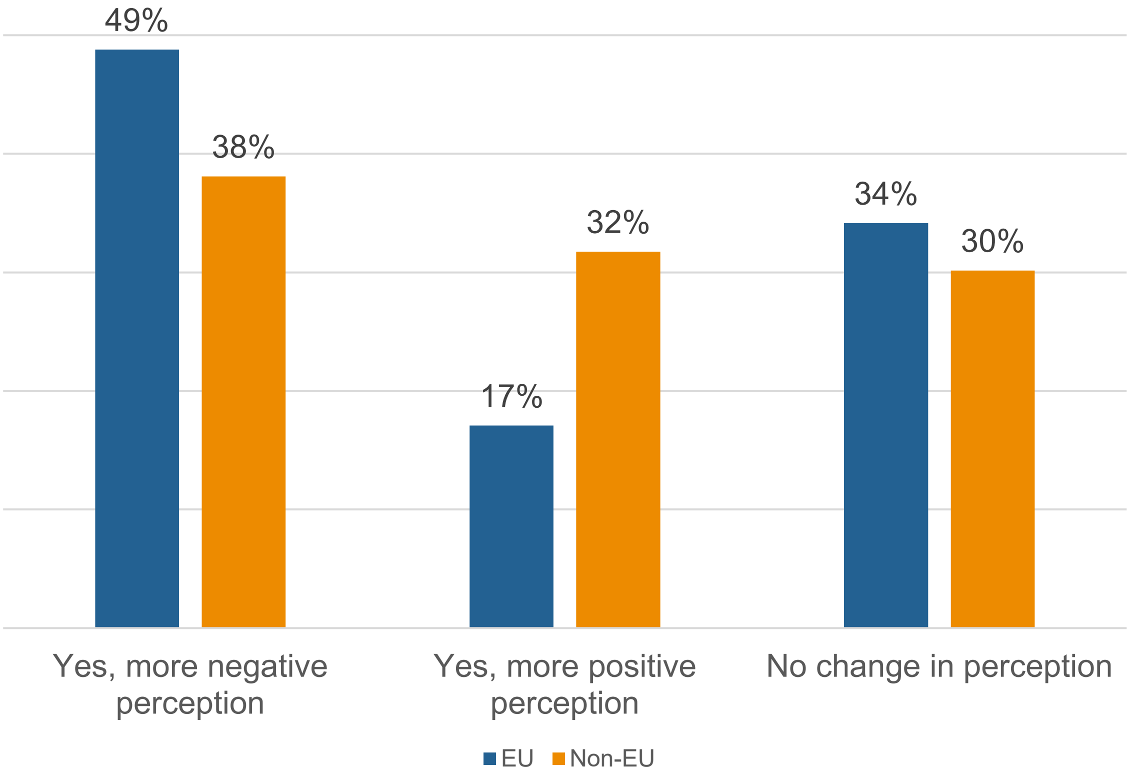
…for varying reasons

“These days; [sic] as a very unrealistic and unsuccessful live experiment with huge consequences - not only for Germany and German industry but for neighbouring countries as well (like south of Sweden).” – Sweden

“Germany's exit from nuclear energy and cut-off of Russian gas has sparked debate in public media and Germany's foreign (economic) policy is seen as rather unsuccessful.” – Türkiye

The German energy transition's reputation has worsened in the last four years

Has the perception on current German energy transition policy changed in the past four years?

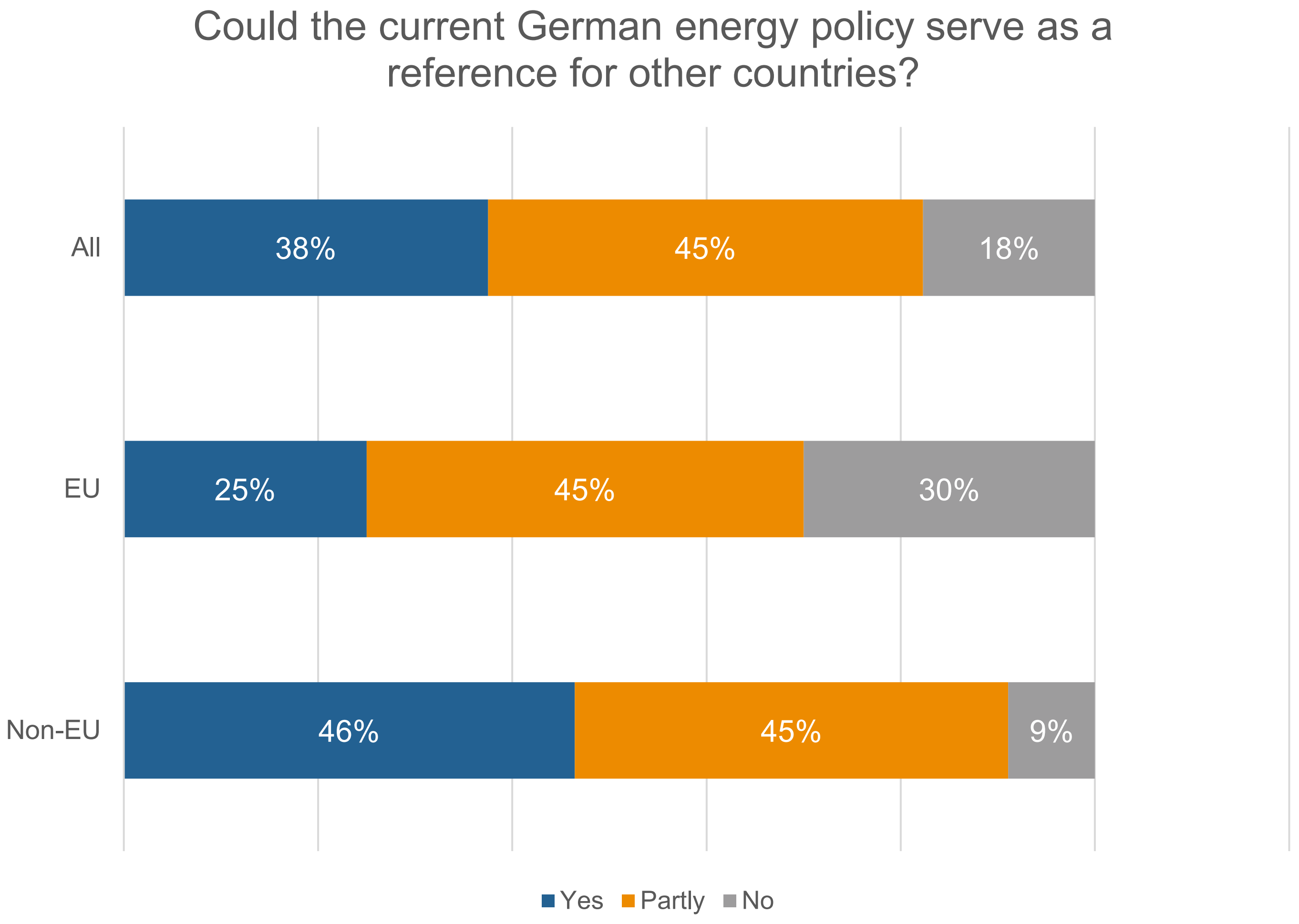


- Especially EU neighbours have primarily developed a more **negative perception (49%)** in the past four years. A larger share of non-EU respondents state that the **perception has become more negative (38%)** than more positive (**32%**). Both within and outside EU, **1/3 of respondents sees no change in perception**.

"[H]igh energy prices, generation deficit and debates on the base load. But still, Germany is perceived as a strong economy, one of the key players in the EU energy policy and a leader in energy transition." – Latvia

"Concerns over energy security and induced reliability from "ideologically" driven energy policy…" – USA

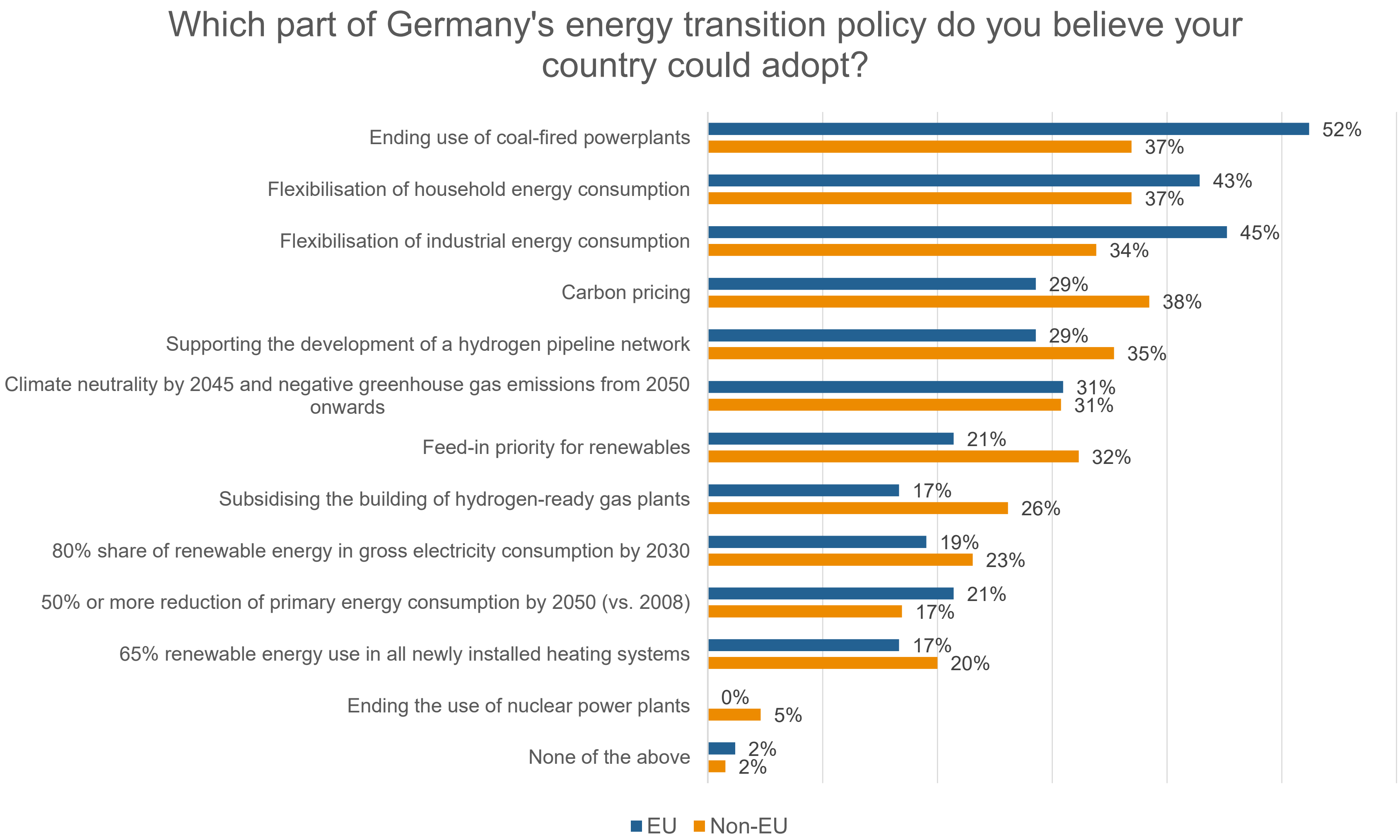
But still remains a reference for most countries…



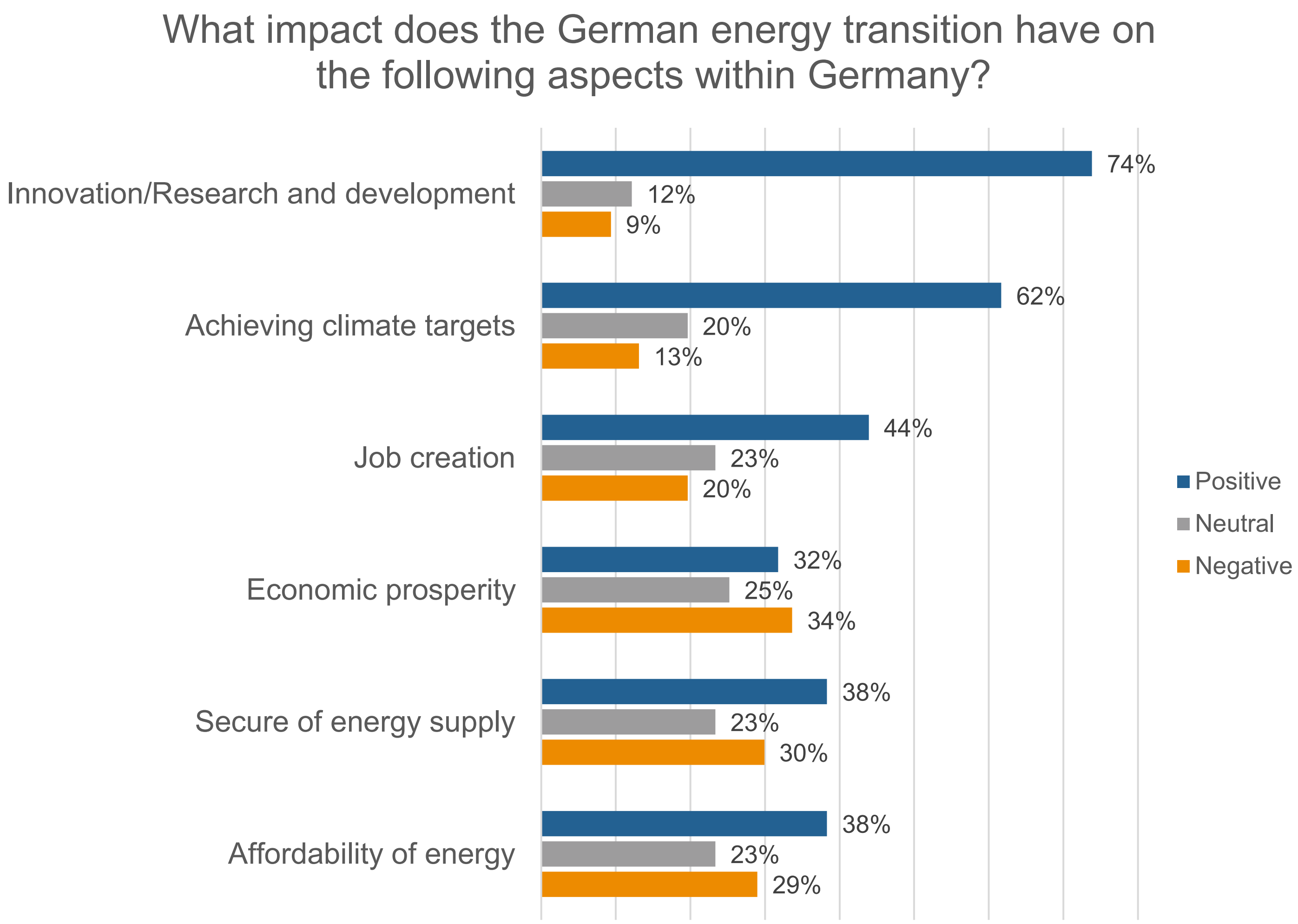
- While over 80% of respondents claim that all or parts of the current German energy policy could serve as a reference for other countries, the portion of non-EU respondents who share this opinion **is over 90%.**
- In 2021, the non-EU respondents who reported that German energy policy could “serve as a blueprint for the world” was **83% and 81%** for EU respondents.

…and most German policies are positively regarded

- When asked about concrete policies, **both EU and non-EU respondents find among Germany energy policy elements that they could adopt in their countries**.
- **Ending the use of coal-fired power plants** and **industry flexibilization** perceived as most adoptable by other EU countries. **Carbon pricing, ending use of coal-fired power plants** and **household flexibilization** garnered most support from non-Europeans.
- Ending the use of nuclear powerplants is the least popular policy.



Domestically, Germany is expected to benefit from its energy transition policies



- Despite general pessimism regarding Germany's energy transition record, **Germany is largely expected to benefit from the energy transition**.
- Compared to other aspects, economic prosperity is expected to be impacted more negatively than positively by the energy transition.

Yet, neighbours report a cooperation deficit from Germany…

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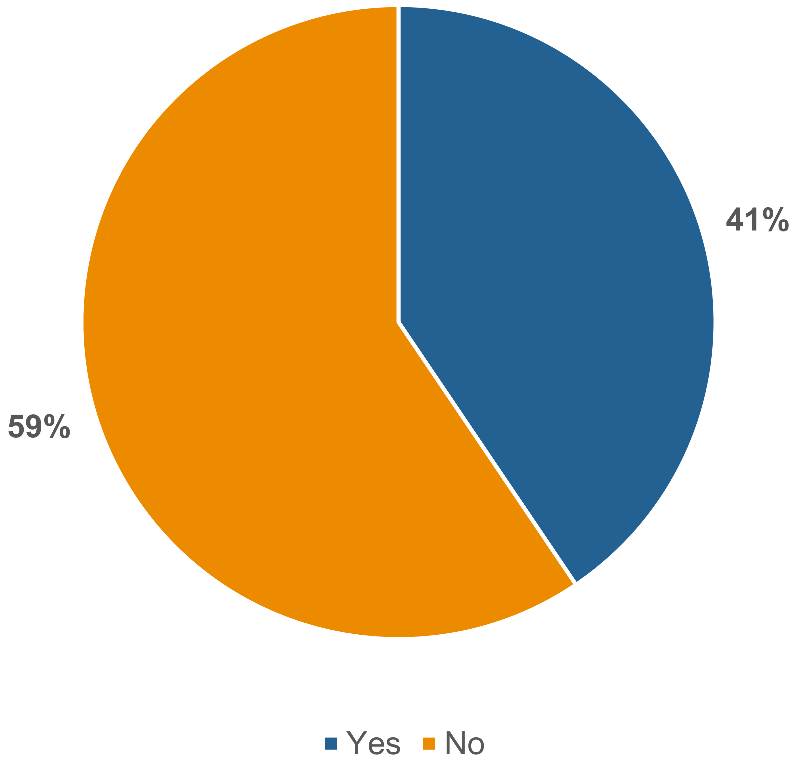
Is Germany coordinating its policy sufficiently with its neighbouring countries in the EU? (EU countries)



- A clear majority of respondents EU countries find **Germany's coordination with neighbours insufficient.**
- The majority of qualitative comments point in the same direction – both from the EU and outside.

"Not enough focus on the EU as a whole." – Slovenia

"Germany wants to impose its policy to the EU." – France

"[I]t needs to talk more to everyone and make decisions on finance and implementation of solutions." – Ireland

…while increased cooperation is seen as crucial for the success of the global energy transition

“Interconnectors from North Africa to Europe transporting solar and wind energy could boost the energy market. However, there needs to be a massive financing of grid infrastructure.” – Turkey

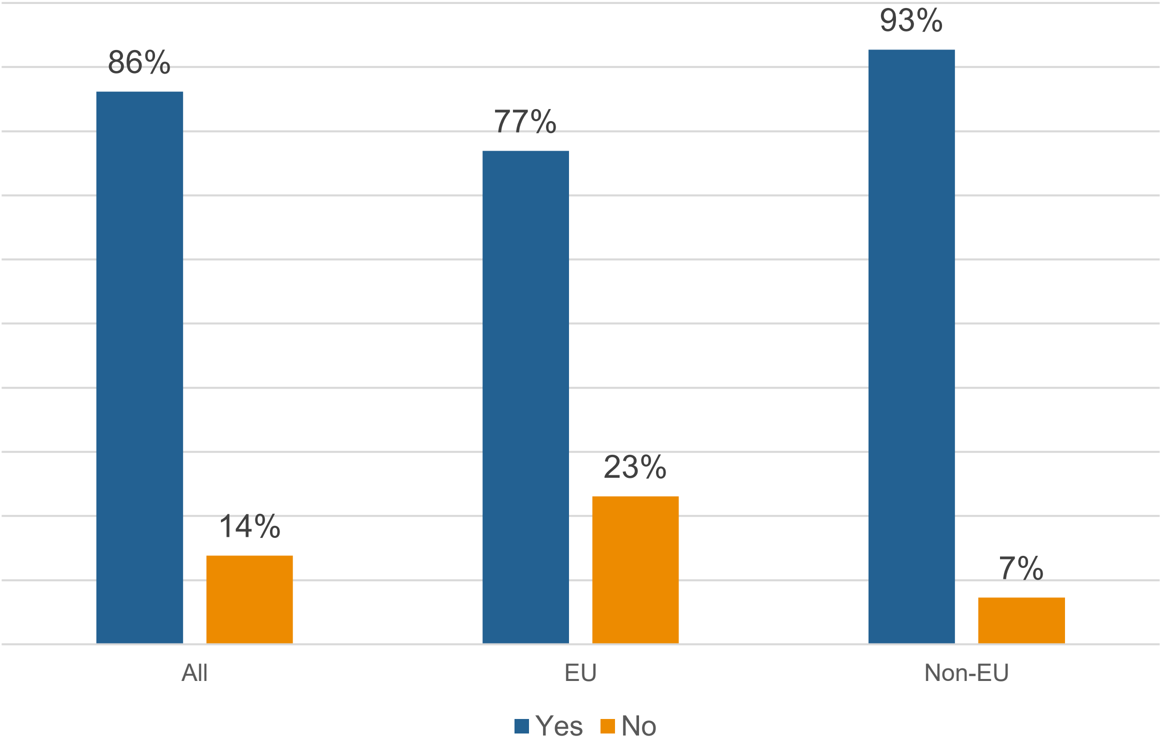
“Partnerships are key as long as there is room for win-win agreements.” – Brazil

“Germany's experience can definitely help other countries.” – China

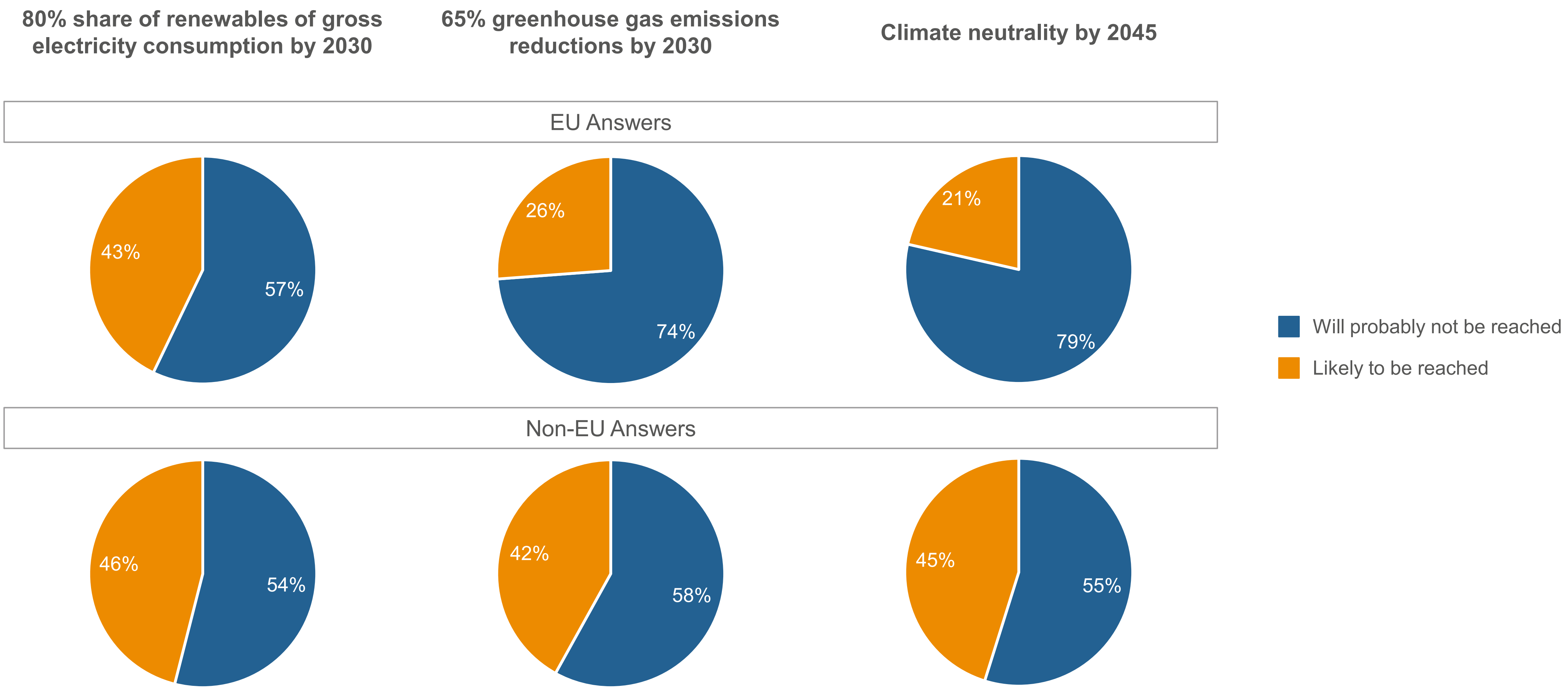
“Cooperative efforts and policies are a must in a globally connected world...” – Bahrain

“Sharing of information on best practices is critical.” – Botswana

Could bilateral climate and energy partnerships between Germany and other countries make a difference in accelerating the global energy transition?

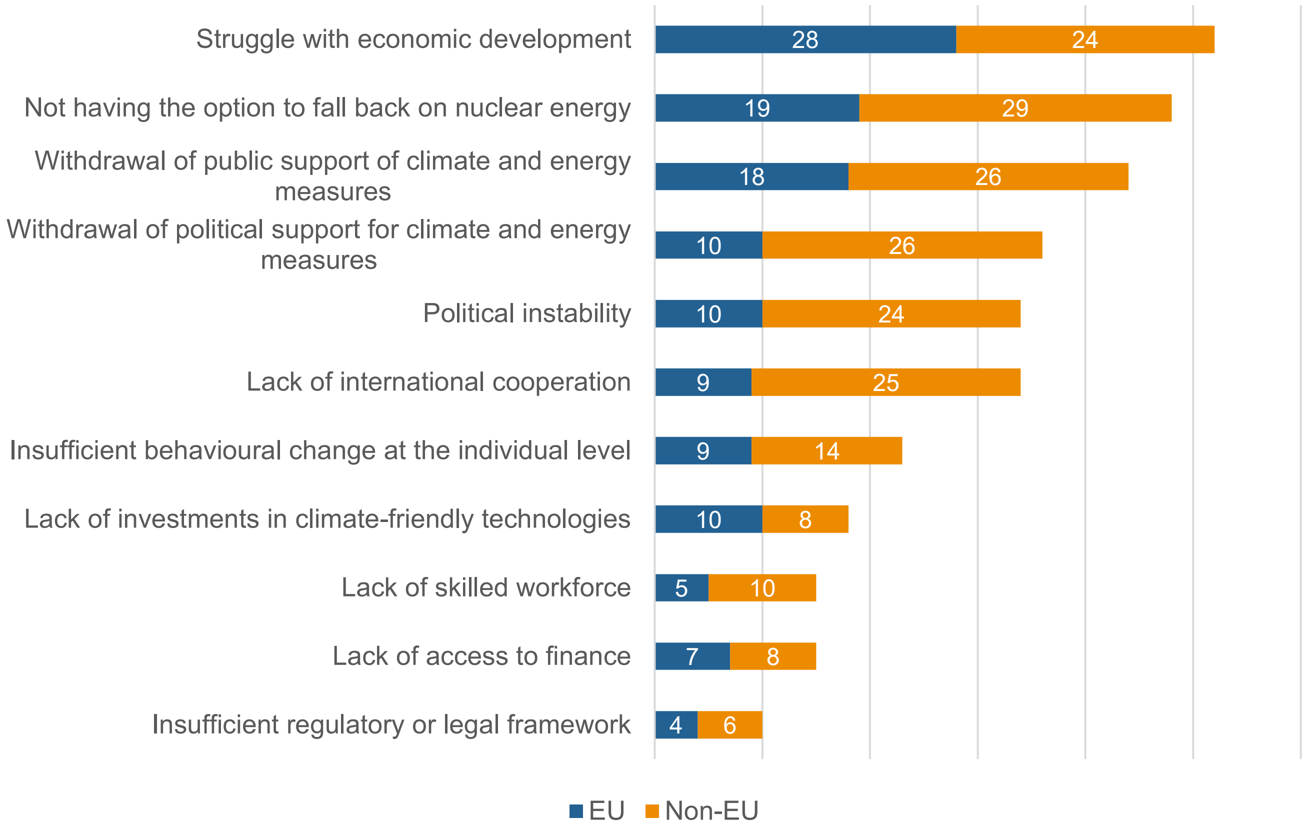


Non-EU respondents are more optimistic about Germany reaching its climate targets



Economic development, lack of nuclear, and falling public and political support for climate and energy measures are considered the biggest risks to climate neutrality

What are the biggest risks that Germany faces in its efforts to reach its climate neutrality target by 2045?



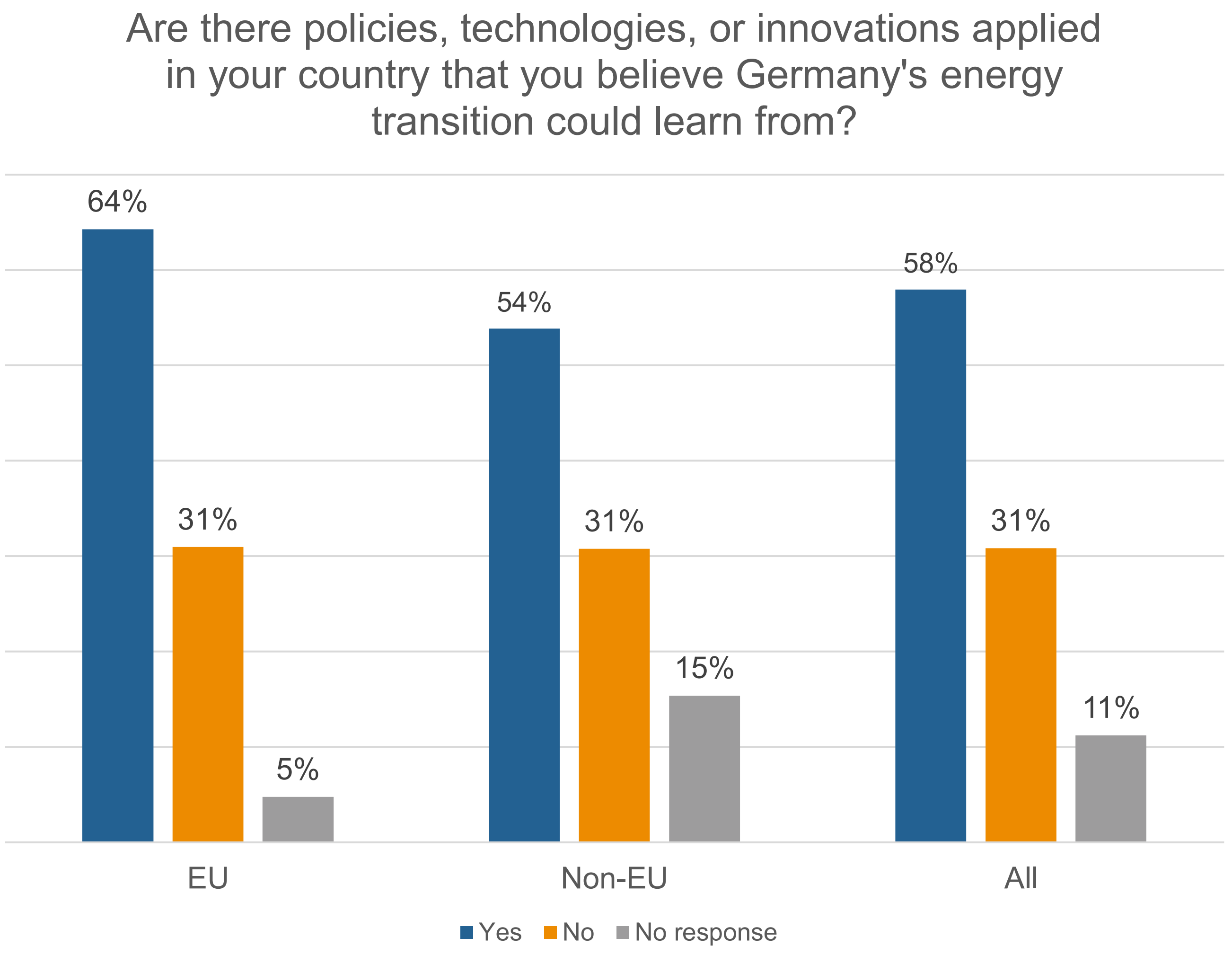
- **Europeans clearly most concerned about the economic development**, whereas non-Europeans mention the first six risks with a similar frequency.

"Fossil lobbies such as car industry actively undermining climate goals because of short-termism." – Austria

"Bureaucracy, long-lasting negotiation between parties for the sake of democracy and balanced interest and "slow speed" of processing (can't/shouldn't use overwork to get things done faster)." – China

Germany is thought to have much to learn yet

- ❑ Respondents from EU and respondents aged 35 or older perceive more strongly that Germany could learn from policies, technologies or innovations applied in their countries. Across all respondents, **58%** believe this is the case.
- ❑ Most mentioned in the qualitative answers is the usage of **nuclear energy**. The strong request for nuclear comes almost exclusively from respondents older than 35, most of them above 50. Several responses refer to the benefits of transmission grids.
- ❑ Most of the policies, technologies or innovations mentioned are things that Germany already explores.



Innovation, new technologies and battery storage among proposed solutions

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"Mechanisms for flexibilization of industrial energy consumption and household energy consumption are good examples." – Brazil

"Ensure that your industry innovates early and NOT stay with the status-quo…" – Ireland

"Utilization of AI and IT technologies." – Japan

"Renewable plants capacity with at least 10% of battery storage." – China

"CCU/S." – USA

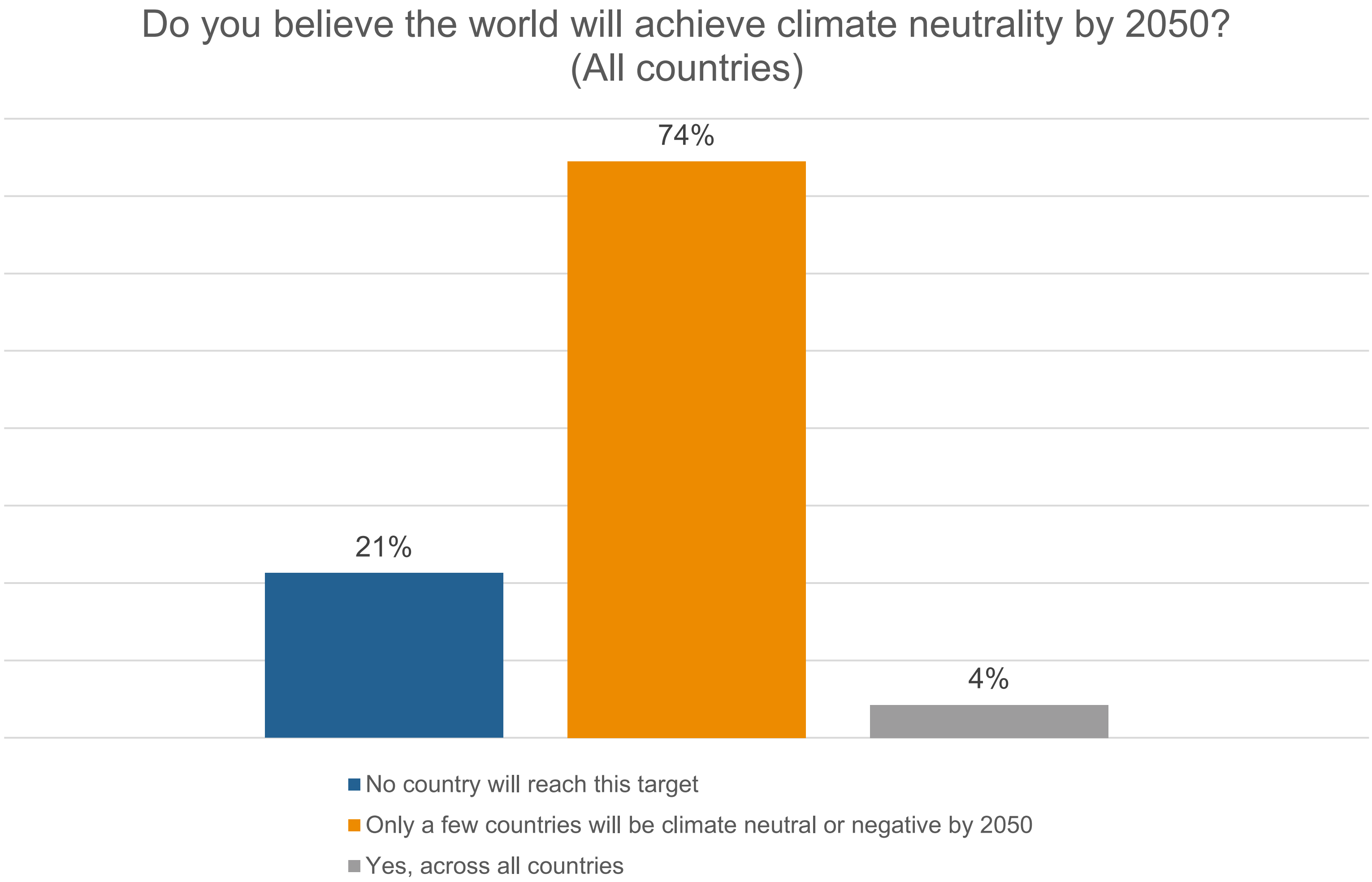
The war in Ukraine, a new US government, the energy crisis and natural disasters most cited as impacting the global energy transition

Is there any global or regional event that has affected the trajectory of your country's energy transition?*

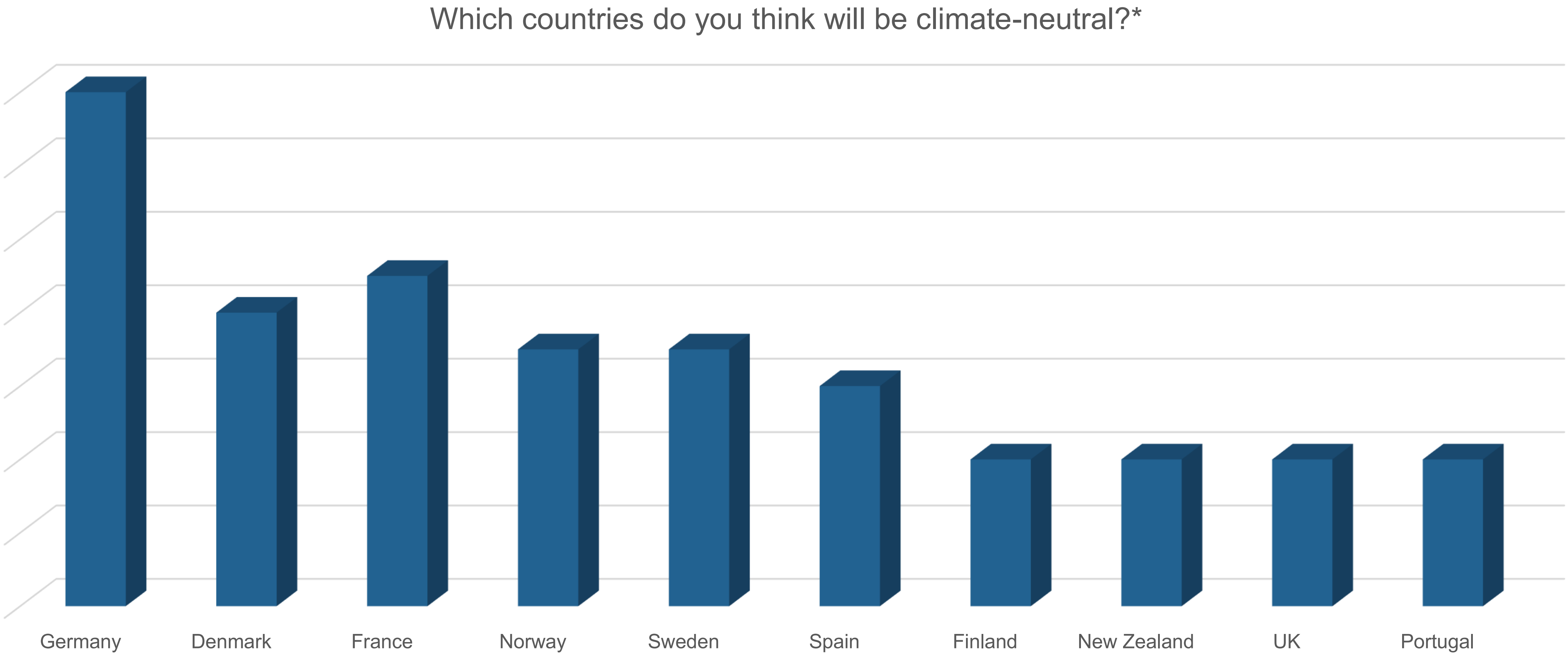
* see: Word cloud based on key word analysis of qualitative answers

Climate neutrality by 2050 considered an unrealistic target for most countries

- **74%** of respondents believe only a few countries will be climate neutral or negative by 2050.
- Among these respondents, **Germany is considered the front-runner** and only European countries are mentioned in the top ten options.



When asked which countries will reach climate neutrality by 2050, Germany is the #1 choice



* This chart excludes qualitative answers referring to groups, e.g. “Small countries”, “the Nordics”, “most South American countries”, etc.

Countries represented

- Argentina
- Australia
- Austria
- Azerbaijan
- Bahrain
- Belgium
- Botswana
- Brazil
- Canada
- China
- Colombia
- Egypt
- Estonia
- Finland
- France
- Greece
- India
- Ireland
- Italy
- Japan
- Kyrgyzstan
- Latvia
- Malaysia
- Malta
- Mexico
- Mongolia
- Namibia
- Nepal
- Netherlands
- New Zealand
- Nigeria
- North Macedonia
- Panama
- Poland
- Portugal
- Republic of Korea (South Korea)
- Romania
- Rwanda
- Slovenia
- Spain
- Sweden
- Switzerland
- Tunisia
- Türkiye
- Ukraine
- United Kingdom
- USA
- Uruguay

Thank you for reading!