

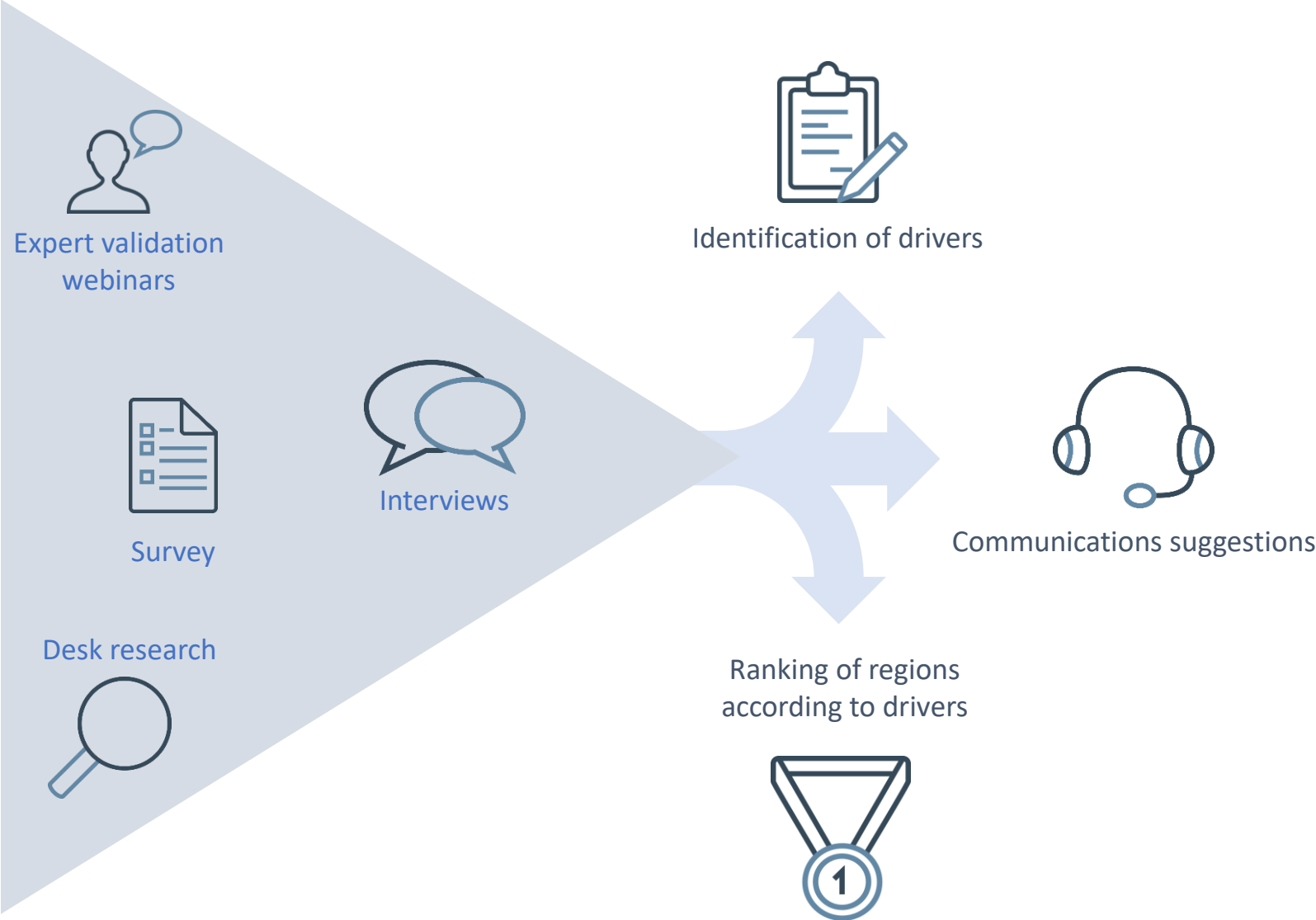
Project scope objectives and outcomes

28 April 2021



Drivers of public acceptance and ranking of regions

Overview of objectives and methods



Drivers of public acceptance and ranking of regions

Methods in detail



Method 1

Literature review

(more than 65 valid sources analyzed)



Method 2

Qualitative analysis of interviews

50 Interviews, approx. 2 per MS



Method 3

Validation through expert webinars

2 webinars, 12 experts

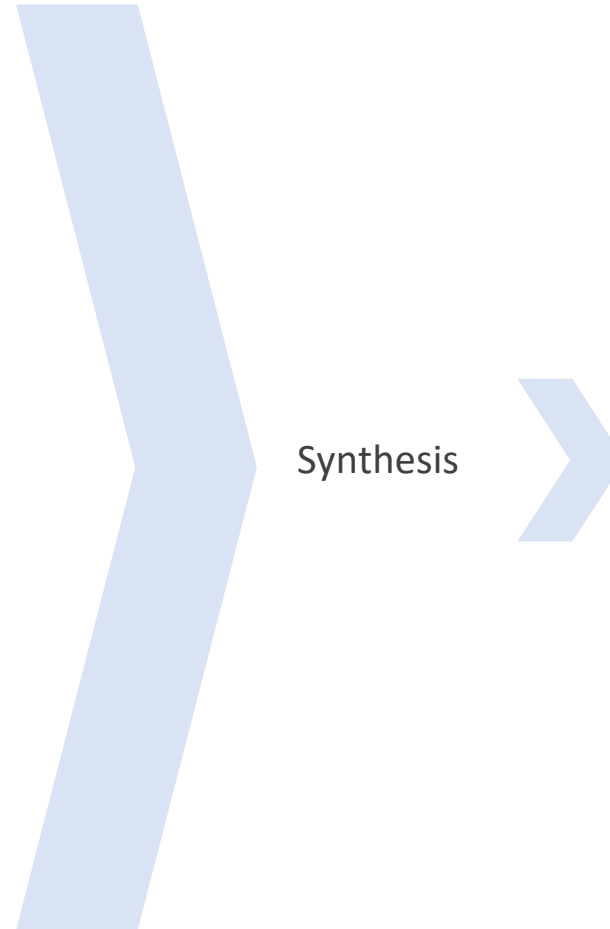


Method 4

Survey

43.4% exclusion rate (attention filter, completion time)
2,968 valid responses

- Descriptive statistics
- Factor analysis
- Linear regression
- Crosstabulation
- ANOVA
- Latent class and clustering techniques
- Conjoint analysis (Max-Diff)



Synthesis



Insights into statistically significant factors for public acceptance



Identification and ranking of drivers and barriers



Guiding scenarios to support the selection of pilot regions



Recommendations for the communication campaign

Key findings: Identifying and ranking of drivers

Insights into significant drivers of public acceptance



Public acceptance of PCIs

- How likely is it for you to accept a new Project of Common Interest in the area where you live?
- How likely is it for you to support a new Project of Common Interest in the area where you live?
- I am ready to support the rollout of Projects of Common Interest in the energy sector.



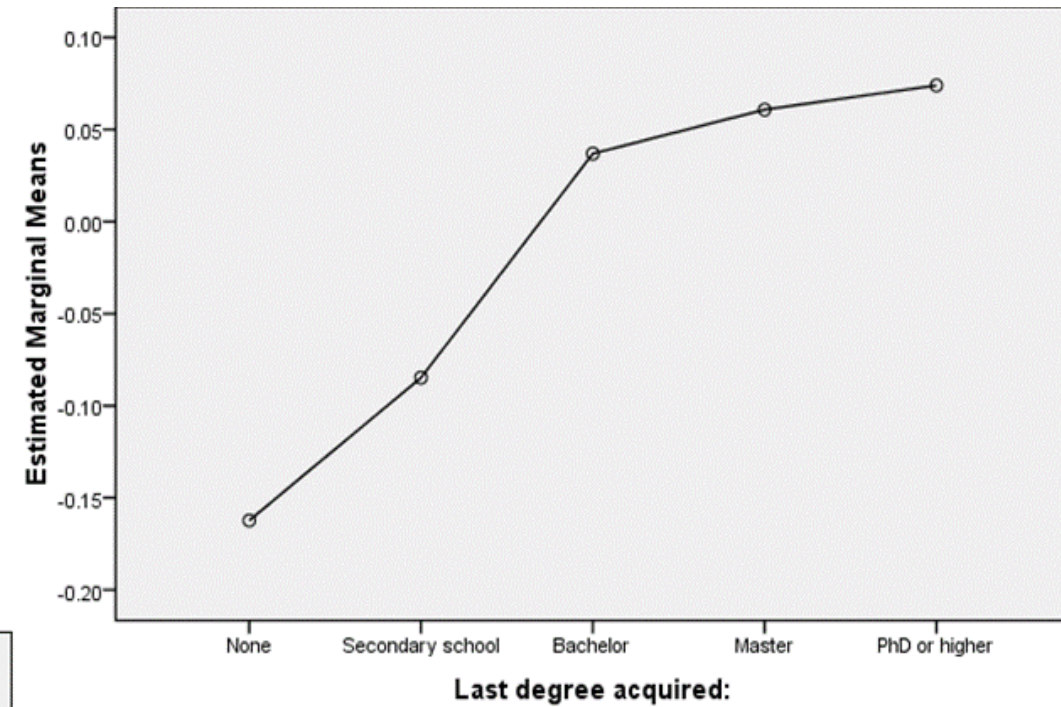
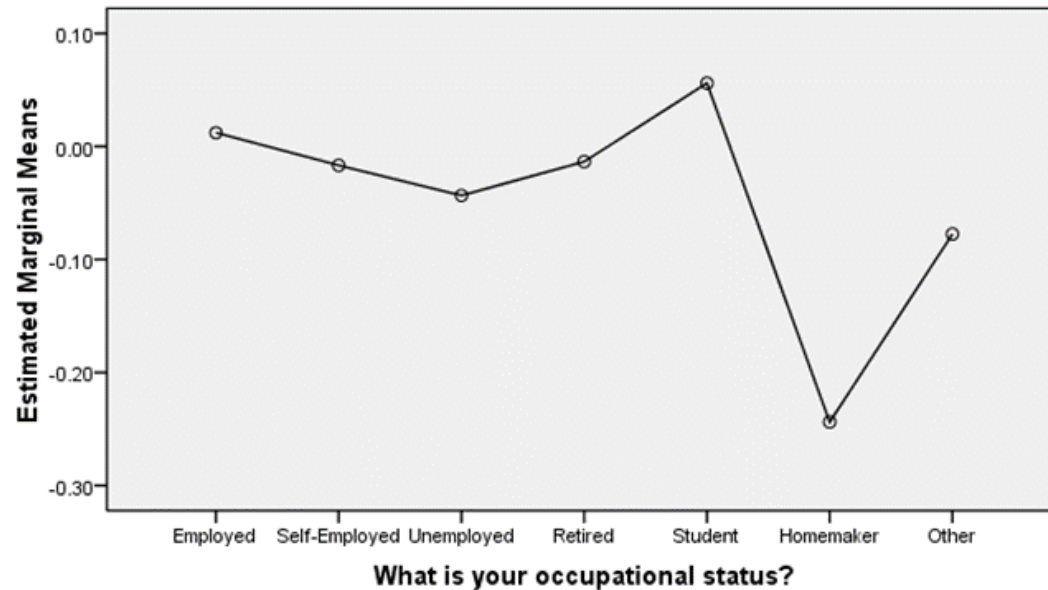
Z-scores (standardised values)

Reliability test (Cronbach alpha .800)

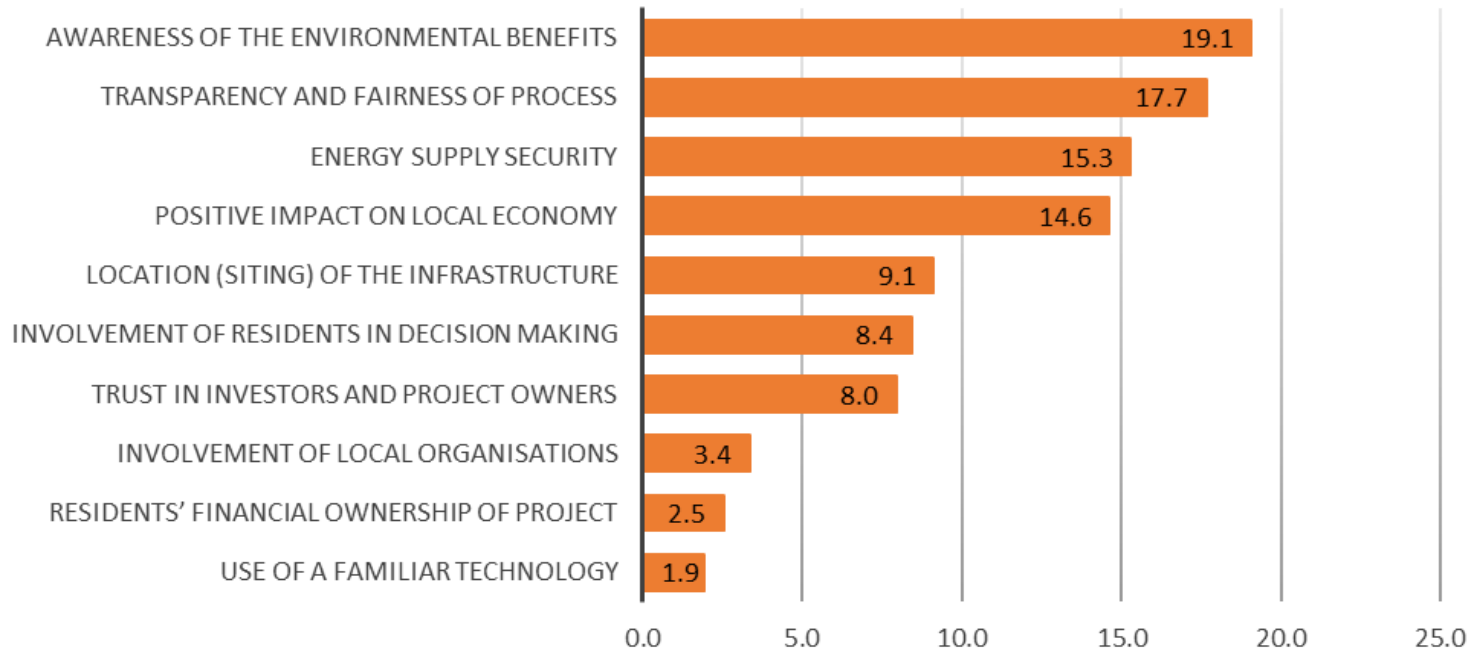
Model Summary				
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.718a	.516	.512	.59040

Main findings: Variables affecting public acceptance

- Belief that PCI will contribute to sustainable growth at national level
- Belief that PCI will improve the image of the region
- Peer approval of family, friends and neighbours
- Education level
- Type of employment



Identification and ranking of drivers and barriers



Environmental benefits: Several POs do not believe in the convincing effect of environmental benefits

Transparency and fairness: crucial

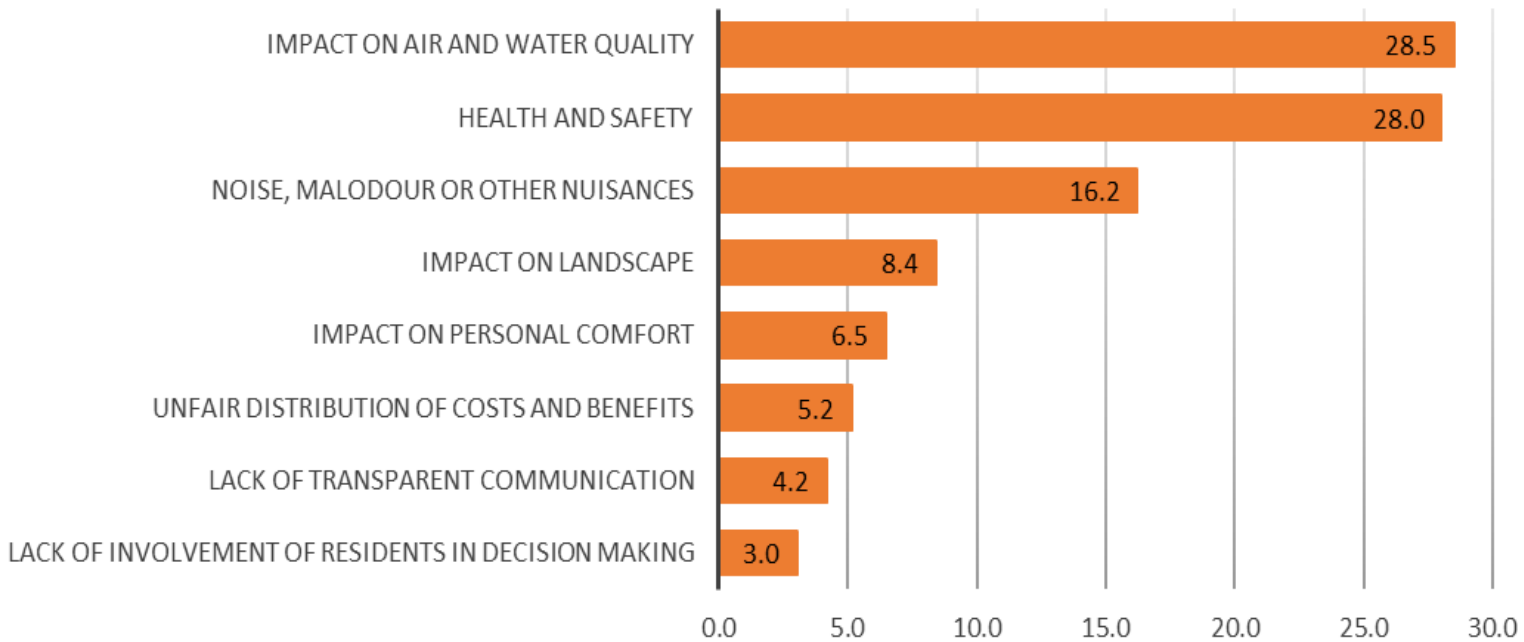
Impact on local economy:

- Important factor according to PO from Bulgaria, Greece and Slovenia
- Difficult to leverage according to PO from Germany, Finland, Poland, Latvia

Security of supply:

- One of the most important factors according to experts from Bulgaria, Estonia and Czech Republic
- Not important for others

Ranking of barriers



Health and safety concerns are of the most important factors to tackle in order to reduce opposition according to PO from Slovenia.

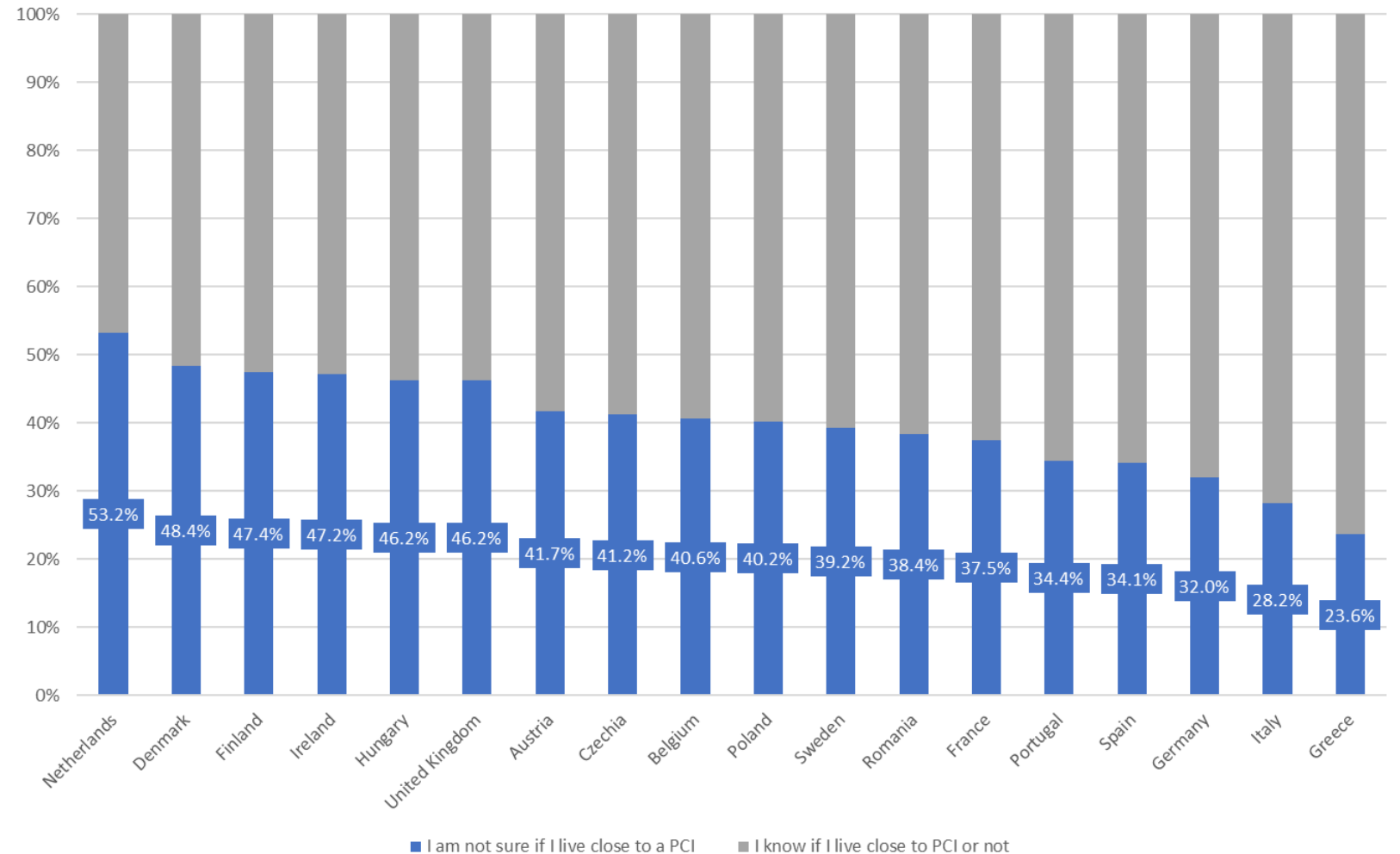
It is very important to address **declines in property values** according to PO from Croatia, Czech Republic, Estonia, Finland, Greece, Slovakia, Slovenia

Key findings: Insights for communication

Awareness of (not) having lived/live close to a PCI

Not all respondents knew whether they lived or are living close to a PCI

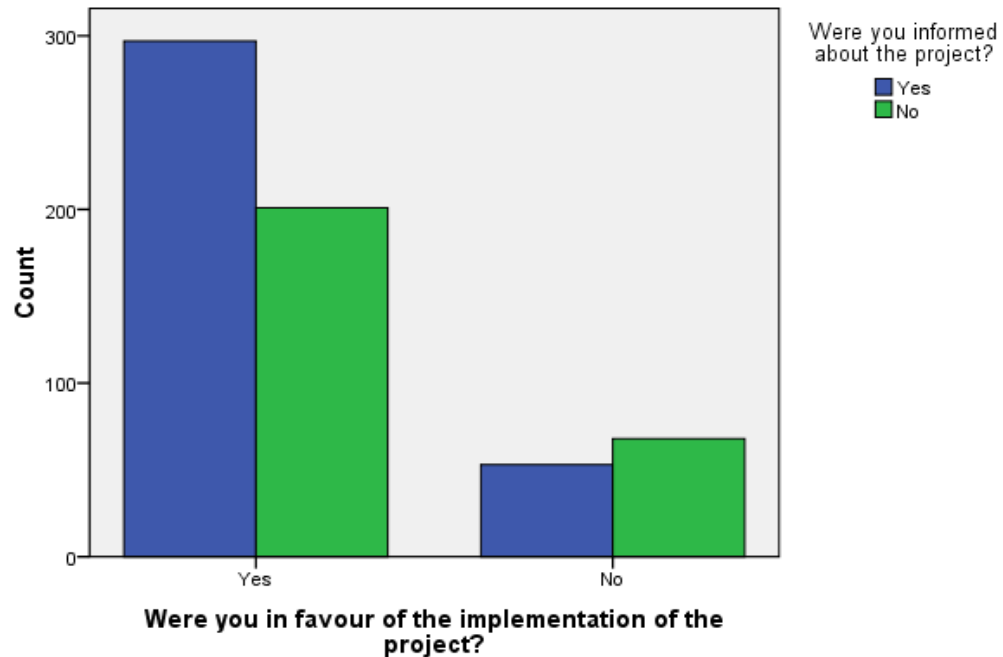
- 337 respondents currently live close to a PCI
- 282 lived close to a PCI in the past
- 1,249 have never lived close to a PCI
- 1,100 are not sure
- There are different level of awareness about the concept of PCI and their existence in specific regions



Importance of information

Among the people who declared to have lived/live close to a PCI, having received information about the project can greatly affect public acceptance.

- People who were informed about the project are more likely to accept it

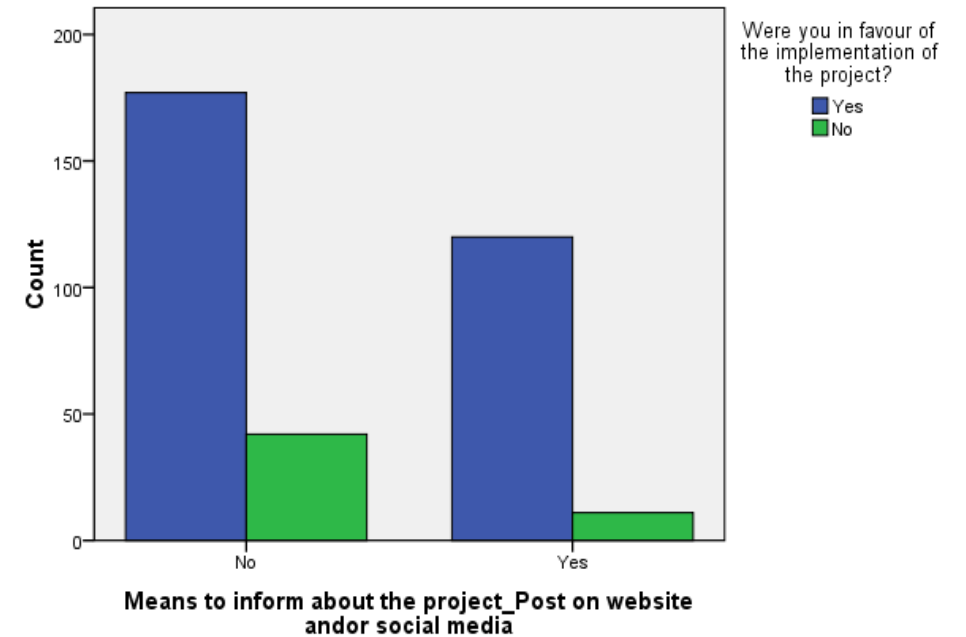


When no website or social media were used:

- lack of support was 19.2%

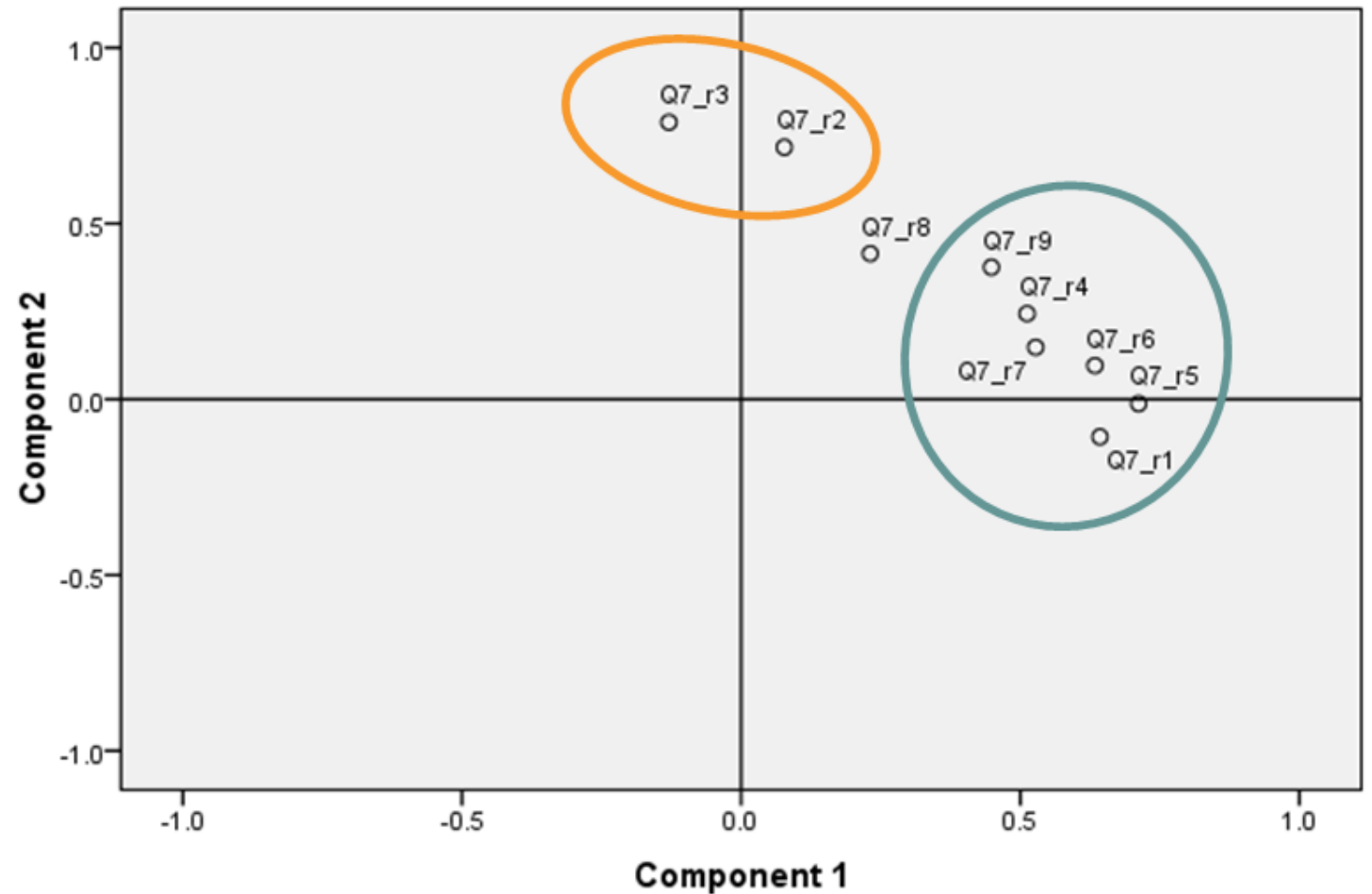
When they were used:

- lack of support dropped to 8.4%



Types of infrastructure are not homogenously perceived

- Solar energy and wind farms are perceived differently than coal plants, biomass plants, gas extraction wells, power-to-gas technology, power lines/electricity pylons and pump hydro storage



There are unique segments in the population

Cluster 1 – The stars

- High levels of public acceptance
- Scores high in all other key aspects
- Largest cluster (961 respondents)

Cluster 2 – The hopefuls

- Mildly below average in public acceptance of PCIs
- High score in peer approval and attitudes about PCIs
- Trust level in PCIs supported by the EU is somewhat lower
- The cluster is the second largest in size (943 respondents)

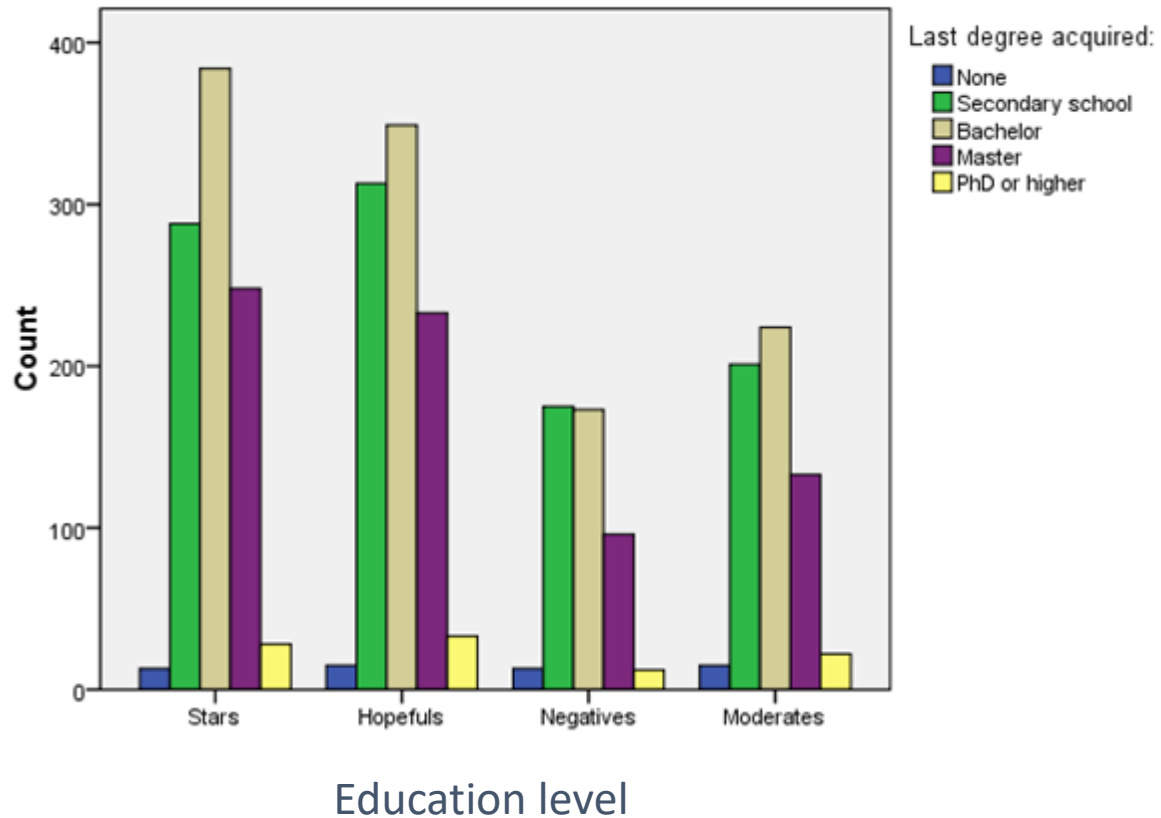
Cluster 3 – The negatives

- Low levels in all key metrics
- Very low public acceptance
- Smallest of the clusters (469 respondents)

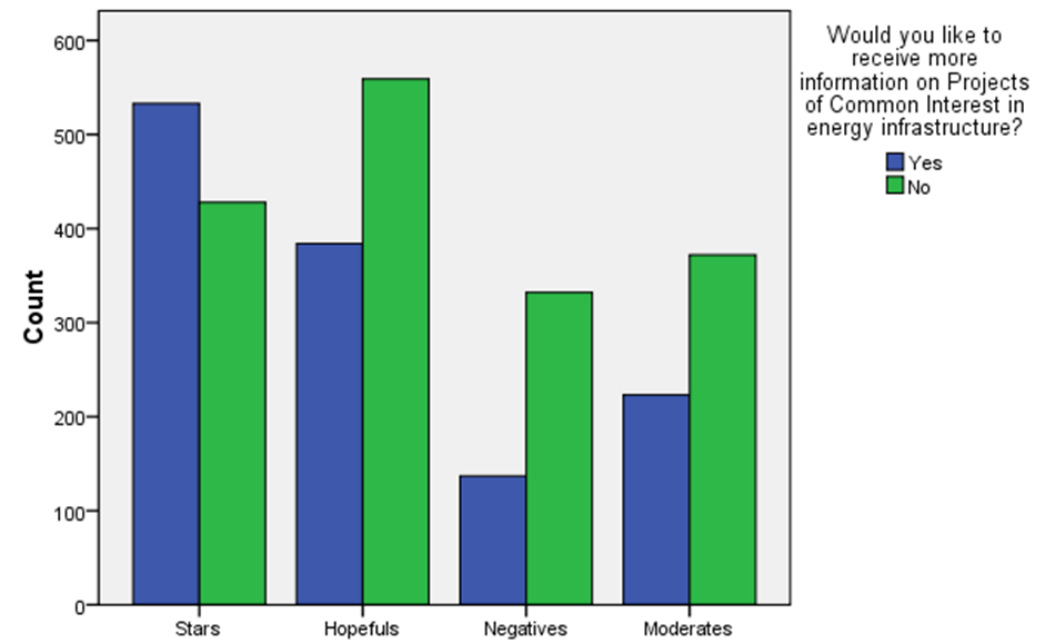
Cluster 4 – The moderates

- Score lower than the hopefuls in attitudes related to PCIs
- High trust levels in infrastructure projects supported by the EU

Segments differ in demographics and behaviour/intentions



Willingness to receive more information



Overview of insights for communication

1. Low awareness (interest) of what is behind the letters “PCI”

Most project owners think that the public does not care about the PCI status

2. The importance of information

Informed citizens tend to have higher acceptance of energy infrastructure projects

3. Communication strategies should focus on aspects that matter

Peer approval is key. Acceptance levels are also different following the rural/urban divide

4. Environmental benefits are perceived differently, according to projects and contexts

It could be used as an argument and be received by those who are sensitive to the ecological argument, but it should not be used in isolation, since other factors can also be strong (positive or negative) barriers

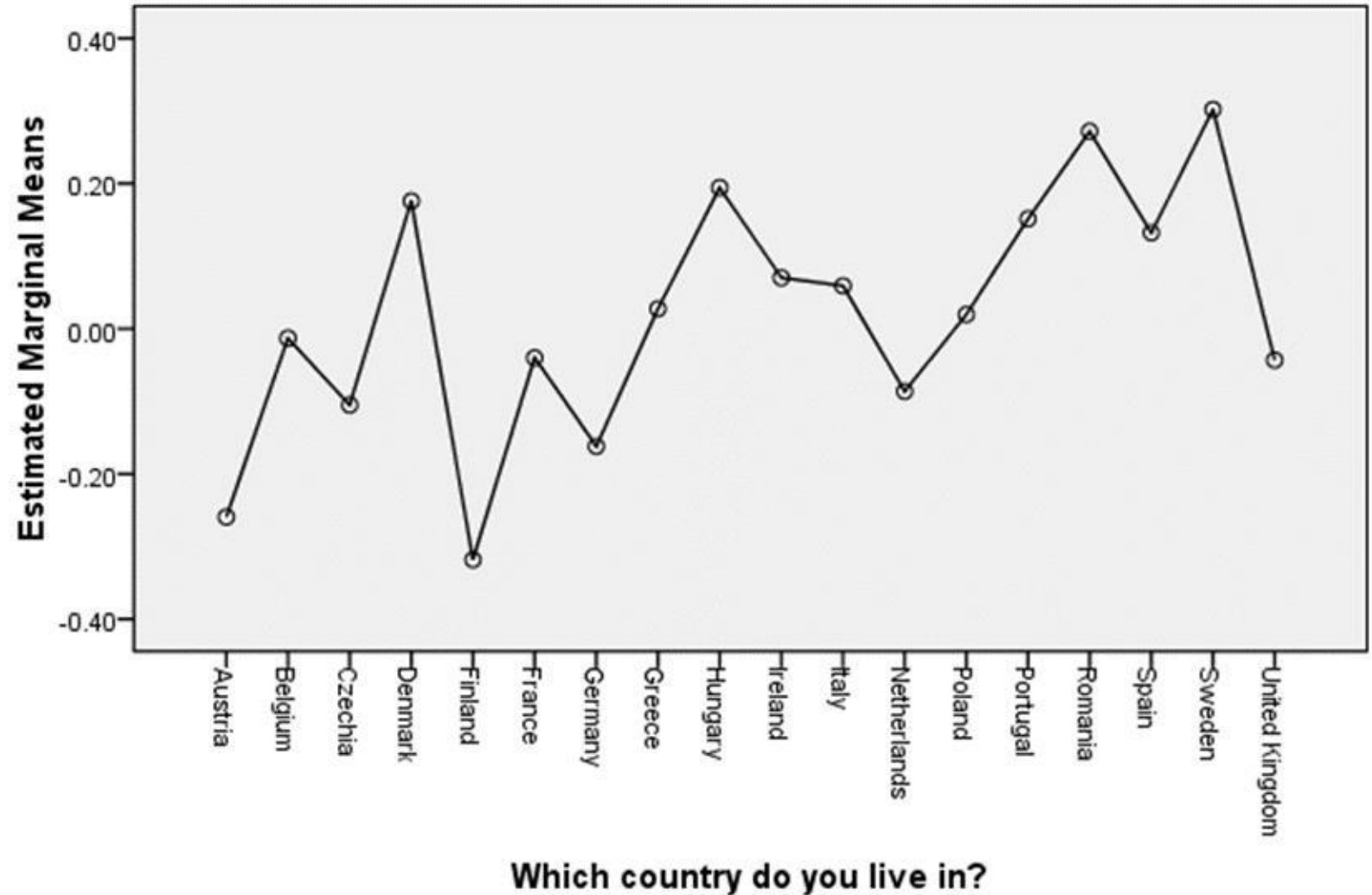
5. Local and tailored communication strategies are more impactful

Strategies should be tailored to meet target audiences but also regional specificities, to a project characteristics, to local experience and knowledge
PCI

Key findings: Insights for the ranking of regions

Public acceptance of PCIs per country

Country	Mean
Sweden	0.3021
Romania	0.2719
Hungary	0.1944
Denmark	0.176
Portugal	0.1514
Spain	0.1322
Ireland	0.0702
Italy	0.0591
Greece	0.0276
Poland	0.0196
Belgium	-0.0131
France	-0.0399
United Kingdom	-0.0431
Netherlands	-0.0862
Czechia	-0.105
Germany	-0.1621
Austria	-0.2593
Finland	-0.3181



Scenario 1 – Raising awareness by targeting regions with high unawareness levels

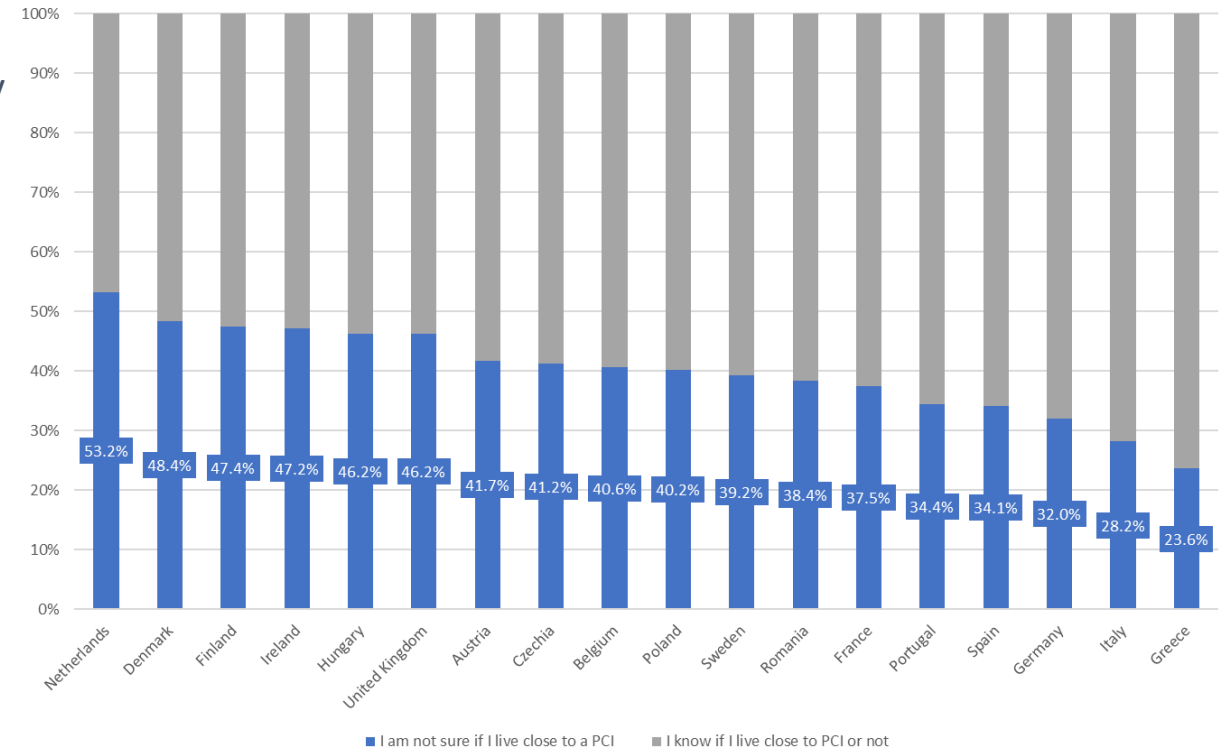
Selecting regions with highest levels of unawareness

People who do not know if they live close to a PCI and people who may not even know what a PCI is

Defining a strategy to raise awareness

It would not necessarily affect the likelihood to accept the PCI in a significant manner

Ranking: The Netherlands, Denmark and Finland are interesting

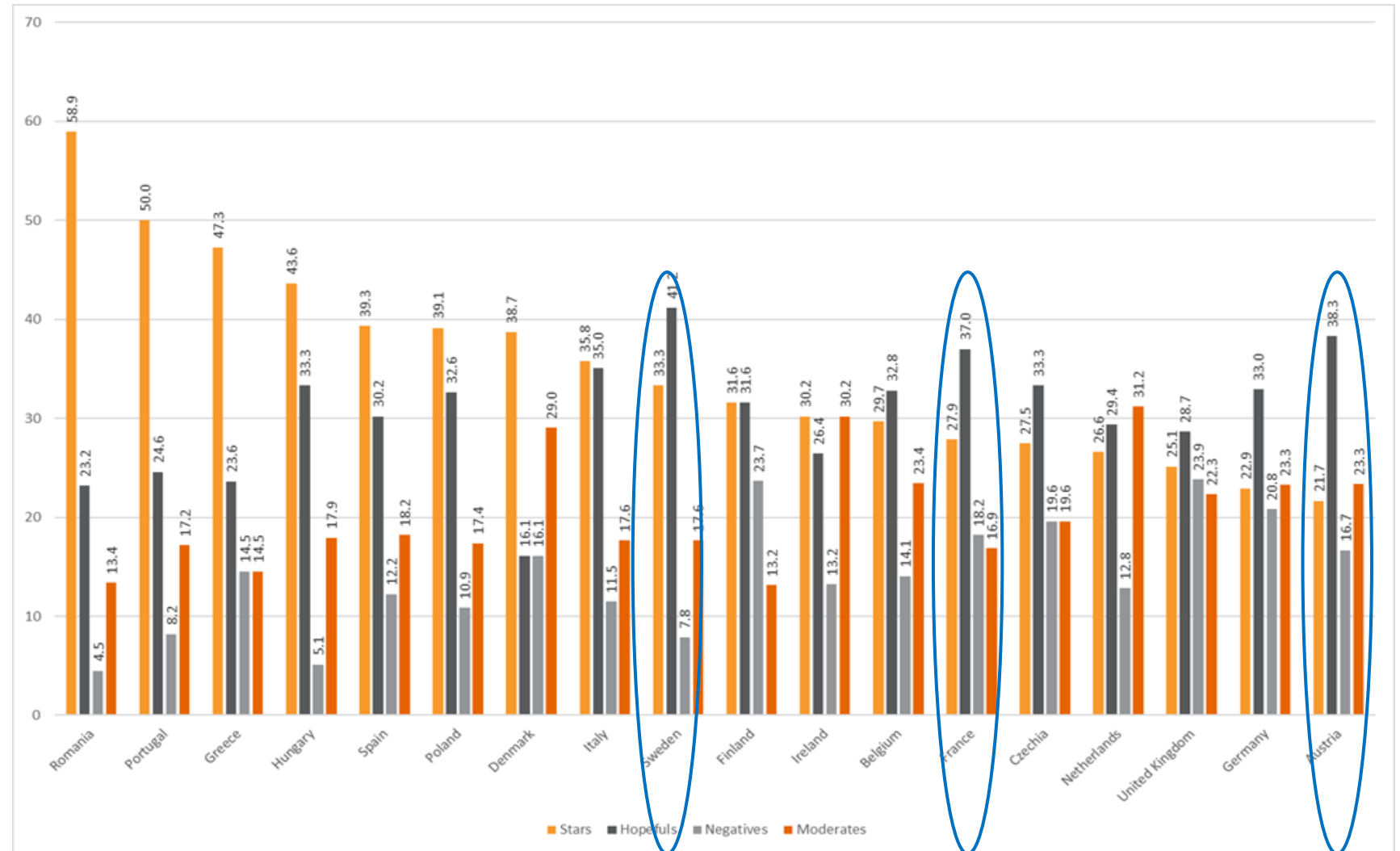


Scenario 3 – Enhancing public acceptance by focusing on regions with the highest proportions of “Hopefuls”

Selecting regions with potential for higher levels of acceptance
Based on the “Hopefuls” cluster from the survey

Defining a strategy to increase acceptance
Trust level in PCIs supported by the EU is lower
Score high in peer approval, which could be used as a lever

Ranking: Sweden, Austria, France are interesting



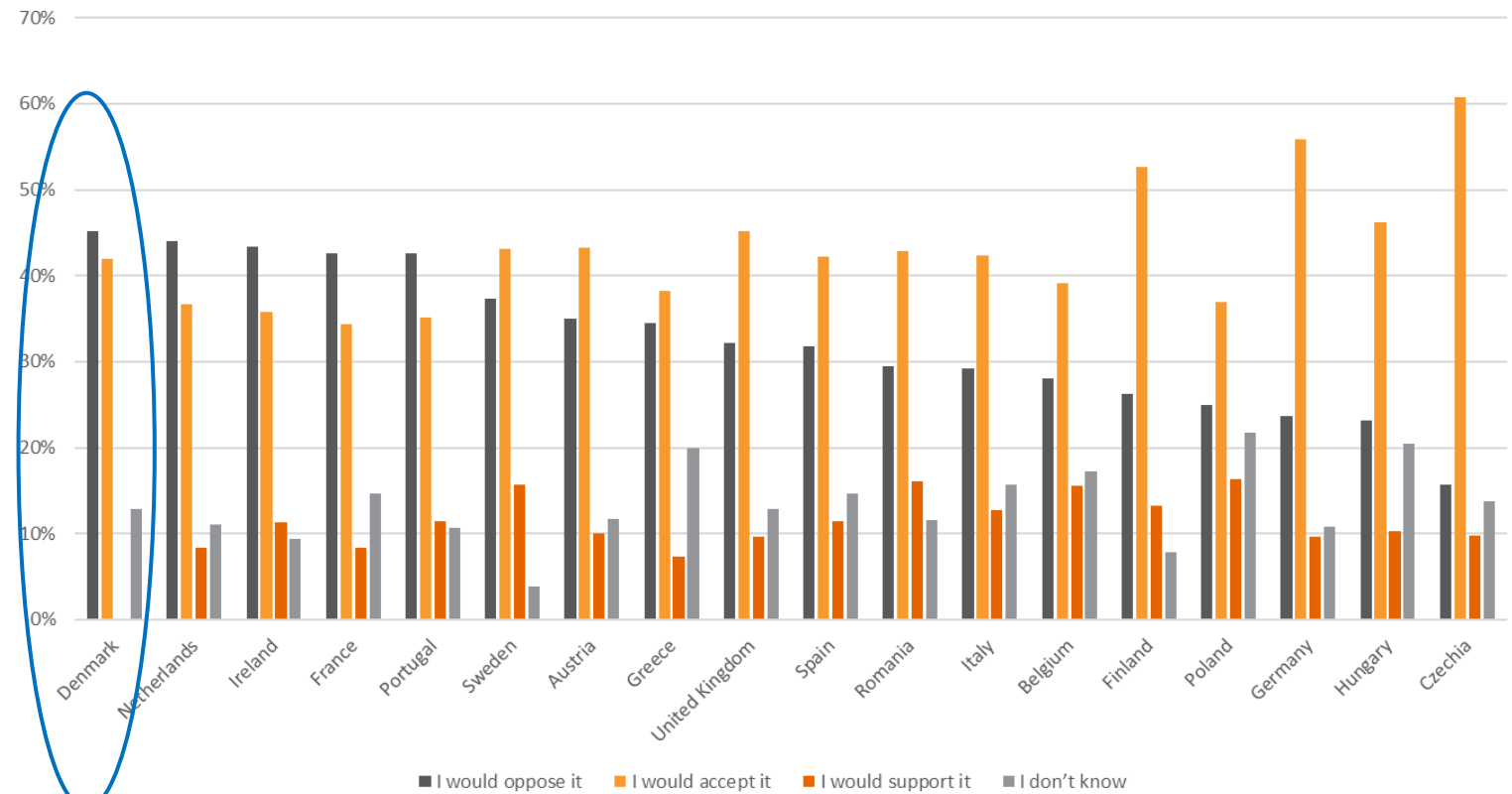
Scenario 5 – Selecting pilot regions according to infrastructure types

Selecting regions with lower acceptance levels of a particular type of infrastructure
Different levels of opposition/acceptance according to the type of infrastructure

Overhead lines and pylons are part of the group with lowest public acceptance (as opposed to wind and solar energy)

Focusing on pylons and overhead lines:
Denmark, the Netherlands, Ireland

Opposition/Acceptance levels of pylons and overhead lines



Overview of scenarios for election of the pilot regions

Scenario 1 – Raising awareness by targeting regions with high unawareness levels



The Netherlands, Denmark and Finland

Scenario 2 – Enhancing public acceptance by targeting regions with highest proportions of “Negatives”



The UK, Finland and Germany

Scenario 3 – Enhancing public acceptance by focusing on regions with the highest proportions of “Hopefuls”



Sweden, Austria, France

Scenario 4 – Enhancing public acceptance by focusing on regions with the highest proportions of “Moderates”



The Netherlands, Ireland and Denmark

Scenario 5 – Selecting pilot regions according to infrastructure types



Denmark, the Netherlands, Ireland

THANK YOU!

scope

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