



# Pledge to the people

**Delivering on the promise  
to empower customers**





# Keeping their promise: A status check on suppliers progress towards their pledges to empower consumers

In March 2020, more than 90 European electricity retailers co-signed the **15 pledges to customers**. They promised **to empower their over 200 million residential customers** with new user-friendly services and electric solutions that make their experience affordable and simple.

Together with suppliers' commitment to decarbonize electricity supply, the 15 pledges aim to ensure a future European electricity system that is reliable, inclusive and sustainable.

Eurelectric and Accenture have evaluated how European energy consumers and energy suppliers perceive progress since the 15 pledges were launched.

How much progress has been made?



# Executive summary

## Consumers feel they have more choice, control and a better experience in meeting their energy needs

- More than three-quarters of energy suppliers have upped efforts to offer consumers sustainable alternatives and encourage their uptake, and 9 out of 10 energy suppliers are actively expanding their service offering.
- As a result, European energy consumers feel that they have more choice, control and a better experience than 12 months ago. More than a quarter of consumers reported more options and solutions, and one in five felt more in control over their energy usage and costs and found the process simpler and more transparent.
- Increasing supplier focus on good customer service, a growing variety of suppliers with expanding range of services, and high satisfaction with products and services of suppliers have all contributed to this positive perception.

## Close to 80% of consumers aren't making use of new energy solutions available yet – many don't know how

- Unfortunately, 26% of consumers – equivalent to 116 million people across the EU - don't know that their energy supplier offers new products and services to help them save energy, generate their own energy, and switch to electric mobility.
- Financial barriers remain important obstacles to the adoption of low-carbon energy products and services. Less than one in five people are using low-carbon solutions – with a quarter of people concerned electric products such as heating and electric vehicles are too expensive.
- Wider participation is essential for the transition to a zero-carbon energy system and requires continued investment in awareness, customer knowledge and service quality, as well as solutions designed for the unique needs and wants of individual customer segments.

## Concerted action involving many partners is needed to help everyone participate in the energy transition

- Consumers look to all actors in the new energy ecosystem to help them in their personal transition journey. Collaboration between suppliers, partners in the new energy ecosystem and governments are critical for wider consumer participation.
- Between 73% and 92% of consumers that have used new energy products and services from their supplier have found them useful. When consumers understand their options and are able to try new solutions, they get on board.
- With increased information, better guidance and simple routes to adopt new solutions – more consumers will participate in the energy transition.
- Governments have multiple roles – as leaders and as enablers – in ensuring that all consumers take part in the energy transition.



A woman with long, wavy blonde hair, wearing a light blue denim jacket, is shown in profile from the chest up. She is pointing her right index finger towards a wall. The wall is covered in a dense layer of crumpled, light-colored paper or fabric, creating a textured, chaotic background. The lighting is dramatic, with strong highlights on the woman's face and jacket, and deep shadows in the background. The overall color palette is dominated by blues and greys, with the white of the crumpled paper providing contrast.

# **Overall, European energy consumers feel that they have more choice and control over their energy use and a better experience when interacting with their supplier than 12 months ago**

The group of consumers that have seen positive change in these areas is three to four times larger than those that have seen a reduction.

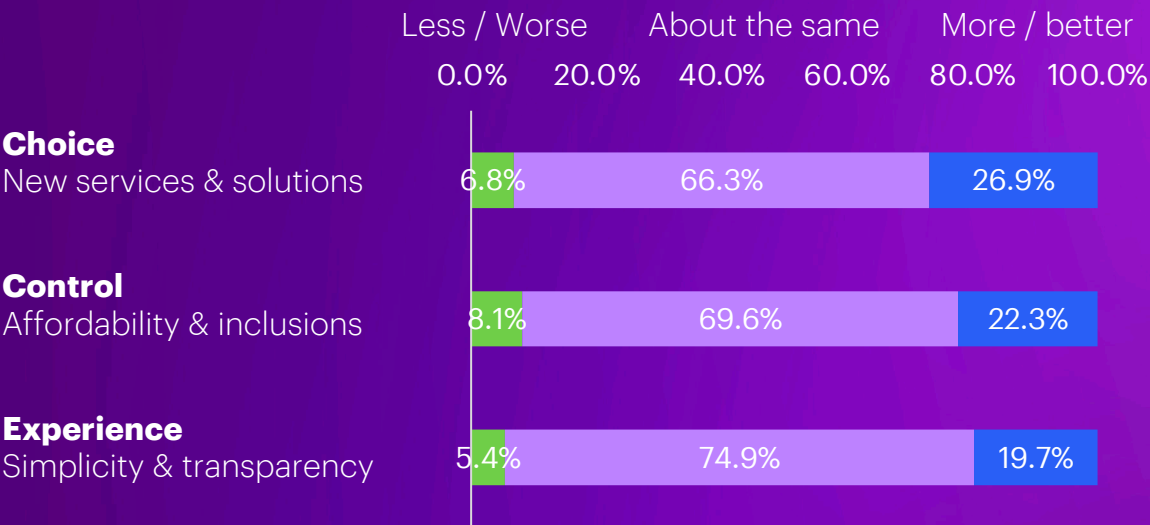


# Energy providers are powering up their new energy offering – and their consumers switch on

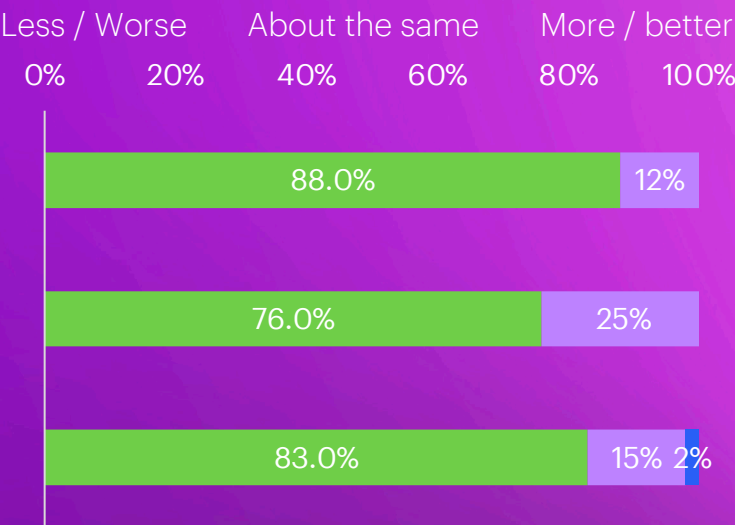
More than a quarter of consumers reported more choice of services and solutions, and one in five felt more in control over energy usage and costs and found the experience simpler and more transparent. The group of consumers that have seen positive change in choice, control and experience is three to four times larger than those that have seen a reduction in these areas.

A huge majority of European energy suppliers have boosted efforts to offer consumers sustainable alternatives and encourage their uptake. 88% of companies have upped activity to provide new products and services, and more than three-quarters on improving their consumers’ experience and control over energy usage and costs.

## Consumer perception



## Company activity



Companies:  
respondents = 47  
Consumers:  
respondents = 2068



# Choice: New services & solutions

Products and services for solar PV and home energy management are most common and popular among consumers and suppliers are expanding their services for electric vehicles and demand response.

With 69% of consumers not yet aware of the new products and services on offer, awareness is the critical lever for increasing uptake of these sustainable options

## Consumer perception

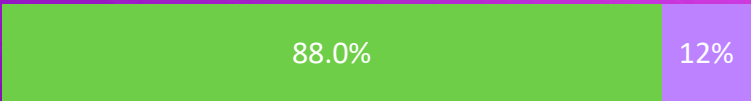
Less / Worse    About the same    More / better

**Choice**  
New services & solutions



## Company activity

About the same    More / better



Companies:  
respondents = 47  
Consumers:  
respondents = 2068

**31%**

**Of consumers are aware of their suppliers' offering of**  
new products & solutions

**30% - 38%**

Of consumers that are aware of these new products  
& solutions **have used them**

**81% - 92%**

Of consumers that have used these new products  
& solutions **have found them helpful**

**78%**

**Of suppliers offer** products and services for solar (PV) panels,  
home batteries, home energy management or other equipment to  
generate and store energy in the home

**57%**

**Of suppliers offer** expert advice about electric vehicles, energy  
generation and storage in the home



# Control: Affordability & inclusion

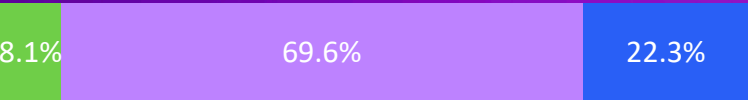
Many energy suppliers offer advice, products and services to help retail customers save costs on their energy bill, and the vast majority of consumers that use these are satisfied.

More consumers can benefit if awareness of these products and services is extended to beyond the 39% of consumers that knows of them currently.

## Consumer perception

Less / Worse    About the same    More / better

**Control**  
Affordability & inclusions



## Company activity

About the same    More / better



Companies:  
respondents = 47  
Consumers:  
respondents = 2068

**39%** Of consumers are aware of their suppliers' offering of new products & solutions that help control energy cost

**43% - 52%** Of consumers that are aware of these new products & solutions **have used them**

**73% - 92%** Of consumers that have used these new products & solutions **has found them helpful**

**83%** Of suppliers offer advice and tips about how retail customers can save costs on their energy bill based on their personal situation

**38%** Of suppliers offer guidance towards relevant support schemes and local actors, in cooperation with governments and social services



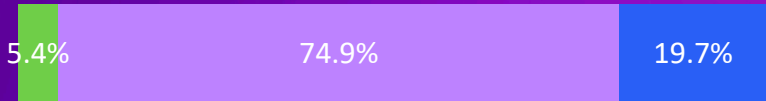
# Experience: Simplicity & transparency

Energy suppliers place strong emphasis on creating a smooth and transparent experience for customers. Many consumers recognise the progress, but a significant group sees room for improvement.

## Consumer perception

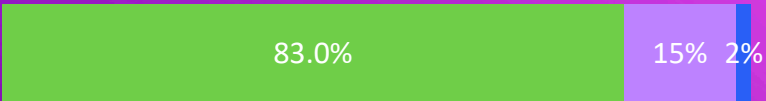
Less / Worse    About the same    More / better

**Control**  
Affordability & inclusions



## Company activity

About the same    More / better



Companies:  
respondents = 47  
Consumers:  
respondents = 2068

- 46%** Of consumers agree that their energy supplier provides **responsive, friendly and personal customer service**
- 45%** Of consumers agree that their energy supplier **ensures that consumer data are kept safe**
- 31%** Of consumers agree that the energy supplier ensures that consumers can easily specify how their **personal data may or may not be used**

- 100%** Of suppliers provide **clear, transparent and consistent information** on their offers, contracts and bills
- 74%** Of suppliers offer **user-friendly products and services** with easy opt-in and opt-out



# There are three main drivers of the positive consumer perception of choice, control and experience

## #1

**High satisfaction with use of new products and services that energy suppliers provide.**

Between 73% and 92% of those that have used new energy products and services from their supplier have found them useful.

## #2

**More choice to find the best deal due to a growing number of suppliers who actively expand the range of services.**

European consumers can choose from an average of 41 energy suppliers – of which 9 out of 10 are actively expanding their service offering.

## #3

**Increasing focus of energy suppliers to simplify customer services through digital channels and self-service solutions.**

European energy suppliers have invested in creating a better customer experience, and many, though not yet all, consumers have seen the results.

# Consumers are highly satisfied with products and services of suppliers

Between 73% and 92% of those that have used new energy products and services from their supplier have found them useful.

Home energy generation, management & electric mobility

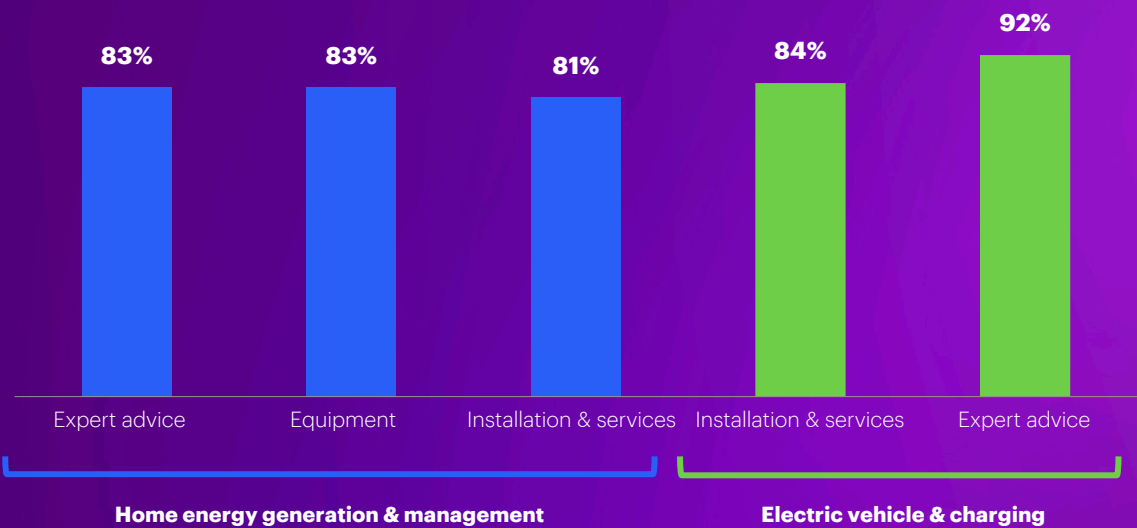
83-92%

Of users found the products & services of their supplier useful

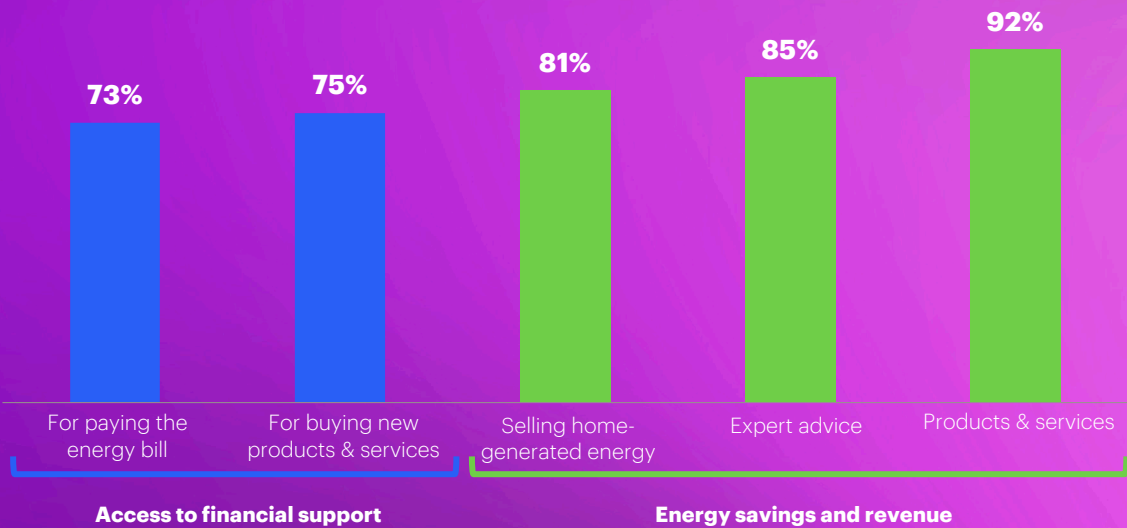
Energy saving & access to financial support

73-92%

Of users found the products & services of their supplier useful



Consumer survey; n = 88, 93, 55, 43 and 36 respectively



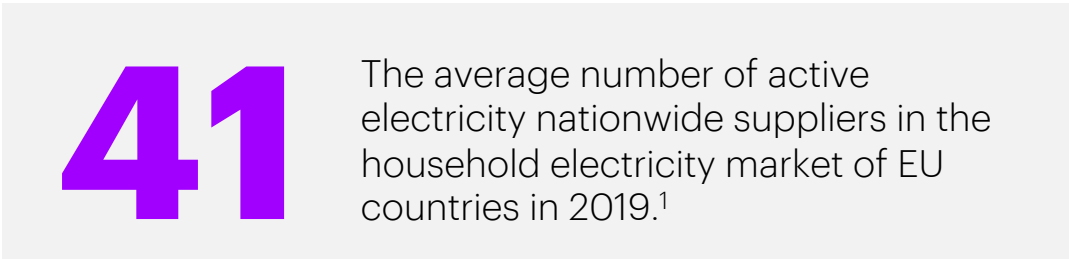
Company survey; n = 171, 144, 54, 121 and 49 respectively



# Consumers can choose from many suppliers and increasing range of services to find the best deal

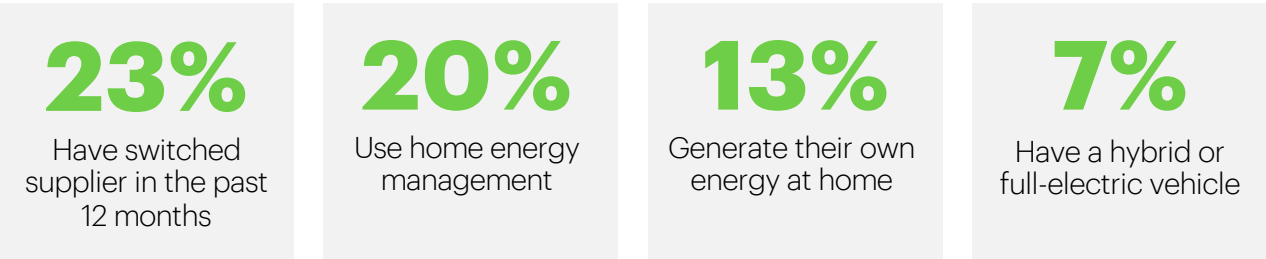
European consumers can choose from an average of 41 energy suppliers – of which 9 out of 10 are actively expanding their service offering. Consumers are exercising this choice to find the best deal – through adopting new products and services or changing supplier.

European consumers can choose from a growing number of energy suppliers...



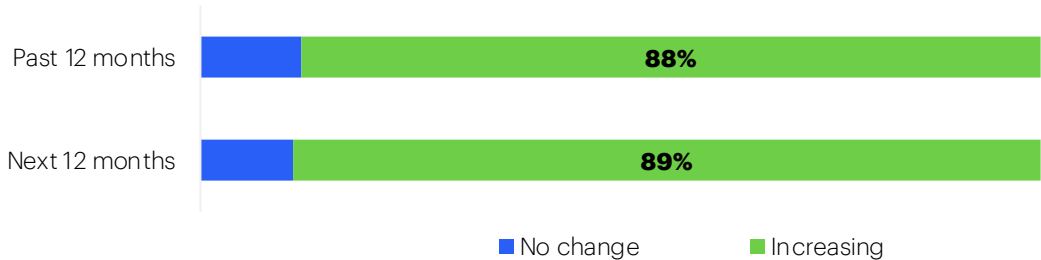
A subset of consumers are exercising their increased choice by switching supplier and/or adopting new products and services...

Share of respondents that have changed supplier and/or adopted new products



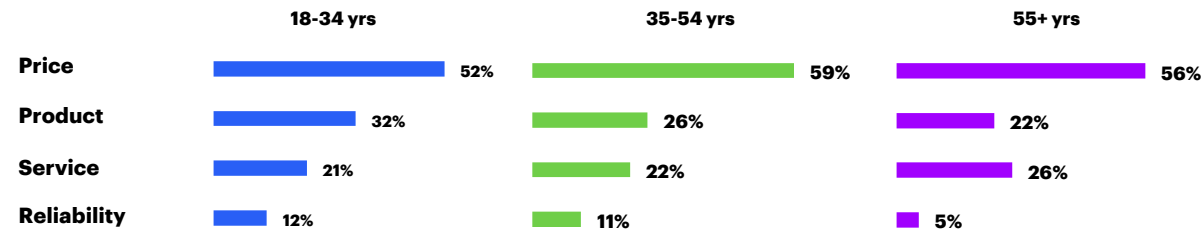
...and suppliers are expanding their offering of products and services

Have you/are you expanding your activity in providing new products and services?



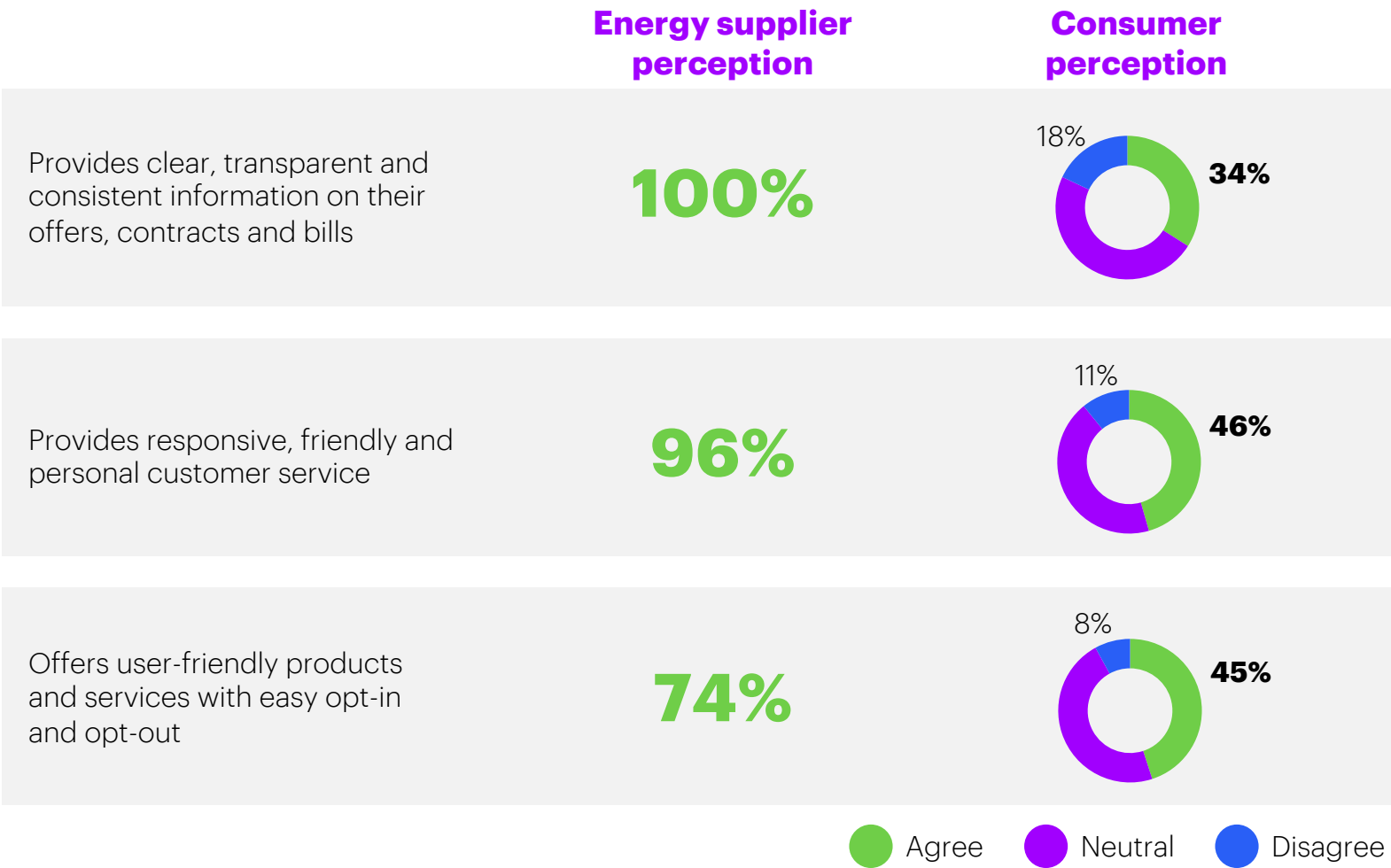
...basing their choices on a range of criteria, as their perception of 'a good deal' expands beyond price

Motivation for switching supplier in the past 12 months, based on top-3 selection



# Energy suppliers prioritise on good customer service

European energy suppliers have invested in creating a better customer experience, and many, though not yet all, consumers have seen the results.



## How energy suppliers have been enhancing consumer experience

### EDF

The EDF & Me mobile app enables users to monitor their energy consumption on a daily basis and receive personalised tips on how to reduce it. It informs those consumers with a Linky Smart Meter if their monthly payment is out of step with their real consumption.<sup>2</sup>

### Electric Ireland

announced an AI-powered customer engagement solution using smart meter data that provides personalised energy insights and informs customers on their individual usage to recommend the best price plans for each consumer.<sup>3</sup>



The background of the slide is a dramatic, low-angle shot of a person climbing a tall, dark, spiraling structure. The person is silhouetted against a bright, glowing vortex of light and smoke that fills the upper right portion of the frame. The overall color palette is dominated by deep blues, oranges, and yellows, creating a sense of intense energy and movement.

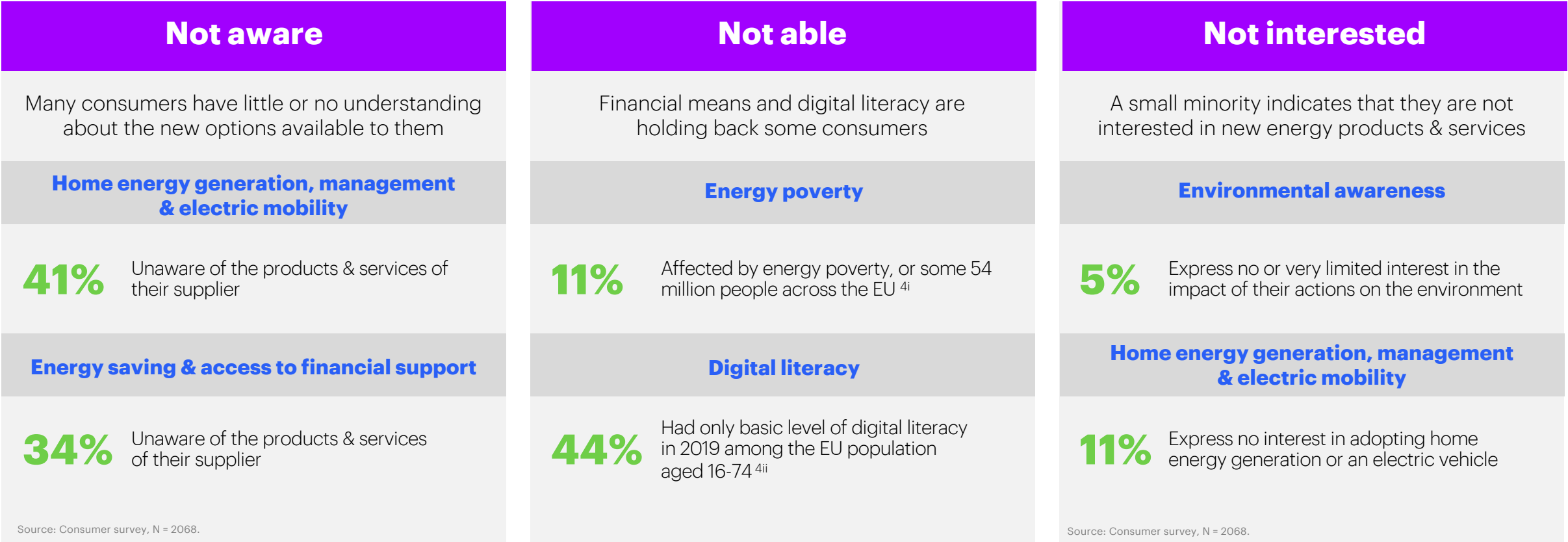
**But almost 80 percent  
of consumers are not yet  
actively taking part in the  
energy transition.**

**Because many of them  
don't know how.**

There is an awareness gap which  
must be addressed.

# Lack of knowledge, poor digital skills and disinterest are stopping consumers from taking part in the energy transition

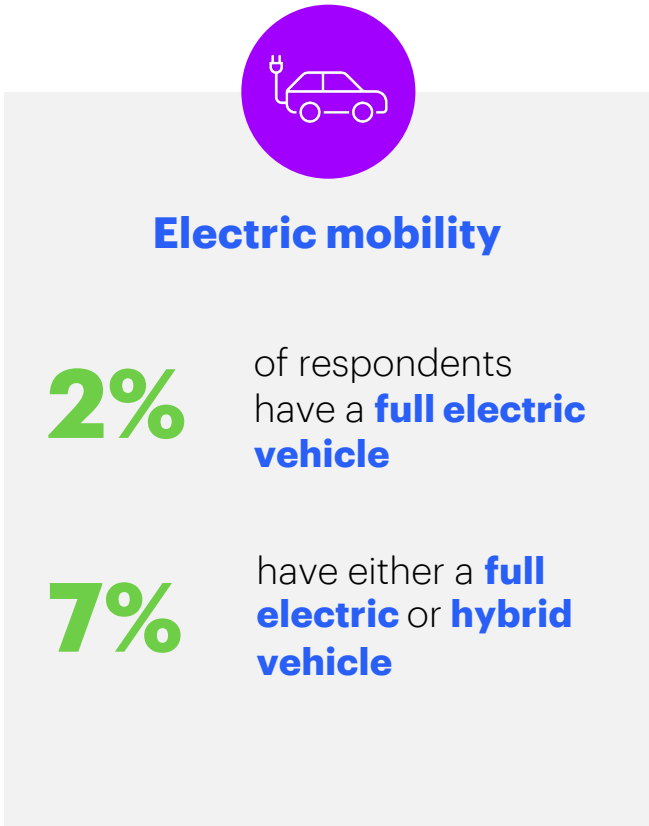
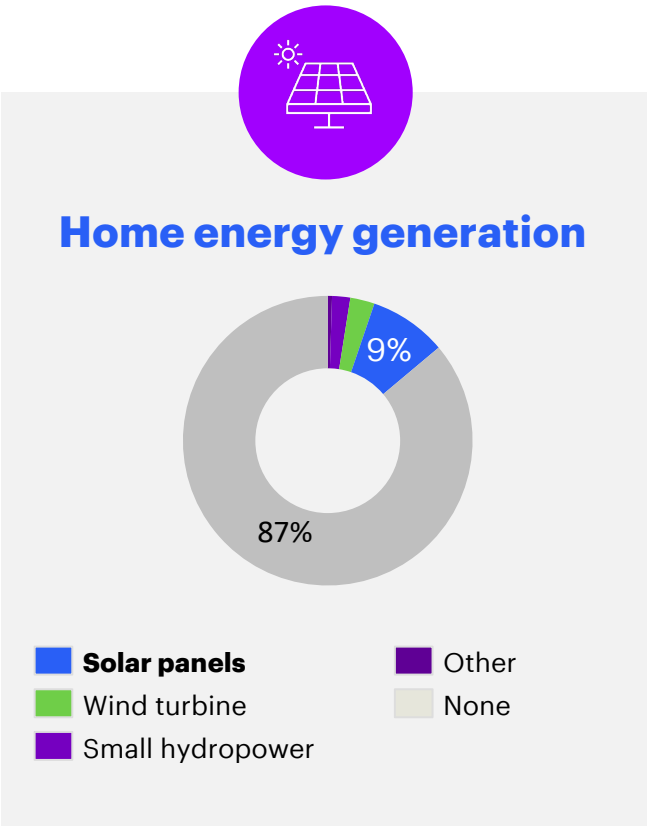
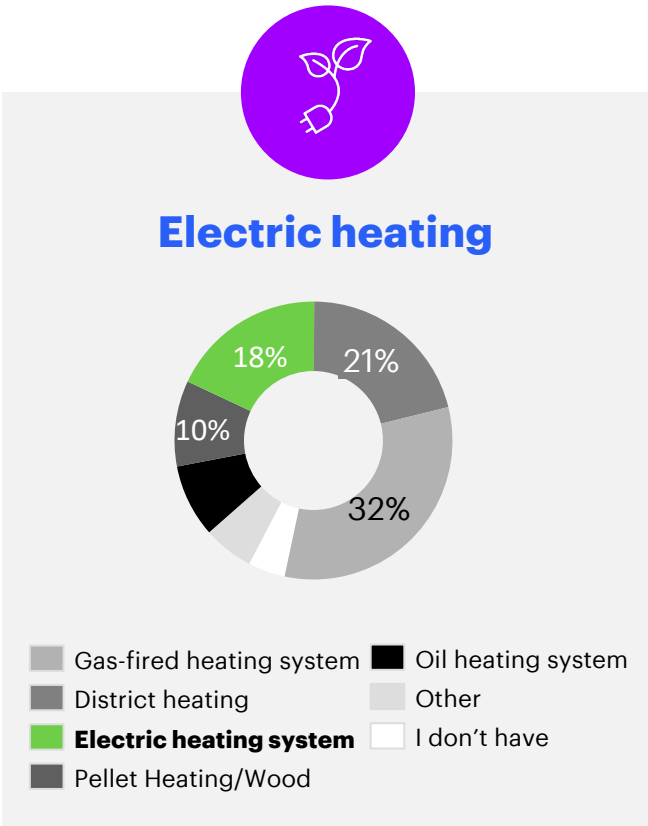
Many consumers don't know that their energy supplier offers products and services to help them save or generate energy and switch to electric mobility; others are unable to adopt them, and some are not interested.





# Cost is an important factor, but not the only one, behind the limited uptake of electric solutions

Less than one in five of consumers already use low-carbon electric heating, home energy generation or an electric vehicle’  
Electric heating is the most commonly adopted electric solution, followed by home energy generation and electric mobility.



# Cost is an important factor, but not the only one, behind the limited uptake of electric solutions

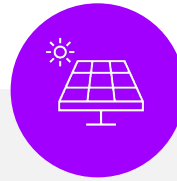
Concerns that electric solutions are too expensive are the top barrier mentioned by consumers for home energy generation and electric mobility, and the second-most important barrier for electric heating.

**Top 3 reasons** holding consumers back from switching to electric products and services



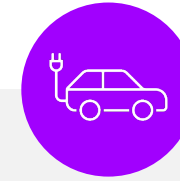
## Electric heating

- 1** **24%** Satisfied with current heating system
- 2** **23%** Too expensive
- 3** **23%** I cannot switch



## Home energy generation

- 26%** Too expensive
- 13%** Not considered
- 11%** Not interested



## Electric mobility

- 36%** Too expensive
- 20%** Other concerns
- 11%** Concerns about driving range

# Consumers want to participate in different ways

Some actively seek new solutions to meet their energy needs, others open to adopting new solutions but are still orienting themselves about the options on offer, while other consumers just want the service and convenience without having to worry about the necessary arrangements.

**21%**

**Actively seeking & using new solutions**

**Some consumers are already actively seeking new solutions and adopting these to improve their comfort and convenience.**

Active consumers want to experience what it is like to have solar panels, drive an electric car, or use other new energy services, and prefer a single provider that can deliver the full solution.

**24%**

**Aware and orienting, not yet using new solutions**

**A second group of consumers is aware of new energy solutions on offer and open to trying these but has not done so yet.**

Consumers that are aware of the services provided but have not taken the effort to start using new services often lack clear information and help to choose the solution best suited for them and arrange the practicalities.

**37%**

**Lacking information, concerned about the hassle**

**Other consumers prefer that others – their energy supplier for example, take care of the practical and technical arrangements to achieve the same comfort and convenience.**

Consumers that want the service but not the hassle want to be pointed to solutions that can easily help them save money or increase convenience and are open to peer advocacy.

NB the remaining 18% of respondents indicated that their energy supplier does not offer new products and services



## Lack of awareness of the available alternatives is the Achilles' heel of consumer participation in the energy transition.

More than one in four (26%) of the consumers that we asked are not aware of any of the products and services that their supplier offers – for saving energy, switching to solar panels or an electric car, or access to finance for example.

The awareness gap must be closed.

Complexity and hassle are major barriers to people embracing energy saving alternatives. Consumers need clear and reliable information and easy routes to adopt electrical energy solutions in their homes.

Meanwhile, many suppliers are still on a journey to understand their customers changing needs and expectations. Enhanced customer intelligence continues to be a critical step for providing a quality service.

01

## Wider participation in the energy transition requires continued investment in awareness, customer knowledge and service quality

**Continue to raise awareness of new energy solutions**, through clear and reliable information about their benefits and financial implications.

02

**Continue to simplify the experience** by taking away any pain points in the customer journey and using automated services to minimise hassle.

03

**Invest in customer knowledge**, understanding their life events and capturing the moments of truth at which they are making decisions about the home and energy

04

**Design for the unique needs and wants of individual customer segments**, recognising that consumers want to participate in different ways

# Continue to raise awareness of new energy solutions

Provide clear and reliable information about the availability, benefits and financial implications of clean energy solutions

The consumers that we surveyed pointed to a lack of clear and reliable information about the availability of new energy solutions for managing their energy needs and reducing their bill. Around 30% listed this as the single thing that would help them most.

Moreover, 69% of respondents were not aware that their energy supplier offers home energy generation, management & electric mobility solutions, and 61% was not aware of services for energy saving and access to financial support.

Efforts to raise awareness and knowledge about new energy solutions among the broader public remain a critical step towards wider participation in the energy transition. Our results also show that once consumers are aware of the available solutions, 30% to 53% are likely to use them, with high levels of satisfaction.

## EDP

has created a Solar PV simulator that helps users understand how solar panels work, how much they can reduce their energy bill, and advises changes in energy use behaviours that can help them get most out of the electricity that they generate with their solar panels.<sup>5</sup>

## Smart Energi

has initiated an **education / awareness campaign** with transparent communication, especially on pricing. For instance, its hourly tariff offer promotes better understanding of electricity market mechanisms and the monitoring systems, making customers more inclined to manage their daily energy use.<sup>6</sup>

# Continue to simplify the experience

Take away pain points in the customer journey and communicate proactively and transparently.

One-fifth of European energy consumers say that their energy experience has improved over the past 12 months, while only 5% feels that they have a worse experience now.

At the same time, many consumers see room for further improvement. Around half of respondents feel that their supplier can make it easier for them to find the best offer, technology solutions and support schemes. And around 40% would like to see more responsive and personal customer service and more user-friendly products.

Proven approaches are those that minimise the steps customers need to go through by streamlining and digitising processes and creating a consistent experience across channels. Transparent and proactive communication also contribute to a better customer experience.

## CEZ

has invested in streamlining and digitising customer service – and was rated the most trusted supplier in the Czech Republic. CEZ proactively informs customers when they can switch to a more attractive distribution tariff to save money. In the same way, when prices are moving, CEZ offers customers to switch tariff to avoid a rising bill.<sup>7</sup>

## EDF

has made transparency and consistency of information an integral part of its strategy, through its **single point of information** about available offers, financial supports, troubleshooting, insurance and other energy efficiency solutions and advices.<sup>8</sup>



# Invest in customer knowledge

Understanding the life events that customers experience and advise accordingly on decisions that affect their home and energy use.

The needs and wants of energy consumers vary, not just based on their background and living situation, but also throughout their lifetime. Life events – a new home, a new car, a growing family – have more fundamental and lasting impacts on energy requirements than daily choices.

Consumers have rapidly increasing choice in meeting their energy needs over time, thanks to the growing array of new energy services and solutions. Many welcome advice from a trusted partner that points them to the best options – solar panels with battery storage, an electric vehicle – at the right time in their life.

Suppliers are ideally positioned to be this partner – if they know their customers well enough to be relevant. The keys to this are data and, more importantly, a trusted relationship.

## **E.ON**

helps customers with insights about the energy consumption of individual appliances in their house, supporting choices that save energy. The solution uses demand disaggregation software coupled to the home energy management smartphone app. The individual customer decides whether to share this information with the company to receive personalised recommendations from specialised advisors.<sup>9</sup>

## **STOCKHOLM EXERGI**

wanted to take a positive action to engage their local community. Surveys rank Sweden as one of the loneliest countries in the world and the elderly are one of the worst impacted. Stockholm Exergi developed Memory Lane, a solution that uses a unique conversational artificial intelligence which allows people, particular the elderly, to capture memorable stories for future generations while also providing companionship.<sup>10</sup>

# Design for the unique needs and wants of individual customer segments

Understand how consumers want to participate in the energy transition, and design services for those that seek active involvement as well as for those that seek the service but not the hassle.

Consumers want to participate in different ways, and this calls for different approaches for meeting their needs.

Only a subset (21%) of consumers actively exercise their increased choice by switching supplier and/or adopting new products and services. They benefit from streamlined process of finding, buying and installing the best solutions for them through tailored advice and a one-stop shop.

Those consumers that are still exploring the solutions available (24% in our sample) look to energy suppliers for reliable information about new technologies, their financial benefits and subsidy schemes for adopting these.

Many other consumers that primarily want the service (37% of surveyed) are best served by solutions that offer tangible and direct benefits with minimal administrative burden.

## ENEL

offers an **innovative and flexible tariff called “Free Hours”** allowing customers to choose 3 hours every day in which their energy use (excl. taxes & levies) is free with a simple click on the App. By consuming in the free chosen hours (e.g., to charge EV) it is possible to save up to 40% of total energy costs.<sup>11</sup>

## Smart Energi

offers a service tailored to energy communities. It aims to make sure the **solar installation serves the community.** The service allocates the power production of the community solar plant based on ownership shares and includes it in the bill of individual consumers.<sup>12</sup>

# Empowering consumers that actively seek and use new products & services

Consumers that actively seek to take part want to experience what it is like to have solar panels, drive an electric car, or use other new energy services, and prefer a single provider that can deliver the full solution.

## Who is the active consumer?



### Young

18% are 18 – 24 years old (vs. 8% in total sample)



### Tech-savvy

49% are early technology adopters (vs. 21% in total sample)



### Environmentally aware

40% actively limit their impact on the environment (vs. 26% in total sample)

## These consumers say that they would be most helped by:

Advice about the best solutions available  
**(42%)**

Advice about the financial benefits of these solutions  
**(39%)**

Access to financial support for buying these solutions  
**(36%)**



Convey the experience

### EDP

created the EDP EV.X app that simulates the use of an electric car. The app tracks the driving patterns of users (driving in a petrol-fuelled car) and shows where and when they could charge the cost savings and CO2 emissions reductions they could make if they were driving an electric vehicle.<sup>13</sup>



Open a one-stop shop

### Engie

launched the "Engie Zero" retrofit scheme in the UK. This one-stop-shop helps to decarbonise homes with digital and decentralised energy solutions. It utilises the savings generated from the improvement works together with existing revenue streams and government incentives to help finance the upfront costs of the works.<sup>14</sup>



# Empowering consumers that are orienting themselves

Consumers that are aware of the services provided but have not taken the effort to start using the services that can help them save money or increase convenience.

## Who is the orienting consumer?



### Later adopters of technology

29% adopt technology after it has been out for a while (vs. 24% in total sample)



### Environmental awareness in balance with convenience

60% avoid environmental damage when it is not inconvenient (vs. 56% in total sample)

## These consumers say that they would be most helped by:

Advice about the best solutions available

**(42%)**

Advice about the financial benefits of these solutions

**(37%)**

Access to financial support for buying these solutions

**(31%)**



Show as well as tell

### ENEL

Opened an ENEL.X Store and Station in Rome, where customers can benefit from advice on electric vehicles and on recharging services, while fast-charging their car. This store is a prototype for a new way of interacting with customers and helping them in their electrification journey, including other home energy solutions.<sup>15</sup>



Connect to finance

### Energia Ireland

Helps customers access the Credit Union scheme for renovations, electric vehicle equipment or solar panels. The CUGreenerhomes.ie platform gives consumers advice on home improvements needed, costs and how to apply for a loan or a government grant.<sup>16</sup>

# Empowering consumers that want the service, not the hassle

Consumers that want the service but not the hassle want to be pointed to solutions that can easily help them save money or increase convenience and are open to peer advocacy.

## Who is the service-minded consumer?



### Less comfortable with technology

40% are late technology adopters  
(vs. 32% in total sample)



### Less environmentally conscious

21% don't consider impacts on the environment  
(vs. 18% in total sample)

**Many of these consumers don't know what would help them participate (40%).**  
**Those that do say that they would be helped by**

Better information about which solutions are available

**(26%)**

Advice about the financial benefits of these solutions

**(24%)**



Minimise the admin

### Edison

helps consumers benefit from the 110% tax deduction for energy retrofits, taking care of the application for the Italian 'Super Bonus' scheme, removing the administrative burden from customers.<sup>17</sup>



Offer simple, tangible benefits

### Eneco

provides value-added services as loyalty benefits for retail customers. These services include emergency home repair, locksmith services, and EV technical support after 3 months of loyalty, and adds offerings like bicycle assistance (after 1 year) and bill support for customers who become unemployed (after 2 years).<sup>18</sup>

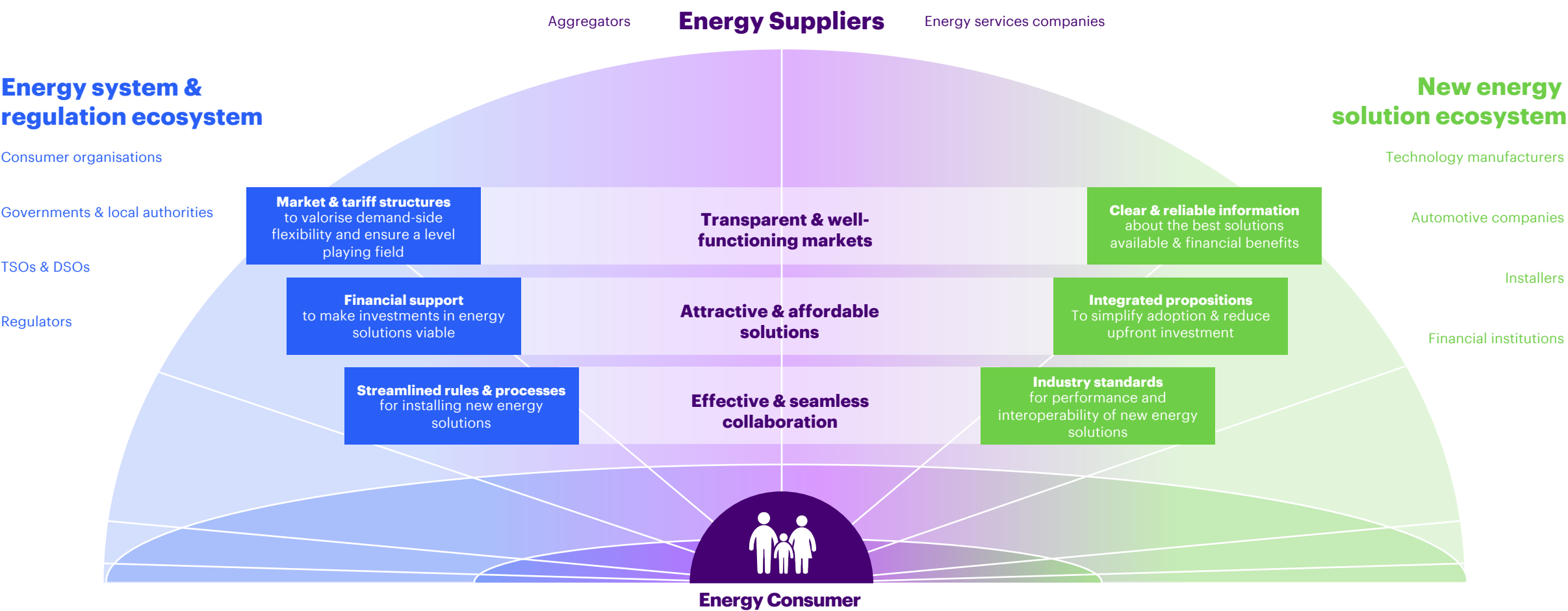


A photograph of several wind turbines in a grassy field during sunset. The sky is a mix of orange, yellow, and blue, with the sun low on the horizon. The turbines are silhouetted against the bright sky. The foreground is filled with tall, dry grass.

# **Consumers look to all actors in the new energy ecosystem to help them in their personal transition journey**

With increased information, better guidance  
and simple routes to adopt new solutions –  
more consumers will participate in the  
energy transition.

# Collaboration between suppliers, partners in the new energy ecosystem and governments are critical for wider consumer participation





# Partnerships for clear & reliable information about available solutions

Partnerships in the new product ecosystem create opportunities for supporting consumers in their personal energy transition journey, making use of the complementary capabilities of multiple stakeholders.

Partnerships can be an effective way to raise awareness and knowledge of new energy solutions. Partner channels give new ways to bring clear and reliable information to a wider group of customers, and collaboration can help ensure that advice is independent and reliable.

Partnerships also enable effective use of data. Through collaboration, suppliers and their partners can combine data to create a better service and more personalised solution for customers – while respecting privacy and security.

Collaboration plays an important role in setting market standards – for new technologies, for communication practices – that create a level playing field and ensure customer protection.



## Accredited partners

### **Energia & Onlinetradesmen.ie.**

Collaborate to making it easy to find qualified and reliable professionals for Energia customers **undertaking home improvements**. OnlineTradesmen.ie is the largest marketplace for professional trades and has a strong focus on sustainable projects.<sup>19</sup>



## Better use of data

### **ESB & Zap map**

Launched a partnership to facilitate EV adoption in Ireland. ESB EV Solutions customers will be able to avail of the benefits of Zap-Pay, a new service from Zap Map that enables EV drivers to use a single app to pay for charging across different networks.<sup>20</sup>

# Partnerships for integrated propositions to simplify adoption

Partnerships in the new product ecosystem create opportunities for supporting consumers in their personal energy transition journey, making use of the complementary capabilities of multiple partners.

Partnerships open up new ways of engaging with consumers at the time when they make life decisions that involve energy needs – renovating their house, buying a car, starting a family.

Partnerships create opportunities for combining products and services – hardware and software, energy and services – in ways that reduce the upfront investment costs.

Partnerships facilitate the creation of infrastructure, market conditions and business models for broad consumer uptake of low-carbon energy solutions.



New channels of engagement

## **Bord Gáis & Carcharger.ie**

has established multiple long-term arrangements to encourage the uptake of electric vehicles in Ireland. It is the preferred EV charger installation partner for Volkswagen, Seat, Škoda, and Ford. Its strategic partnership with CarCharger.ie allows it to offer EV charger installations to its existing customers, and the wider market through its Local Heroes business.<sup>21</sup>



New services & business models

## **Enel & Volkswagen**

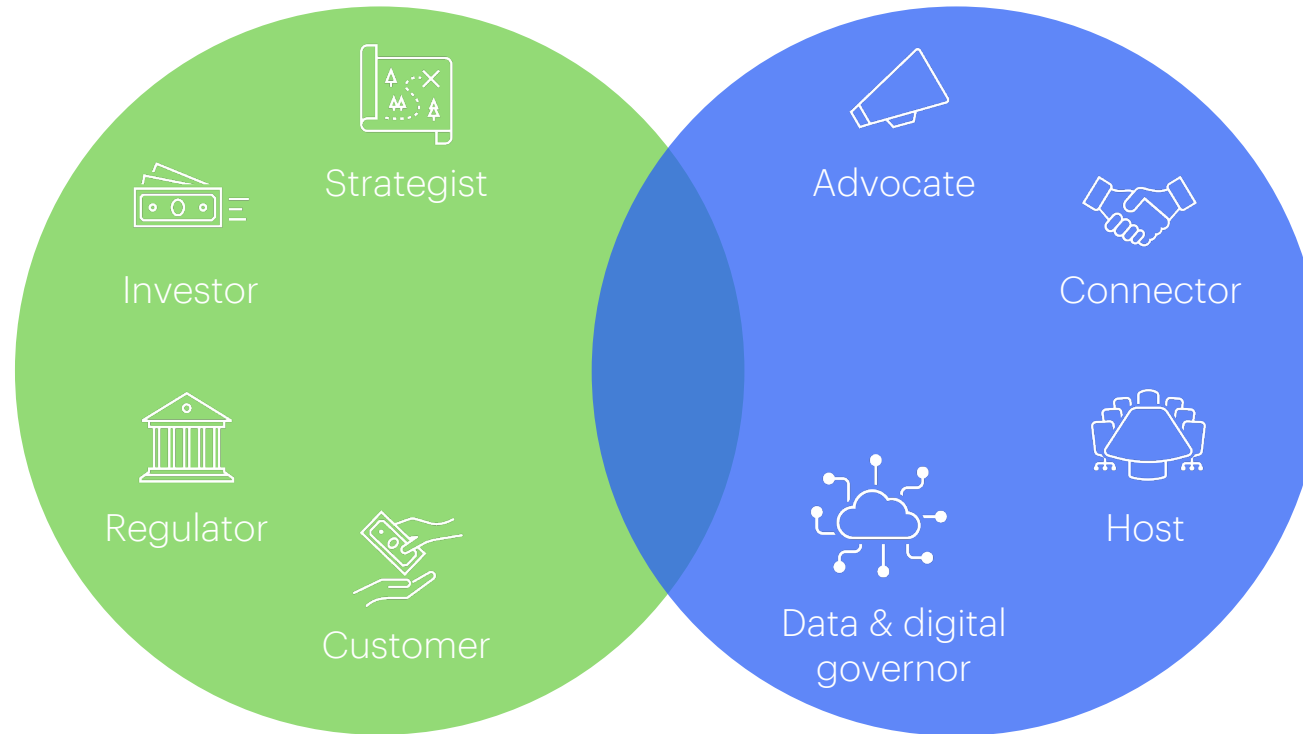
Enel X has set up a JV of equal partners with Volkswagen to enhance the EV uptake in Italy. The JV will operate as Charging Point Operator by owning and operating a high-power charging network of over 3,000 charging points of up to 350 kW each across the country.<sup>22</sup>

# Governments as leaders and enablers

Governments have multiple roles in ensuring that all consumers can take part in the energy transition.

## Government as leader

Government as leader sets the direction and ambition level, supports early-stage technology adoption and ensures that disadvantaged consumer group can participate.



## Government as enabler

Government as enabler creates the market environment for accelerating the uptake of new products and services, provides guiderails, removes barriers and facilitates partnerships.

# Methodology

In April and May 2021, We gathered input from energy suppliers across Europe about their activities and plans for empowering their customers. In parallel, we asked over 2,000 consumer in 10 European countries whether they have seen a change in their level of choice, control and experience in meeting their energy needs.

## Consumer survey

- Eurelectric and Accenture commissioned YouGov to conduct a general population survey in **10** European countries.
- All samples are broadly nationally representative of adults aged 18+ who are either solely or jointly responsible for dealing with energy suppliers in each country.
- In total, **2,068** respondents were interviewed online:

Country-level sample sizes: **Czech Republic** (200), **Estonia** (249), **France** (206), **Germany** (201), **Italy** (200), **Ireland** (204), **Netherlands** (203), **Portugal** (203), **Romania** (201), and **Sweden** (201).

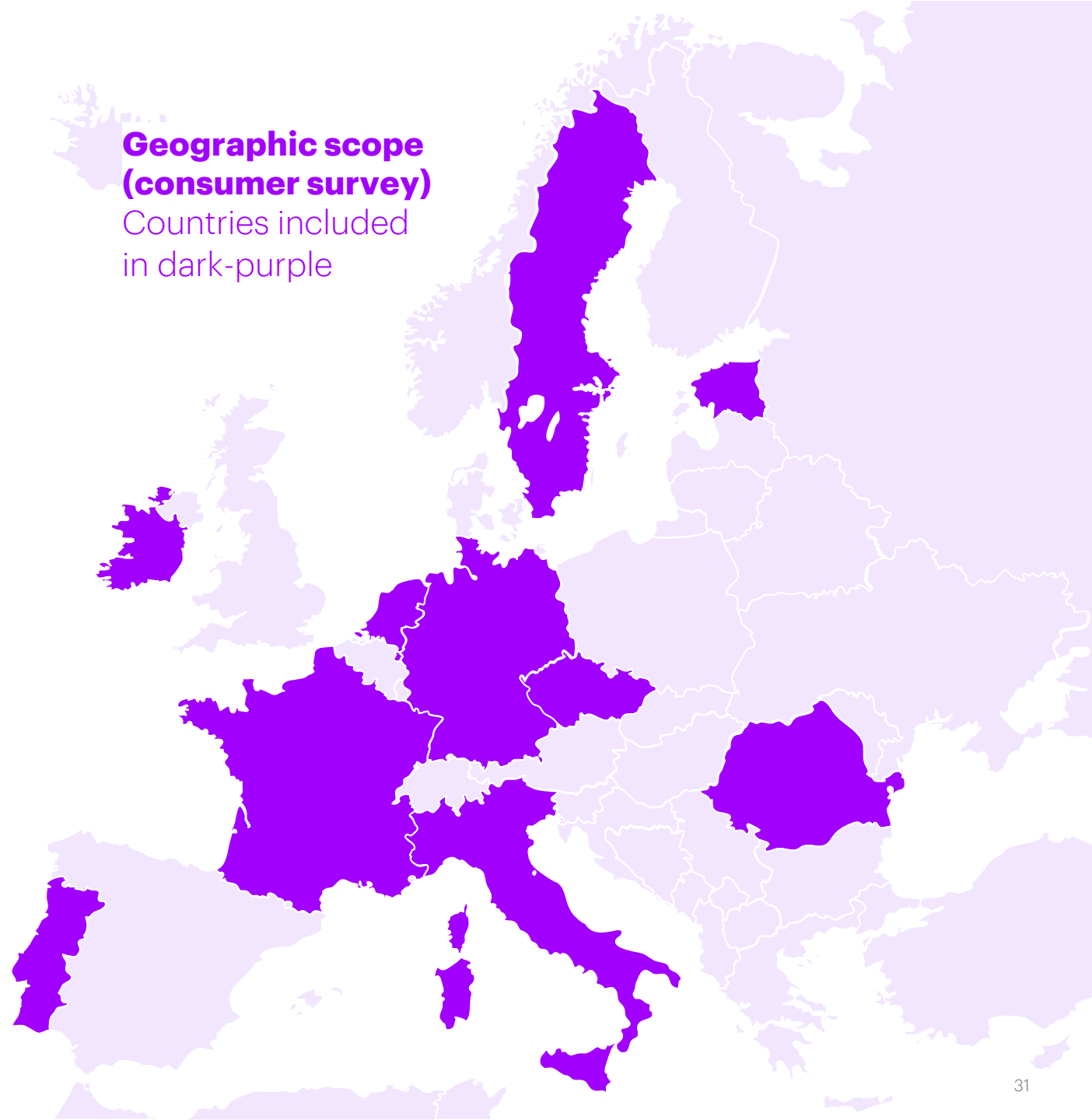
## Company survey and interviews

- In total, **50 Eurelectric members** out of 63 company signatories answered an online survey.
- Eurelectric and Accenture conducted **15 qualitative interviews** to elaborate and deepen the answers provided by through the survey and to collect best practices.

Companies interviewed were : Bordgais, CEZ, Eesti Energia, EDF, Edison, EDP, Electric Ireland, Enel, Energia, E.ON, ESB, MVM, SmartEnergi, Vattenfall, Yasno.

## Geographic scope (consumer survey)

Countries included  
in dark-purple





# Contributors

## **Charlotte Renaud**

Head of Markets & Customers team

**Eurelectric**

---

## **Darya Mustafayeva**

Advisor Retail Markets

**Eurelectric**

---

## **Sanda Tuzlic**

Managing Director, Energy Transition Services

**Accenture**

---

## **Wytse Kaastra**

Managing Director, Utilities & Sustainability

Europe Lead

**Accenture**

---

## **Sytze Dijkstra**

Senior Principal Accenture Research

**Accenture**



# References

1. ACER Market Monitoring Report 2019 – Energy Retail and Consumer Protection Volume, October 2020  
<https://www.ceer.eu/documents/104400/7065288/Energy+Retail+and+Consumer+Protection+Volume/f13c3ce0-5761-e836-7e0b-c50ae6f22053>
2. EDF & Me: <https://www.eurelectric.org/stories/consumers/edf-moi-app/>
3. Bidgely Enhances Smart Meter Deployment by Creating Personalized Energy Experiences for Electric Ireland Customers, March 2021  
<https://www.businesswire.com/news/home/20210330005165/en/Bidgely-Enhances-Smart-Meter-Deployment-by-Creating-Personalized-Energy-Experiences-for-Electric-Ireland-Customers>
4. i. European Committee of the Regions. [Time to eradicate energy poverty in Europe](#) June 2019  
i. i Eurostat [Individuals who have basic or above basic overall digital skills by sex](#) Last updated 25 May 2021
5. Solar simulator <https://caixamagica.pt/en/projetos/solar-simulator>
6. Smart Energi, October 2020, <https://www.smartenergi.com/artikler/2020/10/28/spot-maned-spot-time> interview 22 April 2021
7. ČEZ is still dominating the Czech online energy market, beating competition in major areas of online acquisition. January 2019 <https://www.wuaglobal.com/sparks/cez-is-still-dominating-the-czech-online-energy-market>
8. EDF: Interview, 23 April 2021
9. EON: interview 7 May 2021
10. Stockholm Exergi Memory Lane <https://www.stockholmexergi.se/memory-lane2/>
11. ENEL <https://www.enel.it/en/luce-e-gas/luce/offerte/ore-free>

# References

- 12 Smart Energi, June 2021 <https://www.smartenergi.com/artikler/2021/06/18/verksbyen-boligene-vinn-vinn-for-miljoet-og-lommeboka/>
- 13 EDP EV.X app <https://www.eurelectric.org/stories/consumers/edp-evx-app/>
- 14 Engie Zero Improving Homes Today for a Zero Carbon Tomorrow <https://www.engie.co.uk/places/engie-zero/>
- 15 ENEL.X: Enel X Store in Rome: the first urban area for ultrafast recharging with smart solutions for homes and mobility, March 2021 <https://corporate.enelx.com/en/media/press-releases/2021/03/enel-x-store-in-rome--the-first-urban-area-for-ultrafast-recharg>
- 16 Energia Ireland, with grants of up to 40% available there's never been a better time to get a warmer, greener home <https://www.energia.ie/cosy-homes/greener-homes>
- 17 Edison <https://www.edisonenergia.it/edison/casa/servizi/edison-super-bonus-detrazione-fiscale-110?intc=hpres-wdg-superbns-ambiente>
- 18 Eneco, worry-free with the Comfort Bonus <https://eneco.be/nl/klantvoordelen/comfort-bonus>
- 19 Energia: <https://www.onlinetradesmen.ie/Help/Energia.aspxv>
- 20 Zap-Map signs up ESB Energy to new electric vehicle payment platform <https://www.zap-map.com/zap-map-signs-up-esb-energy-to-new-electric-vehicle-payment-platform/>
- 21 Bord Gáis Energy – Partnership Announcement, 2020 <https://www.carcharger.ie/2020/07/22/bord-gais-energy-partnership-announcement/>
- 22 Enel X and Volkswagen team up for electric mobility in Italy, July 2021 <https://www.enel.com/media/explore/search-press-releases/press/2021/07/enel-x-and-volkswagen-team-up-for-electric-mobility-in-italy>

# About Accenture

Accenture is a global professional services company with leading capabilities in digital, cloud and security. Combining unmatched experience and specialized skills across more than 40 industries, we offer Strategy and Consulting, Interactive, Technology and Operations services — all powered by the world's largest network of Advanced Technology and Intelligent Operations centers. Our 624,000 people deliver on the promise of technology and human ingenuity every day, serving clients in more than 120 countries. We embrace the power of change to create value and shared success for our clients, people, shareholders, partners and communities. Visit us at [www.accenture.com](http://www.accenture.com).

# About Eurelectric

Eurelectric is the federation for the European electricity industry. We represent the power sector in over 32 European countries, speaking for more than 3,500 companies in power generation, distribution and supply. We contribute to the competitiveness of our industry, provide effective representation in public affairs and promote the role electricity in addressing the challenges of sustainable development. We draw on more than 1000 industry experts to ensure that our policy positions and opinions reflect the most recent developments in the sector. This structure of expertise ensures that Eurelectric's publications are based on high-quality input with up-to-date information. We currently have over 34 full members, representing the electricity industry in 32 European countries. Visit us at [www.Eurelectric.org](http://www.Eurelectric.org)



# Disclaimer

This paper has been published for information and illustrative purposes only and is not intended to serve as advice of any nature whatsoever. The information contained herein and the references made in this paper is in good faith, neither Accenture nor any of its directors, agents or employees give any warranty of accuracy (whether express or implied) nor accepts any liability as a result of reliance upon the information including (but not limited) content advice, statement or opinion contained in this paper. This paper also contains certain information available in the public domain, created and maintained by private and public organizations. Accenture does not control or guarantee the accuracy, relevance, timelines or completeness of such information. This paper constitutes a view as on the date of publication and is subject to change. Accenture does not warrant or solicit any kind of act or omission based on this paper. This document makes only a descriptive reference to trademarks that may be owned by others. The use of such trademarks herein is not an assertion of ownership of such trademarks by Accenture nor is there any claim made by Accenture to these trademarks and is not intended to represent or imply the existence of an association between Accenture and the lawful owners of such trademarks.

This document refers to marks owned by third parties. All such third-party marks are the property of their respective owners. No sponsorship, endorsement or approval of this content by the owners of such marks is intended, expressed or implied.