

Energy transition: Italy has failed to meet 34 out of 56 targets, with only 15 achieved

The ENEA analysis presented at the Energy Roundtable of the Connact Autumn Workshop (Brussels, 13 October 2026). There are positive signs regarding energy security, but these are mainly based on the launch of measures.

Italy has failed to meet over 50% of the targets measuring the energy transition. This is the picture that emerges from the analysis by ENEA – the National Agency for New Technologies, Energy and Sustainable Economic Development – discussed at the Energy Roundtable during Connact's Autumn Workshop, "Revitalising European Competitiveness", which focused on Italy's energy transition and its links to energy security and strategic autonomy.

Out of 56 assessments measuring Italy's progress towards the Energy Union's objectives, only 15 are in line with the targets, 34 are not, and 7 show progress that is not yet definitive. The analysis focused on 56 indicators across the six chapters of the Energy Union: Decarbonisation; energy efficiency; energy security; the energy market; research, innovation and competitiveness; energy poverty.

The Energy Union is the geopolitical and economic strategy launched in 2015 by the European Union to transform 27 fragmented national energy markets into a single integrated, secure, sustainable, and competitive market. The analysis draws on the scope, targets, and indicators of European governance (the Commission's reports on the State of the Energy Union, the National Energy and Climate Plans and the related progress reports) and supplements them with tools typically used in public policy evaluation: it examines not only whether a target has been met, but also which policies have worked, why, and at what cost.

Energy security: the best chapter.

Italy remains well short of its target for import dependency: at 74.1%, compared with the target of reducing it to 68%. Energy security is the area in which Italy receives the highest number of positive assessments, but at the same time, the negative assessments are concentrated in a field that is particularly relevant at the moment: energy dependency. The targets were achieved, particularly in terms of the qualitative indicators. According to ENEA, it was primarily the prescriptive policies (halting Russian gas imports, minimum storage levels, FSRUs) and those based on volume (capacity market, MACSE) that proved effective, with geopolitical events playing a significant role.

Decarbonisation is lagging behind. Here, 11 out of 13 indicators are in the red. The exception is the reduction in emissions in the ETS sectors, down 58.2% compared with 2005, in line with the trajectory towards a 66% reduction by 2030. Renewables account for 20.3% of final energy consumption, compared with the 25.3% expected by 2025, and there are around 365,000 electric cars on the road, compared with a target of 4.3 million by 2030.

Competitiveness: no positive indicators. Research, innovation, and competitiveness have received 6 out of 6 negative ratings: the trade balance for low-carbon technologies is negative by approximately €4 billion, and output in energy-intensive sectors has fallen to 80 [AS3.1](2021=100). On energy efficiency, there are 2 positive assessments, 4 negative and 2 neutral ones; on the domestic market, there are 4 positive assessments – all qualitative – and 6 negative ones. As regards energy poverty, around 9% of households are unable to heat their homes adequately, while electricity and gas prices for consumers continue to rise.

Finally, the analysis highlights the limitations of European governance instruments: numerous objectives with unclear hierarchies, many non-measurable targets, confusion between instruments and objectives, and the absence of ex post impact assessments, which makes it difficult to attribute results to individual policies.