FONDAZIONE MAIRE PRESENTS ON THE LEADERS SUMMIT DAY OF COP31 IN ANTALYA THE FOURTH ANNUAL EDITION OF ITS "CLIMATE GOALS" RESEARCH INVOLVING 17 COUNTRIES: 2026 RESULTS IN 3 EUROPEAN COUNTRIES AND TURKEY SHOWS THAT IT IS URGENT TO PASS FROM THEORIES TO ACTION, BOOSTING INVESTMENTS ON NEW CLEAN TECHNOLOGIES, WHILE THE COUNTRY'S AWARENESS OF THE ENERGY TRANSITION RISES TO 98%

- **"Climate Goals" Research is the first global picture on how the perception on the energy transition grows across geographies, economies and society. Fondazione MAIRE - ETS, together with Ipsos Doxa, has been monitoring public awareness on the energy transition worldwide since 2023, involving around 3000 individuals – update with the new Turkey wave and 26 experts across 17 countries in 4 continents**
- **Germany and India lead in awareness; India, Qatar and UAE have the highest perception of priority, Poland the lowest. China leads in considering Investments in the energy transition ad a competitive lever**
- **A new survey in Turkey, host country of COP31, shows a more informed public: 98% have heard of the energy transition (against 90% in 2023) and 49% are very familiar with it (47% in 2023)**
- **+7% against 2023 see the transition as a priority for the country but attention shifts from generic benefits to the concrete conditions needed to deliver the transition**

Antalya, 13 November 2026 – **Fondazione MAIRE – ETS** brought its research "*Climate Goals. Winning the challenge of climate goals through the creation of skills and competences worldwide*" (Addendum 3, 2026 edition), to **COP31**, in Antalya, as a guest of **OICE** at the **Italia Pavilion**. Presented by Ilaria Catastini, General Manager of the Foundation, the fourth edition of the study shows data coming from around 3000 interviews across 17[1] countries and 4 continents, and features a data refresh dedicated to Turkey, the host country of the Conference.

Promoted by **Fondazione MAIRE – ETS** and carried out with **Ipsos Doxa**, with the support of **MAIRE**, the research has been tracking public awareness of the energy transition worldwide since 2023, looking beyond low- or zero-emission energy production to include the transformation of industrial processes, products, business models, distribution systems, and the skills required to

[1] The research draws insights from 3,000 individuals and integrates the views of 26 experts in 17 countries across 4 continents: Qatar, Saudi Arabia and the UAE for the Middle East; India, China, Azerbaijan, Kazakhstan and Turkey for Asia; USA, Chile and Argentina for the Americas; Algeria in Africa; Germany, Italy, Poland, The Netherlands and UK for Europe.

enable this shift. In 2026 the Foundation decided to run a new wave in Turkey – included since the first edition of the study – to assess whether perceptions had changed significantly over three years.

The public is more informed and more focused on practicalities. In 2026, 98% of respondents say they have at least heard of the energy transition (against 90% in 2023), while high familiarity remains broadly stable at 49% (47% in 2023). The share of those who see the transition as a priority for the country rises from 37% to 44%, while its personal importance decreases from 70% to 62%: environmental, energy and employment benefits are still recognised, but less strongly than in 2023.

Attention is shifting from the "generic" benefits of the transition to the concrete conditions needed to deliver it. Among the opportunities, the development of new infrastructure (25% vs 21%) and the training of professionals (18% vs 11%) gain prominence; among the challenges, respondents place greater weight on defining effective energy and environmental policies (38% vs 33%) and on international collaboration (21% vs 16%).

Confidence in the availability of trained professionals is strengthening: 72% of respondents consider the supply of technical professionals in Turkey adequate (60% in 2023) and 87% feel prepared to face the transition (74%) even if 91% continue to consider dedicated education and training programmes important.

Governments are asked to support innovation and create the conditions for investment: in Turkey the top priority is funding new technologies to improve energy efficiency (38%), followed by promoting collaboration between government and private players (28%), investing in alternative fuels (27%) and financial incentives for clean technologies (27%).

Once again this year, MAIRE chose to take part in the UN Climate Change Conference by presenting the findings of its research, reaffirming the importance we place on multilateralism in addressing complex issues such as energy transition. Multilateralism, however, must go hand in hand with concrete action. The guiding theme of COP31 is implementing global climate action and turning decisions into tangible, measurable results. This is precisely the need that emerges from our research: concrete action and feasibility.

MAIRE is present in Turkey through Tecnimont's branch Office in Istanbul, part of the Group's Anatolia and Central Asia region, alongside Kazakhstan and Azerbaijan. It serves as a strategic bridge among Europe, the Caspian and Central Asia to support the industrialization of the energy transition model of the Group.

Fabrizio Di Amato, Chairman of MAIRE and Fondazione MAIRE – ETS, remarked: "Awareness of the energy transition is no longer the issue: the challenge is now execution. The data coming from this unique research by Fondazione MAIRE – ETS show people moving from generic benefits to the concrete conditions that make the transition possible – infrastructure, effective policies, international cooperation, investments in new technologies and, above all, skills. This is why MAIRE and Fondazione MAIRE keep investing in the growth of technical and transversal skills that turn climate goals into projects".

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Highlights from the Climate Goals's research

The study covers Qatar, Saudi Arabia and the UAE for the Middle East; India, China, Azerbaijan, Kazakhstan and Turkey for Asia; USA, Chile and Argentina for the Americas; Italy, UK, Germany, Poland and The Netherlands for Europe; and Algeria in Africa.

Awareness. *Germany and India lead in awareness on the energy transition, with 64 and 63% of the population feeling very familiar with the topic. It is closely followed by the Netherlands (59%). In contrast, Poland shows a superficial*

understanding: only 39% feel very prepared. Argentina (36%) and Kazakhstan (29%) rank among the last for in-depth familiarity with the topic.

Priorities. *The climate agenda is competing with other topics and issues, but the energy transition remains a priority for 70% of the respondents in India, followed by 67% of Qatar and 65% of UAE. The three European Countries included in 2026 edition of the survey have surprisingly set the energy transition among the lowest priorities: the Netherlands is the most committed, Germany shows a more balanced and cautious approach, the lowest rate is in Poland, with only 20% of the sample giving it top priority (lower than Argentina and Kazakhstan) and 66% recognizing priority on par with other themes.*

Opportunities. *Algerians are the most convinced about cleaner environment, health benefits and job opportunities. India and Saudi Arabia emphasize the potential to boost women's inclusion. For China, as well as for Germany, the Netherlands, and Poland, the creation of new jobs in sustainable sectors is an expected benefit, as also the reach of a cleaner environment and reduce global warming.*

Governments. *Governmental priority commitment is most positively rated in India (71%), Saudi Arabia (62%), compared to Kazakhstan (15%), Poland (21%) and Argentina (23%).*

Leadership. *Chinese participants feel their country is leading compared to the others and almost half of respondents place high importance on sustainable innovation of production processes, products and services, with 68% seeing technology as important for the energy transition. Technology emerges as the dominant priority also across Germany, the Netherlands and Poland.*

Challenges. *Algeria, Poland and China struggle to raise public awareness; Chile faces hurdles in private sector renewable adaptation. Ensuring the active involvement of all stakeholders is a challenge for China. Infrastructure development is a focus in the UAE, USA, Germany, the Netherlands, Poland and Kazakhstan. Training of professionals is a key goal in Azerbaijan. Qatar shows concern about job losses in traditional sectors. Turkey, Algeria, the USA, and the UK emphasize the importance of development of energy and environmental policies.*

Pros&Cons. *Kazakhstan shows the highest level of concern over whether the energy transition costs will exceed benefits. Conversely, half of respondents in Saudi Arabia believe that benefits of the energy transition will outweigh the costs initially, balancing out over time. In Europe, a "short-term pain" mindset prevails, with long-term optimism in Germany and the Netherlands contrasting with Poland, which remains a skeptical outlier expecting costs and benefits to stay balanced.*

Education. *China and Chile recognize the urgency for improved training programs on energy transition, whereas Poland and the Netherlands show less urgency, yet a high percentage still wants training within the next 2-3 years, (65% and 69% respectively). India (28%), SA (24%) and Germany (22%) report the highest level of confidence in terms of preparation. Overall, the global consensus underscores the need for both soft and hard skills to develop well-rounded professionals, which is essential for advancing the energy transition. Kazakhstan reports a severe shortage of skilled professionals for the energy transition, with mostly positive assessments from China and India.*

Skills. *Many countries recognize the importance of problem solving, critical thinking and creativity and innovation as essential soft skills in this sector. Technical skill in environmental impact assessment is highly required in Azerbaijan and Poland, while knowledge of renewable energy sources is required in Algeria, Germany and Poland, and expertise in alternative renewable and recycled feedstocks is highly required in Algeria, Qatar, China, Netherlands and the USA.*

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MAIRE S.p.A. is a leading engineering group providing technology solutions and project execution in the downstream segment of energy services, as well as in the chemicals and fertilizers industries. The Group operates through two business units: Integrated E&C Solutions and Sustainable Technology Solutions, the latter active in sustainable fertilizers, low carbon energy vectors, and innovative materials and circular solutions. With operations in around 50 countries, MAIRE employs over 11,500 people. MAIRE is listed on the Milan Stock Exchange (ticker "MAIRE"). For further information: www.groupmaire.com

Fondazione MAIRE – ETS is the corporate foundation of MAIRE Group. The Fondazione MAIRE – ETS has defined as its own mission to foster the training of tomorrow's *"humanist engineers"* who will be able to apply their broad vision and multidisciplinary knowledge to contribute to the energy transition; it carries out projects to combat educational poverty, to grant equitable access to educational opportunities, with a focus on contexts of social marginalization. Fondazione MAIRE – ETS also manages the historical archives of the MAIRE Group, a precious documentary heritage of Italian projects in engineering and architecture, seeing to their preservation and promoting greater awareness of them and their use by an ever-widening public. For further information: www.fondazionemaire.com

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