

04 _ 2024

SURVEY

European survey on energy transition

The unexpected French exception

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ÉDITIONS

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France and its clichés... The clichés the rest of the world has about France. But also the clichés conveyed by many observers, and even by the French themselves, about France. Compared with our neighbours, we are less clear-sighted about realities and more resistant to change. Or so the thinking goes.

We already knew that this cliché, while not completely false, was largely blurred when it came to climate change. The 2023 edition of the Fondation Jean-Jaurès' annual barometer on *French Fractures* documented the fact that the environment had become one of our fellow citizens' top priorities, and that the vast majority of them said they were prepared to "make fundamental changes to their lifestyle" to help combat climate change¹.

The survey carried out by CSA for Engie is invaluable in that it compares the French situation with that of nine other European countries² - nine countries that are highly diverse in terms of size, geography, energy model and even membership or non-membership of the European Union.

Two main lessons can be drawn from a detailed analysis of the results.

The good surprises

That's the first surprise of this survey: there is indeed a French exception, but it's not where many expected it to be. Compared to other Europeans, the French know more, want more and do more.

The French know

Questions about knowledge are often very instructive.

In this case, they show that *the concept of "energy transition" is both known, and better known, in France than elsewhere*. 96% of French people say they are familiar with it and, more significantly, 69% say they "understand what it is all about". With the exception of Germany, no other country has such a high level of awareness, and there are even spectacular differences on this question: +19 points compared to Italy, +25 points compared to Spain, +47 points compared to the UK.

Even better: when asked not in the abstract but in concrete terms about the content of this concept, *the French have the broadest vision of it*. 84% associate it with the deployment of renewable energies - slightly more than in other countries -, 76% with the end of fossil fuels - 15 points more than the average for other countries³ - and 66% also with a reduction in energy consumption - again, 17 points more than the average for other countries.

Furthermore, the data shows that *the objectives pursued by the energy transition are well prioritized, and rather better prioritized in France than elsewhere*.

Respondents were asked what they considered to be the first and second objectives of the energy transition. Some of the proposed objectives were more "macro" - the fight against climate change, respect for and protection of the environment, energy autonomy - while others were more "micro" - controlling energy bills, access to energy for all, the health of residents.

What characterizes the responses of the French is that they are the only ones to place the three "macro" proposals in the top three: the fight against climate change comes first with 56%⁴ - more or less the same as in Spain or Germany -, respect for the environment comes next with 49% and, more distinctively, energy autonomy follows with 32% - that's almost 10 points more than in the other major European countries.

1. Fractures françaises 2023, 11th edition Ipsos/Sopra Steria for *Le Monde*, Fondation Jean-Jaurès, Cevipof and Institut Montaigne.

2. Germany, France, United Kingdom, Italy, Spain, Poland, Romania, Netherlands, Belgium, Portugal.

3. +5 points compared with Germany, +15 points compared with the UK, +17 points compared with Spain, +32 points compared with Italy.

4. i.e. 56% who say that this is their "first" or "second" objective.

The French want

Faced with this energy transition, what mindset should we share? Should we be resistant? reluctant? cautious? supportive?

The French overwhelmingly share the idea that the movement is irreversible. Only 5% defend the “status quo” – the idea that what we are doing is good enough. Even fewer, 3%, advocate “going backwards”. On these two points, we find more or less the same figures in most other countries. But there are two notable exceptions: the Netherlands and, even more so, Germany¹.

Over and above what respondents think we “should” do, the answers to what they think we “can” do are instructive. Is it possible to stop the movement today? No, say 65% of the French, and no other European country has such figures. Yes, say almost 50% of Spaniards, Italians, and Germans.

However, the French are almost equally divided between those who are in favour (47% say we should “go further”) and those who are cautious (44% are ready to “continue our efforts, but cautiously”). The British are somewhat apart on this issue - paradoxically, they are both the most likely not to know what the energy transition is and the most likely to want to go further. However, compared with the other countries of the European Union, the French are at the high end of the scale, with the countries of the south being slightly bolder overall than the countries of the north.

The French (say they) do

The third pleasant surprise is that not only do the French have the best knowledge of the energy transition, not only are they among the most willing to pursue it, but they are also the most active in implementing it.

To the question “Have you taken any action to promote this energy transition?”, 75% of the French

responded positively, and here again, no other country is at such a high level - the average being 63%.

To be more precise, we should add that the French generally say that they are active, but when faced with a list of concrete actions, fewer of them than in other countries say what they are really doing ... with the exception of actions to limit energy consumption, which concern 68% of the French, but which are within the European norm.

France's energy transition is hit by a triple blow

The economic context

When asked about “the two most important problems facing the country at the moment”², 44% of French people last autumn put “rising prices, inflation and the cost of living” at the top of the list, and this concern outweighed all the others - the second concern, insecurity, came in at just 21%.

But it is striking to note that neither the level nor the dominance of the issue of purchasing power sets the French apart from other Europeans: in twenty-five of the twenty-seven countries of the European Union, this same concern comes top, and the average is exactly at the same level as in France.

Yet the survey conducted by CSA for Engie shows that it is in France that the tension between the energy transition and purchasing power is most acute - a sort of echo of the “end of the world versus end of the month” dilemma highlighted by the Yellow vests movement back in 2018. For example, 34% of the French believe that what is holding back the energy transition is the fact that it “represents a high financial investment” - along with Germany, this is the highest figure of the nine countries tested.

1. Advocates of the “status quo” are 12% in the Netherlands and 6% in Germany, while advocates of going backwards are 7% in the Netherlands and 15% in Germany.

2. Standard Eurobarometer, issue 100, October-November 2023.

Again, and above all, the question of whether the energy transition represents an “opportunity” or a “threat” to purchasing power: while, on average, more Europeans surveyed see it as an opportunity (36%) than a threat (30%), the French stand out for the intensity of their concern, with the opportunity (24%) clearly outweighed by the threat (44%).

Through widespread mistrust

The survey also enables us to measure the extent to which and the way in which mistrust impacts on the issue of energy transition.

This is true of *the lack of confidence in the future* that is more characteristic of our country. For example, when asked whether the goal of carbon neutrality by 2050 is “realistic”, 55% of French people say it is not, and 33% say it is - making us, along with the Belgians and Germans, the most pessimistic of the countries tested.

The same is true of *distrust in institutions*, and the answer to the question of who are “the most legitimate players” to drive forward the energy transition is enlightening. We have less confidence in political institutions: 38% of French people cite the government, 25% the European Union and 8% the United Nations - on these three points, the French percentage is quite simply the lowest of the nine countries tested. Conversely, we have more confidence in local institutions: 35% of the French cite citizens, 17% local authorities and 8% associations - here again, no other country achieves such percentages.

Through political debate

Not only do many Europeans (74%) say that the energy transition will be an important factor in their vote for the European Parliament, but we can also see that national political debates have a significant impact on the way in which the energy transition is perceived.

For the past two years, the energy issue has been at the heart of the national political debate - with, in particular, the relaunch of the nuclear programme since the French President’s speech in Belfort, and criticism, mainly from the *Rassemblement national* and the *Republicains*, of the onshore wind farm programme.

With what effect?

More than elsewhere, nuclear power is supported. Along with the Poles and the Dutch, the French are the most likely to associate accelerating the use of nuclear energy with the energy transition - 36% of the French compared with 14% of Italians, 10% of Spaniards and 5% of Germans. Similarly, the French are the most likely to cite nuclear power at the top of the list of ‘clean’ energies - 19%, which is much higher than elsewhere, although obviously behind solar energy (57%) and geothermal energy (41%).

Above all, more than anywhere else, wind power is being challenged - not just in terms of the plans to install it, but also in terms of its very effectiveness: only 31% of French people cite wind power as a clean energy source. This is a spectacularly singular situation in France - even though we are not, by far, the country with the most developed wind farms: 52% of Germans and Italians, 62% of Spaniards and 75% of Britons cite wind power as a clean energy source.

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All in all, the survey carried out by CSA for Engie is a valuable guide to action. It shows that, for those who want to drive forward the energy transition in France, the stakes have shifted. Yesterday, it was all about convictions and knowledge. Today, we must show that the transition can take place, that it is a possible future, that its effects can be positive. We must show, in one word, that it is a desirable future. In other words, we need to design the world of the future and mark out the path that leads to it.

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ENGIE supports the Fondation Jean-Jaurès through sponsorship.

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