MAKING POLLUTERS PAY: WHAT EUROPEAN CITIZENS EXPECT FROM THE EU EMISSIONS TRADING SYSTEM

Polling across six major European economies reveals broad support for carbon pricing, including across political divides, and strong backing for investing saved emission costs in Europe's green industrial transition.

July 2026

This brief presents findings from the YouGov European Political Monthly (EPM) survey conducted on behalf of Beyond Fossil Fuels, 6–18 May 2026 across France, Germany, Spain, Italy, Poland and the Netherlands. The survey gathered responses from 6156 nationally representative adults aged 18 and over, examining attitudes towards carbon pricing for energy-intensive industries, conditions for emissions exemptions, and the role governments should play in driving industrial decarbonisation.

All figures, unless otherwise stated, are from YouGov Plc. Fieldwork was conducted online between 6 and 18 May 2026 among 6156 adults aged 18 and over across France (1009), Germany (1095), Spain (1035) , Italy (1003), Netherlands (1007) and Poland (1007). Data were weighted to be nationally representative of the adult population in each of the six respondent countries.

This brief is endorsed by a broad community of experts and civil society organisations who are advocating for a green industrial transition in Europe. Beyond Fossil Fuels led the coordination of the project behind this publication.

In alphabetical order:

Understanding the EU ETS: why this poll matters

The EU Emissions Trading System (EU ETS) is the European Union's main policy for reducing greenhouse gas emissions from power generation, industry, aviation and other energy-intensive sectors (ETS1). It is based on a simple principle: companies should pay for the carbon they emit, creating an incentive to reduce pollution and invest in cleaner production.

Since its introduction in 2005, the EU ETS has evolved significantly. Successive reforms have strengthened the system and contributed to substantial emissions reductions in the sectors it covers, while generating billions of euros in revenues.

As part of this mechanism, many energy-intensive industries have historically received a share of their emission allowances for free. However, these free allowances are due to be phased out gradually between 2026 and 2034 for the sectors covered by the mechanism.

The next scheduled review of the EU ETS, expected in 2026, comes at a pivotal moment. Rising geopolitical tensions, energy price volatility and increasing pressure to strengthen Europe's industrial competitiveness have prompted calls from some governments and industry groups to weaken parts of the system by extending free allowances or introducing additional flexibilities. Others argue that maintaining a robust carbon price and accelerating industrial decarbonisation is essential to secure Europe's long-term competitiveness, resilience and energy independence.

Against this backdrop, and as the European Commission prepares to reveal its proposal for the EU ETS on 15 July, understanding citizens' expectations is particularly important.

This polling from YouGov across six European countries – France, Germany, Italy, the Netherlands, Poland and Spain, explores public attitudes towards the core principles that underpin the EU ETS: whether polluters should pay for their emissions, how carbon pricing revenues should be used, and what conditions should apply if free allowances continue. The findings provide timely evidence of what European citizens expect from one of the EU's most important industrial and climate policies as its future is debated.

Most European citizens (59%) want energy-intensive industries to pay for their CO_2 emissions – and that support goes well beyond the "green electorate"[1]

As the EU debates the future of the EU ETS, a cornerstone of European climate policy, new polling from YouGov across six European countries—France, Germany, Italy, the Netherlands, Poland and Spain—shows that citizens continue to support one of the core principles at the heart of the EU ETS: energy-intensive industries should pay for the pollution they create.

The polling sends a clear signal to policymakers. Across the countries surveyed, a majority of European citizens (59%) support requiring energy-intensive industries such as steel, cement and chemicals to pay for their CO_2 emissions, demonstrating that the polluter pays principle continues to enjoy broad public legitimacy. Support rises to more than two-thirds in Spain, France, Italy and the Netherlands, while opposition stands at just 23%.

To what extent, if at all, would you support or oppose energy- intensive industries (e.g. steel, cement, chemicals) being required to pay for their CO_2 emissions?

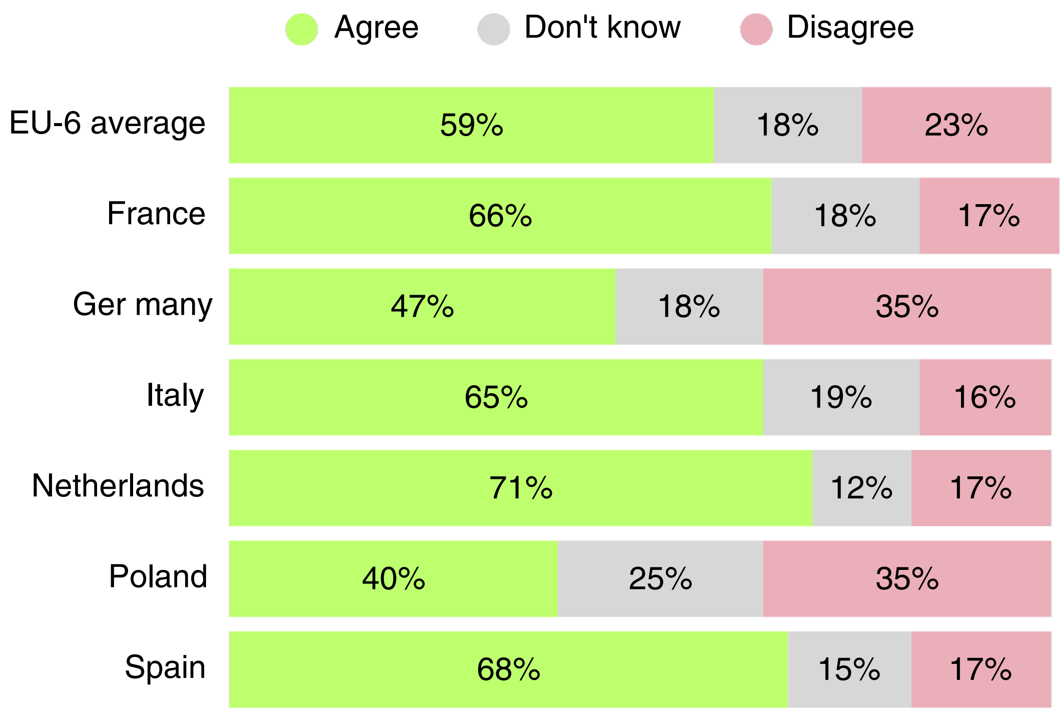

Figure 1: Support for requiring energy-intensive industries to pay for their CO_2 emissions

[1] Any figures referring to 'Europe' figures are an average of the results across the six countries included in the survey conducted by YouGov (France, Germany, Italy, Netherlands, Poland and Spain).

Across the six countries surveyed, **support for requiring energy-intensive industries to pay for their emissions extends across a wide political spectrum**, reaching well beyond citizens traditionally associated with environmental policies. In several countries, **majorities of citizens from parties with very different political traditions back requiring energy-intensive industries to pay for the pollution they create.**

These findings suggest that **the "polluter pays" principle underpinning the EU ETS enjoys a broader political base than public debate often assumes.** Rather than being confined to one part of the electorate, support is found across diverse political constituencies, indicating that expectations of having energy-intensive industries to pay for the emissions cuts across ideological lines.

France
Support for making energy-intensive industries pay for its emissions spans France's political spectrum, backed by 73% of Renaissance voters and 55% of Rassemblement National voters. Opposition stands at just 12% and 27%, respectively.

Germany
In Germany, among CDU/CSU voters, more people support requiring energy-intensive industries to pay for its emissions than oppose it (48% vs. 39%). Among SPD voters, support (49%) is well ahead of opposition (30%), while the vast majority of Green voters back the principle (69%).

Italy
In Italy, 71% of voters of Fratelli d'Italia—the party led by Prime Minister Giorgia Meloni—support requiring energy-intensive industries to pay for their emissions. Only 17% oppose. Majorities are also found among voters of opposition party PD, demonstrating that support for the polluter pays principle extends well beyond traditional political divides.

The Netherlands
The Netherlands records the highest national support (71%) for requiring heavy industry to pay for its emissions. Support is strong among parties of the governing coalition: D66 (92%), VVD (81%). Among PVV voters almost twice as many voters are in support (56% vs. 30%), illustrating broad support across the Dutch political spectrum.

Spain
Spain records one of the highest levels of support in the survey (68%), with majorities among PSOE (78%) and Sumar (88%). Amongst PP voters, those in support are three times as many (61% vs. 19%).

Poland
In Poland, while overall support is lower (40%) than the average of countries included in the poll, a clear majority of Koalicja Obywatelska (KO) voters—the party led by Prime Minister Donald Tusk—support requiring heavy industry to pay for its CO_2 emissions (57%), with supporters outnumbering opponents by more than two to one (57% vs. 23%). This suggests that national averages mask considerably stronger support among voters backing the current government.

Majorities of voters from diverse political traditions support requiring energy-intensive industries to pay for its CO_2 emissions

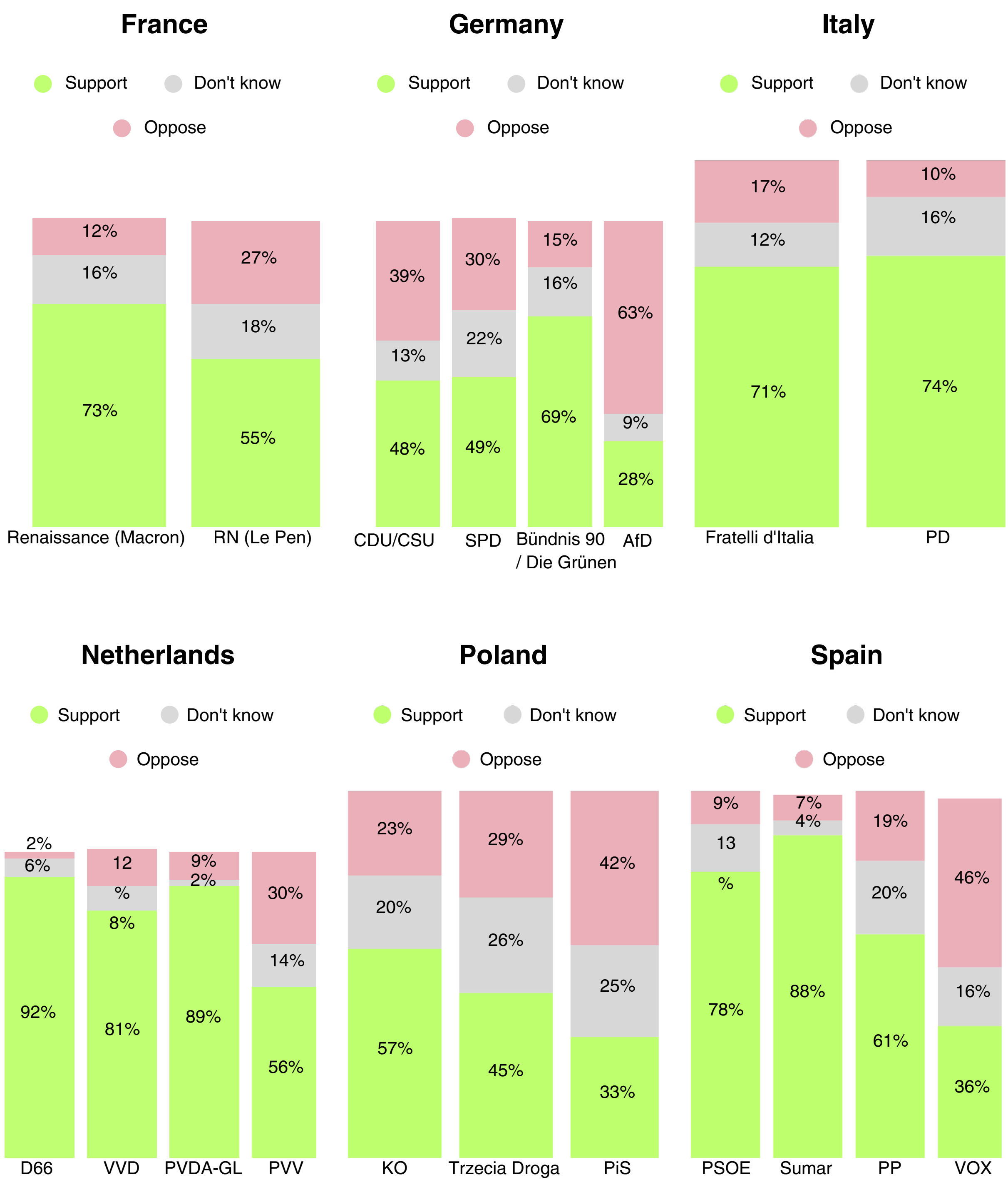

Figure 2: Support for requiring heavy industry to pay for its CO_2 emissions, by political party.

Vast majority of European citizens (72%) expect highest emitters and climate laggards to do more

The polling shows that citizens expect a distinction between companies that are investing in decarbonisation and those that are not.

Across the six countries surveyed, **a majority of European citizens believe that companies emitting the most—or companies failing to reduce their emissions—should pay more than others.** In France, Germany, Italy and the Netherlands, the most popular option is to require companies that are not making sufficient efforts to reduce their emissions to pay more, suggesting that citizens expect to incentivise climate action rather than simply penalise emissions. In Spain and Poland respondents are more likely to favour higher payments for the biggest emitters by volume. By contrast, only 9% of European citizens believe all companies should pay the same amount, while just 8% think companies should not be required to pay at all. Even in Poland, fewer than one in five respondents believe the latter.

These findings show that European citizens support encouraging industrial transformation by maintaining incentives for companies to reduce emissions and rewarding companies investing in decarbonisation.

Under EU regulations, companies are required to pay for their CO_2 emissions. Which of the following comes closest to your view?

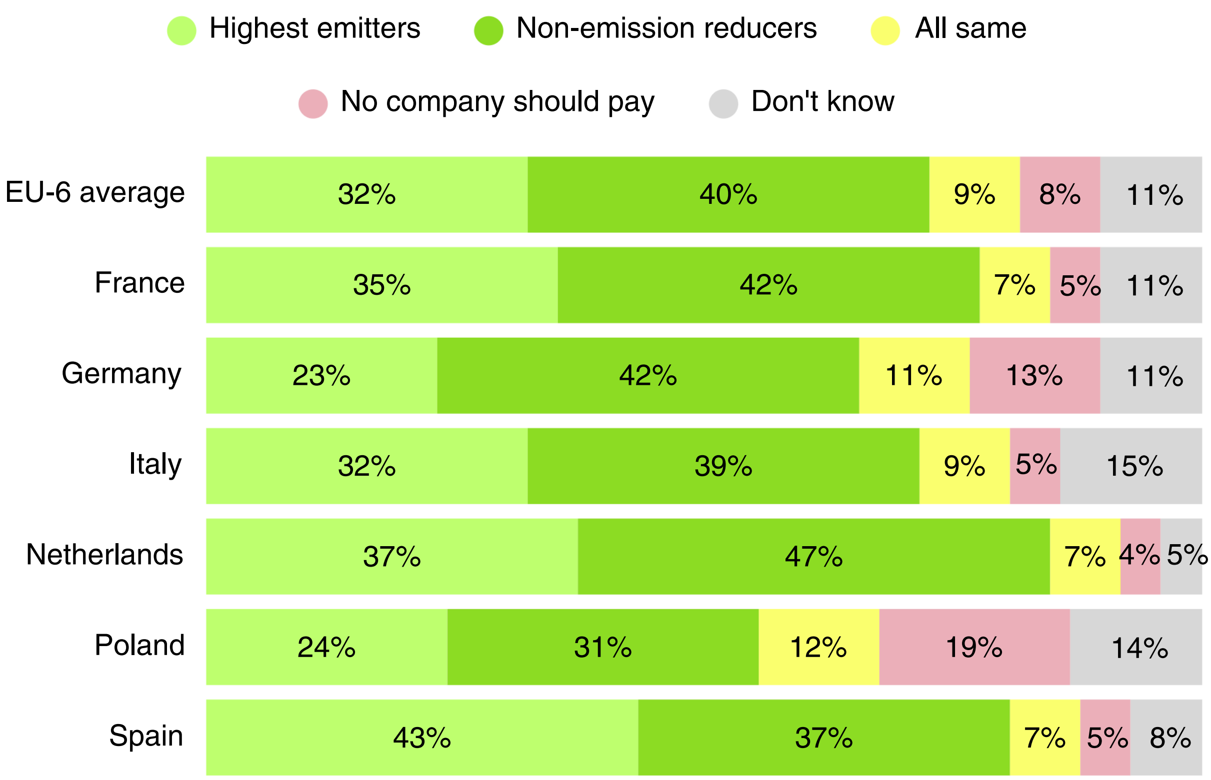

Figure 3: Support for which companies should be required to pay for their CO_2 emissions.

Citizens favour investing carbon revenues in industrial decarbonisation and expect free allowances to come with conditions attached

As policymakers prepare to revise the EU ETS, one of its most contentious features is back in the spotlight: free emission allowances for energy-intensive industries. Introduced as a temporary measure to mitigate the risk of carbon leakage, these allowances given for free are due to be phased out gradually between 2026 and 2034 for sectors covered by the Carbon Border Adjustment Mechanism (CBAM). Yet growing calls for short-term relief and regulatory simplification risk extending free allocation, delaying investment in industrial decarbonisation and slowing the transformation Europe needs to build a more resilient and future-proof economy.

The polling tells a different story. First, **citizens favour governments phasing out free allocations and reinvesting those revenues in industrial decarbonisation** rather than having energy intensive-industries not pay for their emissions. Second, **where free allowances continue to exist, citizens expect them to come with clear conditions**: companies must reinvest the saved costs of receiving free allowances in reducing future emissions and supporting a just transition for their workers.

Across the six countries surveyed, **one out of two respondents** (50%) **favour governments collecting carbon revenues and investing them directly in industrial decarbonisation**, compared with just 18% who believe energy-intensive industries should not be paying for their emissions.

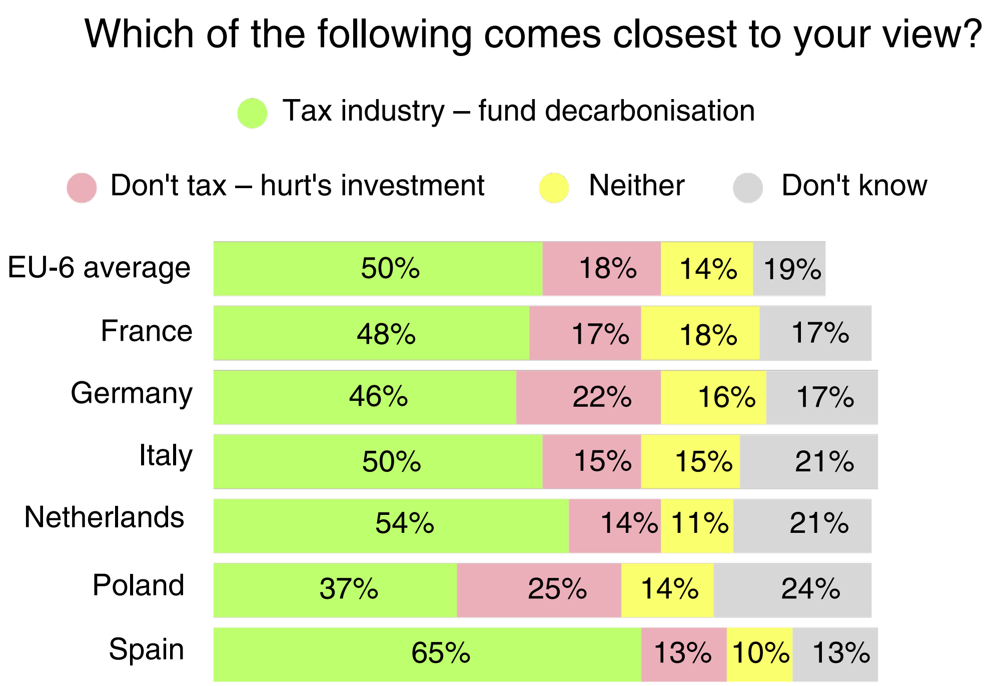

Figure 4: Governance model: Tax and invest vs. non taxation. This question presents respondents with a direct choice between two governance philosophies. Option A) (non taxation) Energy-intensive industries should not be taxed on their carbon emissions, as this prevents them from affording the investments needed to decarbonise. Option B) (tax and invest) It is better that the government taxes industry on their carbon emissions and directly uses the money raised to fund decarbonisation.

The findings also show that, where free allowances continue to exist, citizens expect them to come with conditions attached. Majorities support requiring companies benefiting from free allocation to **reinvest in reducing future emissions (62%)**, **support workers in adapting their skills to less carbon-intensive production while ensuring high-quality working conditions (63%)** and **give local communities a say in decisions about industrial transformation and its impacts (50%)**.

The message is clear: if industry continues to benefit from free allowances, citizens expect that support to accelerate decarbonisation, invest in workers and involve communities in shaping industrial transformation. Free allowances should come with conditionalities attached—not simply reduce the cost of pollution.

What are free allowances?

Under the EU ETS, companies normally have to buy allowances to cover their CO_2 emissions. However, many energy-intensive industries have historically received a share of these allowances for free to reduce the risk of production relocating outside of the EU (carbon leakage).

These free allowances are due to be phased out gradually between 2026 and 2034. Whether this phase-out remains on track is one of the key issues in the upcoming review of the EU ETS.

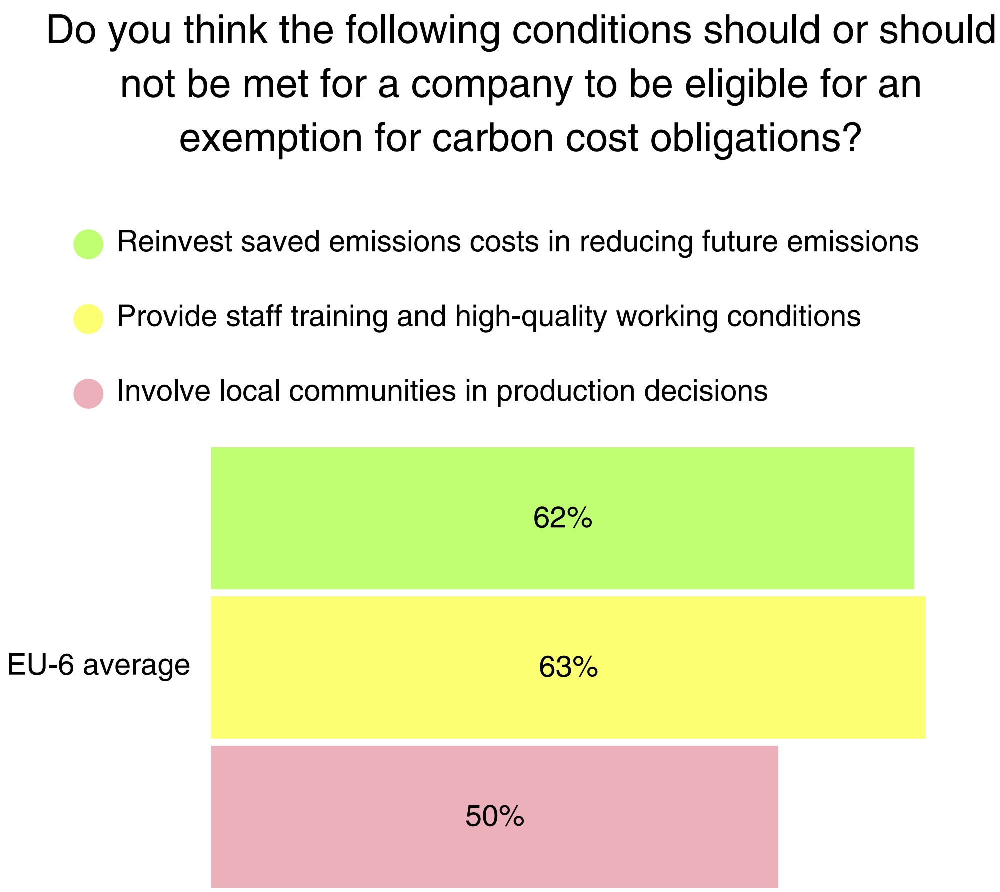

Figure 5: Support for conditions for exemptions to carbon cost obligations

Importantly, **support for free allowances coming with conditions attached and for governments to reinvest revenues in industrial decarbonisation extends across the political spectrum.**

At a time when the debate in Brussels is increasingly focused on extending free allocation and providing short-term relief for industry, the polling suggests that citizens expect strong carbon pricing frameworks that drive long-term investment and transformation instead**.**

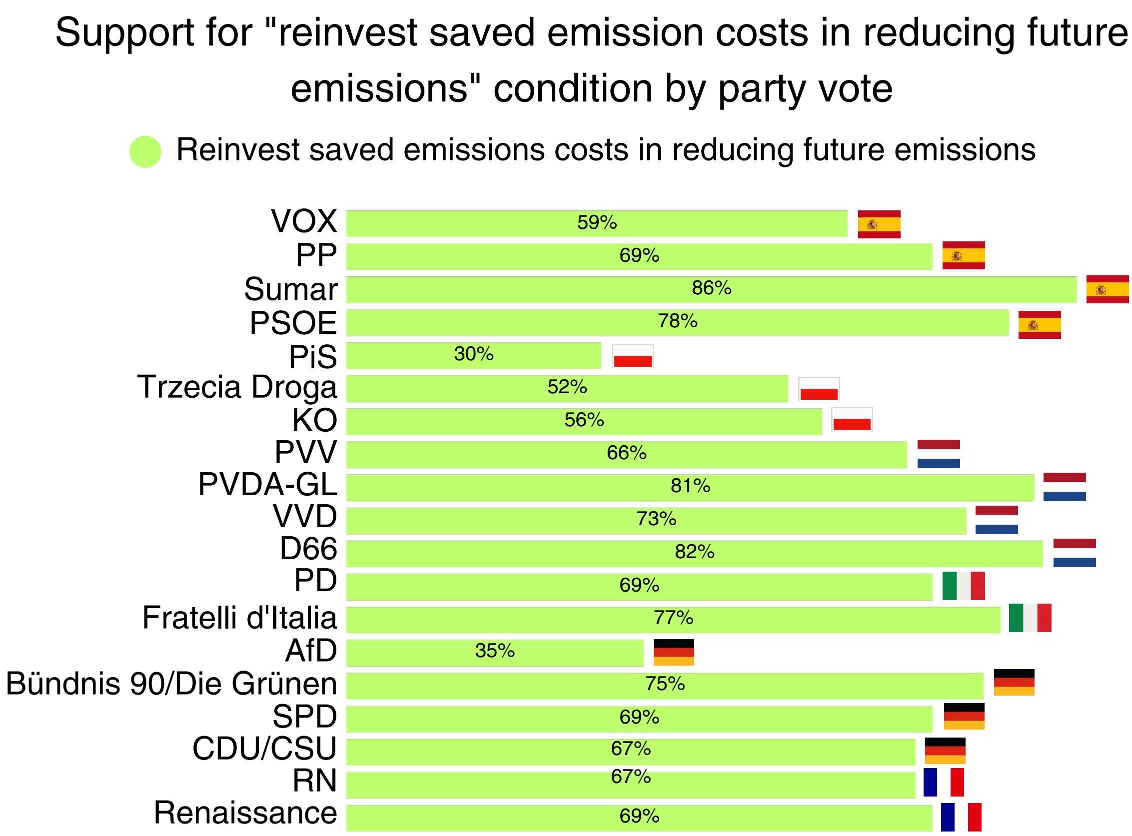

Figure 5: Support for conditions for exemptions to carbon cost obligations

Three clear signals policymakers cannot ignore: what the polling means for the upcoming EU ETS review

As policymakers prepare to revise the EU ETS, the results of the polling challenge recent calls to weaken the mechanism.

European citizens expect a carbon market that maintains incentives to decarbonise, governments to invest carbon revenues in decarbonisation and where free allowances continue, to come attached to clear conditions: companies must reinvest the saved costs of receiving free allowances in reducing future emissions and supporting a just transition for their workers, whilst keeping local communities involved in their production decisions.

This support extends well beyond the traditional climate electorate and cuts across political divides, including among voters of parties often portrayed as sceptical of EU climate policy.

Three clear asks stand out from civil society organisations endorsing this publication.

1. **Preserve a robust carbon price for industry**

   Public backing for carbonpricingremains strong as a majority of citizens support requiring energy-intensive industries to pay for their CO_2 emissions. Therefore the EU ETS should continue to provide a meaningful price signal andincentives for industrialdecarbonisation.

2. **Keep the phase-out of free allowances on track and invest carbon revenues in a clean and just industrial transition**

   Ratherthan extending free allowances, Europeancitizens favour governments collecting carbon revenues to support industrial decarbonisation. This would help accelerate investment in cleaner production,innovation and the transformation ofEurope's industrial base.

3. **While free allowances remain, they should come with conditionalities**

   Where free allowances continue, European citizens expect them to be attached to clear conditions. Companies benefiting from free allocation should be reinvesting in reducing future emissions. They should be supporting a just transition for their workers, whilst they adapt their skills to less carbon-intensive production, and they should involve local communities in their production decisions.

Methodology

The survey was conducted by YouGov using online panels and nationally representative samples in six countries: France (1009), Germany (1095), Italy (1003), the Netherlands (1007), Poland (1007) and Spain (1035). Total sample size was 6156 adults over 18 years old. Fieldwork: 6-18 May 2026

YouGov uses quotas, drawn from reputable population statistics sources (e.g. census, population surveys, election results), to ensure that the sample reflects the demographic and political profile of the population.