



Wittenberg Center for Global Ethics

Sustainable Industry: Guidelines for a Just Transformation in Europe

**Results from the 2026 Survey:
Germany, France and Poland**

A study of the WCGE in cooperation with
and funded by the E.ON Foundation

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Introduction and study design

The challenge: navigating transformation amid crises

As in previous years, the summer of 2026 brought the consequences of extreme heat and drought home to people across Europe. The effects of climate change are now evident in all areas of life. Numerous studies have highlighted the societal risks posed by these developments.

One of the most important levers for limiting further risks is the transition to a climate-neutral industry. At the same time, however, the political and social context has become more challenging. The war in Ukraine and the situation in the Middle East continue to hamper international cooperation. Trade relations between the EU and its two main trading partners, the US and China, remain strained. Alongside this, the growing support for right-wing populist parties in several European countries is a sign of increasing social polarisation.

This complex situation is exacerbating the tension between maintaining economic competitiveness and employment, on the one hand, and pursuing an ambitious, climate-neutral transformation of industry, on the other. Economic growth remains weak, corporate insolvencies are increasing, and employment rates in the manufacturing sector are falling. In response, the European Commission and national governments are introducing relief packages and revising their priorities.

This challenging scenario raises the question of how we can continue to garner support for a climate-neutral industrial transformation. In this context, it is important to understand how people perceive the consequences of these crises, the opportunities and risks they foresee, and the conditions under which they would still be willing to contribute to change. In a liberal, democratic society, strategies for industrial transformation can only be implemented with people's support, not against their will. Therefore, it is crucial to understand the extent to which they are willing and able to contribute to the transformation, as well as how they perceive the distribution of its burdens and benefits.

The employees' perspective is decisive in this context: (1) they are the ones who are most directly affected by industrial transformation in terms of their skills, job prospects, and income; (2) they play a key role in shaping change within companies and workplaces; (3) they act as advocates for or against change based on their workplace experiences; and (4) as citizens, they can grant or withdraw the mandate for politicians to set the necessary course.

The aim of the study: guidelines for a just transformation

Therefore, the Wittenberg Center for Global Ethics (WCGE) conducted an empirical investigation into the following questions: How do employees view the

climate-neutral transformation of industry? How can rapid industrial transformation be reconciled with employment interests in line with the widely invoked ‘just transition’? Answers to these questions require reliable data on employees’ preferences, expectations, and willingness to contribute.

Funded by the E.ON Foundation, our multi-year series of surveys in Germany (since 2022) and in France and Poland (since 2025) provides an empirical basis for public, political, and economic debate. More importantly, we identify the factors influencing support for the industrial transformation. In doing so, we provide those shaping and promoting change with robust guidance on how to act and communicate effectively.

Study approach: a representative survey with an experimental design

The study is based on a series of surveys conducted over several years. An overview of the survey periods, sample sizes, and dimensions of analysis can be found in Figure 1.

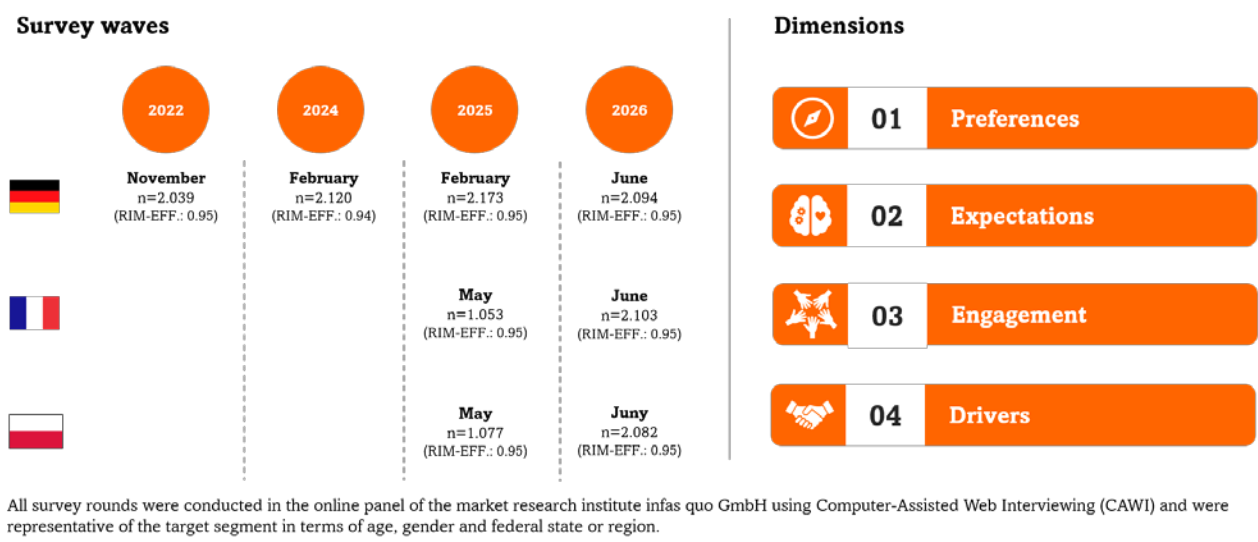


Figure 1: Design – Online surveys 2022, 2024, 2025 and 2026

We conducted a representative survey of over 2,000 employees in Germany on the climate-neutral transformation of industry in [2022](#), [2024](#), and [2025](#). In the summer of [2025](#), we replicated the survey in France and Poland. The 2026 survey was conducted again in Germany, France, and Poland, using the same core indicators as before, but with the addition of new indicators and an expanded survey incorporating an experimental design. (Further information on the methodological approach can be found in Appendix B.)

Executive summary

How do employees in Germany, France, and Poland view the climate-neutral transformation of industry? To what extent have their preferences, expectations, and willingness to contribute changed in the face of current political, economic, and social challenges? And what factors determine support for the transformation? The Wittenberg Center for Global Ethics (WCGE), in cooperation with the E.ON Foundation, has continued its representative surveys from 2022, 2024, and 2025, collecting new data in the three countries in June 2026.

Our analysis shows that most employees still support the climate-neutral transformation of industry. Key factors influencing their support are a positive employment outlook and a fair burden distribution. At the same time, there are signs of increasing uncertainty about the effects of the transformation, as well as growing scepticism regarding others' willingness to contribute. These trends underscore the need for clear guidance and targeted communication to maintain support among employees.

Key findings

Trends

- (1) **Support for the pace of the climate-neutral industrial transformation remains stable.** Four out of five employees oppose slowing down this transformation. In Germany and France, there has been a slight increase in the desire for a faster pace compared with last year. In Poland, however, this desire is significantly less pronounced.
- (2) **However, uncertainty about the impact of the transformation is increasing.** In all three countries, the proportion of people expecting positive effects on personal and general employment from the transformation to a climate-neutral industry is falling. Conversely, the proportion of undecided individuals is increasing, while the number of sceptics remains unchanged.
- (3) **A majority of employees believe that the burden of transformation is unfairly distributed.** In all three countries, a large share of employees thinks that people on low and middle incomes bear the main burden. This perception is prevalent across all social groups.
- (4) **Most employees are still willing to make a personal contribution – but scepticism towards others is growing.** In Germany and France, the willingness to contribute remains relatively stable compared with last year. In Poland, however, it has declined. At the same time, expectations of what others are willing to contribute have fallen significantly across all countries.

- (5) **Most employees are not willing to accept higher costs for the climate-neutral industrial transformation.** In Germany and France, the number of respondents who are not willing to pay extra far exceeds the number who are. In Poland, however, the two groups are equal in size.

Drivers

As in previous years, employees' willingness to contribute cannot be explained by social, regional, or occupational characteristics. Instead, the decisive factors cut across social groups, independent of status, location, or occupation:

- (1) **Overall, the personal employment outlook remains a decisive factor.** Those who expect the climate-neutral transformation to have a positive impact on their own employment are also more willing to contribute – and favour a faster pace of change. These effects are consistent across countries.
- (2) **Perceptions of fairness influence people's expectations regarding employment.** The fairer people perceive the distribution of burdens to be, the more positive their employment outlook and the greater their willingness to contribute.
- (3) **Those who prioritise climate protection are more willing to contribute to the transformation.** Employees who regard climate as one of the most urgent social issues are more willing to contribute, regardless of their own employment outlook – and even when they have negative expectations regarding the transformation.
- (4) **Those who vote for parties at the right end of the political spectrum are less willing to contribute.** Employees who express an intention to vote for such parties are less willing to contribute, regardless of their own employment outlook – and even when they have positive expectations regarding the transformation.
- (5) **Positive employment prospects for the country are an effective way of increasing willingness to pay.** A comparison with the messages commonly used to justify industrial restructuring shows that employees are more willing to make higher financial contributions towards a climate-neutral industry when they are presented with information about the positive net employment effects this would have in the country.

Guidelines for a just transformation

- (1) **Despite the ongoing crises, there has been no backlash; however, action is still needed.** Support among employees for the pace of the climate-neutral industrial transformation has remained stable over time, as has their personal willingness to contribute. The need for change is still recognised and supported. However, uncertainty about the effects of this transformation is growing. At the same time, scepticism about others' willingness to contribute is increasing. To maintain support for the climate-neutral industrial transformation, a concrete and consistent vision for the future of the

industrial sector must be set out. Conversely, inconsistent or contradictory signals would further fuel uncertainty and scepticism.

- (2) **A vision for the future of a climate-neutral industry must consider employment and fairness.** What job and career prospects would be associated with the climate-neutral transformation of industry? How can the burden of this transformation be distributed fairly? In short, what would persuade employees to accept the effects of the transformation? The answers to these questions, or the guidance provided, will directly determine whether employees have a positive outlook with regard to the effects of the transformation, and will indirectly determine their willingness to contribute. Thus, acceptance among employees can only be maintained through narratives that combine competitiveness and climate neutrality with employment and fairness, rather than pitting them against each other. This highlights the importance of the political and business sectors working together to develop, support, and defend a shared vision for the future of the industry in each country.
- (3) **Some people are already convinced, while others are almost impossible to win over. The focus should therefore be on the undecided.** A large group of employees can be divided into two distinct subgroups. The first consists of those who are convinced of the need for transformation ('climate-neutral industry under all circumstances'): they have a strong preference for climate protection and are willing to contribute even without positive employment prospects. The second subgroup consists of those who oppose the transformation ('climate-neutral industry under no circumstances') and have a preference for parties at the right end of the political spectrum. The former group is already engaged and willing to contribute, whereas the latter cannot be swayed even by positive employment prospects and appears resistant to communication. The success of industrial transformation will depend crucially on those who are undecided. While narratives about the future should continue to address all employees, they should particularly focus on this group.

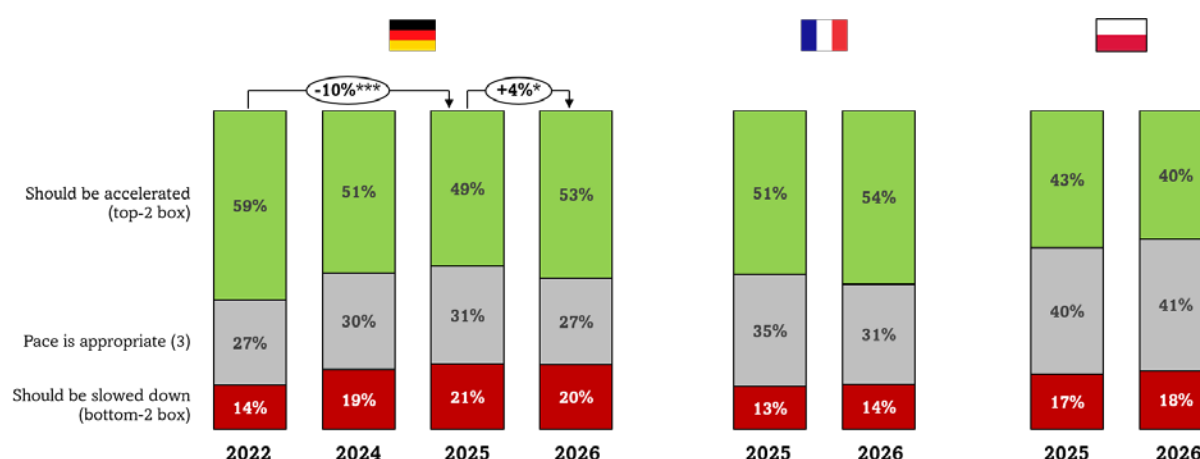
I. Trends: How are employees' views on the industrial transformation evolving?

1. Preferences: Transformation pace and expressed priorities

A clear majority opposes slowing down the industrial transformation

Four out of five employees in all three countries oppose slowing down the transformation to a climate-neutral industry. Support for the current pace of this transformation has therefore remained stable compared with last year (Fig. 2).

There is a growing desire for the process to speed up in Germany and France: 53% of employees in Germany (+4 pp.¹ compared with the previous year) and 54% in France (+3 pp.) want the transformation to be accelerated. In Poland, the desire for a faster pace is significantly lower (40%) and has fallen slightly compared with the previous year (–3 pp.). In Germany and Poland, around 20% of employees want the transformation to slow down, whereas in France, this figure is just 14%.



Survey question: 'How would you assess the pace at which this structural change is currently being driven forward?' | Source: WZGE online survey 2022, 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * p < .05; ** p < .01; *** p < .001. | Samples vary by survey year and country (see Appendix).

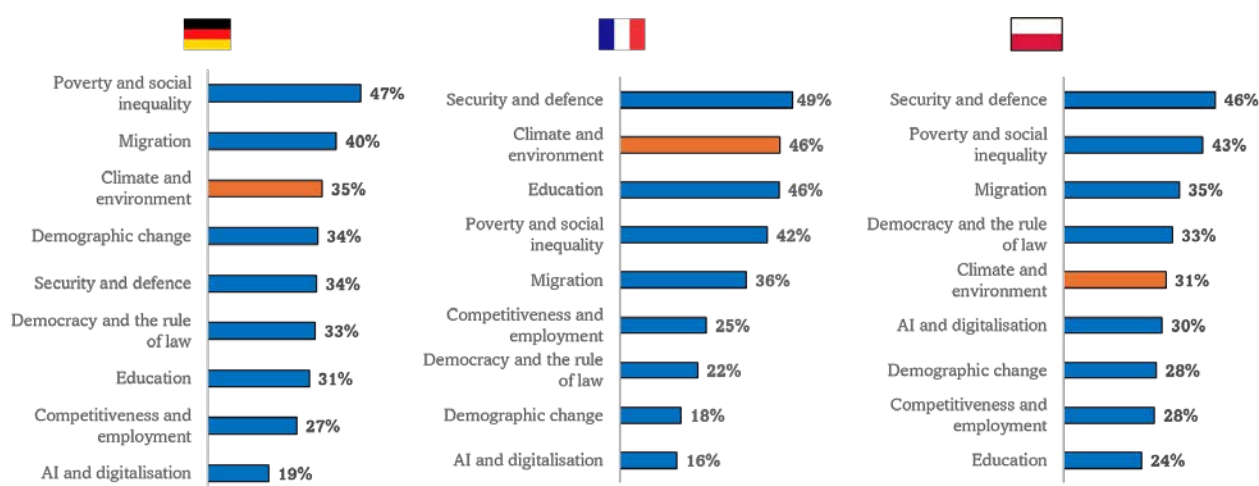
Figure 2: Stance on transformation pace by country and year

¹ Percentage points.

Climate remains one of the top three most urgent social issues in Germany and France

The issue of ‘climate and the environment’ remains one of the three most pressing social issues in Germany and France. This view is most prevalent in France, where 46% of employees rank it among the top three issues, compared with 35% in Germany. In Poland, however, it does not make the top three, with only 31% of employees ranking it as one of the three most pressing social issues (Fig. 3).

The importance attached to ‘climate and the environment’ compared with other social issues varies from country to country. In Germany, ‘poverty and social inequality’ and ‘migration’ are regarded as more pressing. In France, ‘security and defence’ ranks first, followed by ‘climate and the environment’ and ‘education’ (both 46%). In Poland, ‘climate and the environment’ ranks only fifth – behind ‘security and defence’ (46%), ‘poverty and social inequality’ (43%), ‘migration’ (35%), and ‘democracy and the rule of law’ (33%).

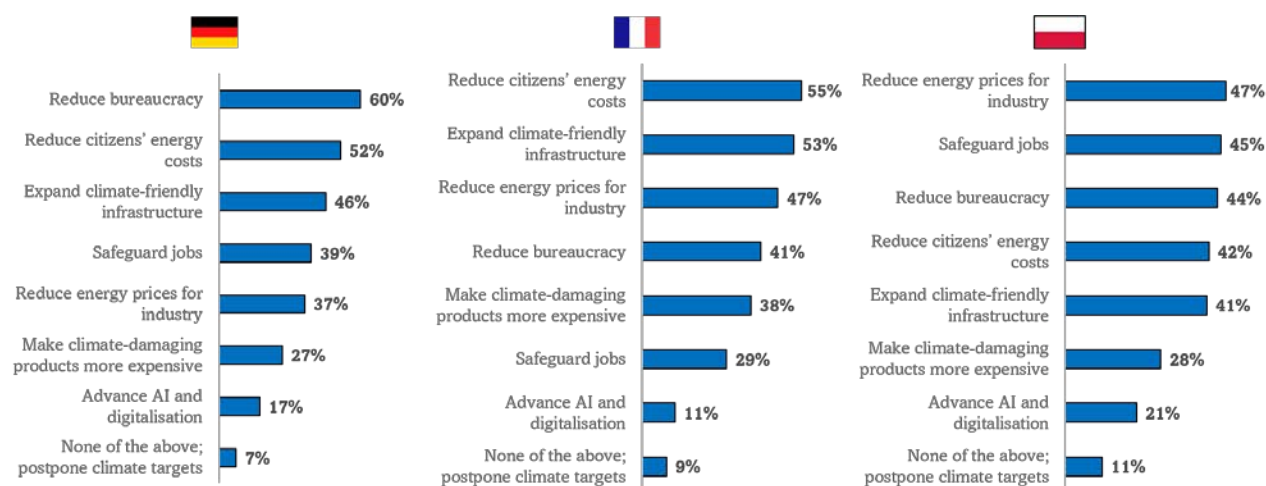


Survey question: 'In your view, what are the most pressing social issues that need to be addressed at present?' (top 3 responses). | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding. | Samples vary by country (see Appendix).

Figure 3: Ranking of the most pressing social issues by country (2026)

Governments should provide more relief while maintaining their climate targets

Which three priorities should governments set to ensure industry becomes climate neutral? The order of priority varies from country to country. In Germany, reducing bureaucracy is the top priority, with 60% of employees ranking it within the top three government priorities. In France, reducing the energy cost burden on citizens is the top priority (55%), while in Poland, it is reducing energy prices for industry (47%). Costly measures, such as ‘making climate-damaging products more expensive’, are rarely considered a priority in any of the three countries. Only a minority reject all the listed priorities and would rather postpone climate targets (Fig. 4).



Survey question: 'What priorities should the government set so that industry becomes climate-neutral as quickly as possible?' (top 3 responses; the list of priorities was updated in 2026). | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding. | Samples vary by country (see Appendix).

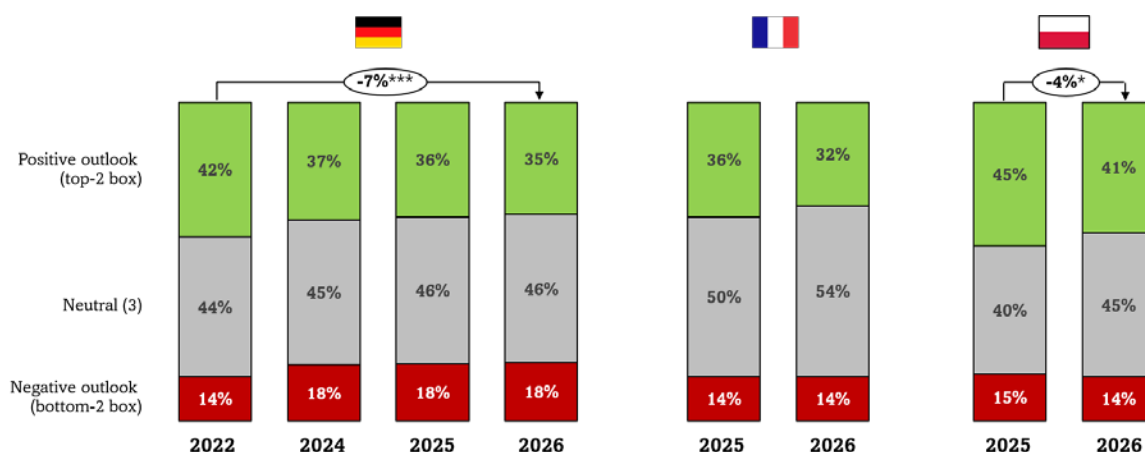
Figure 4: Preferences regarding government priorities for a climate-neutral industry by country (2026)

Alongside these country-specific preferences, there are also shared priorities. For instance, 52% of respondents in Germany prioritise reducing the burden of energy costs on citizens. Reducing bureaucracy is a priority for 44% of respondents in Poland and 41% in France. Reducing energy prices for industry is one of the most frequently cited priorities in France and Poland, with 47% of respondents in both countries considering it a top priority. In Germany, however, this is considered a significantly lower priority, with only 37% of respondents ranking it as such. The expansion of climate-friendly infrastructure enjoys broad support in Germany (46%) and France (53%).

2. Expectations: Effects on employment, the economy, and society

Personal employment prospects are viewed more positively than the general outlook – overall, uncertainty is growing

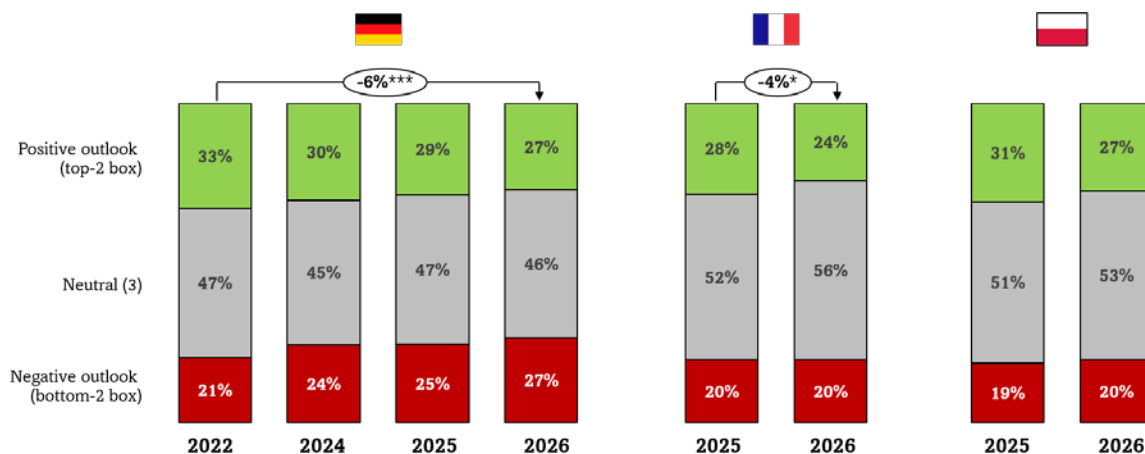
When asked about the expected impact of industrial transformation on their employment situation, fewer employees in all three countries now have a positive outlook. In Germany, the difference compared with the previous year is marginal (–1 pp.), but compared with 2022 (–7 pp.), it is statistically significant. In Poland and France, the figure has also fallen compared with the previous year (–4 pp.), though this decline is only statistically significant in Poland. In France, most employees have a neutral view. In Germany and Poland, although this group is the largest, it does not constitute the majority. Negative expectations have remained stable in all three countries. Therefore, optimists continue to outnumber sceptics (Fig. 5).



Survey question: 'When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as...' [extremely positive / negative.] | Source: WZGE online survey 2022, 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * p < .05; ** p < .01; *** p < .001. | Samples vary by survey year and country (see Appendix).

Figure 5: Expected effects of the transformation on the personal employment situation by country and year

The positive outlook regarding the expected impact on the country's overall employment situation is also waning. In Germany positive expectations have declined significantly since 2022 (–6 pp.). The figure has also fallen in Poland and France compared with the previous year (–4 pp.), though this decline is only statistically significant in France. Overall, when it comes to the expected effects on employment in the country, optimists and sceptics are closely matched, and neutral assessments predominate (Fig. 6).



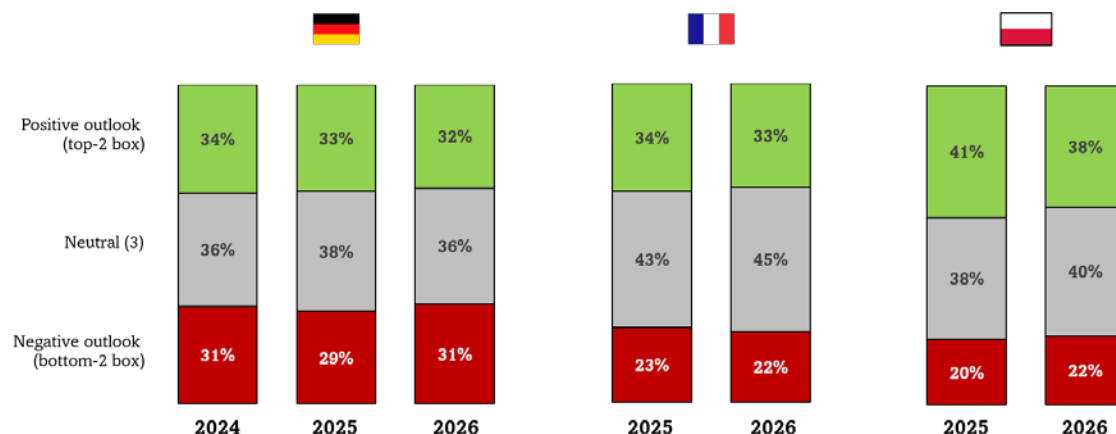
Survey question: "The climate-neutral transformation in [country] will..." [have positive / negative effects on employment.] | Source: WZGE online survey 2022, 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * p < .05; ** p < .01; *** p < .001. | Samples vary by survey year and country (see Appendix).

Figure 6: Expected effects of the transformation on employment by country and year

More people in France and Poland expect positive effects on the economy; in Germany, optimists and sceptics are evenly matched

Compared with last year, there have hardly been any changes in terms of the expected impact of the transformation to a climate-neutral industry on the economy. In Germany, the shares of optimists and sceptics are evenly matched (32%

and 31% respectively), whereas positive expectations continue to predominate in France and Poland (33% and 38%, respectively, vs. 22%). The proportion of sceptics has risen slightly compared with last year in Germany (from 29% to 31%) and Poland (from 20% to 22%). Employees in Poland remain the most optimistic about the country's economic prospects (Fig. 7).

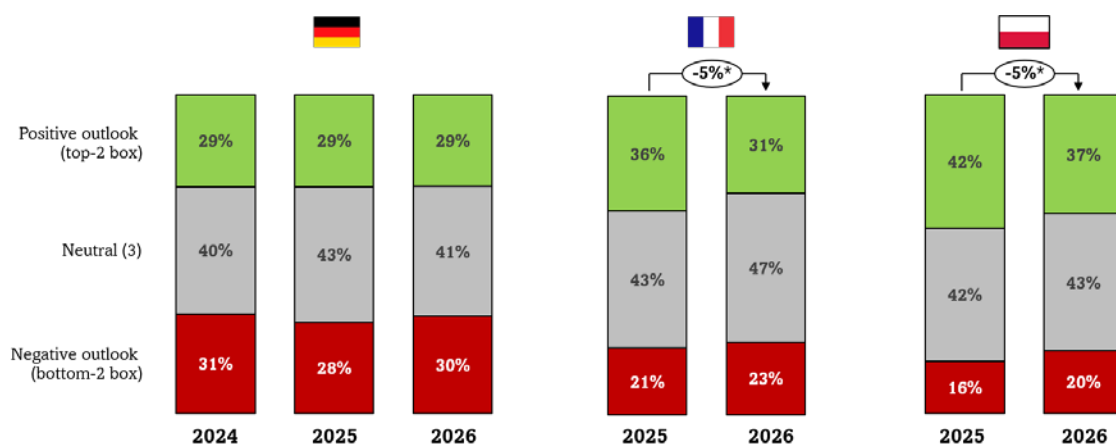


Survey question: 'The climate-neutral transformation of industry will have [far more positive / negative effects] for the economy in [country].' | Source: WZGE online survey 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * p < .05; ** p < .01; *** p < .001. | Samples vary by survey year and country (see Appendix).

Figure 7: Expected effects of the transformation on the economy by country and year

The number of sceptics regarding social cohesion is growing. In France and Poland, optimists still outnumber sceptics

In France and Poland, positive expectations regarding the impact of the transformation on social cohesion within the country are declining. In France, only 31% of employees now view this issue positively (–5 pp. compared with the previous year); in Poland, the figure is 37% (–5 pp.). In Germany, positive expectations remain constant at 29%. At the same time, the proportion of sceptics has risen slightly compared with the previous year in all three countries – to 30% in Germany, 23% in France, and 20% in Poland. The proportions of optimists and sceptics in Germany are now almost equal. However, optimists still clearly outnumber sceptics in France and Poland. In all three countries, though, a neutral assessment is still the most common view (Fig. 8).

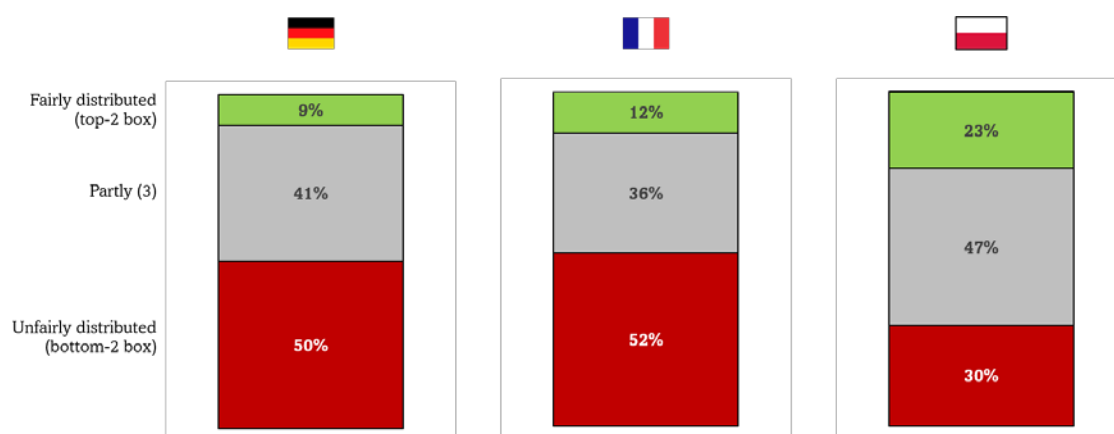


Survey question: 'The climate-neutral transformation of industry will have [far more positive / negative effects] for social cohesion in [country]' | Source: WZGE online survey 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * $p < .05$; ** $p < .01$; *** $p < .001$. | Samples vary by survey year and country (see Appendix).

Figure 8: Expected effects of the transformation on social cohesion by country and year

The prevailing view in Germany and France is that the costs and benefits of the transformation are distributed unfairly. In Poland, the largest proportion of respondents are undecided

When asked about the distribution of burdens in connection with the transformation to a climate-neutral industry,² respondents' perceptions vary from country to country. In Germany and France, around half of employees consider the distribution to be unfair (50% and 52% respectively); only 9% and 12% respectively consider it to be fair. In Poland, the perception is more moderate: 47% responded 'partly', well ahead of 'unfair' (30%) and 'fair' (23%) (Fig. 9).

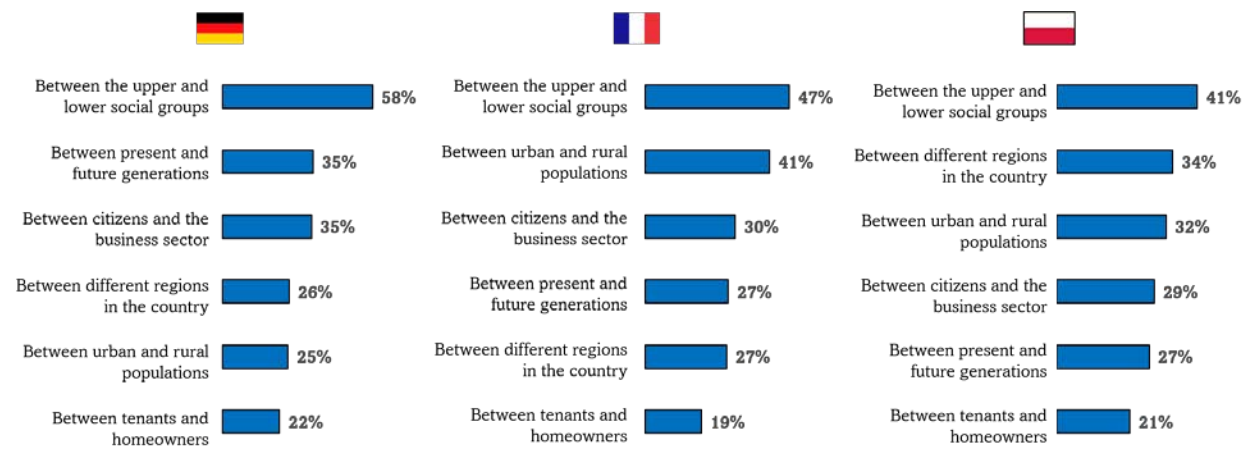


Survey question: 'In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed fairly or unfairly?' (Collected for the first time in 2026.) | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding. | Samples vary by country (see Appendix).

Figure 9: Perceived fairness of the burden distribution by country (2026)

² As part of the 2026 survey, the questionnaire was expanded to include an exploratory study on the perceived fairness of burden distribution. Since this question was first asked in 2026, there is no comparable data available.

Among those who deem the distribution of burdens to be unfair, the prevalent perception is that this primarily occurs between upper and lower social groups (Germany: 58%; France: 47%; Poland: 41%). In Poland, perceived regional differences in the burden distribution are also particularly pronounced (34%), while French employees emphasise differences between urban and rural populations (41%). In Germany, by contrast, greater emphasis is placed on intergenerational fairness (35%) and the burden distribution between citizens and the business sector (also 35%) (Fig. 10).



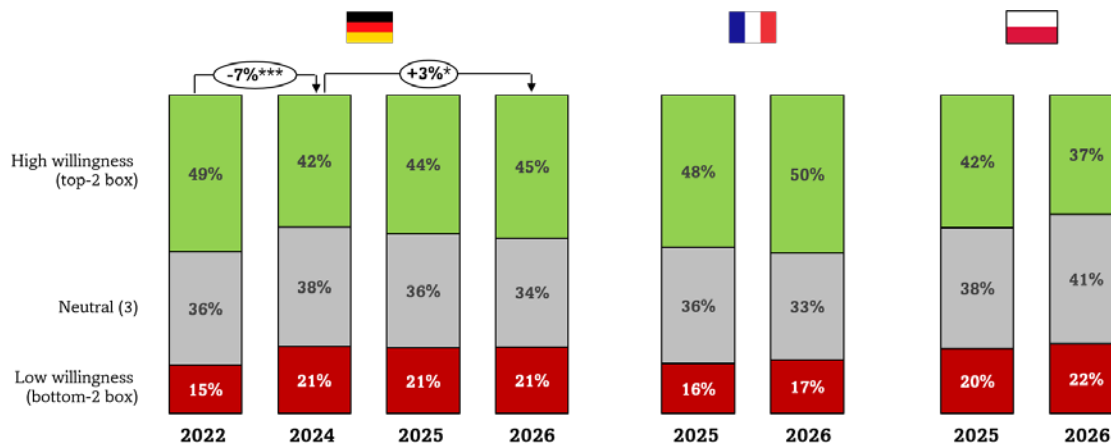
Survey questions: "TL19a (filter question): In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed fairly or unfairly?" | "TL19b: Between which groups do you perceive these differences most strongly?" (Collected for the first time in 2026.) | Source: WZGE online survey 2026; multiple responses possible; own calculations; figures may not sum to 100% due to rounding. | Samples vary by country (see Appendix).

Figure 10: Perceived differences in the distribution of the transformation’s burdens by country (2026)

3. Engagement: Willingness to contribute, adapt, and pay

Willingness to contribute remains high, but scepticism about the willingness of others is growing

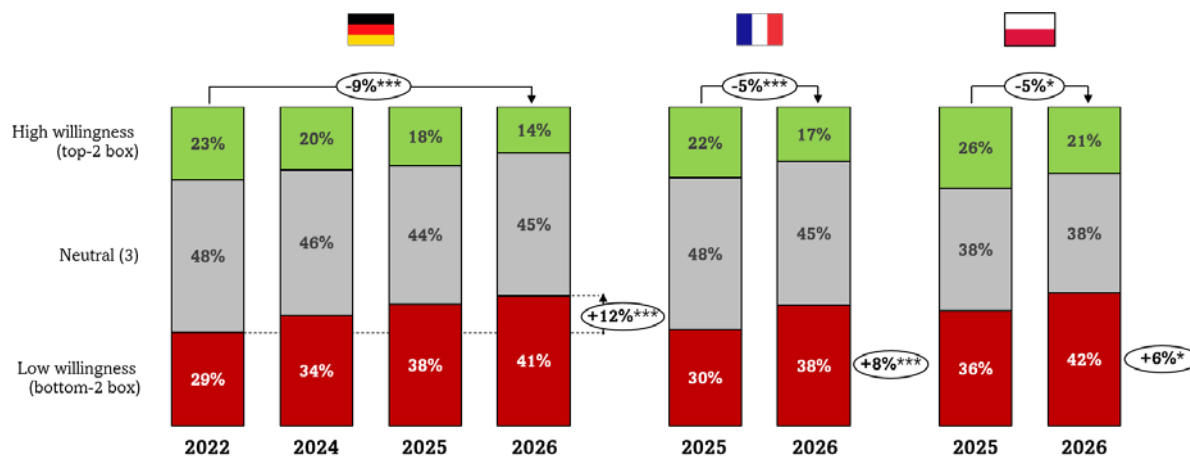
People with a high willingness to contribute outnumber those with a low willingness to contribute. In France, high willingness remains stable at 50%. In Germany, it stands at 45%, following a significant decline between 2022 and 2024, and a subsequent, albeit slight, recovery. In Poland, by contrast, the willingness to contribute has fallen to 37% compared with the previous year (–5 pp.). The number of people with a low willingness to contribute remains stable in all three countries compared with the previous year (Fig. 11).



Survey question: "To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" [Extremely high / low willingness.] | Source: WZGE online survey 2022, 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * $p < .05$; ** $p < .01$; *** $p < .001$. Samples vary by survey year and country (see Appendix).

Figure 11: Personal willingness to contribute to the climate-neutral transformation of the country's industry by country and year

An increasing number of people hold a negative perception of others' willingness to contribute. In Poland and France, for example, this negative perception has increased significantly (by 6 and 8 pp., respectively). In Germany, the difference compared with the previous year is smaller; however, significant growth has been observed compared with 2022 (+12 pp.). Consequently, mistrust of others' willingness to contribute has grown significantly over time and in all countries (Fig. 12).



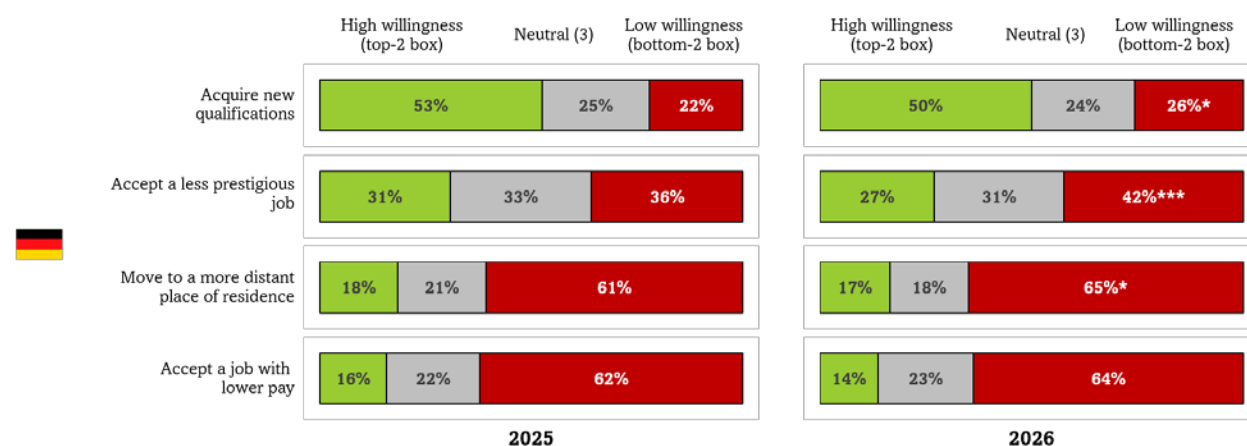
Survey question: "In general, how would you assess the willingness of people in [country] to make a personal contribution to making the industry climate-neutral?" [Extremely high / low willingness.] | Source: WZGE online survey 2022, 2024, 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * $p < .05$; ** $p < .01$; *** $p < .001$. | Samples vary by survey year and country (see Appendix).

Figure 12: Assessment of others' willingness to contribute by country and year

Employees are most willing to undertake reskilling or upskilling, whereas a clear majority reject income losses

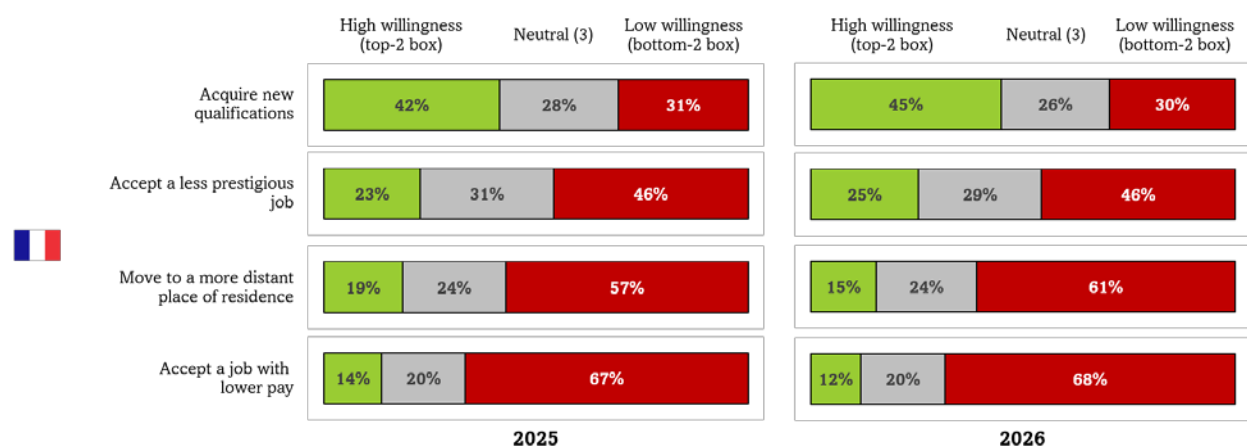
Developing new skills is the most widely accepted consequence of the transformation. Half of employees in Germany, 45% in France, and 44% in Poland say they are willing to do so to work in a different field or profession. In contrast,

most people would not change jobs for a lower salary. A lower-paid job would be rejected by 64% of employees in Germany, 68% in France, and 66% in Poland. Similarly, moving residence is widely rejected (Germany: 65%; France: 61%; Poland: 48%), as is a job change involving a lower status (Germany: 42%; France: 46%; Poland: 44%) (Fig. 13, 14 and 15).



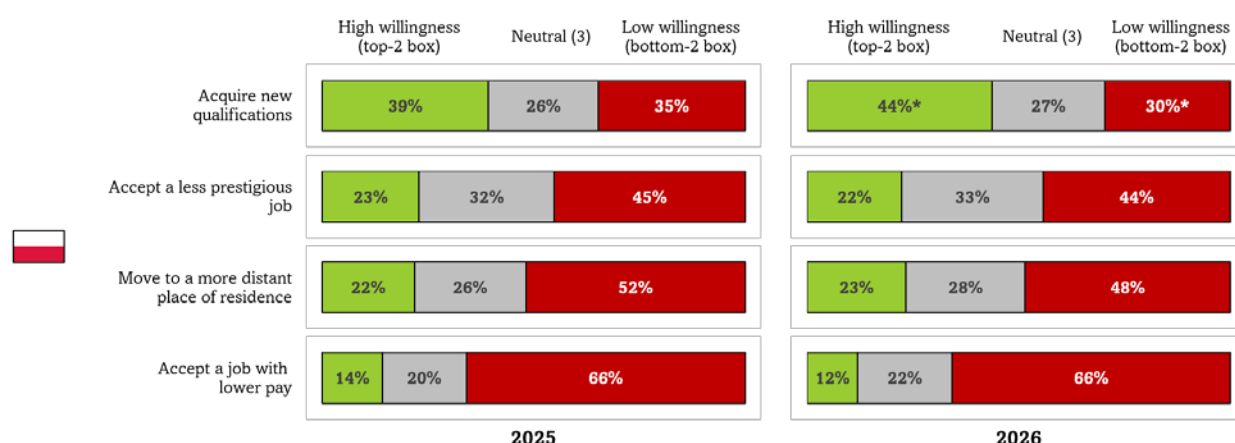
Survey question: 'The climate-neutral transformation of industry may have concrete effects on your professional situation. Considering your professional situation in this context: to what extent do you agree with the following statements?' [Definitely / Definitely not.] | Source: WZGE online survey 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * $p < .05$; ** $p < .01$; *** $p < .001$. | Samples vary by survey year and country (see Appendix).

Figure 13: Willingness to accept job-related changes in Germany, by dimension (2025–2026)



Survey question: 'The climate-neutral transformation of industry may have concrete effects on your professional situation. Considering your professional situation in this context: to what extent do you agree with the following statements?' [Definitely / Definitely not.] | Source: WZGE online survey 2025 and 2026; own calculations; figures may not sum to 100% due to rounding. | Only statistically significant changes are annotated (chi-square tests): * $p < .05$; ** $p < .01$; *** $p < .001$. | Samples vary by survey year and country (see Appendix).

Figure 14: Willingness to accept job-related changes in France, by dimension (2025–2026)



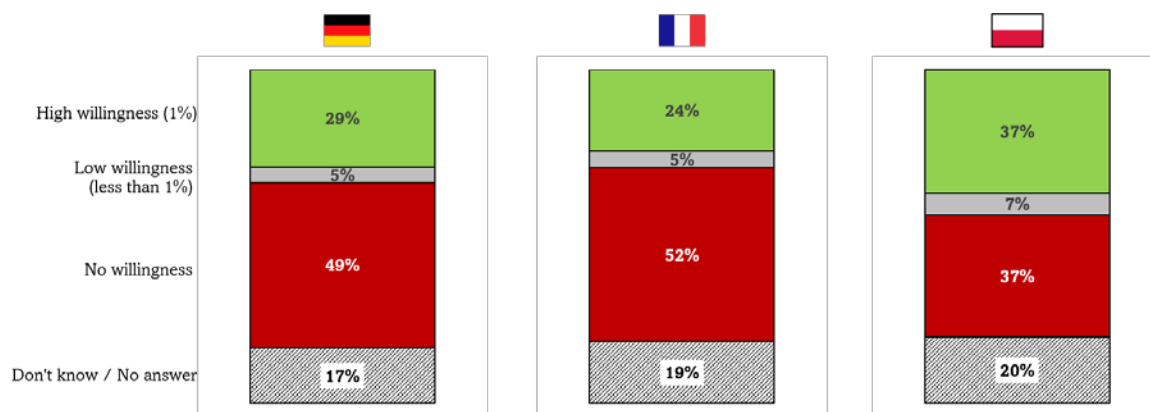
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Figure 15: Willingness to accept job-related changes in Poland, by dimension (2025–2026)

Compared with the previous year, the rejection of job-related changes due to the transformation in Germany has risen significantly in three of the four surveyed dimensions: regarding less prestigious work (36% to 42%), living further away (61% to 65%) and acquiring new qualifications (22% to 26%). In France, the changes are not significant in any of the four dimensions. In Poland, willingness to reskill has risen significantly (from 39% to 44%), whereas the other dimensions remain stable.

In Germany and France, most employees oppose making financial contributions towards the transformation – in Poland, the situation is more balanced

In both France and Germany, the largest group is made up of people who are opposed to paying a levy of either 1% or 0.5% of their net household income for the climate-neutral industrial transformation. In France, this group accounts for 52% of employees, whereas in Germany it accounts for 49%. Only 34% of employees in Germany and 29% in France are willing to pay. By contrast, 44% of Polish employees would be willing to accept such a levy, compared with 37% who are opposed – employees in Poland are therefore noticeably more willing to pay than those in the other two countries (Fig. 16).



Survey questions: "TL20a: Would you be willing to contribute 1% of your net household income each month towards the climate-neutral transformation of industry?" | "TL20b (if TL20a=No): Would you be willing to contribute less than 1% of your net household income each month (e.g. 0.50 euros per 100 euros) towards the climate-neutral transformation of industry?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding. | Samples vary by country (see Appendix).

Figure 16: Willingness to pay by country (2026)

II. Drivers: What factors move employees' willingness to contribute to and willingness to pay for the transformation?

A successful industrial transformation requires more than passive acceptance – it requires active support, reflected in a personal willingness to contribute. As in previous years, we used data from a representative survey to identify the factors that significantly influence employees' willingness to contribute to the climate-neutral industrial transformation. Additionally, we conducted a vignette study this year to examine the impact of alternative justifications for industrial transformation on respondents' willingness to pay.

1. What drives the willingness to contribute?

As in previous surveys, employees' willingness to contribute cannot be explained by regional or occupational characteristics.³ Similarly, social status⁴ and job security concerns⁵ play only a minor role in all three countries. Instead, the most relevant drivers of willingness to contribute cut across society: (1) personal employment outlook; (2) the perceived fairness of burden distribution; (3) trust in others' willingness to contribute; (4) prioritising climate over other urgent social issues; and (5) political party preference (Fig. 17).

³ An individual's willingness to contribute cannot be explained by factors such as economic sector, type of occupation, region, commuter status or town size. In France, the type of occupation (physical/mental work) plays a minor role: employees in predominantly physical occupations express slightly lower willingness to contribute (OR 1.14 [1.07–1.21], $p < 0.001$).

⁴ Respondents were asked to provide a subjective assessment of their relative social status. They were asked to imagine a ladder with ten rungs and to place themselves on one of the rungs. Across the three countries, the willingness to contribute remains largely constant across social groups. In France (OR 0.93 [0.85–1.03], $p = 0.153$) and Poland (OR 1.00 [0.92–1.09], $p = 0.962$), the association between social status and an individual's willingness to contribute is not statistically significant after controlling for other variables. In Germany, a marginally significant effect was found (OR 1.09 [1.00–1.18], $p = 0.048$), which remains secondary compared with other explanatory factors.

⁵ Concerns about job security also play only a minor role, but this is only the case in Germany. Here, there is a weak correlation between concerns about job security and the expected effects of the transformation on personal employment. In France and Poland, however, this effect is not statistically significant (see Appendix A.1).



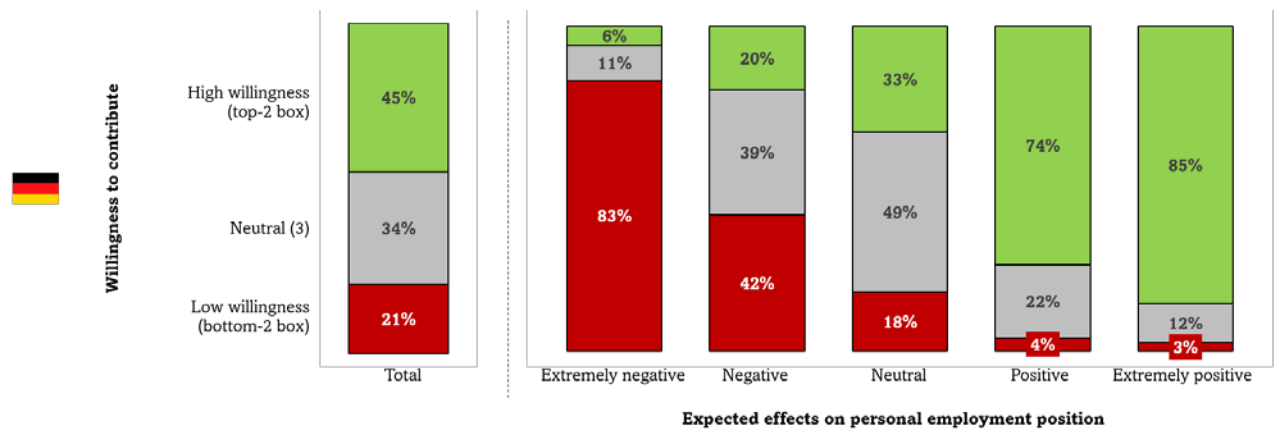
Figure 17: Drivers related to employees' willingness to contribute to the climate-neutral transformation of industry

1.1 Personal employment outlook

Employees with a positive personal employment outlook are more willing to contribute

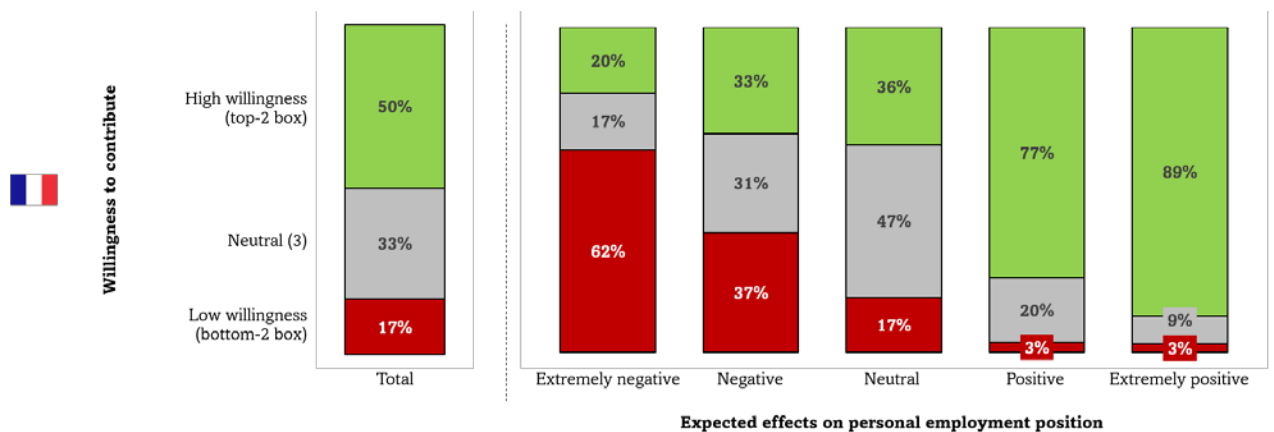
As in previous rounds of the survey, employees who view the transformation positively in terms of their own employment outlook are more willing to contribute and favour a faster pace.⁶ Employees who view the effects of the transformation on their personal employment situation as (very) positive are significantly more willing to contribute than those with (very) negative expectations (Figs. 18, 19 and 20). This effect remains consistent across all three countries and over time. In other words, an individual's willingness to contribute depends on their positive outlook regarding the impact of the transformation on their employment.

⁶ Employees with a more optimistic view of the impact of the climate-neutral transformation on their own employment situation are more likely to advocate maintaining or accelerating the pace of the transformation. This effect is consistently significant across all three countries and across all available survey waves.



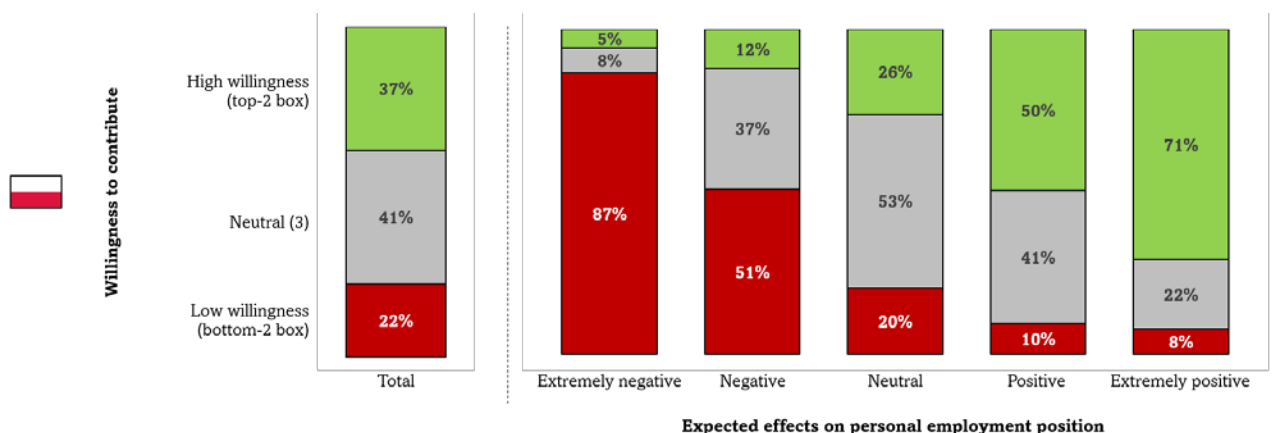
Survey questions: "TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as..." | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.30, 95% CI [2.04, 2.60], $p < .001$. | Samples vary by country (see Appendix).

Figure 18: Willingness to contribute by personal employment outlook in Germany (2026)



Survey questions: "TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as..." | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.42, 95% CI [2.18, 2.68], $p < .001$. | Samples vary by country (see Appendix).

Figure 19: Willingness to contribute by personal employment outlook in France (2026)



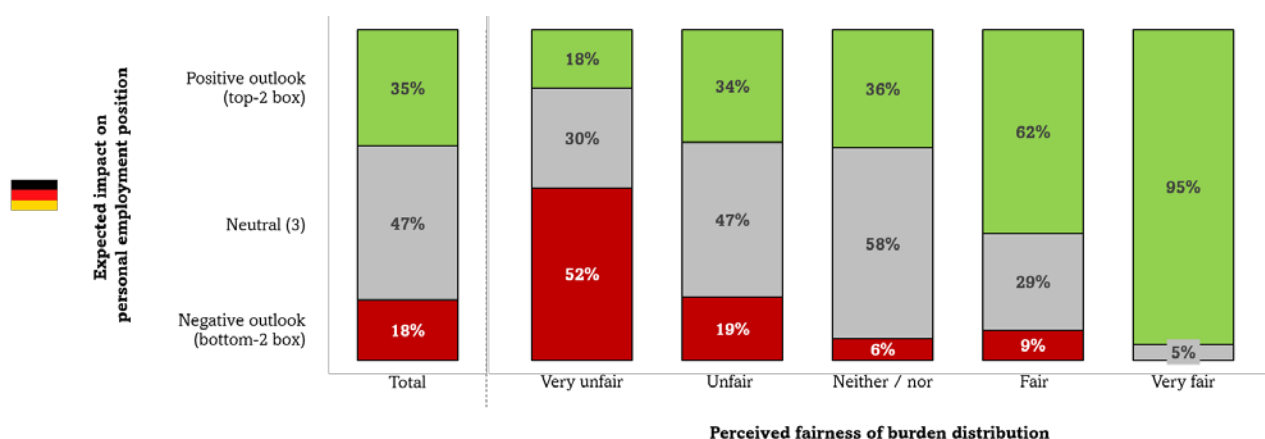
Survey questions: "TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as..." | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.14, 95% CI [1.93, 2.36], $p < .001$. | Samples vary by country (see Appendix).

Figure 20: Willingness to contribute by personal employment outlook in Poland (2026)

1.2 Perceived fairness of burden distribution

The fairer people perceive the distribution of burdens to be, the more positive they are about their own employment outlook – and the more willing they are to contribute

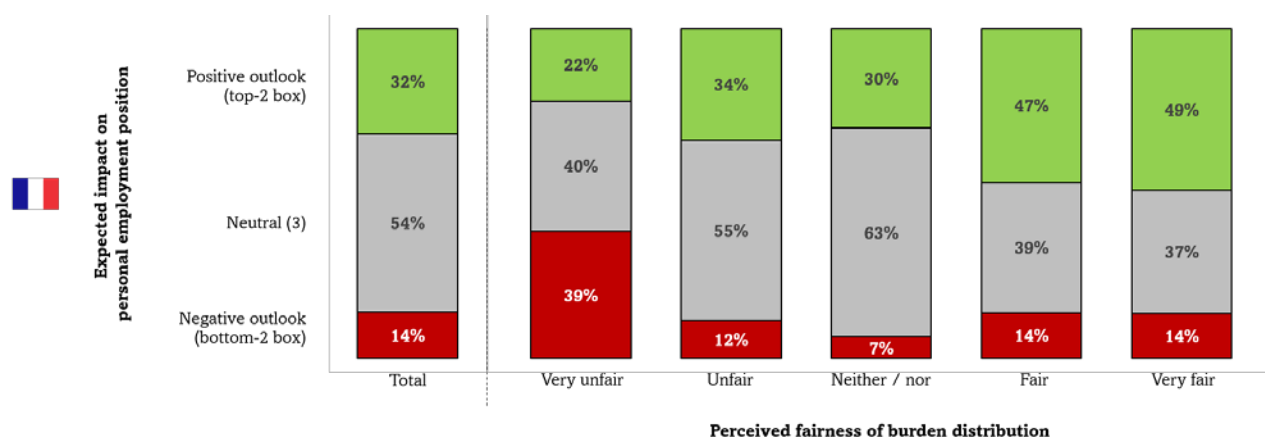
In Germany and Poland, the perception of an unfair burden distribution has a particularly strong influence on people's own employment outlook.⁷ Although this effect is less pronounced in France, it remains one of the strongest predictors of an individual's employment outlook compared with other explanatory factors (Figs. 21, 22 and 23). The perception of a fair or unfair distribution of burdens is related to one's own employment outlook, regardless of occupational, regional, or social characteristics, or of political party preference (see Appendix A.2).



Survey questions: "TL19a: In your view, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?" | "TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as..." | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.27, 95% CI [2.05, 2.50], p < .001. | Samples vary by country (see Appendix).

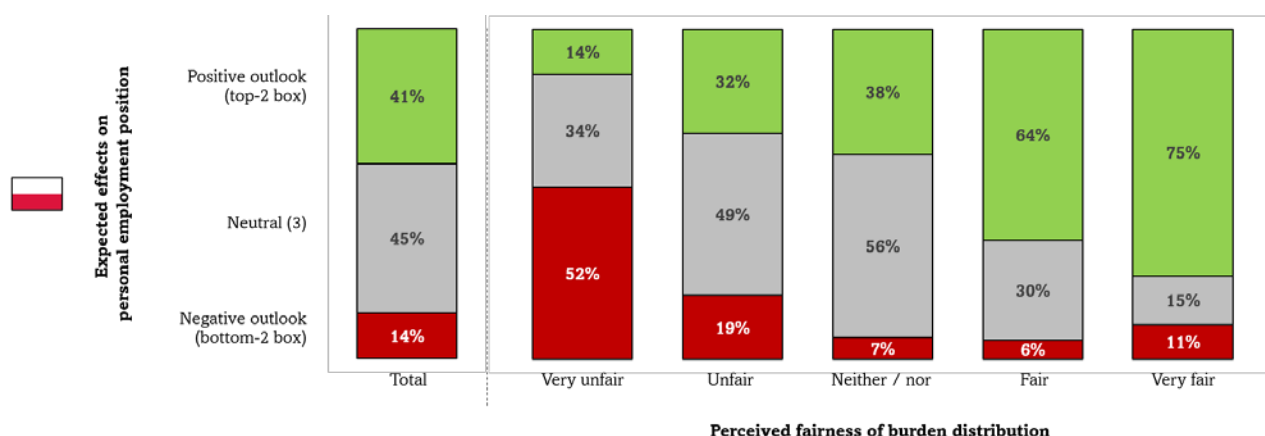
Figure 21: Employment outlook by perceived fairness of burden distribution in Germany (2026)

⁷ The effect of perceived fairness on an individual's willingness to contribute was examined using mediation analysis. The results show that this perception operates predominantly via two mediating factors – the assessment of one's own employment prospects and trust in others' willingness to contribute – but that a significant, albeit smaller, direct effect also remains.



Survey questions: 'TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?' | 'When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as...'. Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.45, 95% CI [1.32, 1.59], $p < .001$. | Samples vary by country (see Appendix).

Figure 22: Employment outlook by perceived fairness of burden distribution in France (2026)



Survey questions: 'TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?' | 'When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as...'. Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.45, 95% CI [1.32, 1.59], $p < .001$. | Samples vary by country (see Appendix).

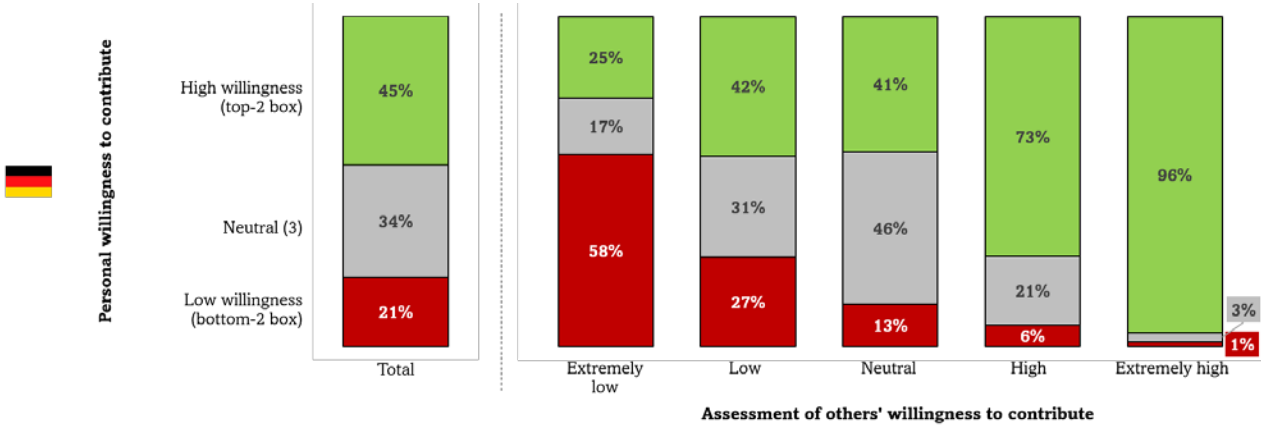
Figure 23: Employment outlook by perceived fairness of burden distribution in Poland (2026)

1.3 Trust in others' willingness to contribute

The greater the expected willingness of others to contribute, the more willing people are to contribute themselves

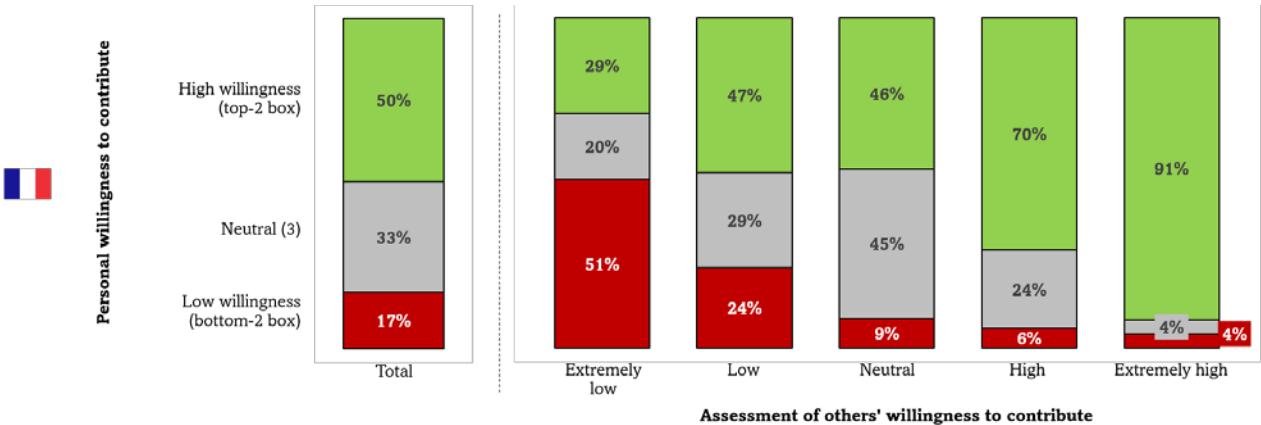
People who believe that others in the country are willing to contribute are themselves more likely to be willing to do so (Figs. 24, 25 and 26), regardless of other occupational, regional, and social characteristics. Employees who rate others' willingness to contribute as (very) high show a significantly higher willingness to contribute than those who rate it as (very) low. This effect is robust across

the three countries and over time.⁸ In other words, the personal willingness to contribute requires trust that others will also play their part and that the burdens of transformation will be shared equally.⁹



Survey questions: "TL06b: In general, how would you assess the willingness of other people in [country] to make a personal contribution [...]?" | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.28, 95% CI [2.08, 2.51], p < .001. | Samples vary by country (see Appendix).

Figure 24: Personal willingness to contribute by assessment of others' willingness to contribute in Germany (2026)

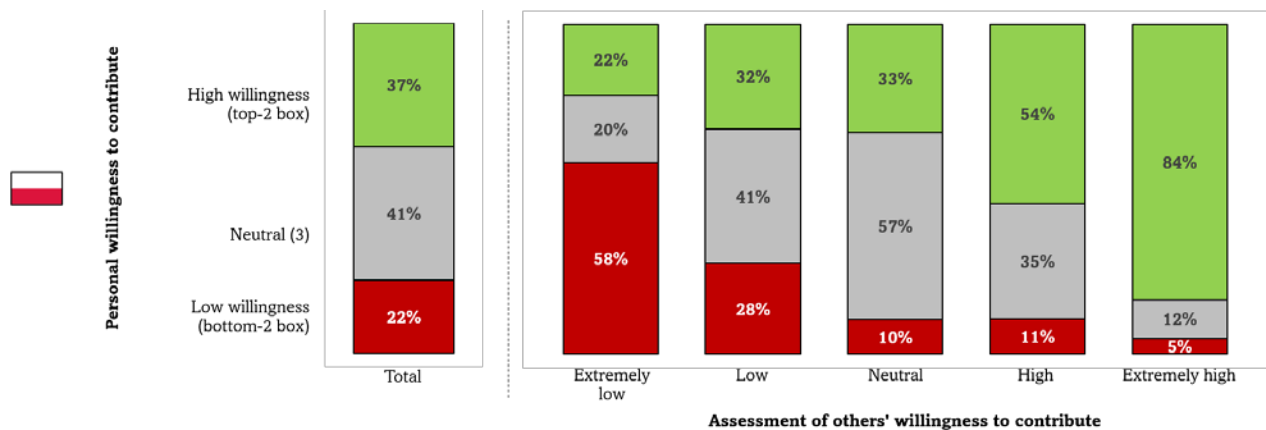


Survey questions: "TL06b: In general, how would you assess the willingness of other people in [country] to make a personal contribution [...]?" | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.28, 95% CI [2.08, 2.51], p < .001. | Samples vary by country (see Appendix).

Figure 25: Personal willingness to contribute by assessment of others' willingness to contribute in France (2026)

⁸ The effect of this assessment on people’s willingness to contribute weakened slightly in 2026. However, the personal willingness to contribute has remained constant compared with the previous year, despite growing scepticism (chi-squared trend test 2025–2026; assessment of others’ willingness to contribute has changed significantly, p = 0.002).

⁹ The perception that the burden is distributed unfairly is also linked to a more negative assessment of people’s willingness to contribute within the country. Those who perceive the distribution of the burden as unfair have less confidence in others’ willingness to contribute – and are themselves less willing to contribute to the transformation (see Appendix A.3).



Survey questions: "TL06b: In general, how would you assess the willingness of other people in [country] to make a personal contribution [...]?" | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.28, 95% CI [2.08, 2.51], $p < .001$. | Samples vary by country (see Appendix).

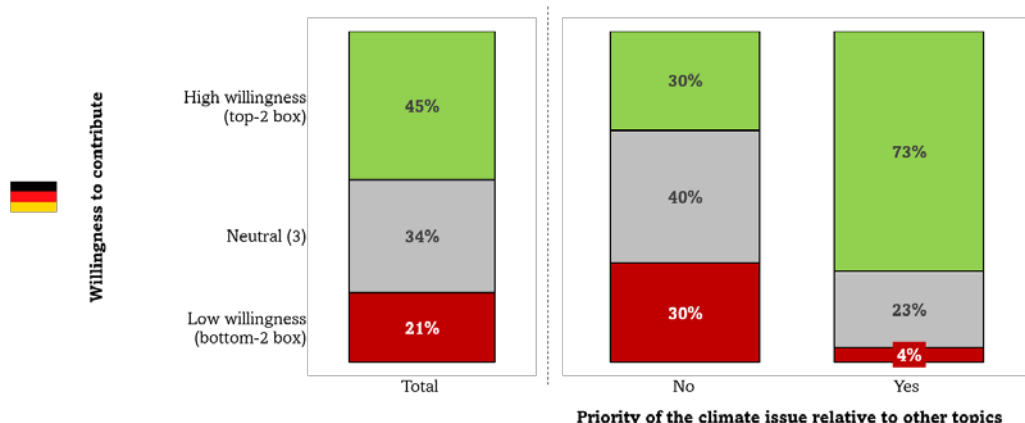
Figure 26: Personal willingness to contribute by assessment of others' willingness to contribute in Poland (2026)

1.4 Climate as an urgent social issue

People who prioritise the issue of climate are more willing to contribute to the transformation, regardless of their expectations about its effects

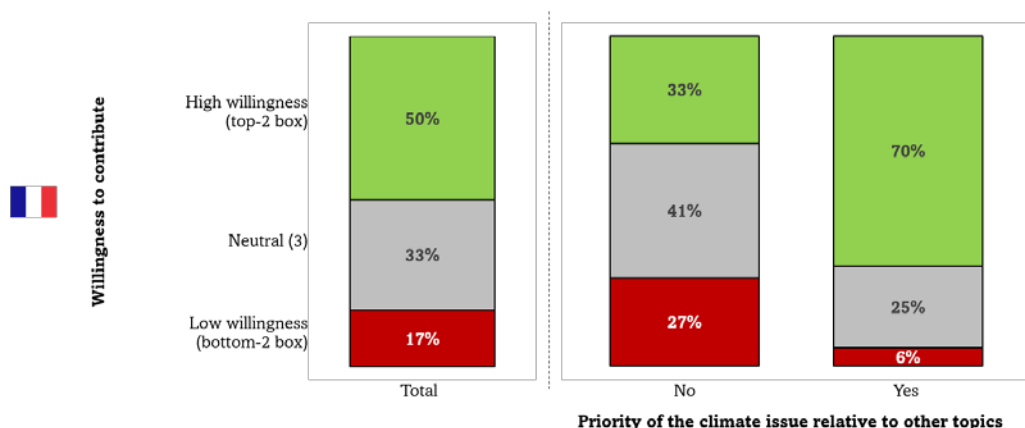
The view that 'climate and the environment' is one of the most pressing social issues (see Section I.1 – Preferences) significantly and directly increases people's willingness to contribute in all three countries (Figs. 27, 28 and 29). This effect persists even when expectations are negative; employees who prioritise climate issues are still more willing to contribute, even if they have a more pessimistic employment outlook.¹⁰

¹⁰ The identified effects occur across all social groups and are strongly influenced by one's own political party preference (see Appendix A.4). People who consider climate to be one of the most pressing social issues show a significantly higher willingness to contribute. This effect persists even when controlling for personal and general employment prospects, suggesting that it is independent of expectations regarding the transformation.



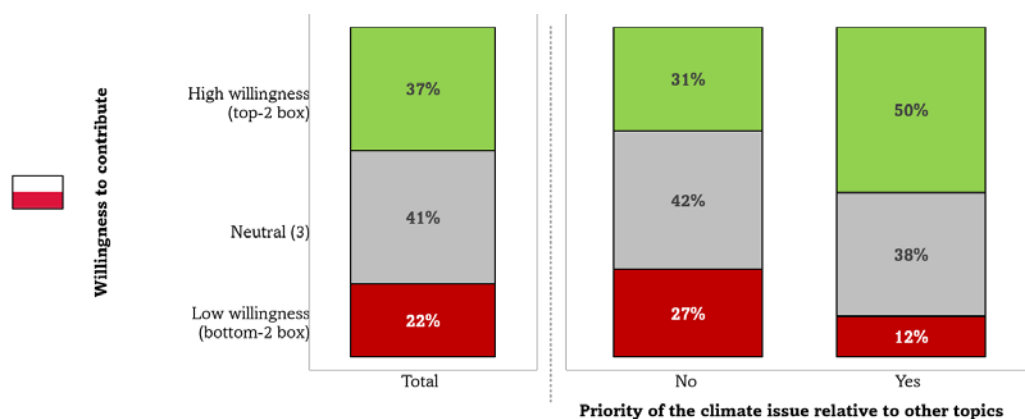
Survey questions: "TL04_6: In your view, what are the most pressing social issues that need to be addressed at present?" Item 6: Climate and environment. | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 0.34, 95% CI [0.28, 0.42], $p < .001$. | Samples vary by country (see Appendix).

Figure 27: Willingness to contribute and prioritisation of the climate issue in Germany (2026)



Survey questions: "TL04_6: In your view, what are the most pressing social issues that need to be addressed at present?" Item 6: Climate and environment. | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 0.34, 95% CI [0.28, 0.42], $p < .001$. | Samples vary by country (see Appendix).

Figure 28: Willingness to contribute and prioritisation of the climate issue in France (2026)



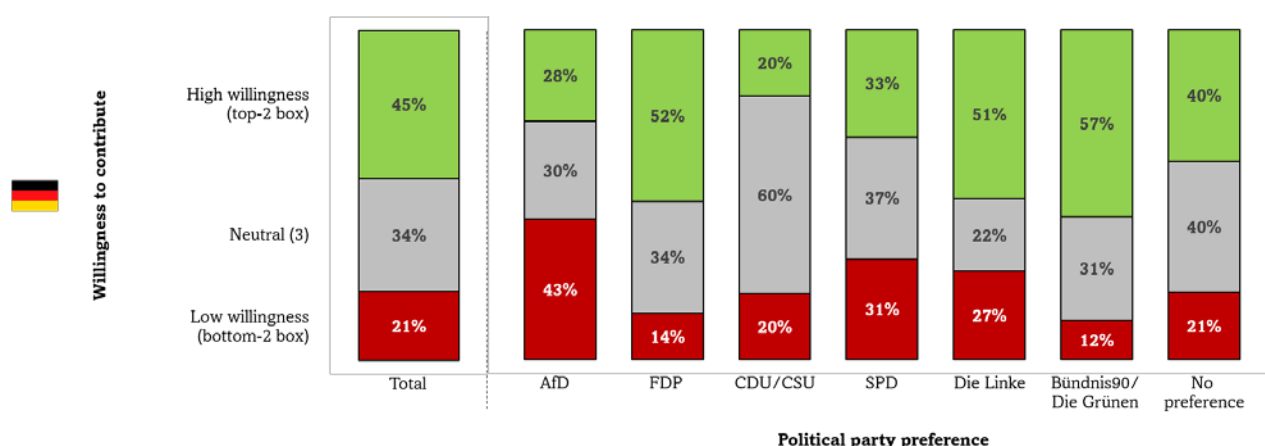
Survey questions: "TL04_6: In your view, what are the most pressing social issues that need to be addressed at present?" Item 6: Climate and environment. | "TL06a: To what extent are you willing to make a personal contribution to making [country] industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 0.34, 95% CI [0.28, 0.42], $p < .001$. | Samples vary by country (see Appendix).

Figure 29: Willingness to contribute and prioritisation of the climate issue in Poland (2026)

1.5 Political party preference

People who vote for parties at the right end of the political spectrum are less willing to contribute, regardless of their personal expectations

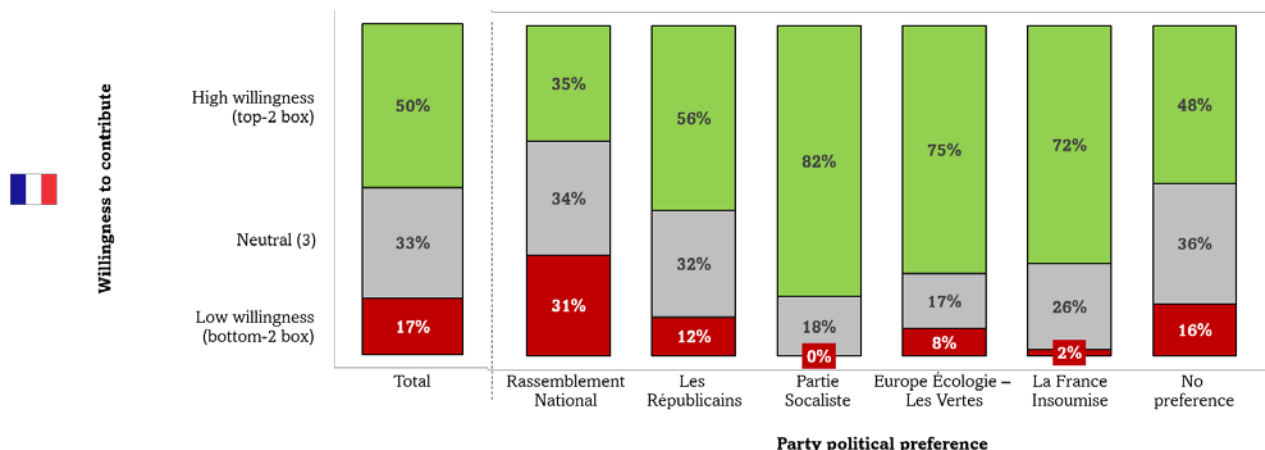
In all three countries, a preference for political parties at the right end of the spectrum is associated with a lower willingness to contribute; even when employees have positive expectations regarding their employment outlook, those with such a preference are less willing to contribute to the climate-neutral industrial transformation. This effect is most pronounced in France (Figs. 30, 31 and 32).¹¹



Survey questions: 'PI7 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'PI8: Which party is it?' | 'TL06a: To what extent are you yourself willing to make a personal contribution to making [country] industry climate-neutral?' | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.84, 95% CI [1.36, 2.49], $p < .001$. | Samples vary by country (see Appendix).

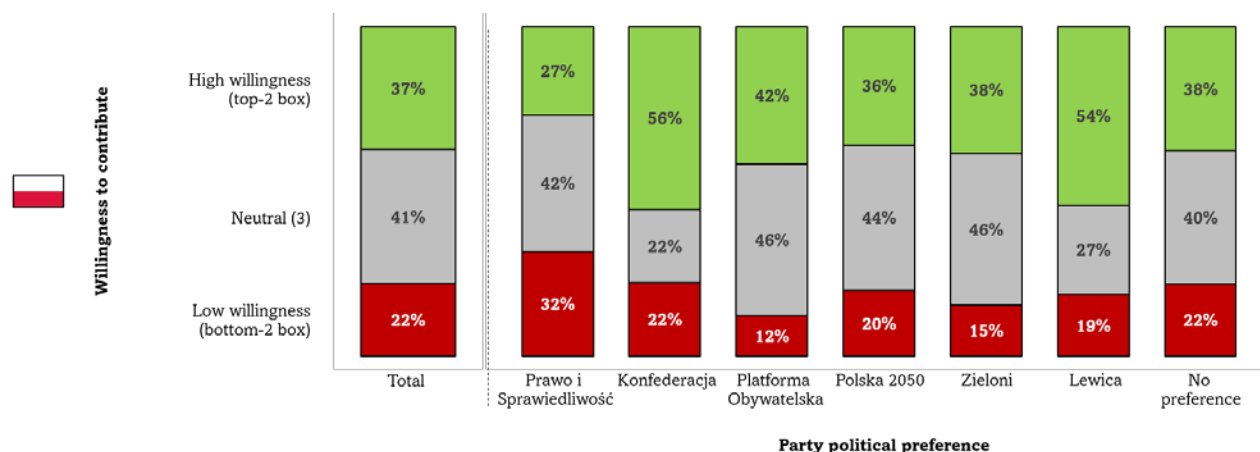
Figure 30: Willingness to contribute by political party preference in Germany (2026)

¹¹ In contrast to the findings of other studies, our analysis shows that, among voters with a preference for parties at the right of the political spectrum, opposition to the climate-neutral transformation is not linked to their own concerns about job security. In Germany, there is even a weak inverse correlation (OR 0.90, $p = 0.026$): right-leaning respondents tend to express lower job insecurity than their counterparts (see Appendix A.5). This effect persists even when controlling for personal and general employment outlook, suggesting that it is independent of expectations regarding the transformation.



Survey questions: 'P17 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'P18: Which party is it?' | 'TL06a: To what extent are you yourself willing to make a personal contribution to making [country] industry climate-neutral?' | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.90, 95% CI [2.14, 3.91], $p < .001$. | Samples vary by country (see Appendix).

Figure 31: Willingness to contribute by political party preference in France (2026)



Survey questions: 'P17 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'P18: Which party is it?' | 'TL06a: To what extent are you yourself willing to make a personal contribution to making [country] industry climate-neutral?' | Source: WZGE online survey 2026; own calculation; totals may not sum due to rounding; Regression analysis (ordered logit): OR = 1.58, 95% CI [1.16, 2.16], $p < .01$. | Samples vary by country (see Appendix).

Figure 32: Willingness to contribute by political party preference in Poland (2026)

2. How can we leverage people's willingness to pay?

What messages can increase employee support? Using an experimental design,¹² we evaluated three different, commonly used messages relating to the climate-neutral transformation and examined their impact on the respondents' willingness to pay (Fig. 33).

¹² The 2026 survey involved an experimental vignette design that tested three different communication messages (see Appendix B – Methodological approach). In this context, willingness to pay is regarded as a measure of employees' acceptance of the transformation.

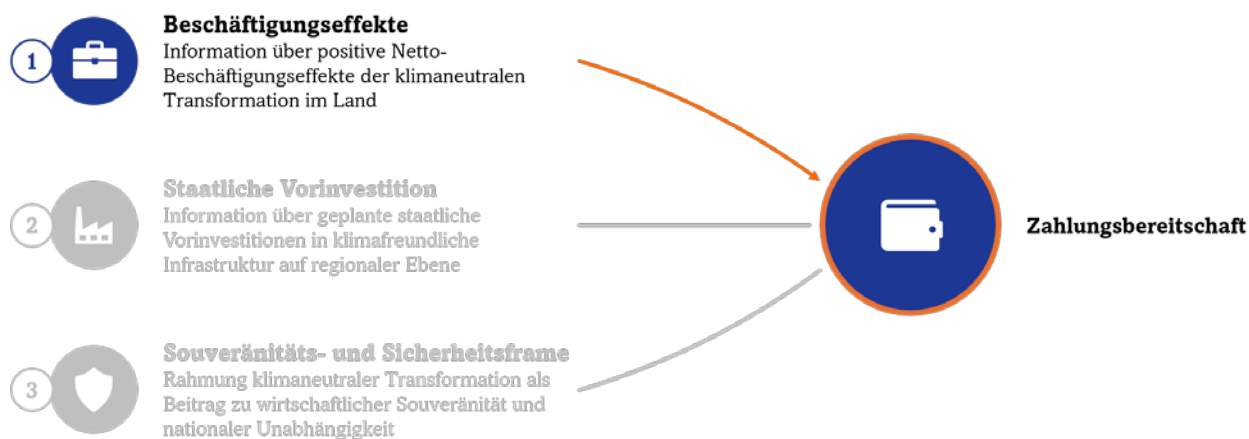
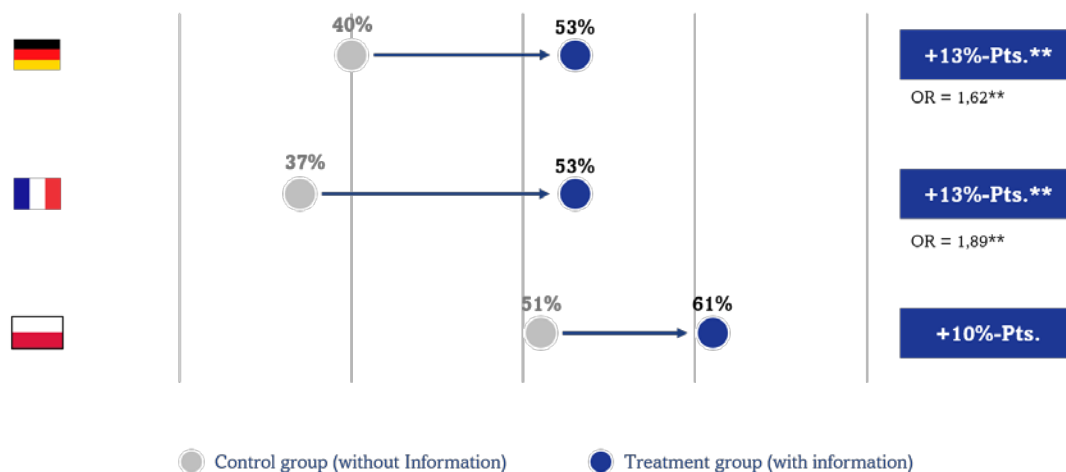


Figure 33: Impact of commonly used messages on employees' willingness to pay

Information about positive effects on employment increases people's willingness to pay – messages about government investment and national sovereignty show no effect

When respondents are provided with information about the net positive employment effects of the transformation to a climate-neutral industry in their country, their willingness to pay increases. This effect is statistically significant in Germany and France. In Poland, although an increase in willingness to pay can be observed, it is not statistically significant (Fig. 34).



Survey question: "Would you be willing to contribute [less than] 1 per cent of your household income each month towards the climate-neutral transformation of industry?" | Source: WZGE online survey 2026; totals may not sum due to rounding; only significant effects are annotated (regression analysis (ordered logit): * $p < 0.05$; ** $p < 0.01$; *** $p < 0.001$) | Sub-sample: control and treatment groups; see Appendix for sample size.

Figure 34: Effects of providing information on the positive net employment effects on willingness to pay, by country

The other examined messages, by contrast, had no effect on employees' willingness to pay. Information regarding compensation through government investment in infrastructure, as well as the framing of the climate-neutral

transformation as a contribution to national sovereignty, had no influence on respondents' willingness to pay in any of the three countries (Figs. 35 and 36).

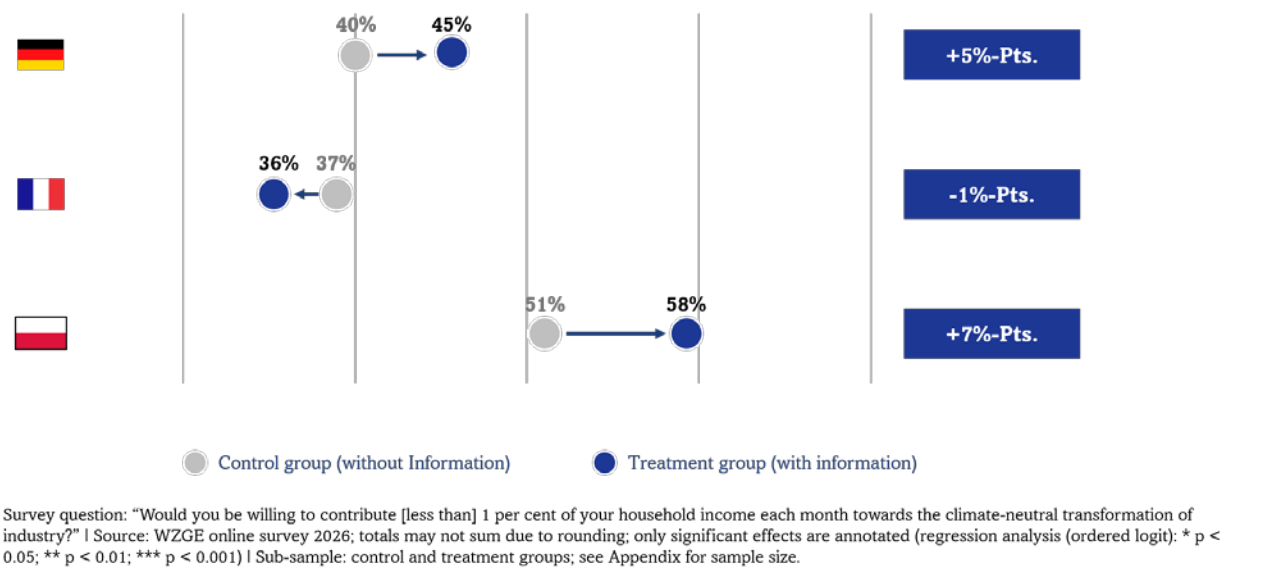


Figure 35: Effects of providing information on government investment on willingness to pay, by country

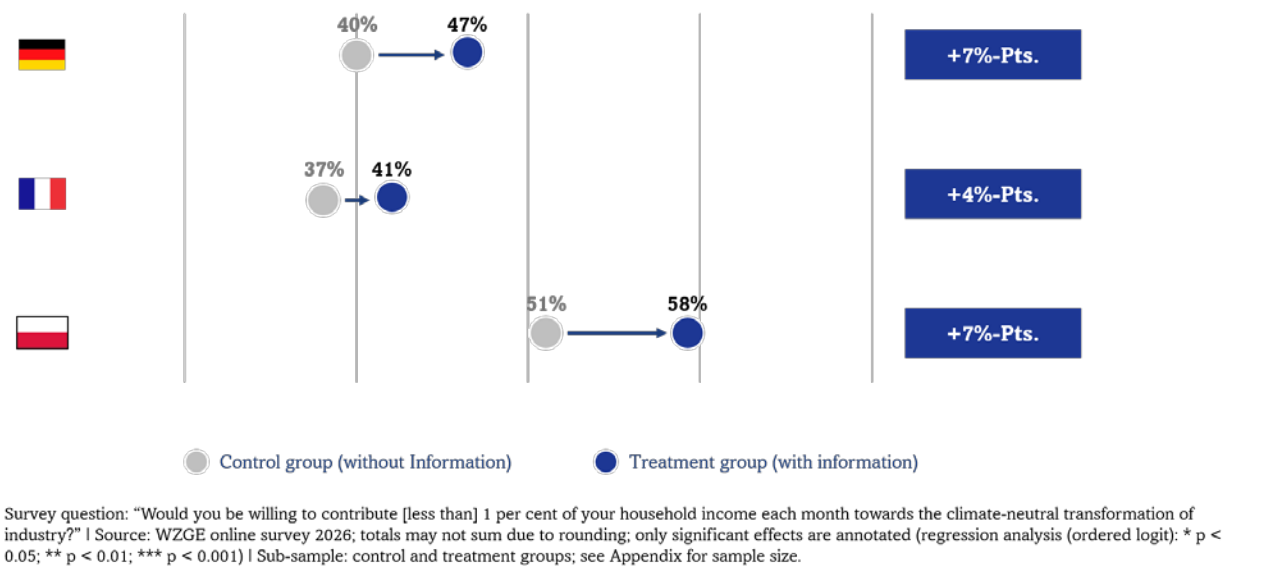
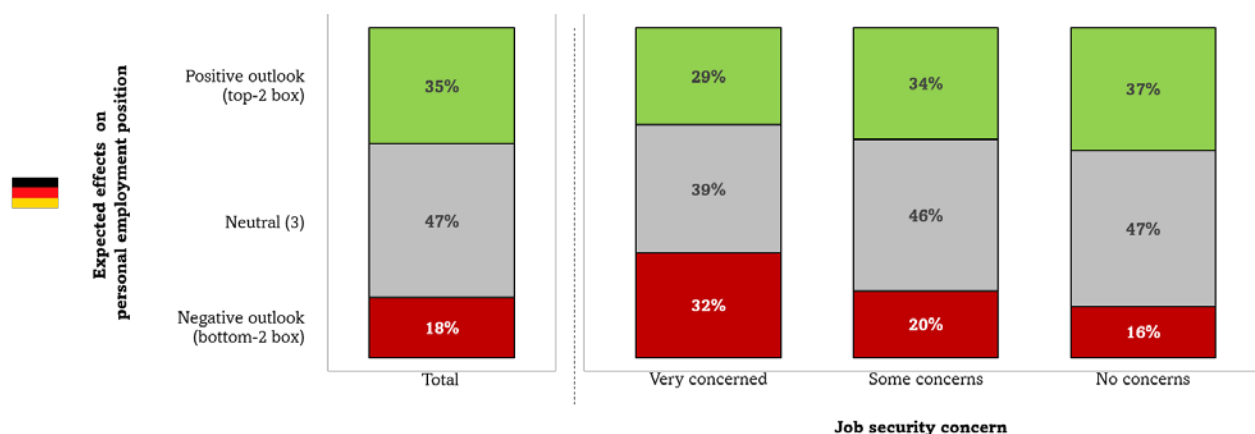


Figure 36: Effects of providing information on sovereignty framing on willingness to pay, by country

Appendix A – Further analyses

A.1 The personal employment outlook in the context of industrial transformation cannot be explained by pre-existing concerns about job security

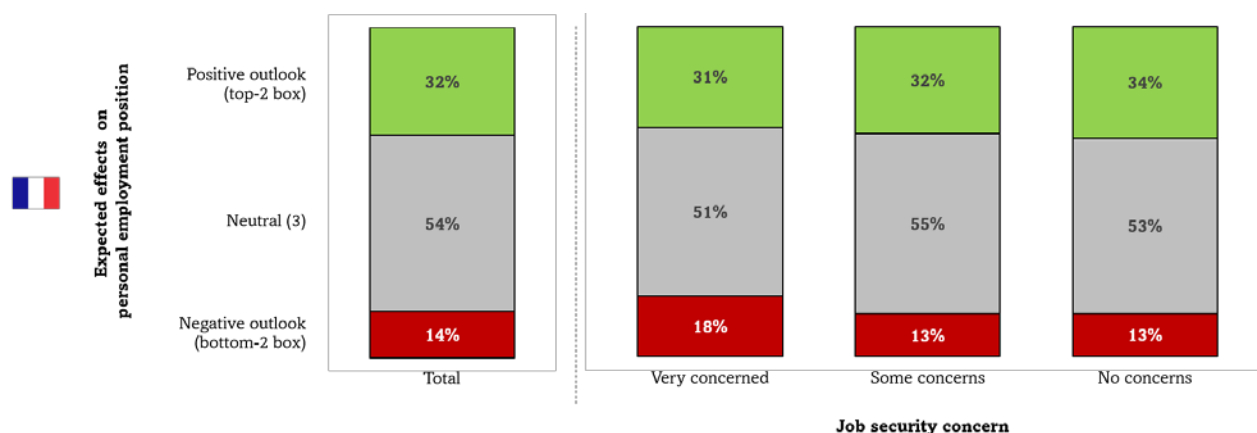
Concerns about job security do not explain employees' scepticism regarding the impact of the transformation to a climate-neutral industry on their employment outlook.¹³ Only in Germany are job security concerns linked to a slightly more pessimistic employment outlook in the context of the transformation. However, this effect is weak and remains secondary compared with other variables (Figs. 37, 38 and 39).



Survey questions: 'TL18_2: Looking ahead to your professional future. [...] Are you worried about the security of your job' | 'TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as...'. Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.18, 95% CI [1.01, 1.38], $p < .05$. | Samples vary by country (see Appendix).

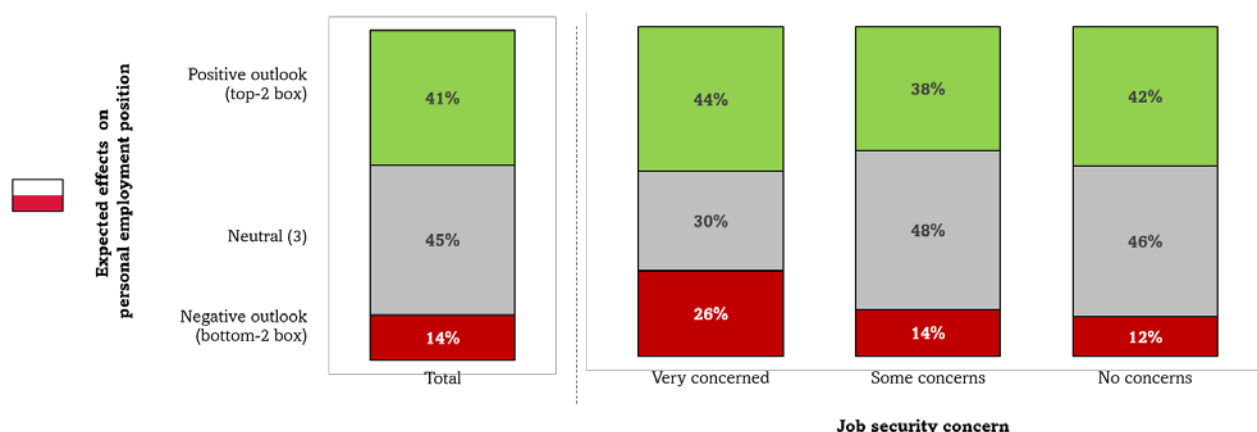
Figure 37: Expected effects of the transformation on personal employment by employees' job security concern in Germany (2026)

¹³ The topic of job security concerns was included in the 2026 questionnaire. Items designed to examine this issue assessed whether respondents were worried about their financial situation, job security, mismatched qualifications, and difficulties keeping up with technological progress.



Survey questions: 'TL18_2: Looking ahead to your professional future. [...] Are you worried about the security of your job' | 'TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as...'. Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.18, 95% CI [1.01, 1.38], $p < .05$. Samples vary by country (see Appendix).

Figure 38: Expected effects of the transformation on personal employment by employees' job security concern in France (2026)



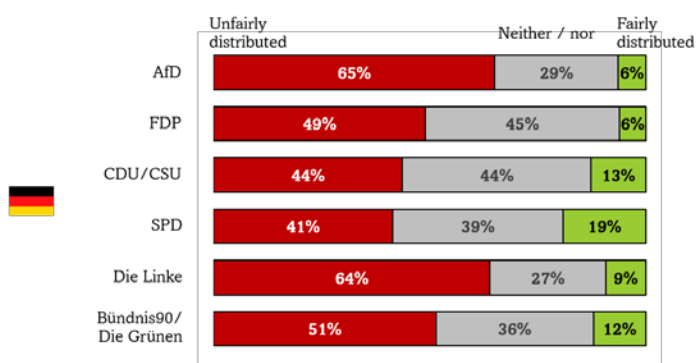
Survey questions: 'TL18_2: Looking ahead to your professional future. [...] Are you worried about the security of your job' | 'TL09b: When I think about my own situation as an employee, I view the climate-neutral transformation of the industry in [country] all in all as...'. Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.18, 95% CI [1.01, 1.38], $p < .05$. Samples vary by country (see Appendix).

Figure 39: Expected effects of the transformation on personal employment by employees' job security concern in Poland (2026)

A.2 Perceptions of fairness shape employees' expectations regarding the effects of the transformation, regardless of political party preference or social status

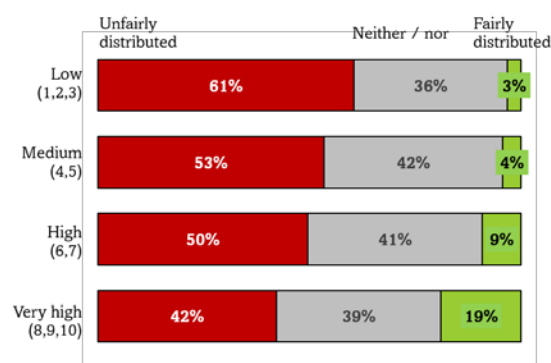
Although the perception of an unfair burden distribution is particularly pronounced among the lowest social status groups, it is also prevalent among the highest social status groups in France and Germany. Nor does political party preference explain the differences in this perception: employees with right-wing or left-wing political leanings are equally likely to believe that the costs and benefits of the transformation are unfairly distributed (Figs. 40, 41 and 42).

Perceived fairness of the burden distribution by party political preference



Survey questions: 'P17 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'P18: Which party is it?' | 'TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed fairly or unfairly?' | Regression analysis (ordered logit): OR = 1.07 95% CI [0.99, 1.15], p = 0.06. | Samples vary by country (see Appendix).

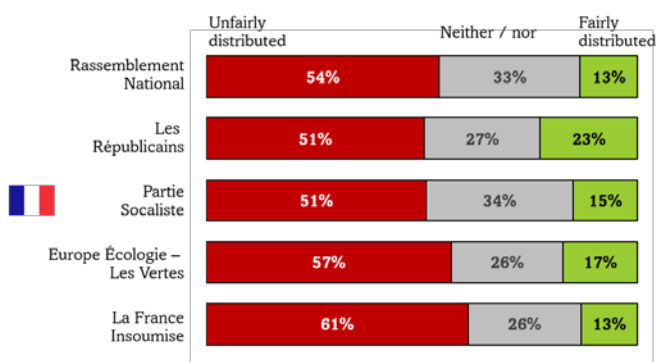
Perceived fairness of the burden distribution by social status



Survey questions: 'TL01: Please imagine a ladder with 10 rungs. [...] Where would you place yourself on this ladder?' | 'TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed fairly or unfairly?' | Regression analysis (ordered logit): OR = 1.27, 95% CI [1.18, 1.36], p < .001. | Samples vary by country (see Appendix).

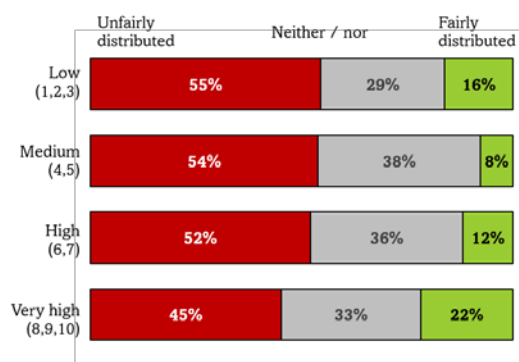
Figure 40: Perceived fairness by political party preference and social status in Germany (2026)

Perceived fairness of the burden distribution by party political preference



Survey questions: 'P17 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'P18: Which party is it?' | 'TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?' | Regression analysis (ordered logit): OR = 1.02 95% CI [0.91, 1.14], p = 0.77. | Samples vary by country (see Appendix).

Perceived fairness of the burden distribution by social status



Survey questions: 'TL01: Please imagine a ladder with 10 rungs. [...] Where would you place yourself on this ladder?' | 'TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?' | Regression analysis (ordered logit): OR = 1.14, 95% CI [1.06, 1.24], p < .001. | Samples vary by country (see Appendix).

Figure 41: Perceived fairness by political party preference and social status in France (2026)

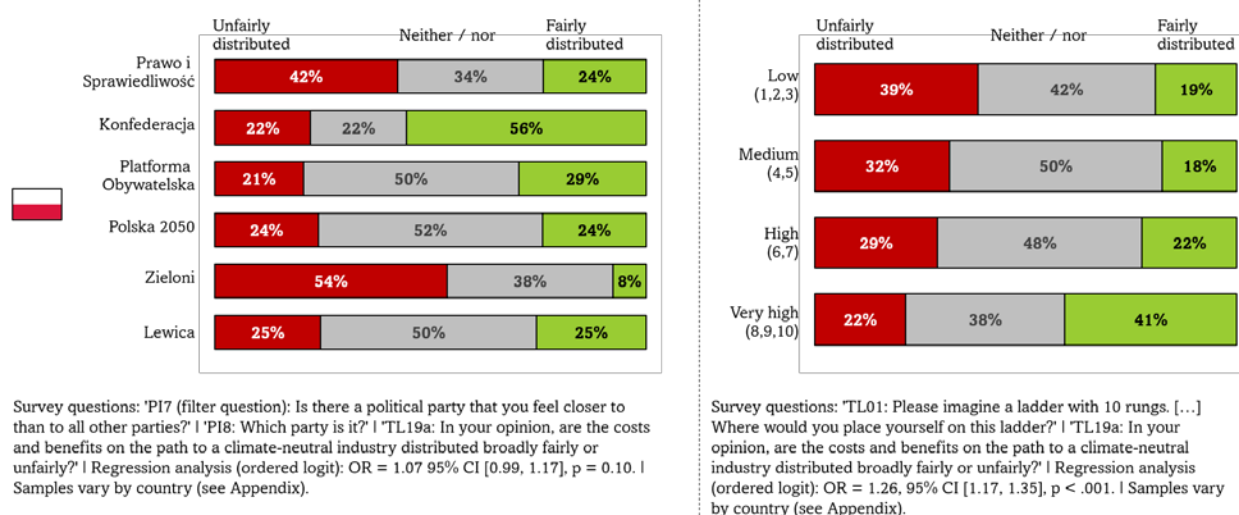


Figure 42: Perceived fairness by political party preference and social status in Poland (2026)

A.3 The higher the perceived fairness in the burden distribution, the higher the trust in others' willingness to contribute

The perception that the burden is distributed unfairly goes hand in hand with a lower level of trust in others' willingness to contribute. Those who perceive the costs and benefits of the climate-neutral transformation as being distributed unfairly are also more sceptical about others' willingness to contribute (Figs. 43, 44 and 45).

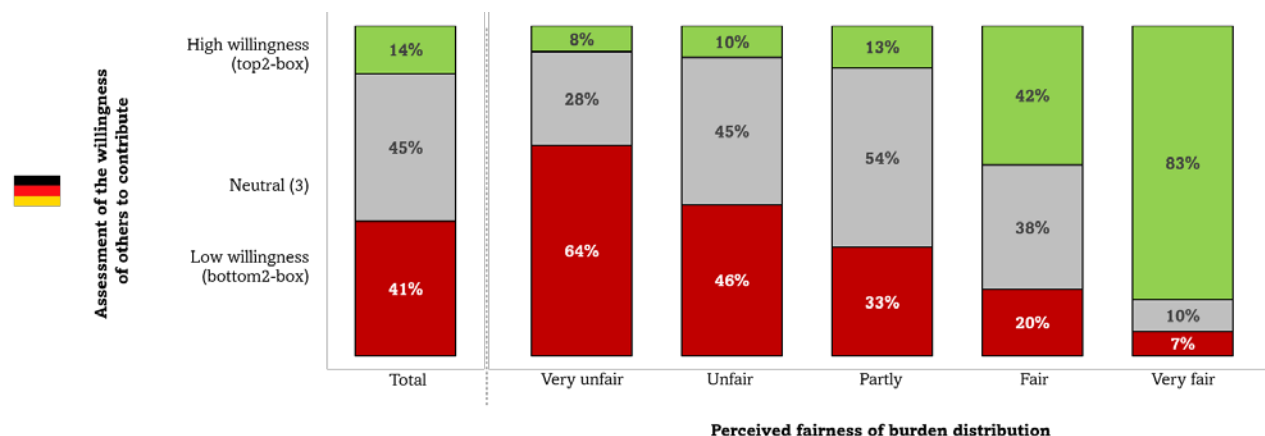
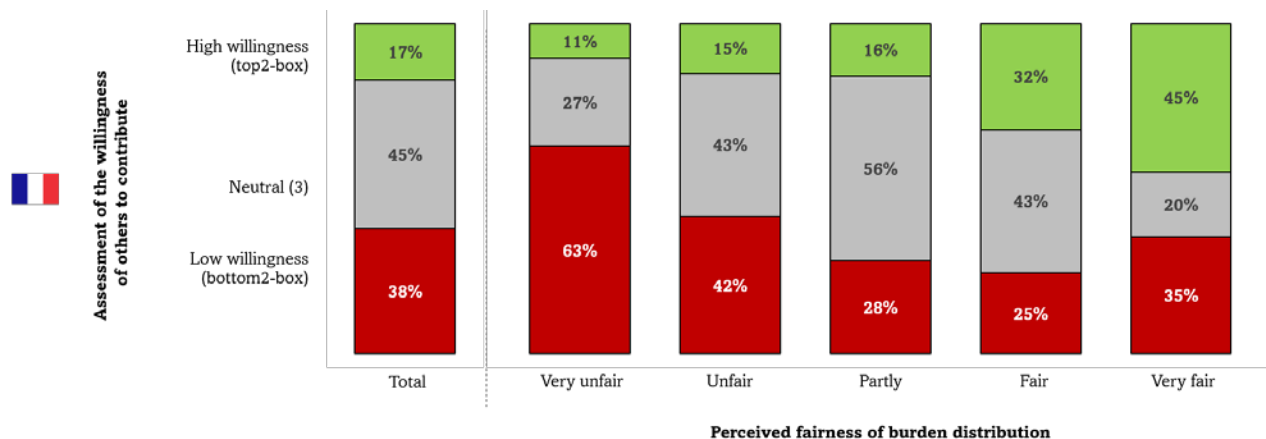
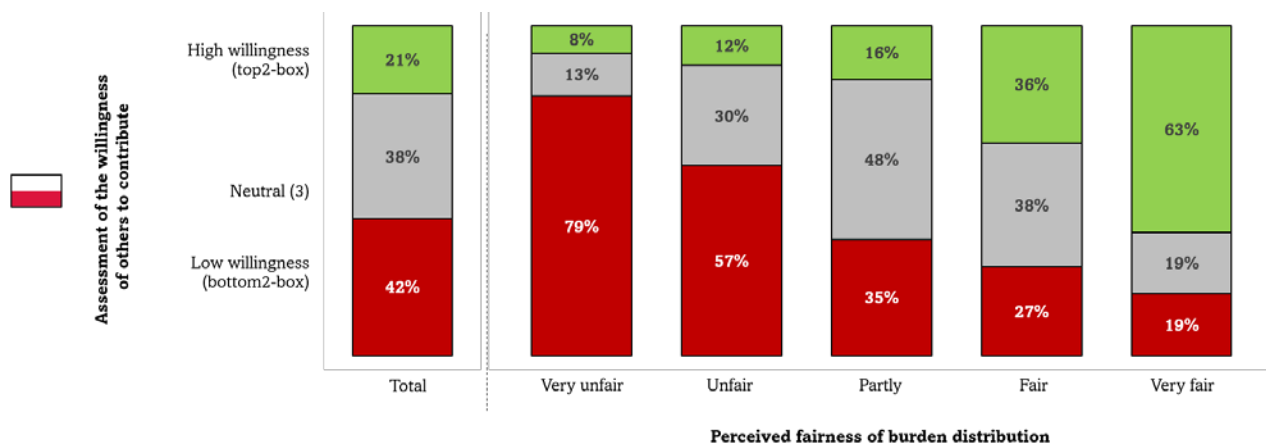


Figure 43: Trust in others' willingness to contribute by perceived burden distribution in Germany (2026)



Survey questions: "TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?" | "TL06b: In general, how would you assess the willingness of people in [country] to make a personal contribution to making the industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 1.71, 95%-KI [1.56, 1.88], $p < .001$ | Samples vary by country (see Appendix).

Figure 44: Trust in others' willingness to contribute by perceived burden distribution in France (2026)



Survey questions: "TL19a: In your opinion, are the costs and benefits on the path to a climate-neutral industry distributed broadly fairly or unfairly?" | "TL06b: In general, how would you assess the willingness of people in [country] to make a personal contribution to making the industry climate-neutral?" | Source: WZGE online survey 2026; own calculations; figures may not sum to 100% due to rounding; Regression analysis (ordered logit): OR = 2.35, 95%-KI [2.14, 2.57], $p < .001$ | Samples vary by country (see Appendix).

Figure 45: Trust in others' willingness to contribute by perceived burden distribution in Poland (2026)

A.4 The prioritisation of climate as an urgent social issue is linked to political party preference

Prioritising the issue of climate over other pressing social issues has a positive effect on people's willingness to contribute (see Section II.1.4 – Climate as an urgent social issue) – regardless of social status. However, this prioritisation is linked to one's own political leanings (see Section II.1.5 – Political party preference): among those who identify more closely with parties at the right end of the political spectrum, the issue of climate is given significantly lower priority.¹⁴

¹⁴ In all three countries, right-wing political party preference is associated with a significantly lower likelihood of prioritising climate change as one of the most pressing issues (Germany: OR

By contrast, an affinity for left-wing parties is associated with a higher priority for climate as an urgent social issue (Figs. 46, 47 and 48).

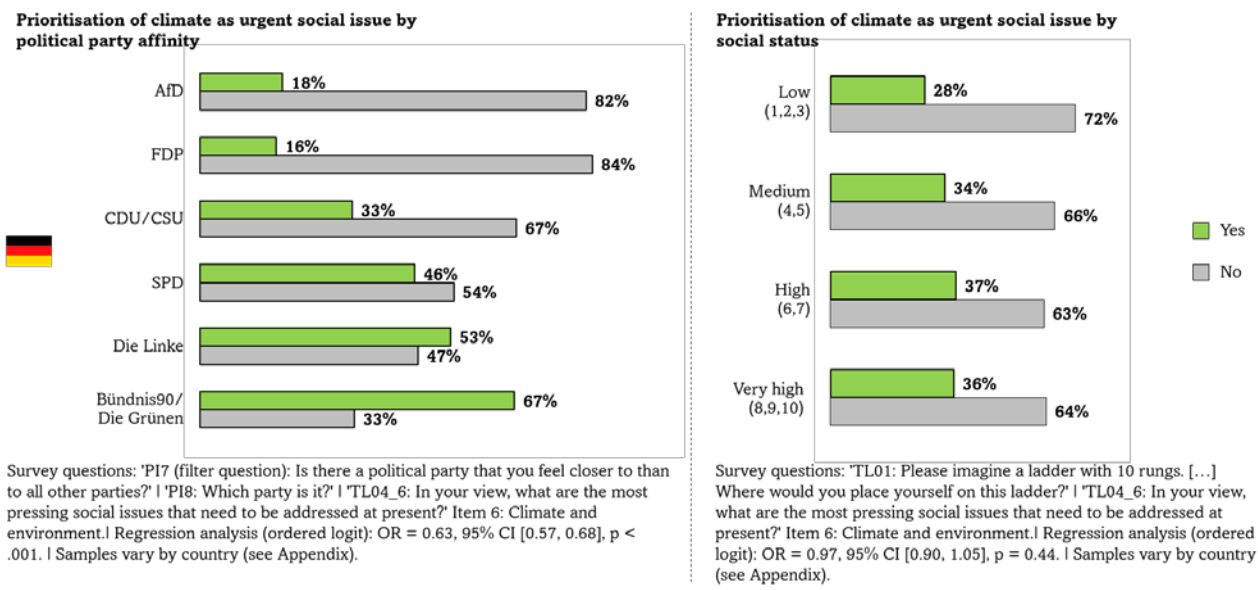


Figure 46: Prioritisation of climate as an urgent social issue by political party preference and social status in Germany (2026)

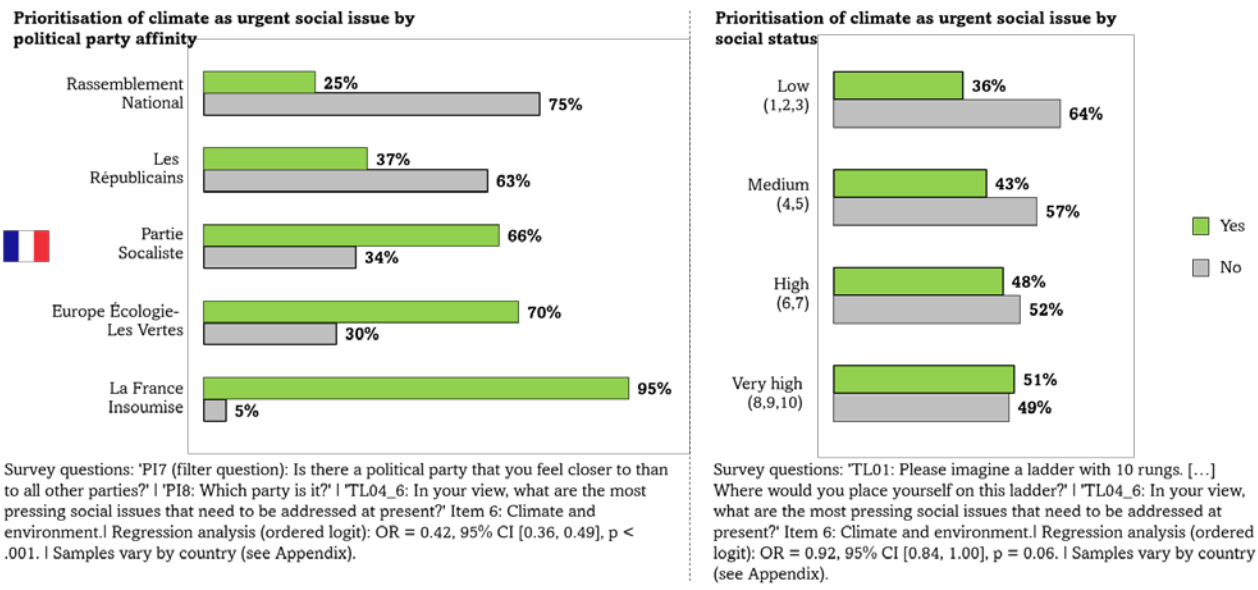


Figure 47: Prioritisation of climate as an urgent social issue by political party preference and social status in France (2026)

0.24 [0.18–0.31]; France: OR 0.13 [0.10–0.18]; Poland: OR 0.50 [0.37–0.67]; p < 0.001 in each case). The effect is strongest in France and weakest in Poland.

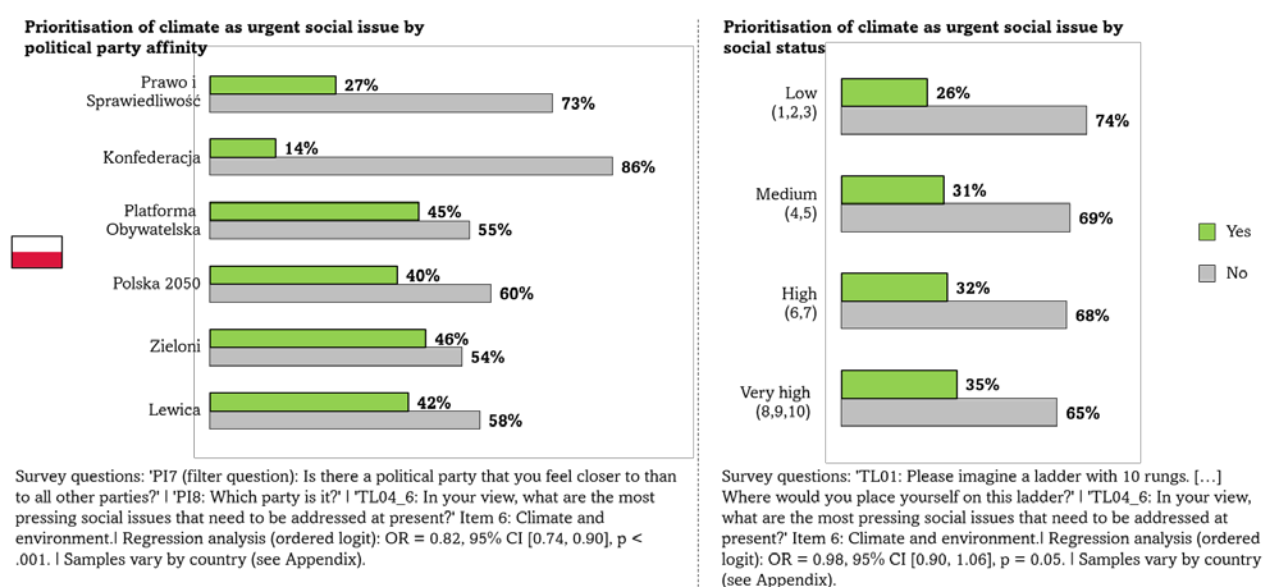


Figure 48: Prioritisation of climate as an urgent social issue by political party preference and social status in Poland (2026)

A.5 Preference for parties at the right of the political spectrum is associated with a lower willingness to contribute, irrespective of job security concerns

The effect of political leanings on willingness to contribute (see Section II.1.5 – Political party preference) cannot be attributed to existing concerns about job security: across all three countries, such concerns vary only slightly according to political party preference, and in Germany, there is an inverse relationship (Figs. 49, 50 and 51). Therefore, preference for parties at the right of the political spectrum affects employees' willingness to contribute to the transformation, regardless of whether they feel their job to be at risk.

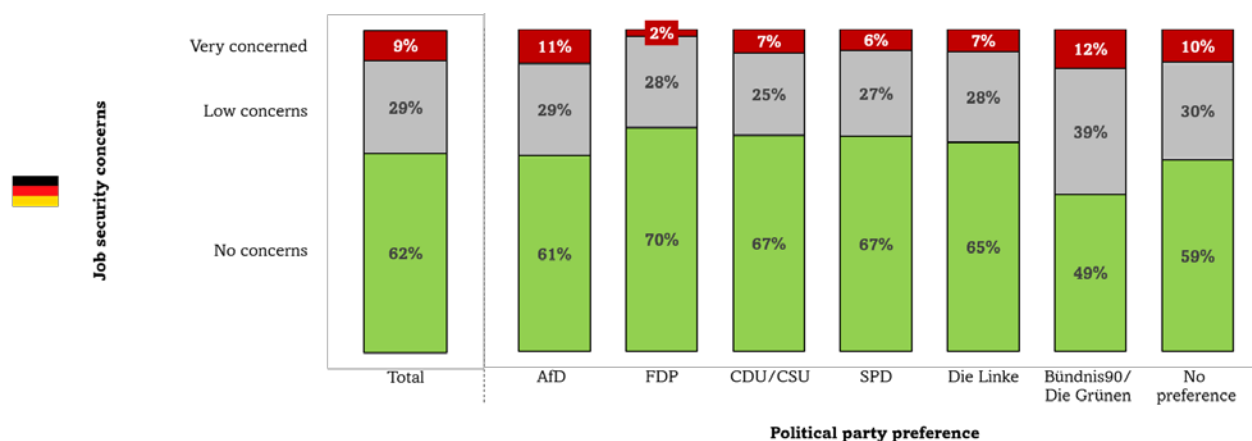
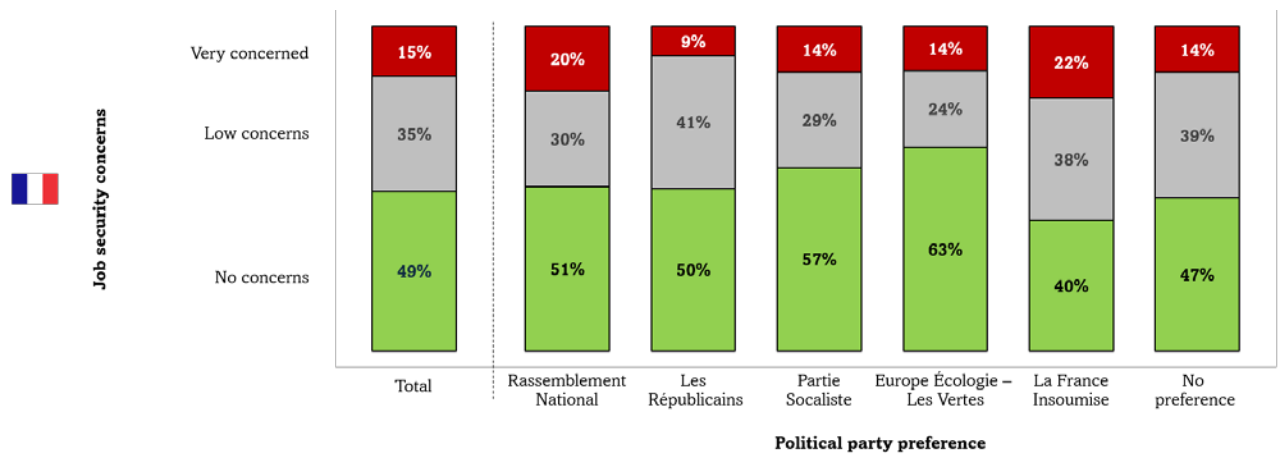
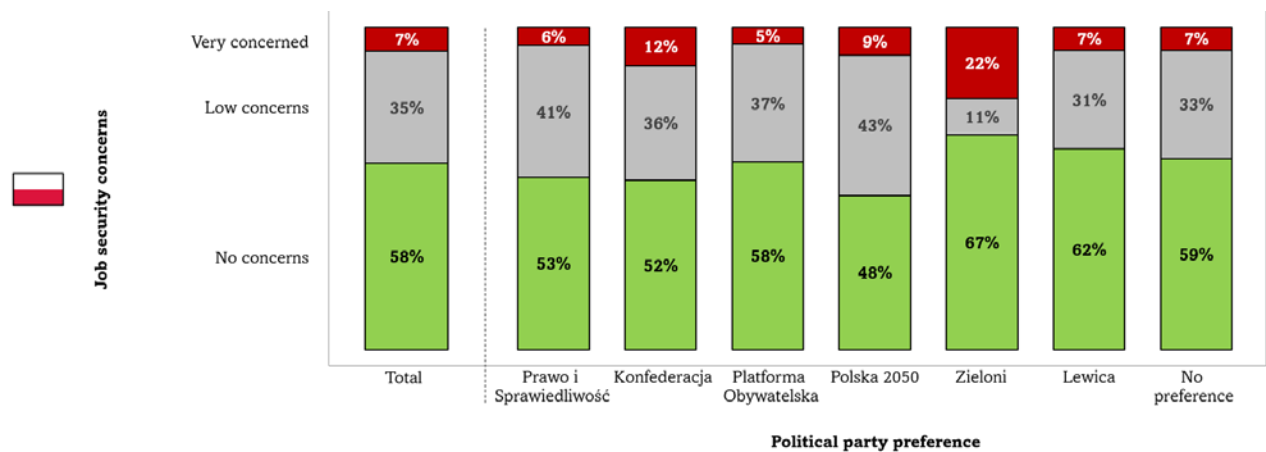


Figure 49: Job security concerns by political party affinity in Germany (2026)



Survey questions: 'PI7 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'PI8: Which party is it?' | 'TL18_2: Looking ahead to your professional future. How do you feel about the following areas? Are you worried about the security of your job?' | Source: WZGE online survey 2026; own calculation; totals may not sum due to rounding; Regression analysis (ordered logit): OR = 1.02, 95% CI [0.81, 1.31], p = 0.81. | Samples vary by country (see Appendix).

Figure 50: Job security concerns by political party affinity in France (2026)



Survey questions: 'PI7 (filter question): Is there a political party that you feel closer to than to all other parties?' | 'PI8: Which party is it?' | 'TL18_2: Looking ahead to your professional future. How do you feel about the following areas? Are you worried about the security of your job?' | Source: WZGE online survey 2026; own calculation; totals may not sum due to rounding; Regression analysis (ordered logit): OR = 1.26, 95% CI [0.99, 1.60], p = .0056. | Samples vary by country (see Appendix).

Figure 51: Job security concerns by political party affinity in Poland (2026)

Appendix B – Methodological approach

B.1 Representative survey

The 2026 survey built upon the same dimensions and variables as the previous surveys in 2022, 2024, and 2025, ensuring comparability across waves. For 2026, three new variables were included in the questionnaire: willingness to pay, concerns about one's future career, and perceived fairness.

The sample size varies across the screening questions and between the control and treatment groups (Table 1).

	Germany	France	Poland
Sample size (n)			
2022	2,039		
2024	2,120		
2025	2,173	1,053	1,077
2026	2,094	2,102	2,082
Filter questions (2026)			
Political party preference	920	733	800
Vignette experiment (2026)			
Control group	400	398	408
Treatment 1: Employment effects	394	383	376
Treatment 2: Government investment	415	393	395
Treatment 3: Sovereignty framing	394	409	402

Table 1: Sample description. Survey 2022, 2024, 2025 and 2026

Descriptive (trend) analysis and analysis of acceptance factors

Questions using a five-point Likert scale were consolidated into a three-point scale: top-2 box (scale values 1 and 2 – high), neutral (scale value 3) and bottom-2 box (scale values 4 and 5 – low). Response codes for 'don't know' and missing data were treated as missing. To test whether the observed changes between survey waves were statistically significant, chi-squared tests of independence were conducted on the three-level recoded distributions.

To analyse the factors influencing acceptance, two regression models were estimated separately for Germany, France, and Poland.

Structural context, expectations, and behavioural intentions: The first section examined which characteristics of the structural context shape the respondents' expectations regarding the transformation – and whether these expectations, in turn, influence their preferred pace of transformation and their willingness to contribute. The characteristics of the structural context considered were social status, age, gender, and size of place of residence, as well as labour market position (economic sector, type of occupation, managerial responsibility). Regression analysis was used to analyse the relationships.

Upstream attitudes, expectations, and behavioural intentions: The second section examined whether four upstream attitudes – prioritisation of the climate issue, political party preference, job security concerns, and perceived fairness in the burden distribution – possess independent explanatory power beyond the structural context. A mediation analysis for selected relationships examined whether the four upstream attitudes directly influence the preferred pace of transformation or willingness to contribute, or whether this relationship is mediated – wholly or partly – by an intervening variable. In addition, a trend analysis investigated whether the relative weight of the predictors had changed across the survey waves. To this end, the same regression models were estimated separately for each available wave.

The analysis was supported by AI-powered tools for the development and implementation of the analysis scripts in Python, as well as for the editorial revision of the report. All decisions regarding data analysis – including the underlying model, the selection of variables and the interpretation of the results – were made by the research team. Responsibility for the quality and accuracy of the findings lies entirely with the authors.

B.2 Vignette experiment

The vignette experiment examined the effect of different communication messages on employees' willingness to pay. Three messages were tested: (1) information on positive net employment effects, (2) information on government pre-investment in climate-friendly infrastructure, and (3) framing the transformation as a contribution to economic sovereignty and national independence. Willingness to pay served as a concrete measure of respondents' willingness to act. The items were based on the concept of willingness to pay and were operationalised as a levy of 0.5% or 1% of monthly net household income.

A between-subjects experiment involving four groups was used to measure the causal effects. Randomisation was carried out within the survey software. All groups were presented with an identical base text describing the climate-neutral transformation and its funding requirements. The treatment groups were additionally presented with one of the three messages described below.

Control group: Germany is planning a climate-neutral transformation of industry by 2045. This transformation requires investments that can be funded by the state, businesses, or the public.

Information on positive net employment effects (T1): Current forecasts show that the climate-neutral transformation of industry will have a positive impact

on employment. While existing jobs will be lost in some sectors, new ones will be created at the same time. In net terms, around 600,000 additional jobs are expected to be created by 2045, primarily in the industrial, skilled trades, and services sectors.

Information on government investment in climate-friendly infrastructure (T2):

The Federal Government has announced that, before placing any further financial burden on the public, it will first invest in climate-friendly infrastructure. The Federal Government will make 100 billion euros available to the federal states and local authorities – for, among other things, the expansion of public transport infrastructure, the conversion and construction of climate-neutral heating networks, relief for private and commercial consumers with regard to energy costs, and climate-friendly new-build housing in the low-cost segment. In many regions, corresponding measures are already being planned.

Framing the transformation as a contribution to economic sovereignty and national independence (T3):

The climate-neutral industrial transformation will strengthen Germany's economic sovereignty. Germany currently imports around 68% of its energy requirements – fossil fuels from abroad. A climate-neutral industrial transformation would gradually reduce this dependence: electricity and heat would increasingly be generated domestically using renewable energy sources. Germany would thus become less reliant on international supply chains and safeguard its economic self-determination.

The information in each vignette was adapted to the national context based on desk research into government documents (Table 2).

Treatment	Germany	France	Poland
All	Climate-neutral transformation by 2045.	Climate-neutral transformation by 2050.	Climate-neutral transformation by 2050.
Employment effects	A net total of approximately 600,000 additional jobs by 2045.	A net total of approximately 750,000 additional jobs by 2050.	A net total of approximately 300,000 additional jobs by 2050.
Government investment	100 billion euros.	54 billion euros.	98 billion zlotys.
Sovereignty frame	68% share of energy imports.	46% share of energy imports.	87% share of energy imports.

Table 2: Country-specific adaptations to the vignette texts

To check whether the treatments had been processed correctly, each vignette included a manipulation check. The main analysis includes only those respondents who answered the manipulation check question correctly. A sensitivity analysis involving all respondents was subsequently conducted. The dependent variable, willingness to pay, was constructed from two questions ('Would you contribute 1% of your net household income?' and 'Would you contribute less than 1% of your net household income, e.g. 0.5%?') to form a three-level ordinal scale. The treatment effects were analysed separately for each country using ordered logit regression.

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About the WCGE

The Wittenberg Center for Global Ethics is a not-for-profit think tank for practice-oriented economic and leadership ethics. Since 1998, we have been promoting ethical leadership skills in academic settings and seminars, inspiring public debate through research and opinion, building bridges through dialogue and facilitation, and providing support through consultancy and coaching. Our work is independent, scientifically grounded, and globally oriented. We receive support from partners in the political, business, academic, and civil society sectors.

This study forms part of our multi-year series of surveys on climate-neutral industry: we are examining how employees in Germany (since 2022) and in France and Poland (since 2025) view industrial transformation, and what factors influence their willingness to contribute.

All reports in this series of studies, further publications, and information on our seminars and advisory services can be found at www.wzge.de and www.linkedin.com/company/wzge.

