

Energy Transition Future Monitor 2026

The Acceptance of the Energy
Transition in the Wake of the Iran War

June 2026

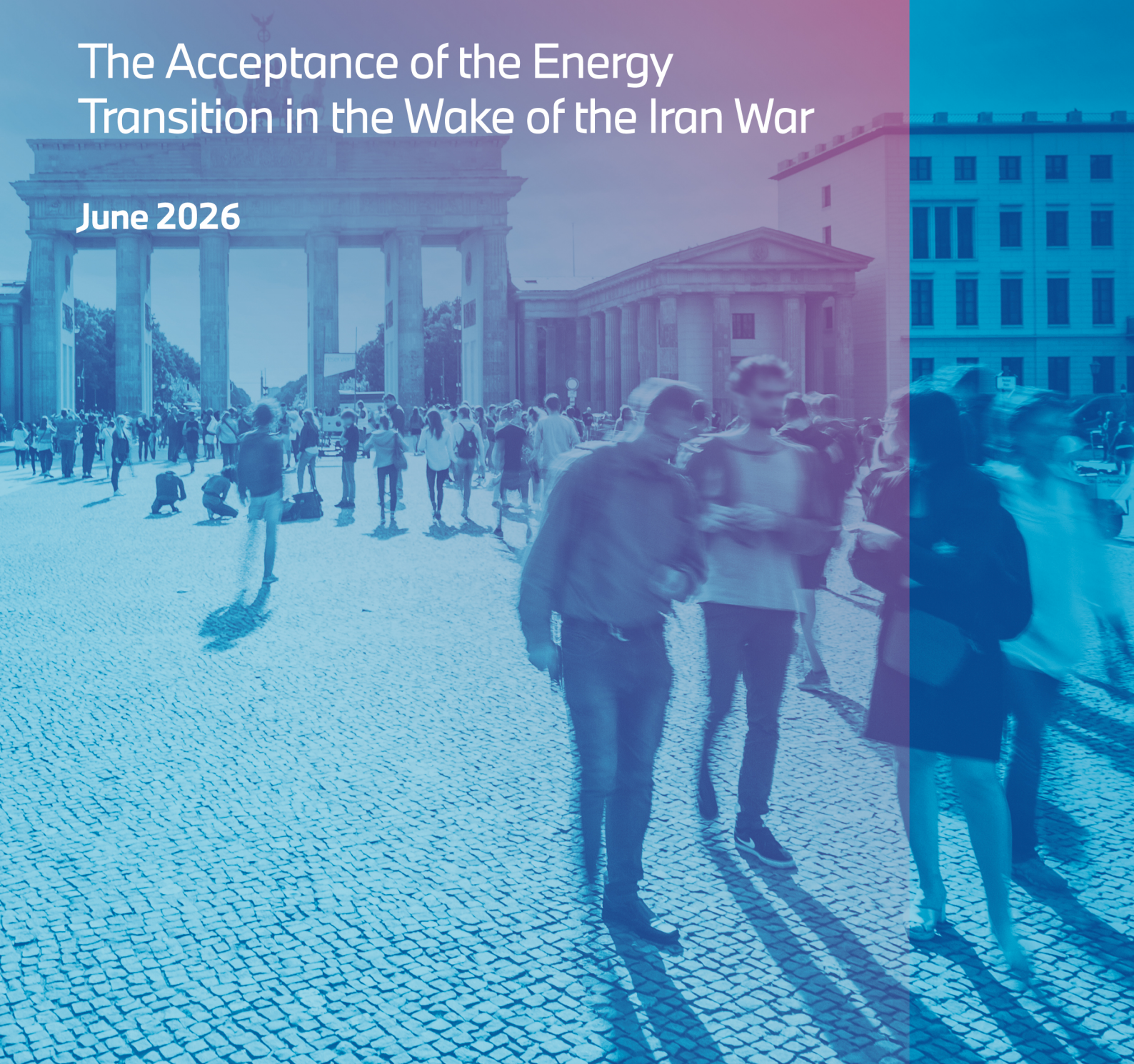


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Preface

The Iran War has once more brought home the risks associated with energy supply, both in terms of supply security and energy price trends. The question is: How does such conflict influence the support for the energy transition and the expectations for the government's energy policy? Last year, the BMW Foundation Herbert Quandt commissioned two surveys on the public's acceptance of the energy transition and on what people think about how best to ensure the country's energy supply. In light of the dramatic events of the last few weeks, which are having an enormous impact on the energy supply, the Allensbach Institute conducted another survey on behalf of the BMW Foundation Herbert Quandt, updating several of its indicators.

This time, the survey centered around concerns about rising prices and energy supply security, the public's assessment of the consequences of the energy transition, and its appraisal of the government's current energy policy measures. The data are based on 1,015 face-to-face interviews with a representative cross-section of the population aged 16 and over. The interviews were conducted in late April 2026.

Allensbach on Lake Constance,
June 3, 2026

Institut für Demoskopie Allensbach

Pronounced inflation fears and growing doubts about energy supply security

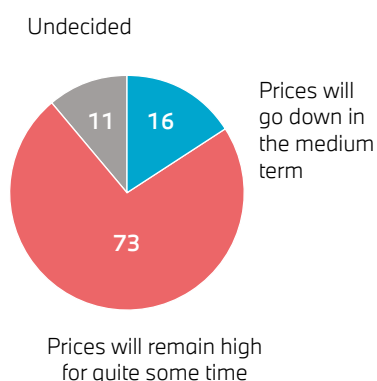
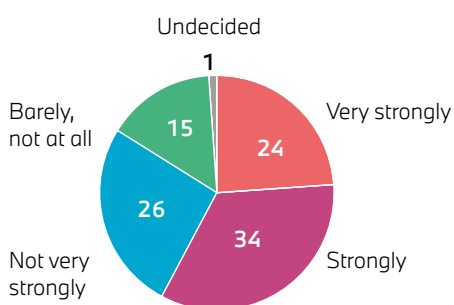
The large majority of the population is directly affected by the rise in energy prices as a result of the Iran War. 58 percent of respondents say that they are strongly or even very strongly affected, an additional 26 percent are at least somewhat affected. Only 15 percent of the population does not feel affected by the increase in gas and diesel prices. Confidence that fuel prices will stabilize again at a significantly lower level is low. Three quarters of the population assume that gas and diesel prices will remain high in the long term.

Great concerns and skepticism about future development

Question: "As a result of the Iran War, gas and diesel prices have gone up. How strongly are you personally affected by these price hikes? Would you say that the higher gas prices affect you ..."

Question: "Do you believe that gas and diesel prices will go down in the medium term, or will prices remain high for quite some time?"

%



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

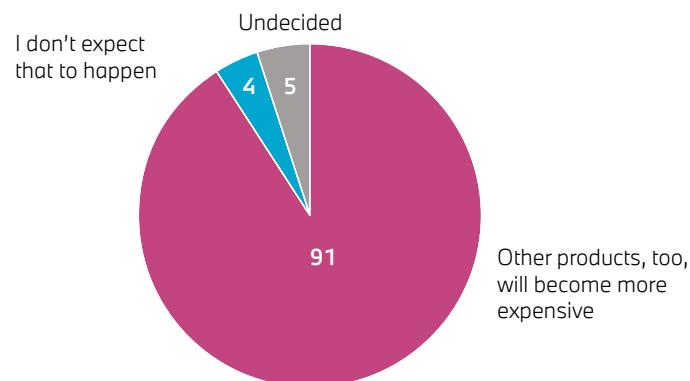
Fig. 1

Fuel prices were at the center of both the public debate and political decisions in recent weeks. Citizens are, however, also concerned about the development of oil and natural gas prices; they, moreover, assume that the Iran War will not only drive up energy costs but generally lead to a burst of inflation, which will also affect other products such as, for example, food and groceries. This is believed by 91 percent of the population; only 4 percent are optimistic that inflation risks can be limited to the energy sector.

Inflation risks

Question: "Do you expect not just gas and diesel prices to go up but also other products such as food and groceries to become more expensive as a result of the Iran War?"

%



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

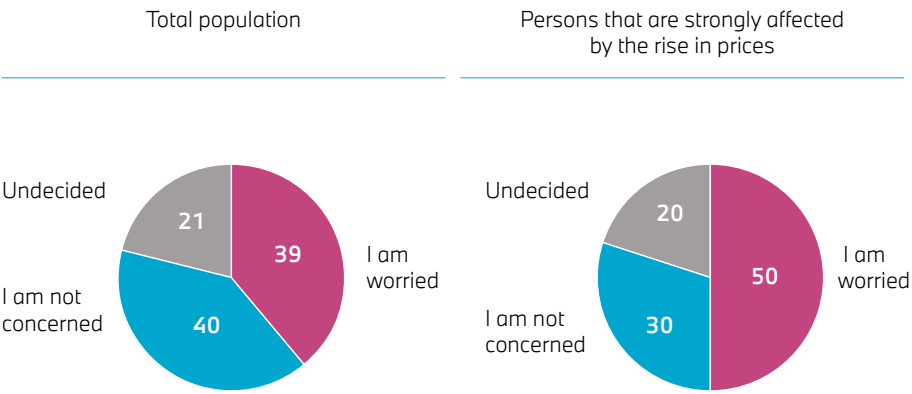
Fig. 2

The Iran War has not only renewed the focus on price trends but also on supply security. 39 percent of the population are worried that there could be fuel shortages in Germany in the foreseeable future; 40 percent are unconcerned; one in five say they are undecided. Concerns about gas and diesel shortages are above average among East Germans and among those who are strongly affected by the rise in fuel prices: half of the respondents in those categories are worried that there could be fuel shortages soon.

Concerns about fuel shortages

Question: "Are you worried that Germany will experience fuel – gas or diesel – shortages, or are you not concerned about that?"

%



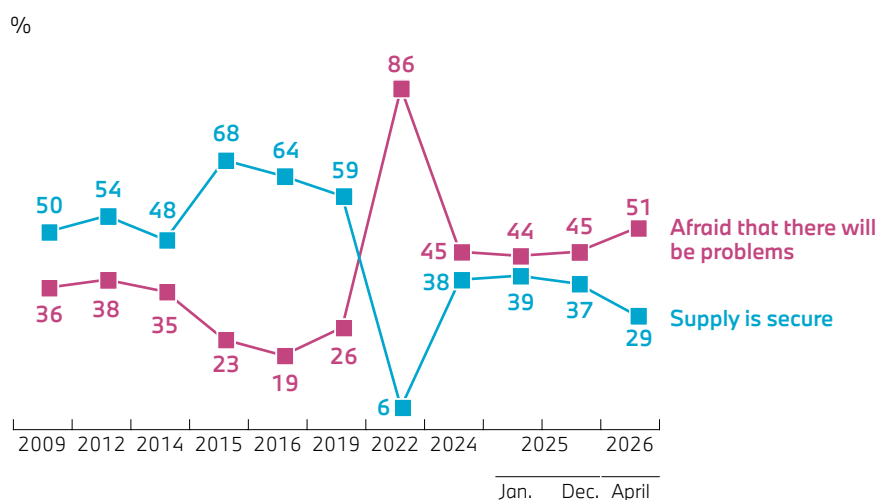
Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

Fig. 3

The concern is even greater when it's not just about gas and diesel but more generally about the supply of energy such as electricity, natural gas, and heating oil. Here, the Iran War has definitely led to growing doubts about supply security. In December of last year, 45 percent of the population were worried about supply bottlenecks; today it is 51 percent. Conversely, confidence that the energy supply will be secure for the next few years has declined from 37 to 29 percent during the same period. The long-term trend shows that the wars of recent years have been watershed moments for the public's assessment of supply security. Before the war in Ukraine, the majority of the population was convinced that there was no reason to worry about the energy supply. Here, the war in Ukraine came as a real shock. After the outbreak of the war, 86 percent of the population no longer believed the energy supply to be secure; while public opinion has been somewhat more relaxed since then, it has never returned to the calm assessment prior to the outbreak of the war in Ukraine. Skepticism is particularly high among critics of the energy transition. Two thirds of respondents in this group are afraid that there will be energy supply problems in the years ahead.

Growing concerns about supply security

Question: "Do you believe that our energy supply – electricity, gas, heating oil, and fuel – is secure in the years ahead or are you afraid that there will be energy supply problems?"



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

Fig. 4

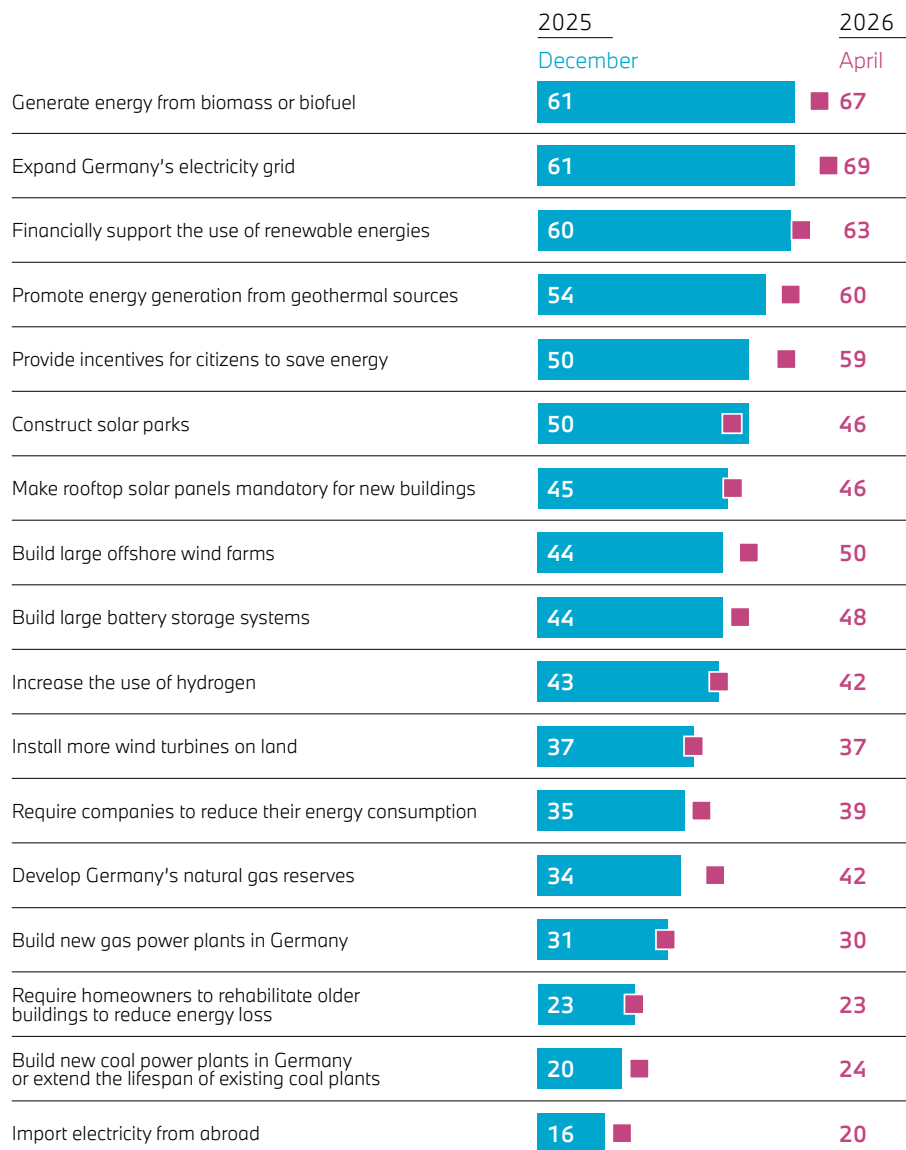
As a result of the widespread and growing fears that the energy supply may not be secure in the years ahead, the population supports a growing range of measures to ensure a reliable energy supply. These measures include promoting the typical renewable energies, generating more energy from biogas, accelerating the use of geothermal energy, expanding the electricity grid, and providing incentives to save energy. In terms of the ranking of these measures, not much has changed since the end of last year. However, several measures are even more strongly supported now than in December 2025. These include providing incentives to save energy, expanding the power grids, generating energy from biomass or biogas, expanding offshore wind farms, and developing natural gas reserves in Germany. Particularly with regard to this last point, opinion has changed markedly: In December 2025, 34 percent of the population thought it a good idea to develop natural gas reserves in Germany; this figure has climbed to 42 percent today. There is currently also significantly more support for expanding the electricity grid than there was a few months ago: Then, 61 percent thought it sensible and important to expand the power grid in Germany; today, this figure is at 69 percent. At the same time, there has been a marked increase in support for incentives to promote energy conservation: In late 2025, 50 percent of the population saw it as a sensible measure to increase incentives for citizens to save energy; this figure has climbed to 59 percent. During the same period, the support for measures requiring companies to reduce their energy consumption has grown from 35 to 39 percent.

The only measure that is currently receiving less support than in late 2025 is the construction of solar farms: while 50 percent of the population saw this as a sensible measure in December 2025, the figure is currently at 46 percent. There has been little change in opinion on installing solar panels on the roofs of newly constructed buildings (which is supported by 46 percent), expanding onshore wind power, building new gas power plants, and making it mandatory for homeowners to rehabilitate old houses. The percentage of those who consider this last point to be a sensible measure has remained at 23 percent, the number of those who favor the construction of new gas power plants has remained at around 30 percent.

Ideas on how best to secure the energy supply

Question: "Opinions differ on which measures may be appropriate to ensure Germany's energy supply in the future. What do you think? Which of the following measures do you think would be sensible to ensure the future energy supply?"

%



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys 12098, 13017

Fig. 5

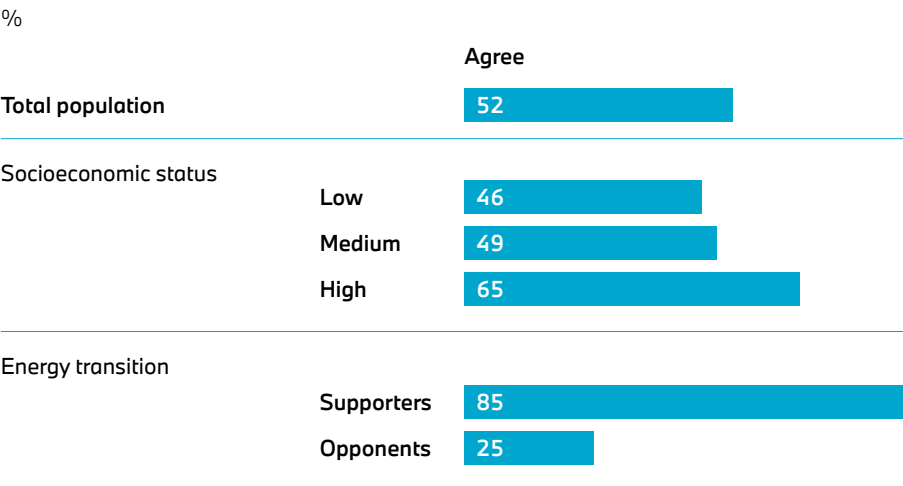
Basic attitude toward energy transition largely unchanged

Despite concerns about rising prices and a reliable energy supply, the basic attitude toward the energy transition has remained largely unchanged as a result of the dramatic events of the last few weeks. The majority of the population is convinced that the energy transition is necessary and that there is no alternative to it. This is a higher percentage than those who consider the current implementation of the energy transition to be the right approach; even among opponents of the energy transition in its current form, 25 percent see no alternative to the energy transition. As before, support for the energy transition is strongly linked to socioeconomic background. Two thirds of people from a higher socioeconomic background – compared to barely half of the respondents from a lower socioeconomic background – are convinced of the necessity of the energy transition in Germany.

AfD supporters are the only group where the majority calls into question the need for an energy transition. In that group, only 25 percent see the energy transition as necessary, while 58 percent reject it on principle.

Necessary energy transition

"The energy transition in Germany is necessary; there is no way around it."



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

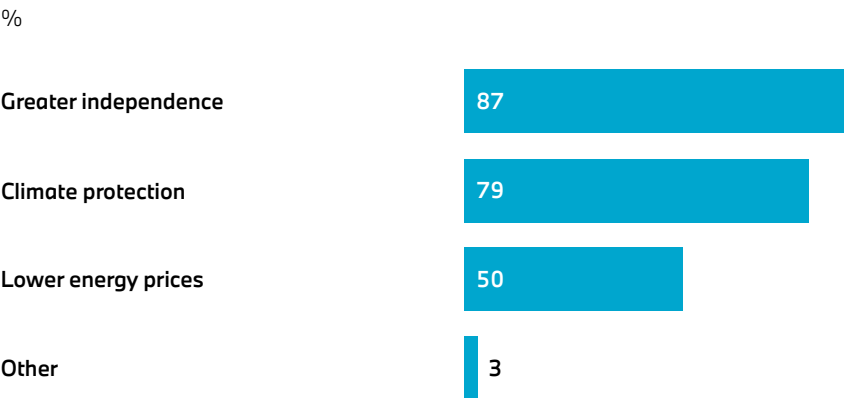
Fig. 6

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Despite major worries about energy price trends, the hope of reducing energy prices by shifting to renewable energies is not the main motivation for supporting the energy transition. Those who see the energy transition in Germany as necessary primarily argue that it is necessary to enhance energy supply independence while also protecting the climate. Among those who see no alternative to the energy transition, 87 percent cite as their motive the striving for greater energy supply autonomy, 79 percent cite climate protection. With a share of 50 percent, the hope for a long-term reduction in energy prices comes in at third place.

Motives for supporting the energy transition

Question for people who consider the energy transition in Germany to be necessary:
"What is your main reason for seeing the energy transition in Germany as necessary:
protecting the climate, becoming more independent from energy imports from abroad,
reducing energy prices in the long term, or other motives?"



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

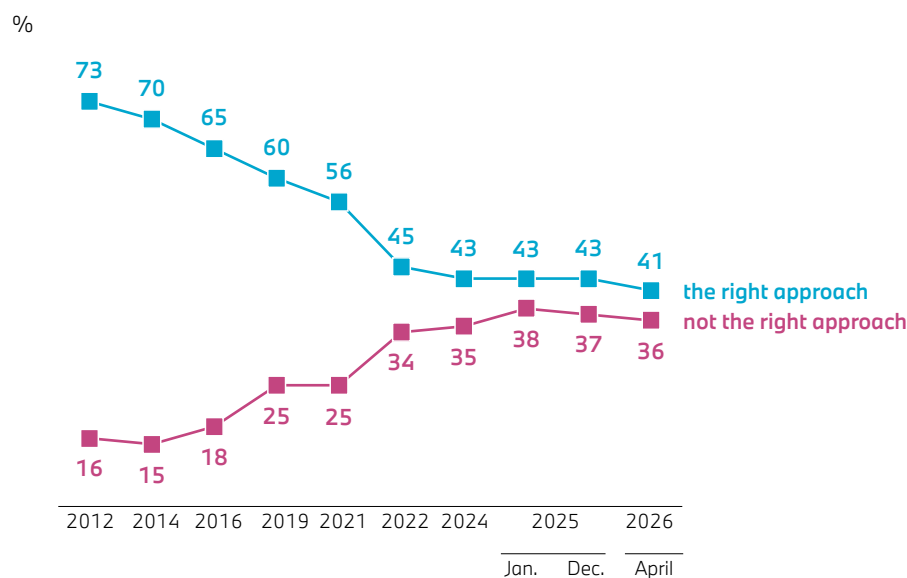
Fig. 7

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The basic attitude toward the energy transition as it is being implemented in Germany has changed little as a result of the events of recent weeks. The percentage that sees the nuclear phase-out and the transition to renewable energies as the right approach, has slightly decreased from 43 to 41 percent, while 36 percent criticize these measures. On the whole, the trend analysis shows little change over the last four years, whereas support for the energy transition declined steadily and sharply between 2012 und 2022.

The support for the energy transition has declined only slightly

As part of the energy transition, the continual expansion of renewable energies to ensure supply security is considered to be:



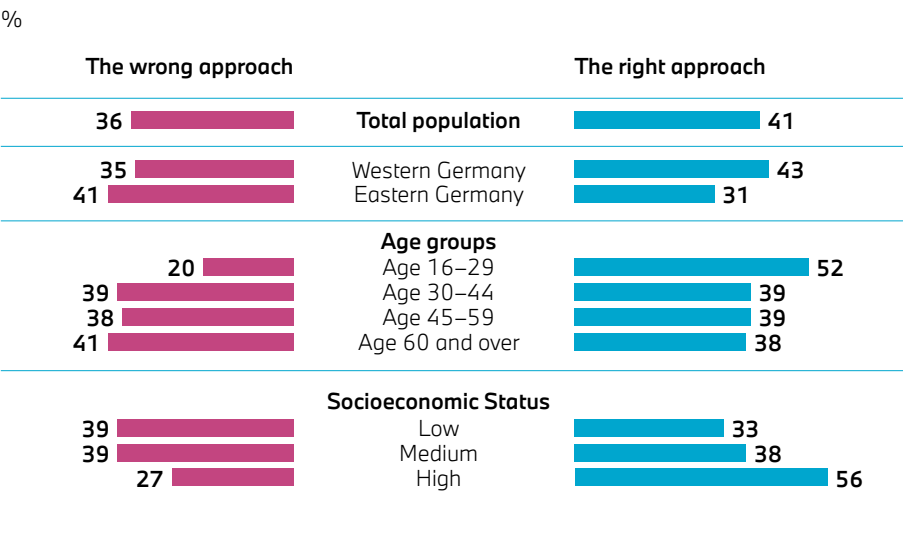
Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys, most recently 13017

Fig. 8

As before, the energy transition has more support in the west of Germany than in the east, with significantly more support among those under 30 than among middle-aged and older generations, as well as among people of higher socioeconomic status than people of medium and lower socioeconomic status. While the energy transition is supported by a relative majority of people in western Germany, a clear relative majority in eastern Germany opposes the energy transition in Germany in its current form: 41 percent of eastern Germans consider it to be the wrong approach, 31 percent as the right approach. Among people of higher socioeconomic status, the energy transition is supported by 56 percent, compared to only a third of those from a lower socioeconomic background. As before, the energy transition is primarily supported by Green Party and Left Party supporters, while the large majority of AfD supporters takes an opposite view. It can be observed, however, that since the end of last year, support for the energy transition has declined also among supporters of the coalition parties. This is true especially for SPD supporters: while the majority of them supported the energy transition at the end of last year, currently only 38 percent believe it is the right approach.

The energy transition is supported mainly by the younger generation and people of higher socioeconomic status

Question: "As part of its energy transition, Germany has phased out nuclear energy and is continuously expanding its energy supply primarily through renewable energies. Generally speaking, do you consider this to be the right or the wrong approach?"



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

Fig. 9

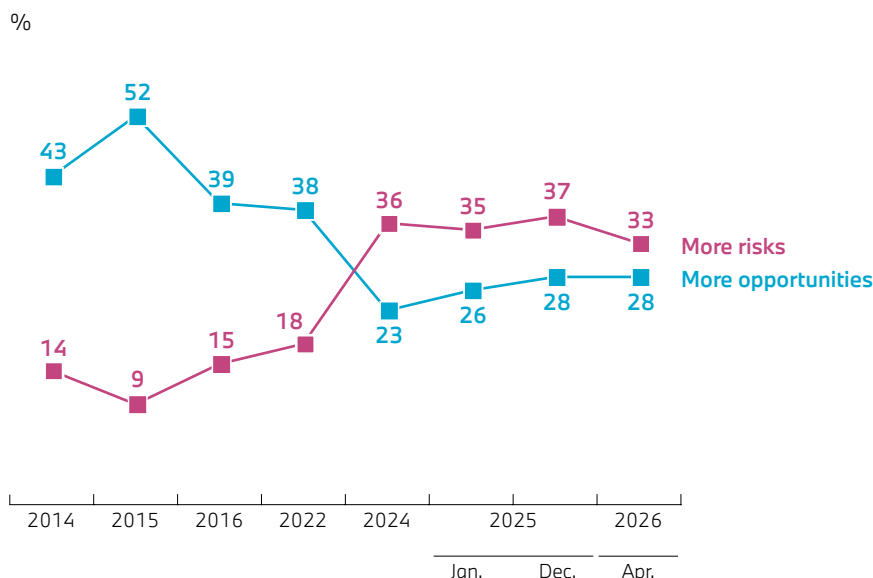
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Partly different assessment of the consequences of the energy transition

Like the basic attitude toward the energy transition, there has, at first glance, also been little change in the assessment of the opportunities and risks of the energy transition. The prevailing view continues to be that the energy transition brings more risks than opportunities for Germany: 33 percent of the population associate the energy transition primarily with risks, 28 percent with opportunities. Until 2022, the energy transition was mainly seen as an opportunity scenario; after that, the risk scenario has been gaining ground, whereby the gap between the risk and opportunity association has narrowed over the last few years. Here, too, we can see marked differences between east and west, socioeconomic backgrounds, and the younger generation as compared to the middle-aged and older generations. While the western German population associates the energy transition with opportunities and risks in roughly equal measure, eastern Germans see far more risks than opportunities. Likewise, people from weaker socioeconomic backgrounds associate the energy transition far more often with risks than with opportunities, as compared to people of higher socioeconomic status. The assessment is also strongly influenced by expectations of personal impact: The overwhelming majority of those who are convinced that the energy transition will bring them personal benefits expects the energy transition to be primarily an opportunity scenario, while the overwhelming majority of those who anticipate or already experience personal disadvantages generally see the energy transition as a project fraught with risks.

The energy transition is seen to bring more risks than opportunities

Question: "In your opinion, will the energy transition bring more opportunities or risks for Germany?"



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys, most recently 13017

Fig. 10

All in all, 29 percent of the population are convinced that the energy transition will have negative consequences for them personally, while only 11 percent see or expect positive personal outcomes. It is worth noting that the assessment of personal impacts is currently significantly lower than at the end of last year. In December 2025, 14 percent still saw the energy transition as positive for them personally, while 37 percent identified personal disadvantages. For one thing, this certainly has to do with the fact that some government regulations have been relaxed or repealed; mostly, however, the data suggests that the Iran War has highlighted the risks associated with fossil energy supply and, in certain details, has led to markedly different assessments of the consequences of the energy transition.

The energy transition is expected to have less personal impact

Question: "What about your personal situation? Would you say that, overall, the energy transition holds more advantages or more disadvantages for you personally?"

Overall, the energy transition brings	2014	2016	2025		2026
	%	%	Jan. %	Dec. %	Apr. %
More advantages	22	18	10	14	11
More disadvantages	31	21	36	37	29
Neither	37	50	43	42	47
Undecided	10	11	11	7	13
	100	100	100	100	100

Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys, most recently 13017

Fig. 11

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When we look at some of the details, the assessment of the consequences of the energy transition shows several striking changes – primarily concerning energy supply security and autonomy. For example, the conviction that the energy transition will make Germany more independent of electricity imports from abroad has increased from 28 to 39 percent, while the percentage of people who hope that the energy supply generally will be more secure has increased from 17 to 27 percent. Conversely, the number of those who associate the energy transition with supply security risks has declined from 43 to 32 percent. Likewise, the belief that Germany will lose international competitiveness as a result of the energy transition has declined from 44 to 35 percent.

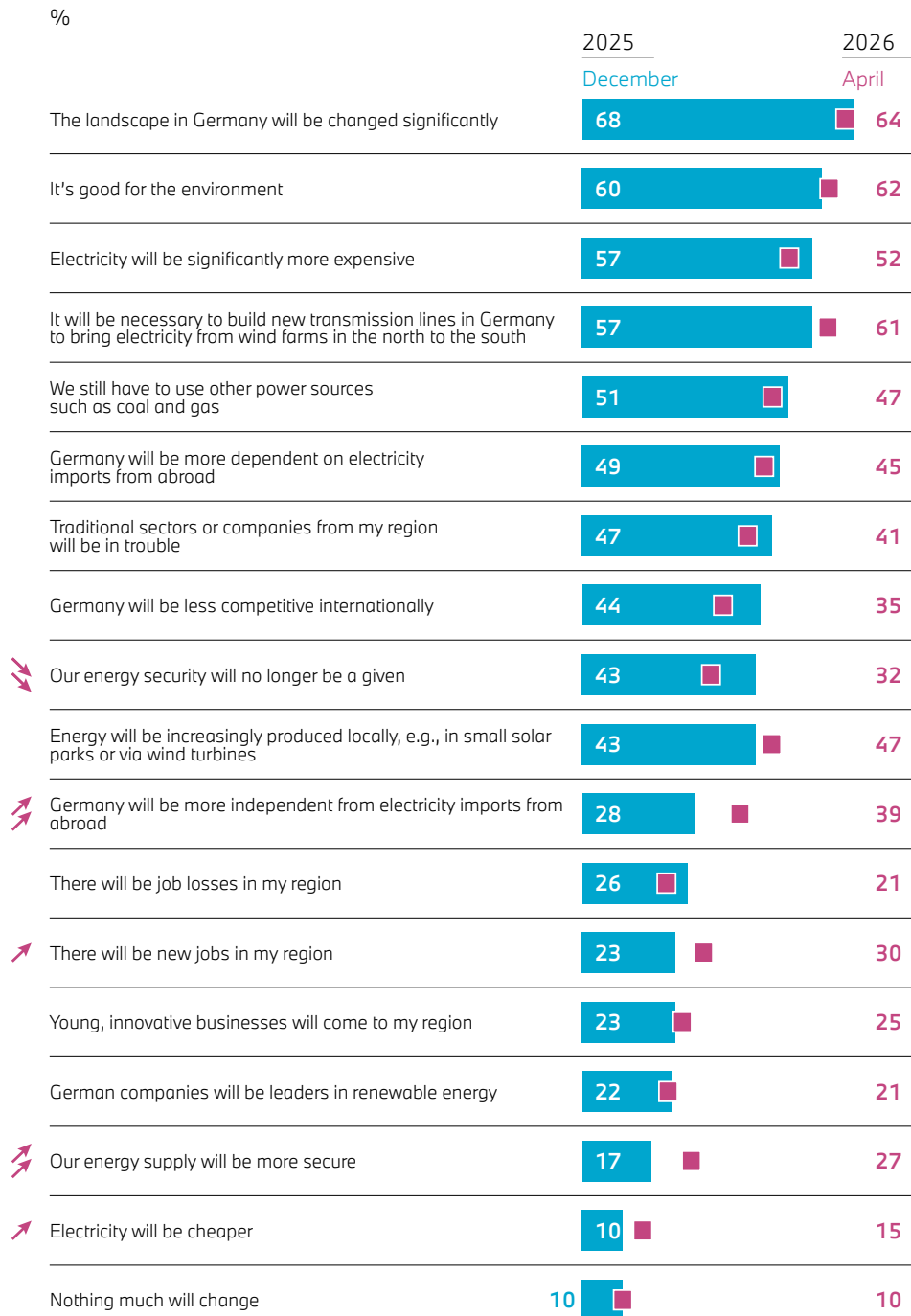
The assessment of how the energy transition will impact electricity prices is showing a positive trend: At the end of 2025, 57 percent of the population assumed that electricity will become significantly more expensive as a result of the energy transition; this figure is currently at 52 percent. During the same period, the percentage of people who hope that electricity will become cheaper has grown from 10 to 15 percent. While the energy transition continues to be associated with high costs, there are signs that

these concerns are abating; in addition, we are seeing a positive trend when it comes to hopes for better supply security and autonomy. The impact of the energy transition on the economy also tends to be seen more positive today than at the end of 2025. For example, the percentage of those who expect a positive impact on the regional labor market has grown from 23 to 30 percent, while the percentage of people who worry that traditional industries and companies in their region will be negatively affected has declined from 47 to 41 percent.

Consequences of the energy transition

Question: "What do you think will be the consequences of transitioning to renewable energies, such as wind or solar power? What impact will it have?"

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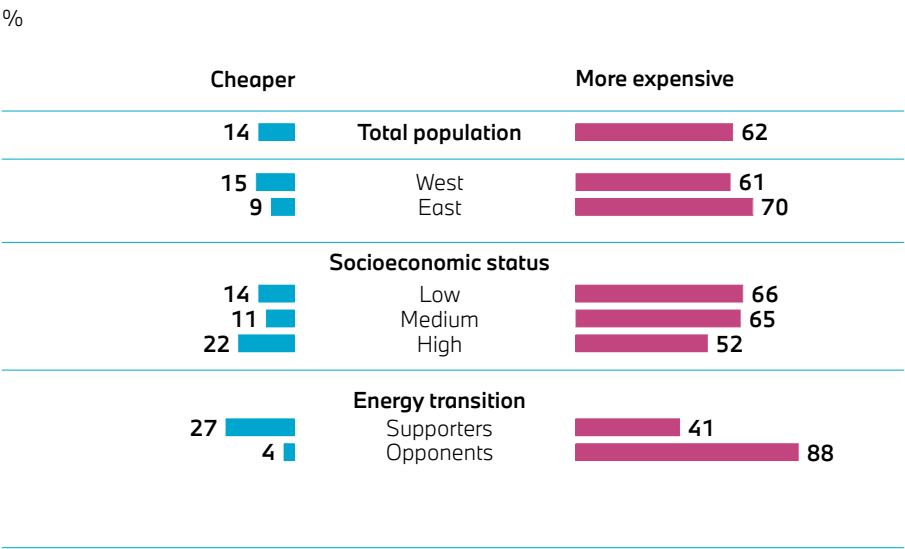
Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys 12098, 13017

Fig. 12

The large majority of the population, however, remains aware of the fact that the energy transition involves high costs. In 2025, both surveys showed that the overwhelming majority estimates the financial burden on both households and companies to be huge. In 2026, the large majority continues to be convinced that the energy transition will make energy more rather than less expensive. 62 percent of the population assume that the energy transition will drive up costs; only 14 percent anticipate the energy transition to have a positive influence on prices. Even people in western Germany and people from higher socioeconomic backgrounds see the energy transition as driving up costs; this view is held especially by those who oppose the energy transition. But even a relative majority of the supporters of the energy transition are convinced that energy will probably become more expensive as a result of the energy transition.

The energy transition as a cost driver

Question: "In your opinion, will the energy transition make energy cheaper or more expensive?"



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Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

Fig. 13

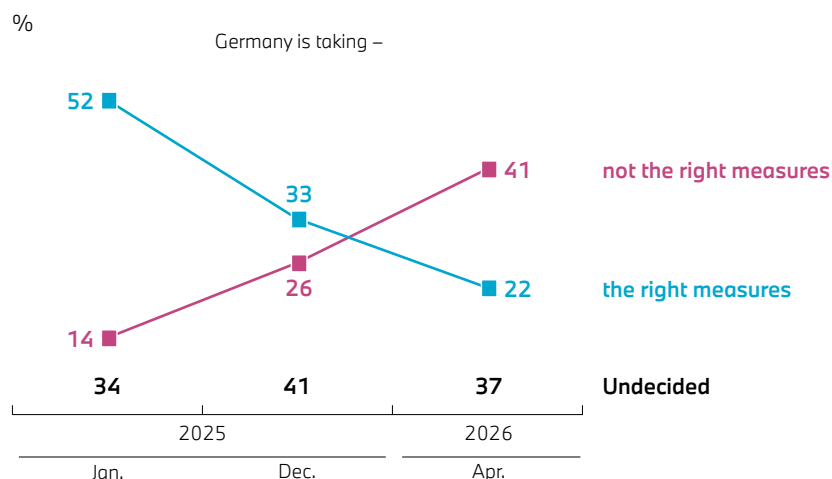
Even so, higher energy prices are currently less likely to be associated with the energy transition, as the last few months have primarily been defined by rising prices for fossil fuels.

Growing uncertainty about energy policy measures

While the basic attitude toward the energy transition has changed only little in the last few months, criticism of its implementation has risen sharply. Even between January and December 2025, the percentage of those who are convinced that the right measures are taken to implement the energy transition declined from 52 to 33 percent; since then, this figure has declined further to 22 percent. At the same time, the percentage of people who essentially support the energy transition but criticize its implementation has grown from 14 to 41 percent. 37 percent don't feel qualified to make a judgment. Other indicators show that there is generally a great deal of uncertainty when it comes to assessing the government's energy policy measures, and that this uncertainty has increased over time.

Growing doubts about the implementation of the energy transition

Question for people who believe that the nuclear phase-out and the transition to renewable energies is the right approach: "All in all, is Germany taking the right measures to implement the energy transition?"



Survey base: Federal Republic of Germany, people who support the nuclear phase-out and the transition to renewable energies
Source: Allensbach Archives, IfD Surveys 12098, 13012, 13017

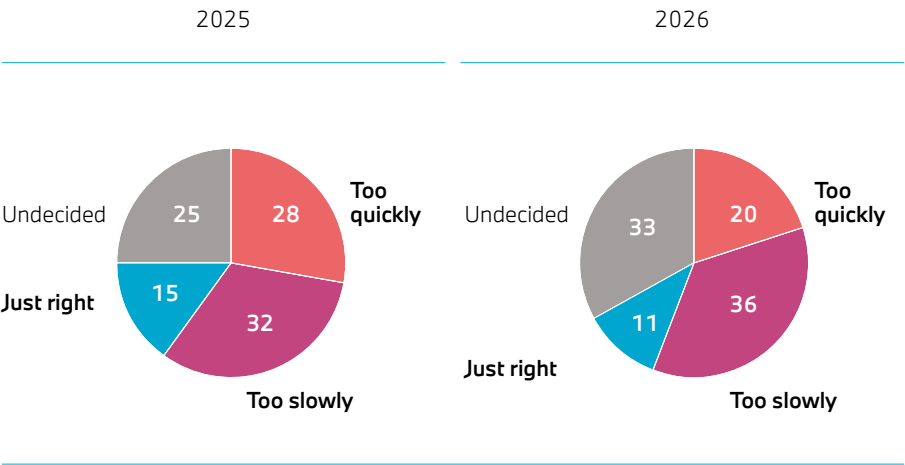
Fig. 14

This growing uncertainty also shows up in the assessment of whether the energy transition is moving at a good pace, too fast, or too slow. Here, assessments have shifted toward criticism that implementation is too slow: At the end of 2025, 28 percent considered the speed to be too fast; this figure is currently at 20 percent; conversely, the criticism that the energy transition is implemented too slowly has grown from 32 to 36 percent. The number of those who see the implementation speed as just right has shrunk, while uncertainty about assessing the government's policies has grown: At the end of 2025, one in four did not think themselves qualified to pass judgment on the speed of the energy transition; today, it is one in three.

Growing uncertainty when it comes to assessing the speed of implementation speed

Question: "In your opinion, is the energy transition implemented too quickly, too slowly, or at just the right pace?"

%



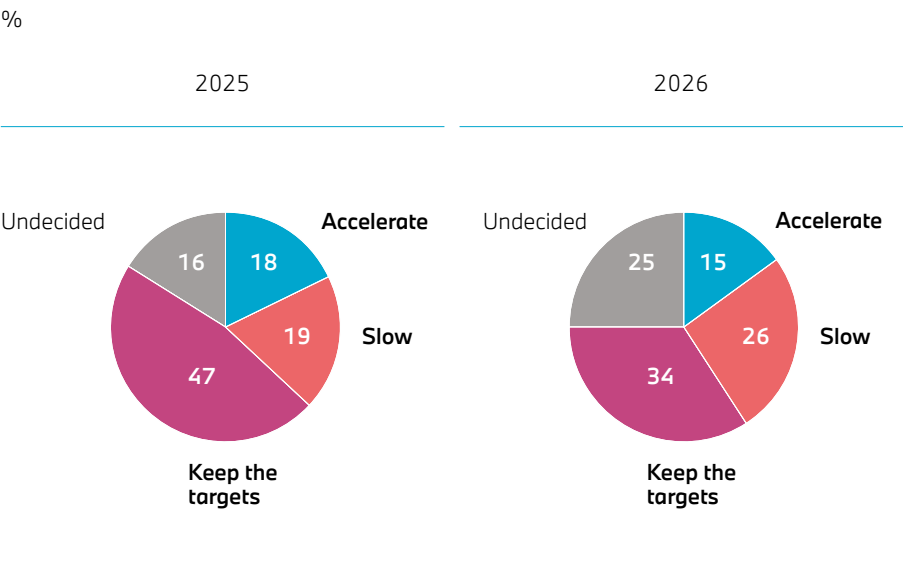
Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys 13012, 13017

Fig. 15

In the last few months, the belief that the current government wants to slow rather than accelerate the expansion of renewable energies has grown stronger. At the end of 2025, 19 percent were convinced that the government wanted to slow the expansion; this figure has climbed to 26 percent. The number of people who believe that its expansion targets will for the most part remain unchanged has dropped even more sharply, from 47 percent in late 2025 to 34 percent today. Here, too, uncertainty has grown: In late 2025, only 16 percent did not feel qualified to pass judgment; today, it is 25 percent.

Assessment of the government's energy policy agenda

Question: "What is your impression: Does the current federal government want to accelerate or slow the expansion of renewable energies in Germany or by and large keep the targets?"



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys 13012, 13017

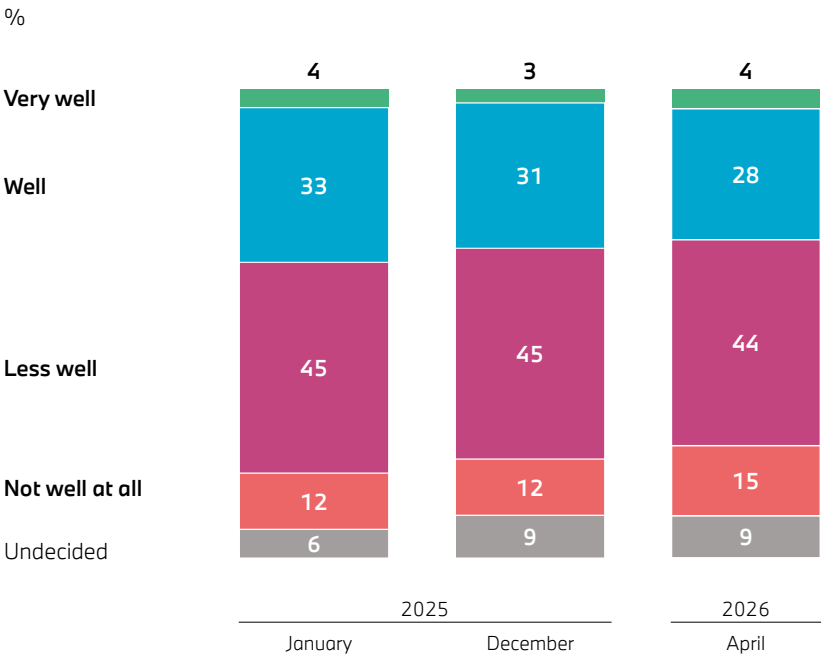
Fig. 16

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The public also takes an increasingly critical view of the level of information they receive about the aims and progress of the energy transition. Already back in early 2025, only 37 percent of citizens considered themselves to be sufficiently informed about the goals and progress of the energy transition; currently, this figure is at 32 percent. 59 percent feel insufficiently informed, 15 percent not well-informed at all.

Growing information deficit

Question: "All in all, how well do you feel informed about the goals and progress of the energy transition?"



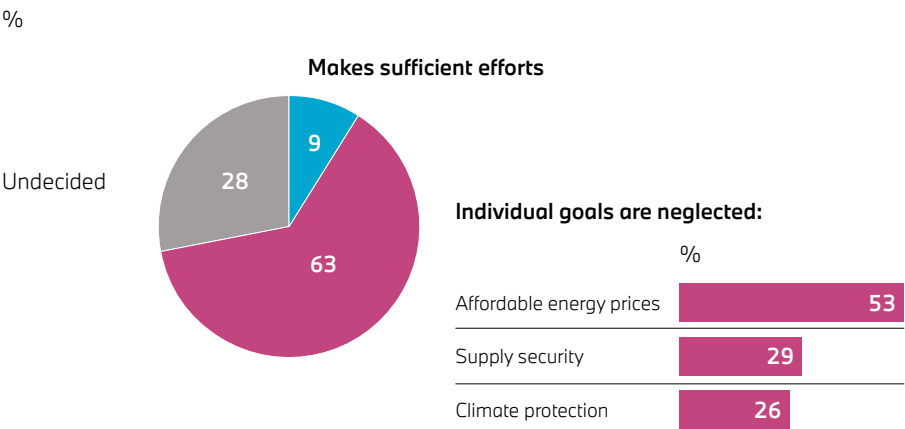
Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Surveys 12098, 13012, 13017

Fig. 17

The realignment of the government’s energy policy, which is increasingly focusing on affordable energy prices, essentially aligns with the interests of the citizens. The majority, however, is not aware of this: Only 9 percent have the impression that the government makes sufficient efforts to reconcile supply security, climate protection, and affordable energy prices; 63 percent of the population believe that some of these energy policy goals are neglected – with affordable energy prices being mentioned most frequently. 53 percent say they have the impression that the government’s energy policy is not sufficiently oriented toward affordable energy prices; 29 percent believe that it does not sufficiently take into account the issue of supply security; and 26 percent believe that it fails to sufficiently consider environmental goals.

Too little focus on affordable energy prices?

Question: "Does the government make sufficient efforts to reconcile supply security, climate protection, and affordable energy prices, or does its energy policy neglect some of these goals?"



Survey base: Federal Republic of Germany, population 16 years and over
Source: Allensbach Archives, IfD Survey 13017

Fig. 18

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It can be assumed that the crisis-induced price increases over the last few months influence public opinion and lead to the accusation that the government is not focusing enough on affordable energy prices. All in all, however, the growing uncertainty about the government's energy policy measures also shows that large parts of the population are not sufficiently aware of the government's energy policy priorities and especially the importance it attaches to affordable energy prices.

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