

Loom Strategy:

Sovereignty and the EU energy transition

August 2026

Executive Summary

01

A clear majority want clean energy built at home.

- Two-thirds back building clean-energy tech domestically even if the rollout is slower (70%) or short-term costs are higher (67%), versus 34% who would keep importing from China because it's cheaper and faster.
- The conjoint confirms it as a revealed preference: **"made mainly in China" is a significant turn-off despite being cheaper.**

02

Support for domestic production is broad and cross-partisan.

- Support for building clean energy technology at home reaches across age, financial situation, and past vote, even as the transition is becoming increasingly polarised.
- There is an **opportunity to build consensus for the transition by activating support for sovereignty.**

02

Sovereignty is more important to an energy strategy than jobs.

- Concern over China's growing leverage over Europe, reliance on China for defence, and the threat of US tariff retaliation drives support for domestic production.
- This is distinct from job creation. **The conjoint shows that where technology is sourced is more important than the jobs it creates.**

03

Impact on household bills is the strongest determinant of an energy strategy's success.

- This is a strong preference for domestic production, but not a general willingness to pay more at home. **Support for building at home is real, but it will narrow as costs move closer to the household.**
- Bills is the 'cost of living' lens applied to energy – far more so than job creation.

04

The sovereignty premium is national first, European second. International alliances are contested.

- **Both national and a pan-European production are strongly preferred over China**, with national holding a narrow lead over broader EU frames.
- There is no consensus on alliances. Eastern states prefer trade cooperation with the US, while Western states and the Left lean towards China.



France represents a vanguard for national sovereignty, while Hungary is most relaxed about Chinese dependence.

Country	Position	What defines it
France	National sovereignty vanguard	The deepest concern about dependence, the strongest penalty on Chinese sourcing, and the only market where a specifically domestic framing carries a clear premium over EU production.
Germany	Pro-domestic, most pro-Europe	Highly concerned about dependence, but the most pragmatic on how. An "Europe & allies" framing is essentially as acceptable as a purely domestic one.
Poland	Pro-domestic and Atlanticist	Among the most pro-US on trade, hawkish on defence, and one of only two markets where domestic sourcing outweighs even lower energy bills.
Spain	Pro-domestic, relaxed on China	The most relaxed about China, the lowest aversion to Chinese imports, and the only market that rates a China trade deal above a US one.
Hungary	Consistent outlier	Concern about China muted to near-indifference, the weakest domestic preference, uniquely relaxed about Chinese sourcing (especially Fidesz voters), and the only market open to Russia.



Methodology

Survey design

- We designed a survey structured around three modules: attitudes to clean-energy sovereignty and dependence on China — including concern about economic, supply-chain and geopolitical risks; a choice-based conjoint experiment on national energy strategy; and a split-sample information experiment testing the effect of factual context.

Conjoint Experiment

- Each respondent completed eight paired, forced-choice tasks, choosing between two competing energy strategies described by five attributes.
- This reveals how the public weighs each attribute when they are traded off against one another.

Information Experiment

- To measure "narrative risk", respondents were randomly assigned 50/50. Group A answered the concern and policy questions cold, with no information; Group B saw a short factual primer on China dependence before the same questions.
- Comparing the two arms isolates the effect of information on both concern and policy support.

Data Collection

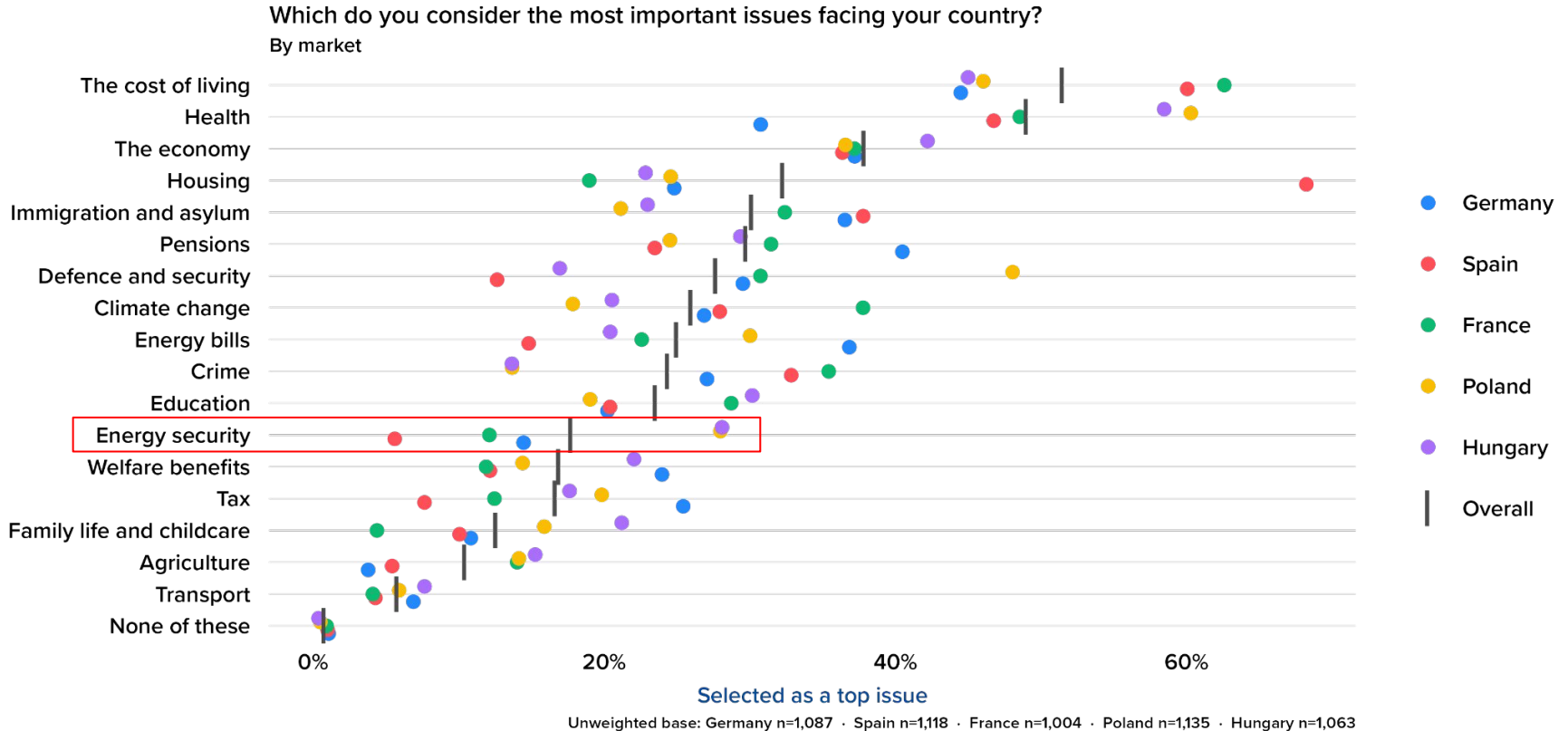
- We surveyed c. 5,400 people online aged 18+ across Germany, Spain, France, Poland, and Hungary (c. 1,000+ per market) between 6th - 13th July 2026.
- The data have been weighted within each market to be representative of the 18+ population by age, gender, education, region and past vote.



How Europeans see energy security

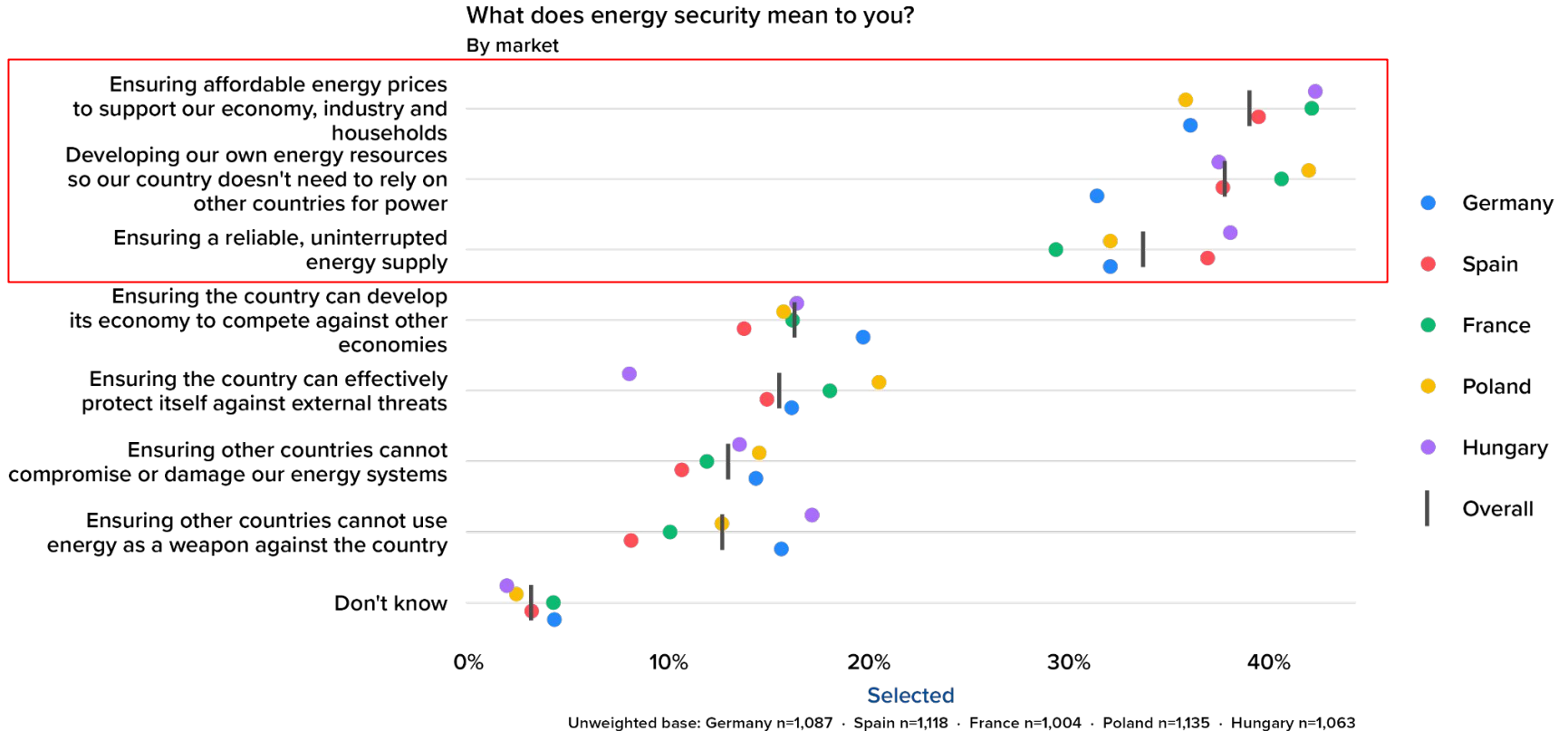


The cost of living, health, and the economy are the dominant issues across Europe. Energy security is a low salience issue in and of itself.





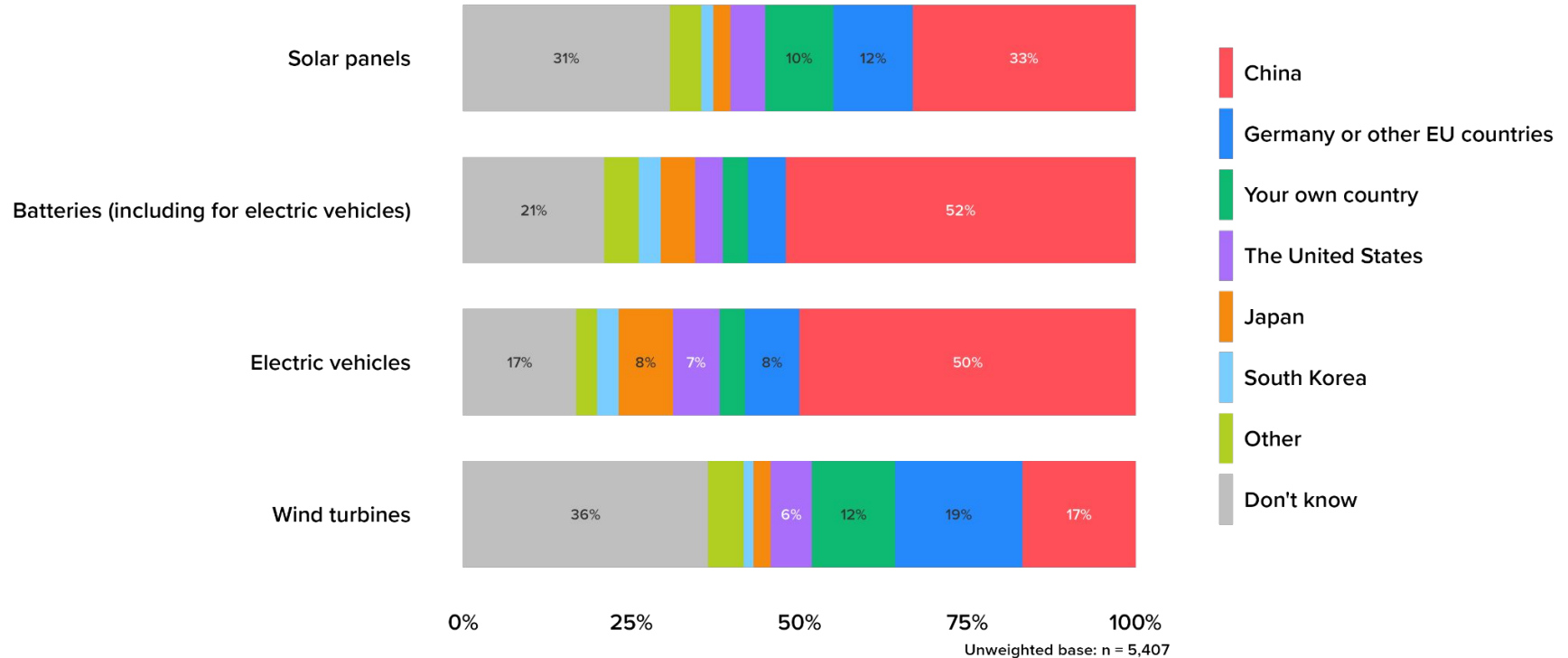
Energy security means affordability, independence from other countries. and reliable supply. Few connect it to defence or weaponisation.





Most recognise China's grip on batteries and EVs. Far fewer know it also leads in wind and solar, where there is greater uncertainty.

Which country or region supplies the most of each technology to Europe today?



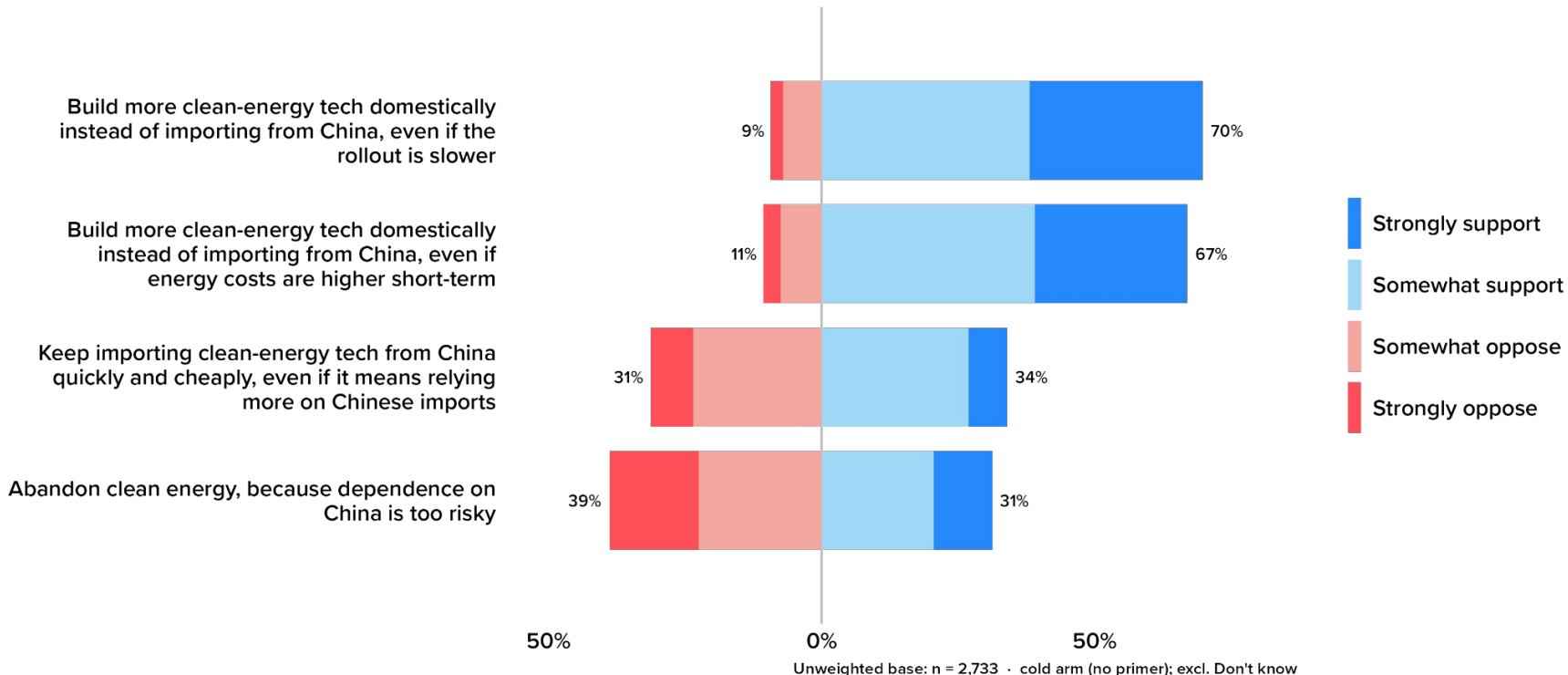


The sovereignty premium



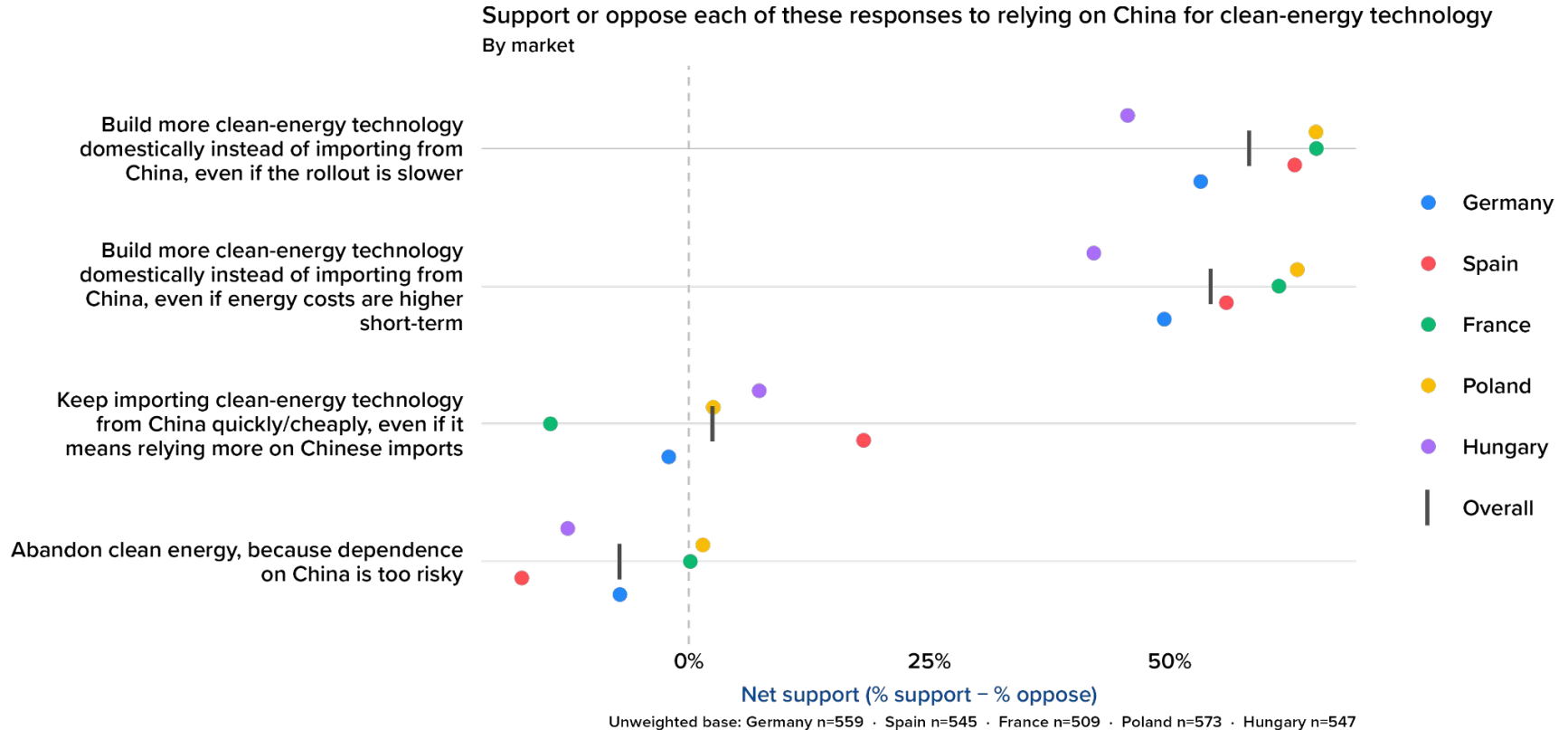
Europeans support building clean-energy tech at home, even if slower or costlier in the short term than relying on cheaper Chinese imports.

Support or oppose each of these responses to relying on China for clean-energy technology
Labels show % support / % oppose (Don't know excluded)



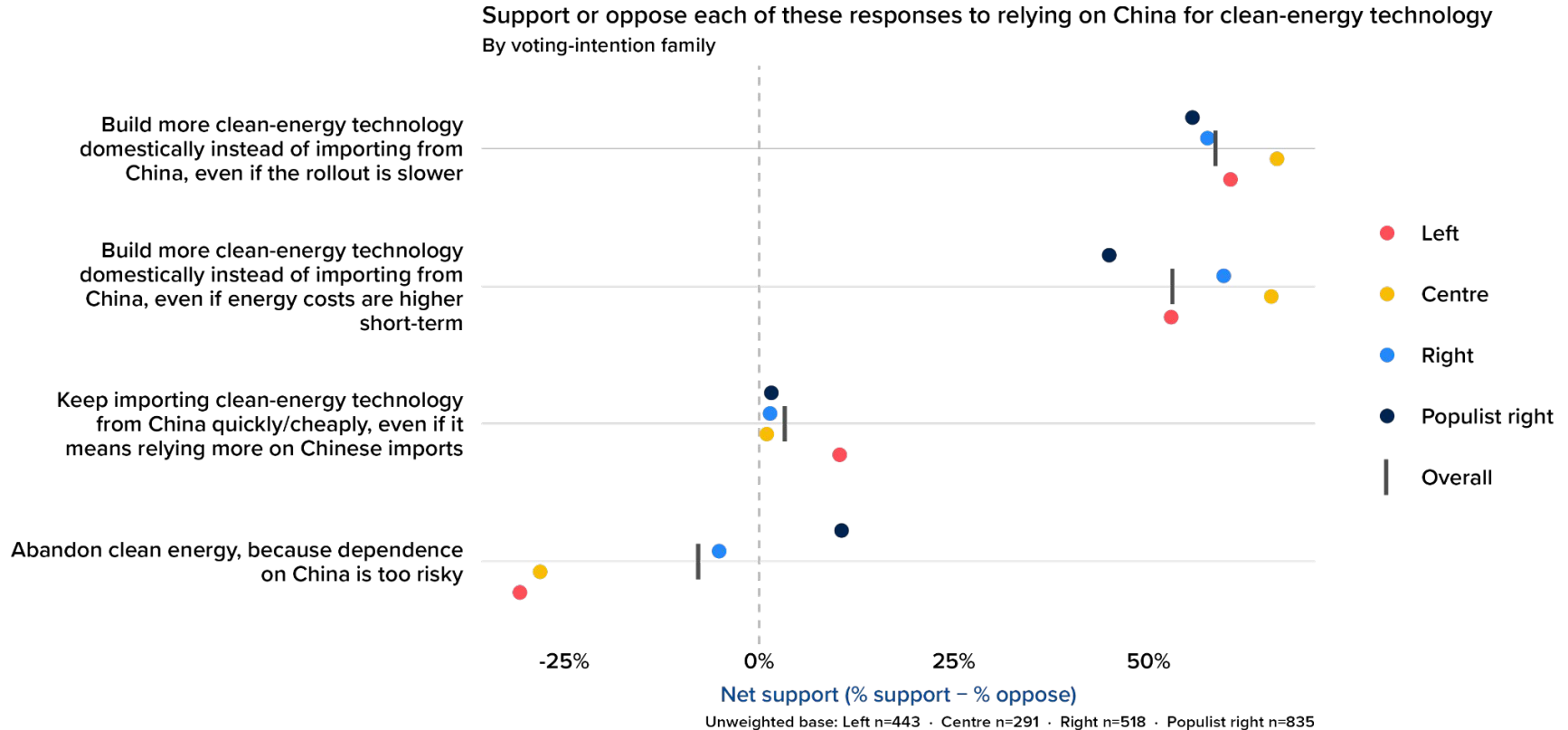


France shows the greatest aversion to reliance on Chinese imports, while Spain and Hungary are significantly more relaxed.





Responding to dependence by abandoning clean energy is supported only on the populist right, while building domestically is cross-partisan.

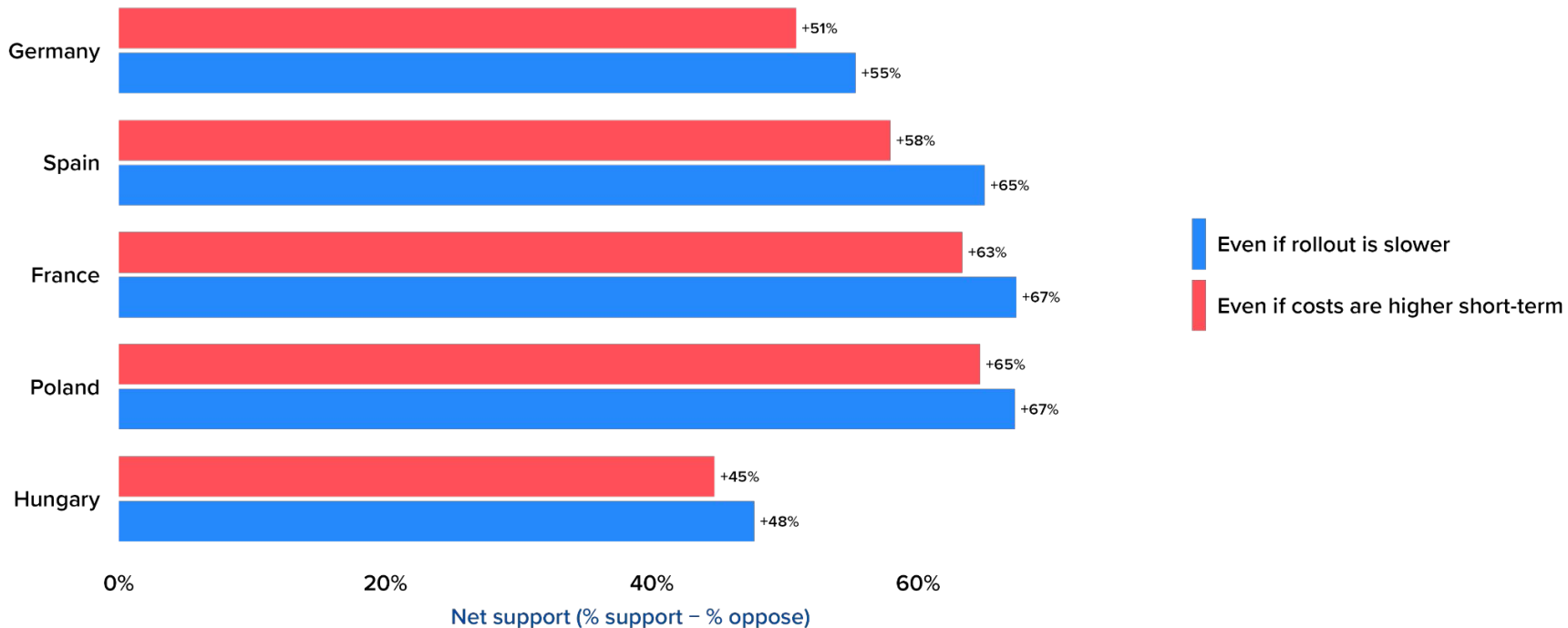




Building at home is supported in every market, although the public in all countries are more wary of trading off costs than speed.

Support or oppose each of these responses to relying on China for clean-energy technology

Net support to build clean-energy tech domestically, by market



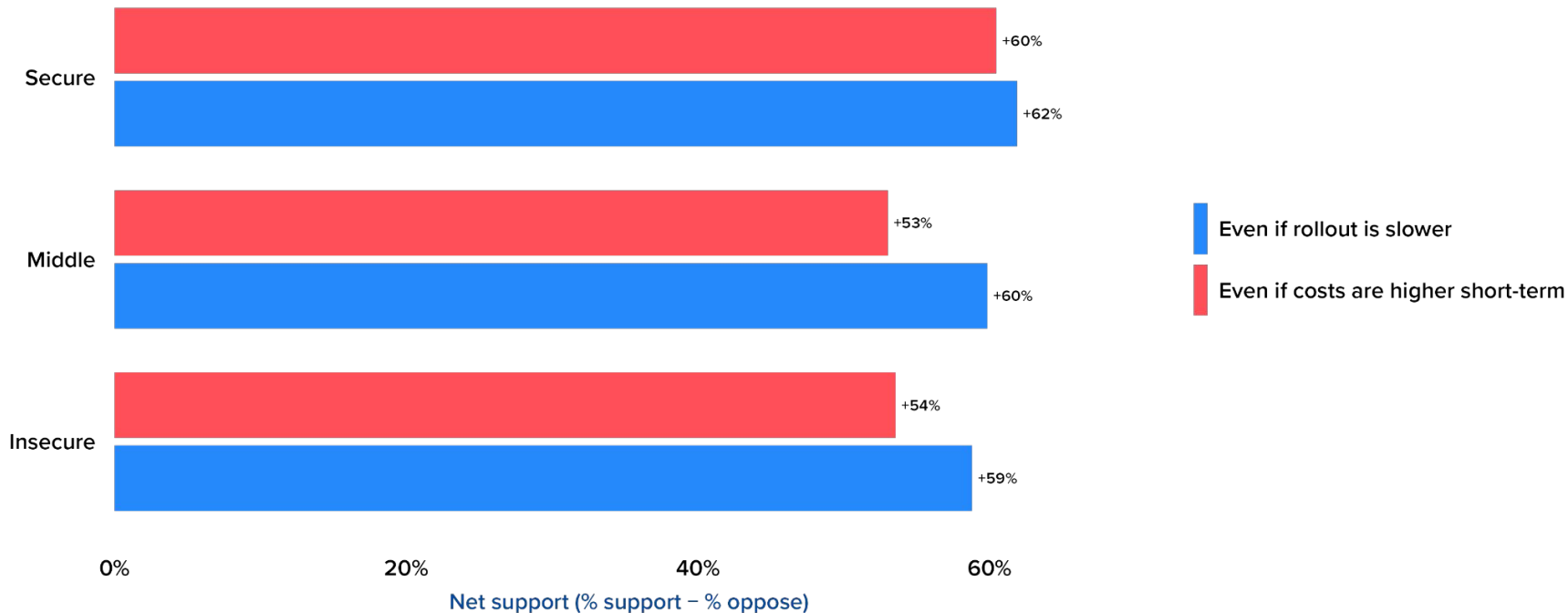
Unweighted base: Germany n=559 · Spain n=545 · France n=509 · Poland n=573 · Hungary n=547



The domestic preference softens as household finances tighten, but **even the insecure stay supportive**. There is little variation by financial situation.

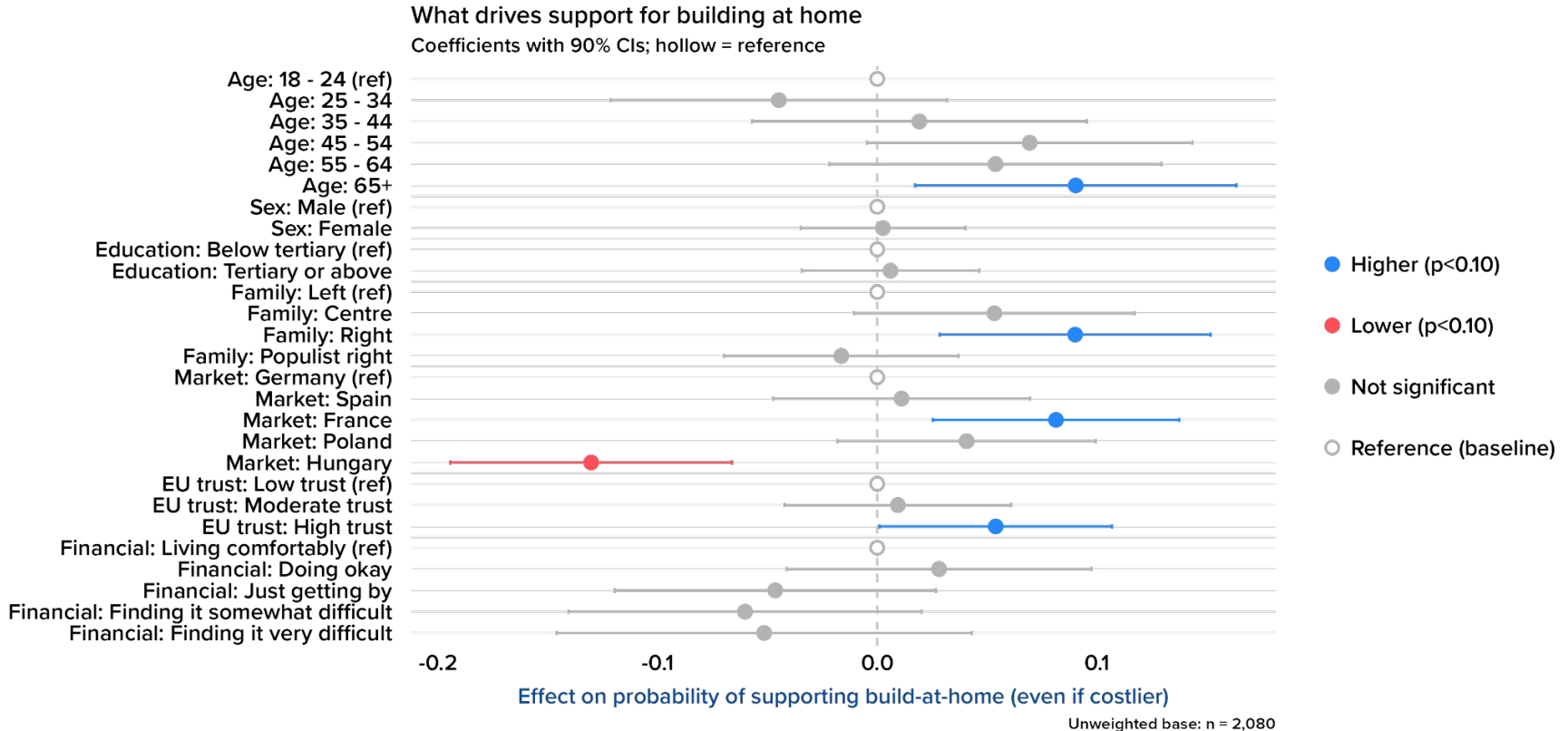
Support or oppose each of these responses to relying on China for clean-energy technology

Net support to build clean-energy tech domestically, by financial security



Unweighted base: Secure n=1,127 · Middle n=875 · Insecure n=718

Older Europeans, those with high trust in the EU, and those on the conventional right are most supportive of building at home.





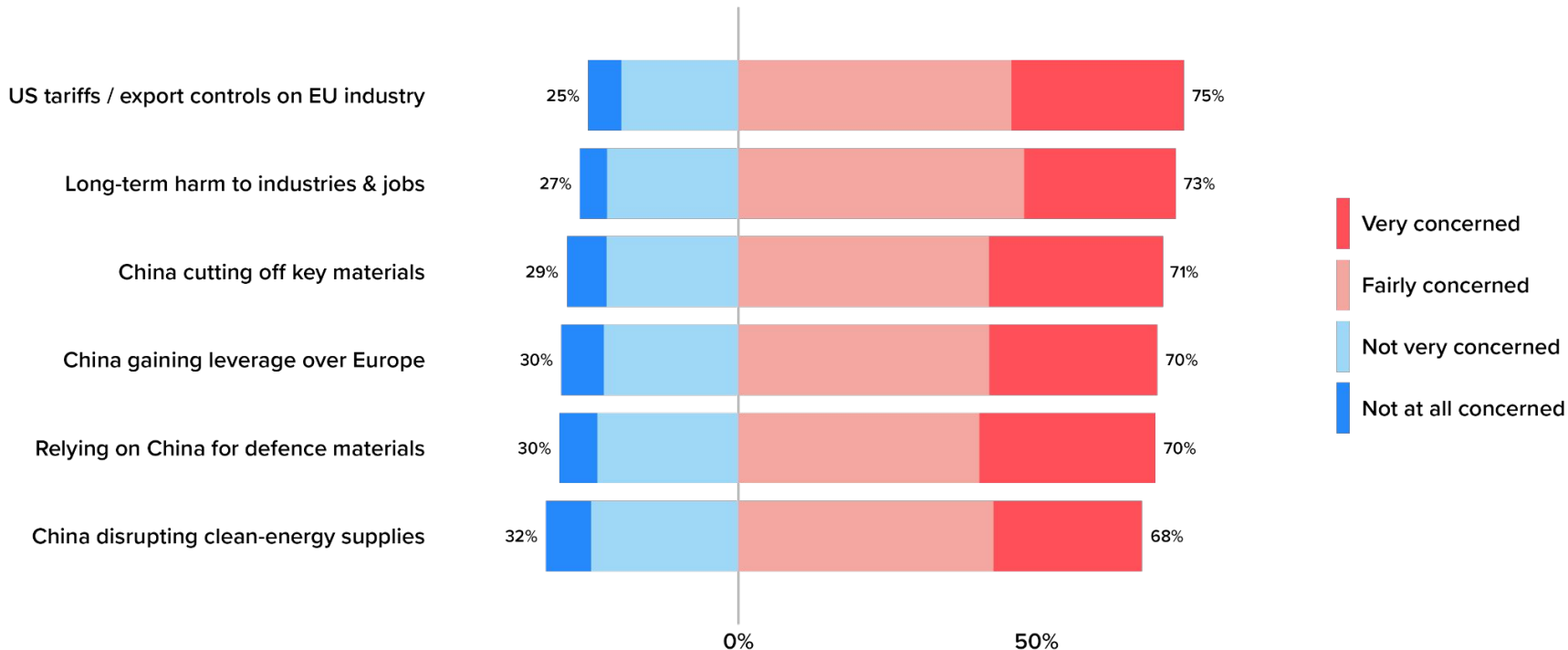
What drives concern about
sovereignty



Concern about the consequences of dependence on China runs deep. And the threat of US trade retaliation is viewed as most acute.

How concerned are you about each of the following for your country?

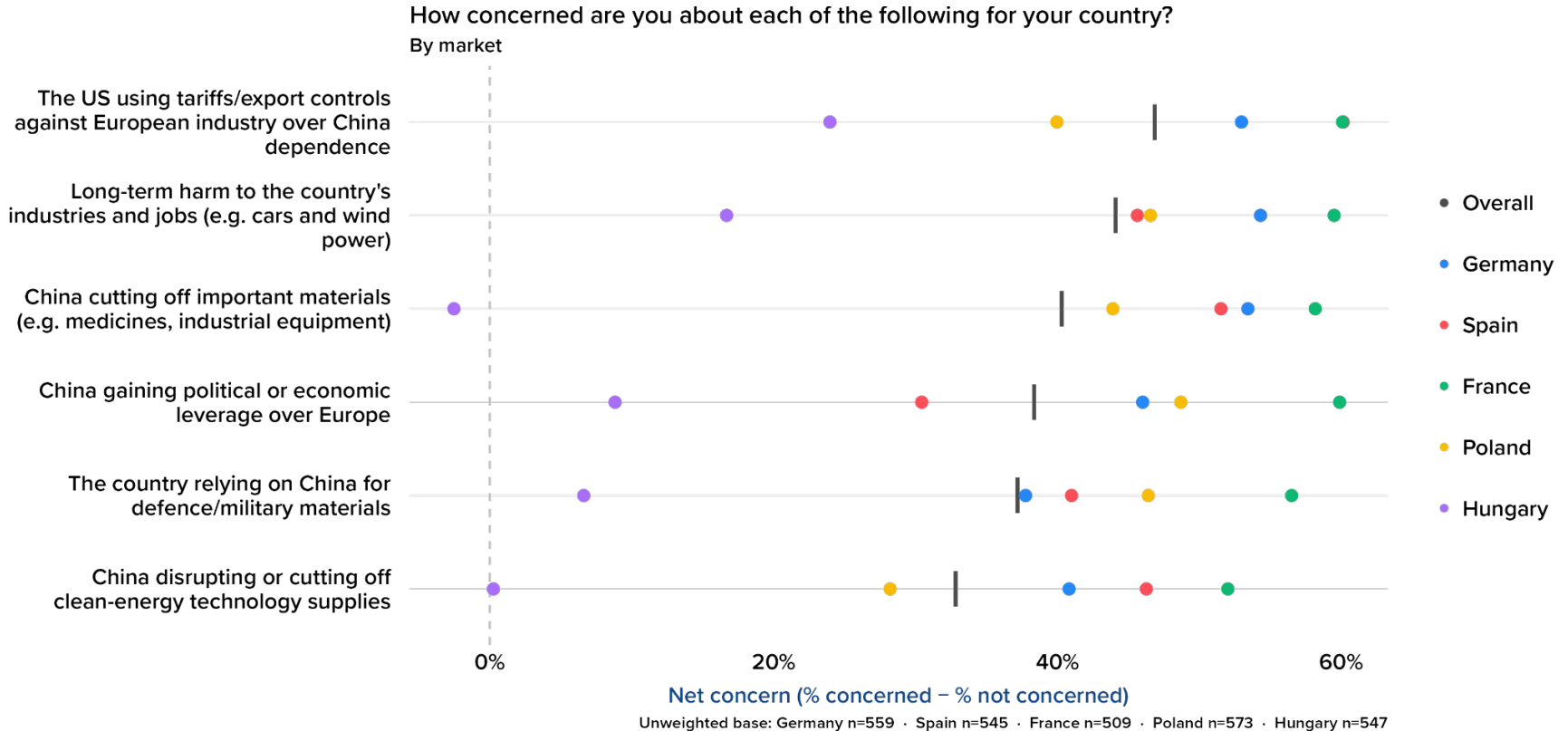
Labels show % concerned / % not concerned (Don't know excluded)



Unweighted base: n = 2,733 · cold arm (no primer); excl. Don't know



This concern runs high everywhere except Hungary, where worry about China is muted to the point of indifference.

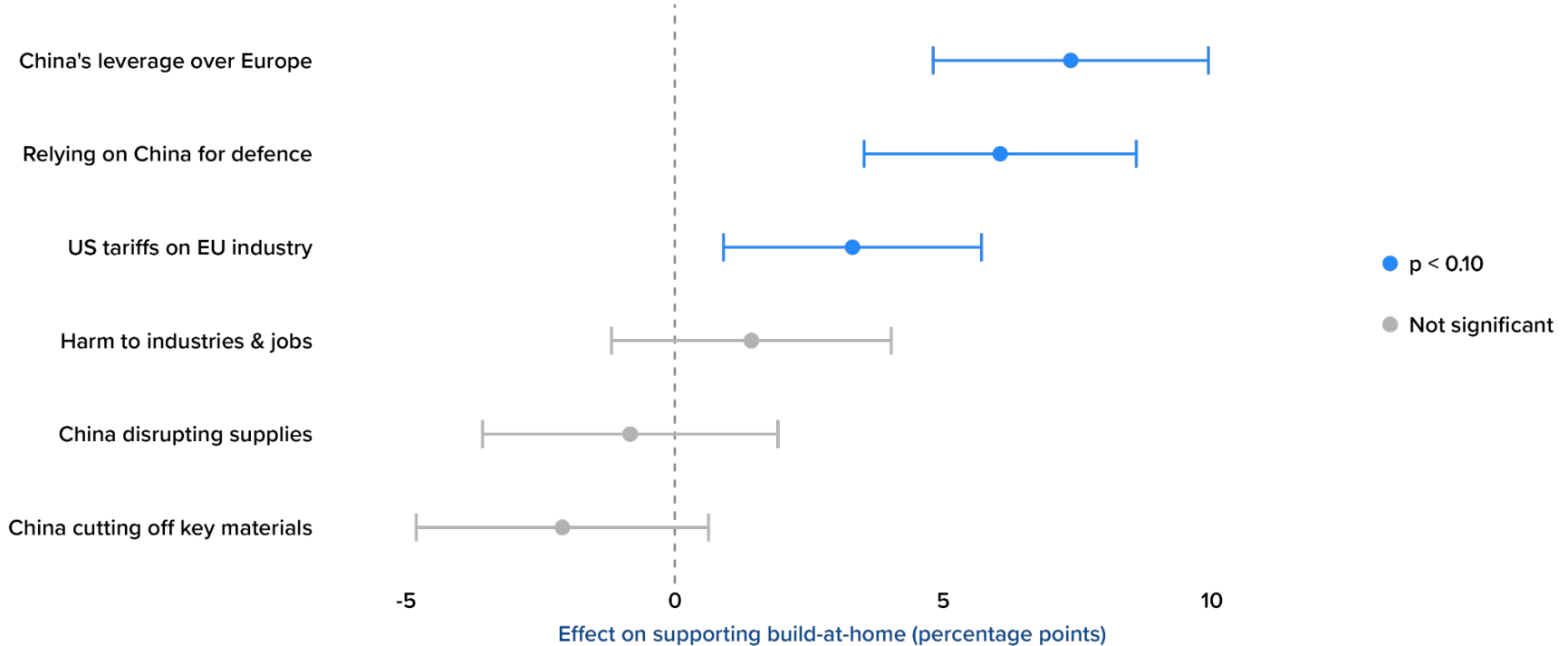




US retaliatory tariffs, China's leverage over Europe, and reliance on China for defence most drive support for domestic production.

Which concerns convert into support for building at home?

AME on supporting build-at-home even if costlier, per step up in each concern



Unweighted base: n = 2,291



What makes an acceptable energy strategy?



To test different energy strategies, we conducted a **conjoint experiment**.

Which of these two strategies would you prefer for [COUNTRY]?

Select your preferred option

Which of these two strategies would you prefer for [COUNTRY]?

Select your preferred option

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Where the technology is made and sourced: Mainly from Europe and allied democracies	Where the technology is made and sourced: Mainly made here in [COUNTRY]
Effect on your household energy bills: Bills fall a lot	Effect on your household energy bills: Rise a little
Speed of the clean-energy rollout: Faster than today	Speed of the clean-energy rollout: About the same speed
New manufacturing jobs in [COUNTRY]: Some new jobs	New manufacturing jobs in [COUNTRY]: Many new jobs
Security of supply for defence and critical equipment: Weakened	Security of supply for defence and critical equipment: About the same

Next

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Where the technology is made and sourced: Mainly from Europe and allied democracies	Where the technology is made and sourced: Mainly made here in [COUNTRY]
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Next

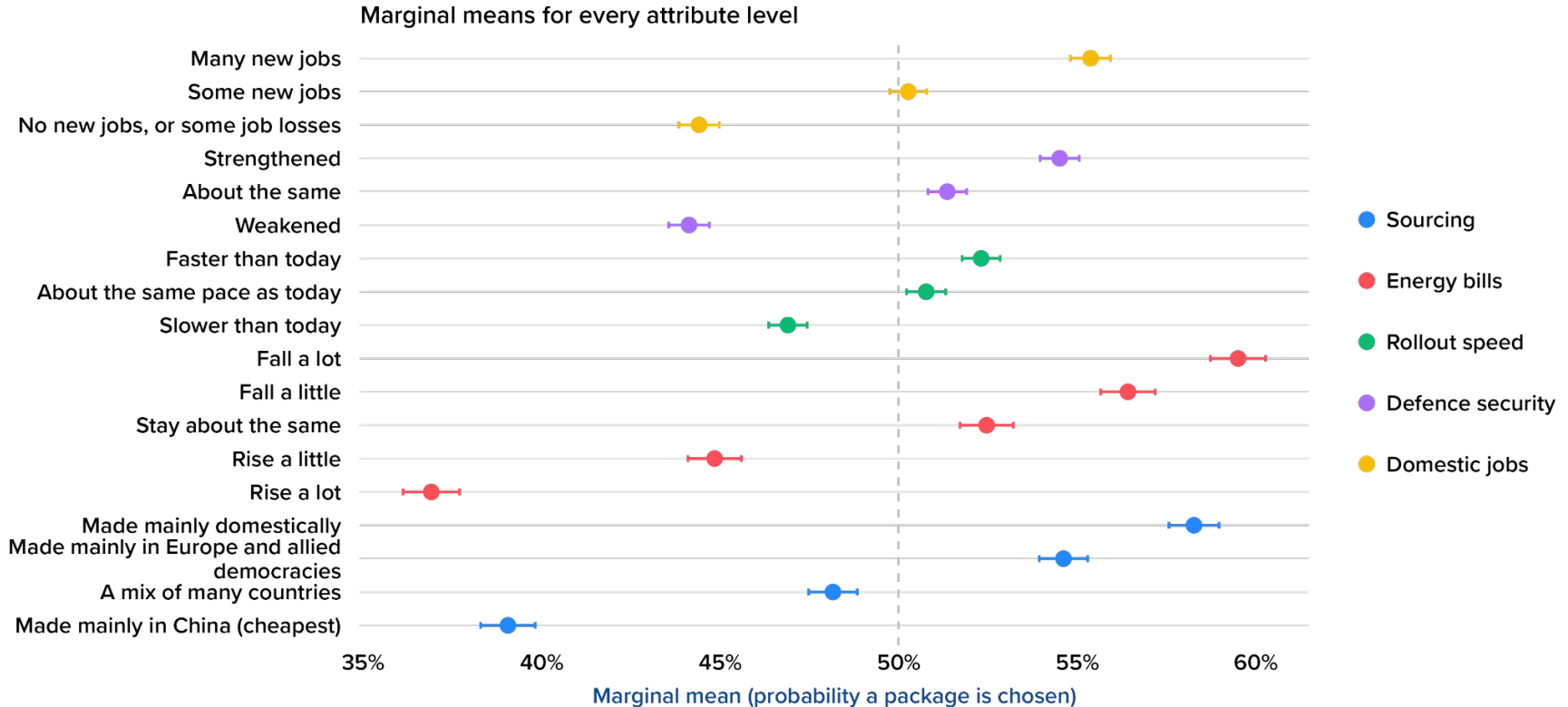


Respondents were forced to choose between competing energy strategies, revealing how the public weigh sourcing, household bills, speed of the transition, jobs, and security of supply for defence.

Where the technology is made and sourced	Effect on your household energy bills	Speed of the clean-energy rollout:	New manufacturing jobs in [COUNTRY]	Security of supply for defence and critical equipment
Mainly from China (cheapest)	Fall a lot	Faster than today	Many new jobs	Strengthened
A mix of many countries	Fall a little	About the same	Some new jobs	About the same
Mainly from Europe and allied democracies	Stay about the same	Slower than today	No new jobs or some job losses	Weakened
Mainly made here in [COUNTRY]	Rise a little			
	Rise a lot			



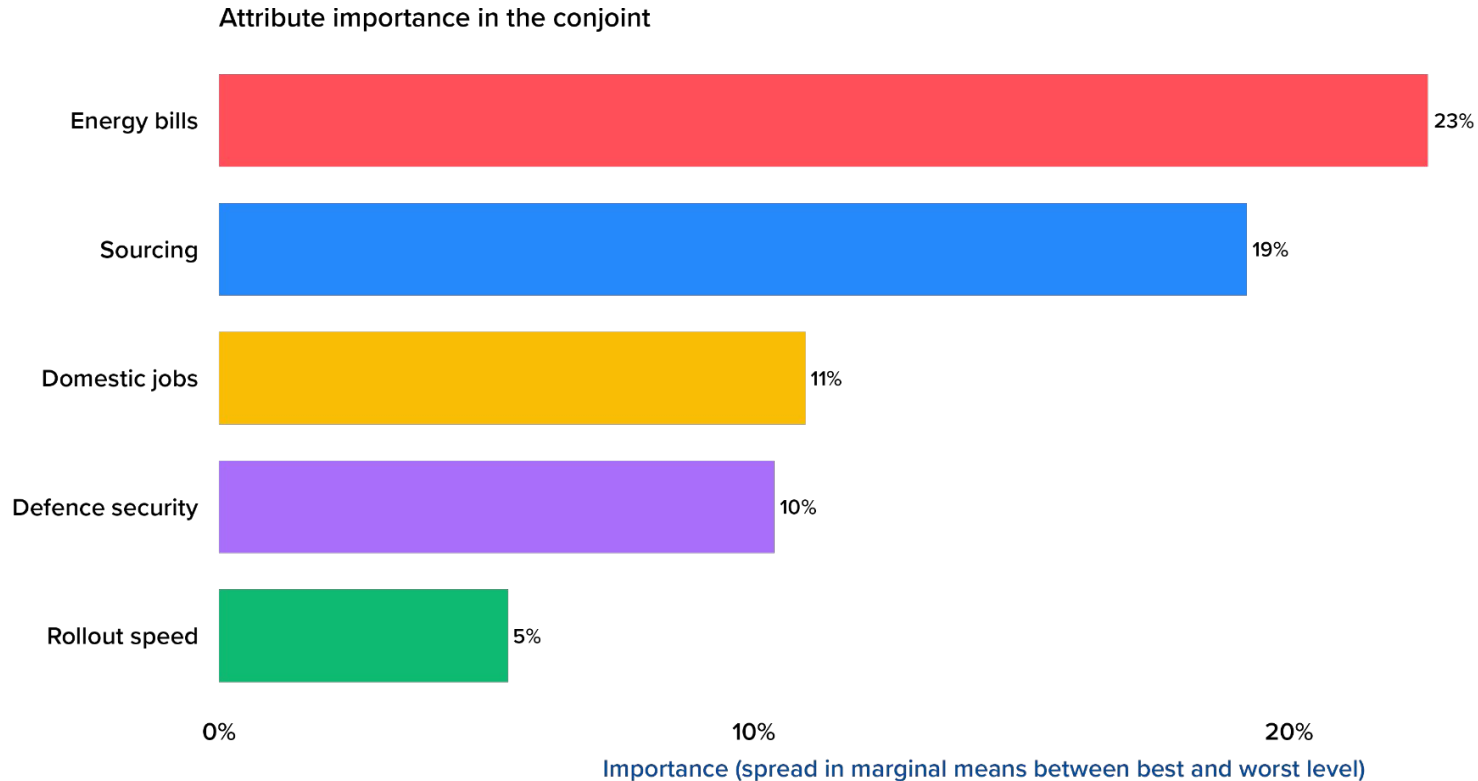
Impact on energy bills and where technology is sourced have the greatest impact on the acceptability of a national energy strategy.



Unweighted base: n = 5,407



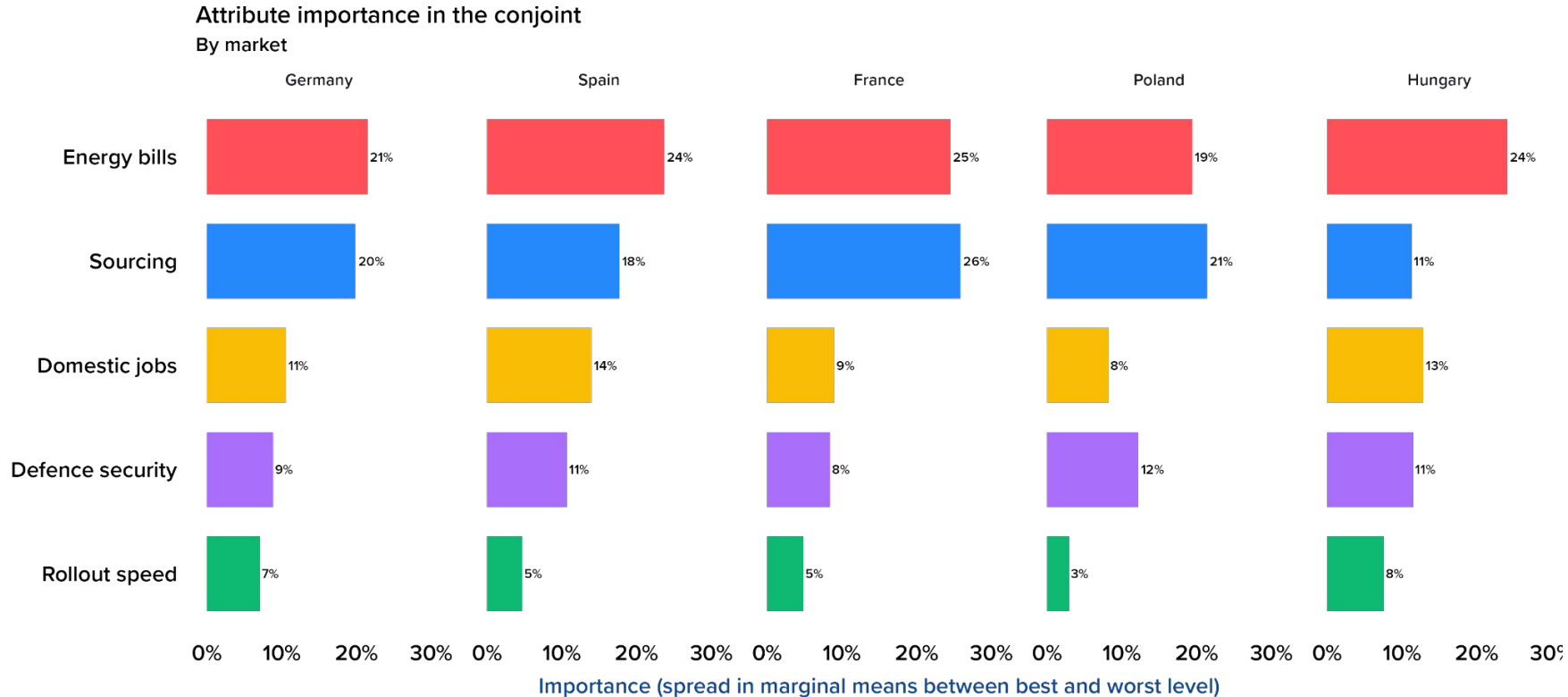
Energy bills is the strongest determinant, although this is closely followed by **domestically sourced technology**. Both lead job creation.



Unweighted base: n = 5,407



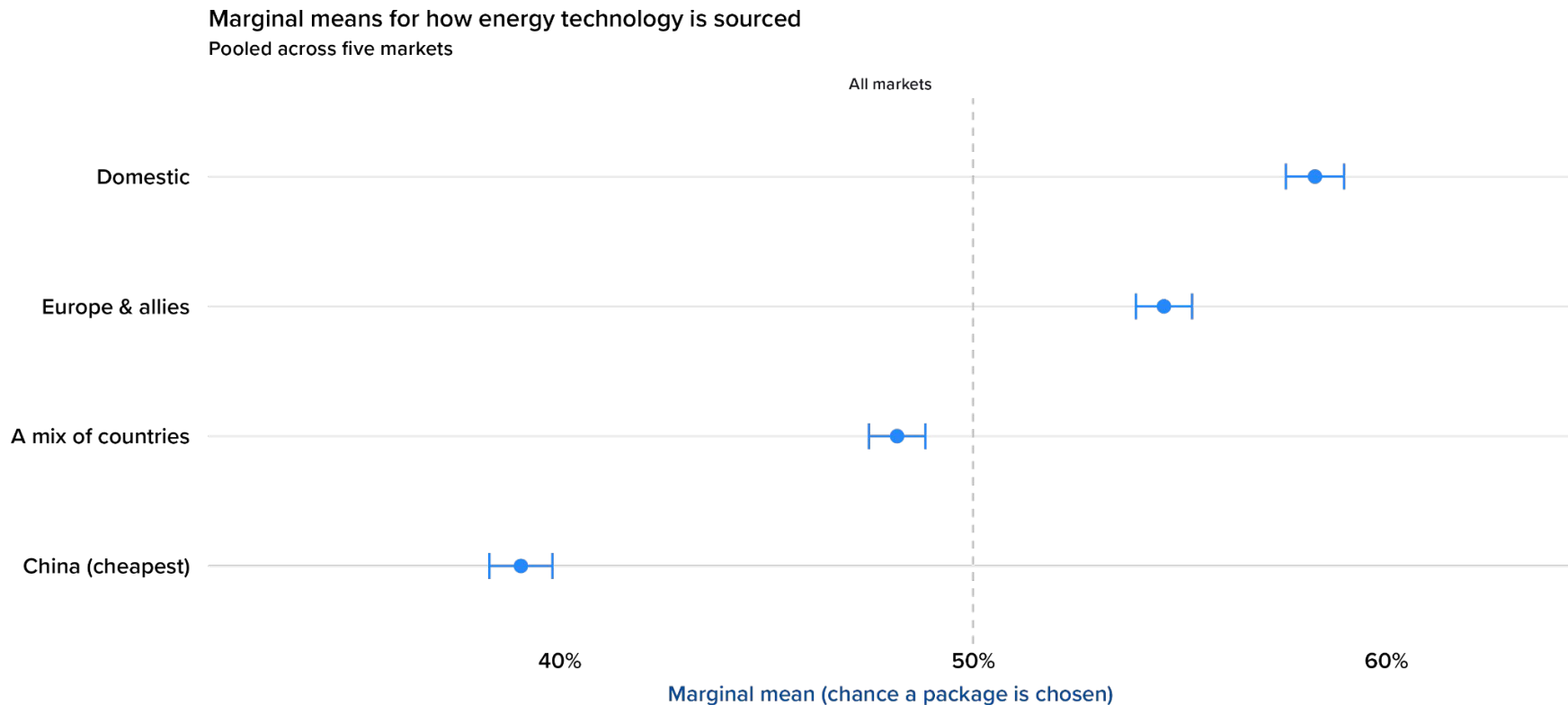
Sourcing is a top-two driver everywhere except Hungary. In France and Poland, domestic sourcing is more important than lower bills.



Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063



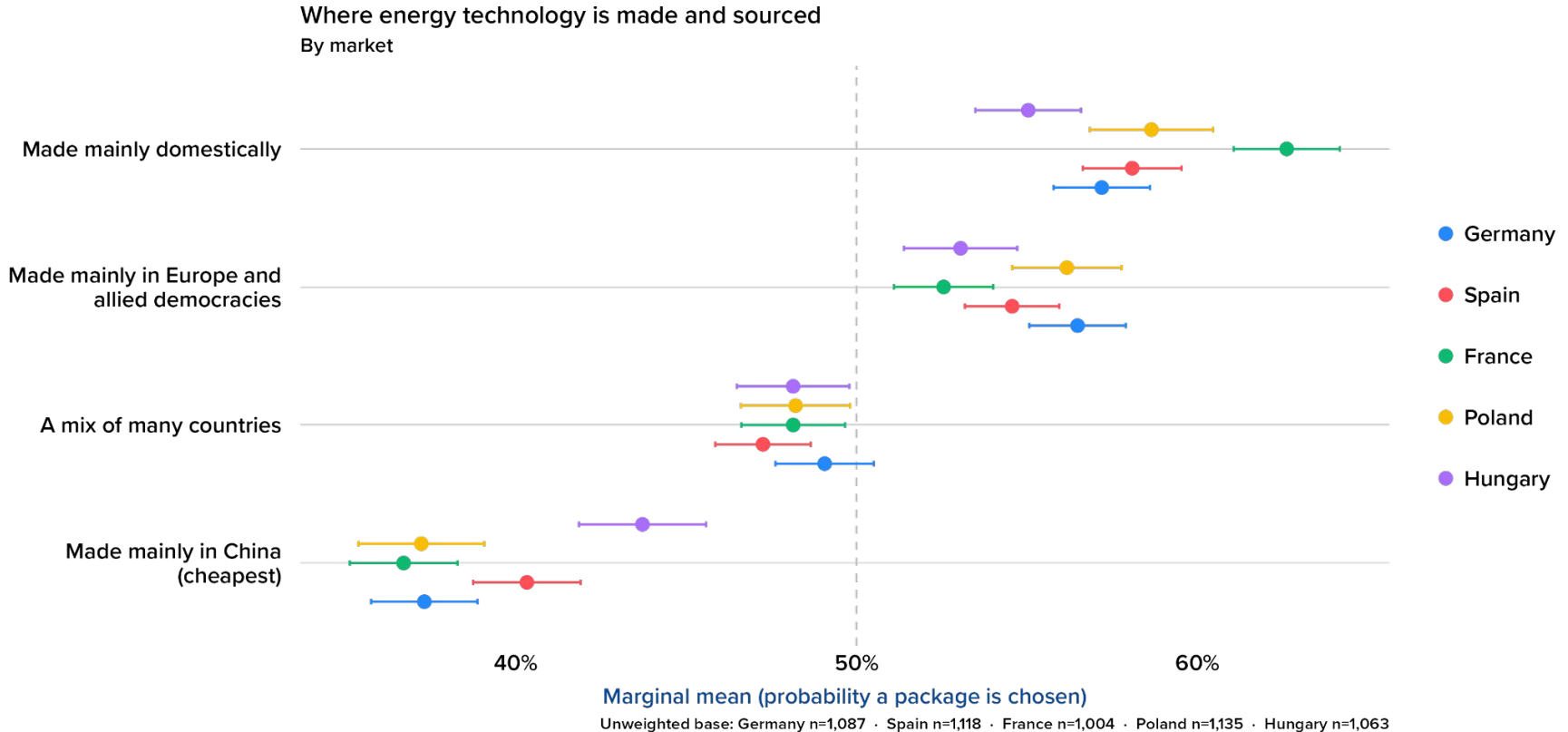
“Made mainly in China” is the single most rejected option, despite being identified as the cheapest; “made domestically” is the most rewarded.



Unweighted base: n = 5,407

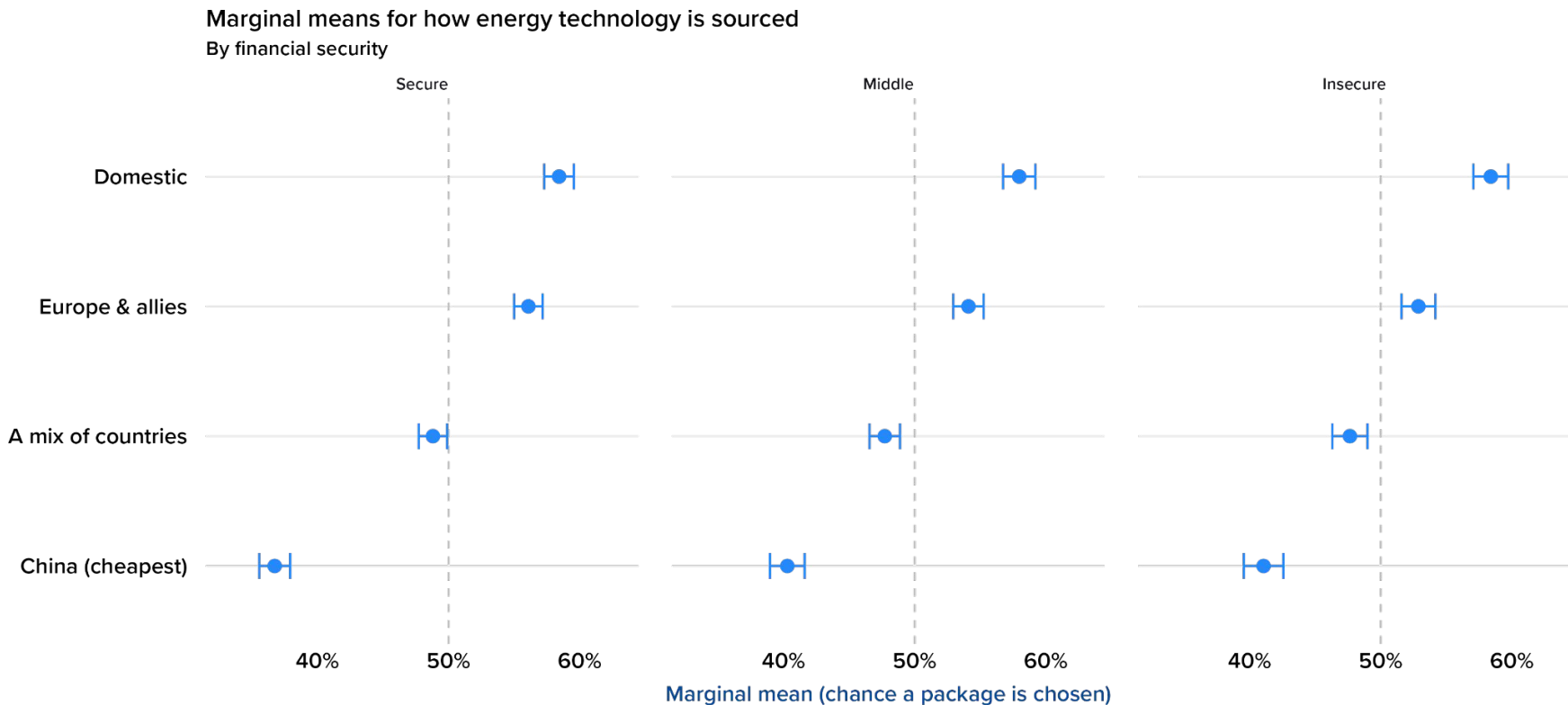


The pull towards domestic production and away from China holds in all five countries, although it is less penalised in Hungary.





The domestic premium survives financial strain, as **even the insecure penalise cheaper Chinese sourcing.**

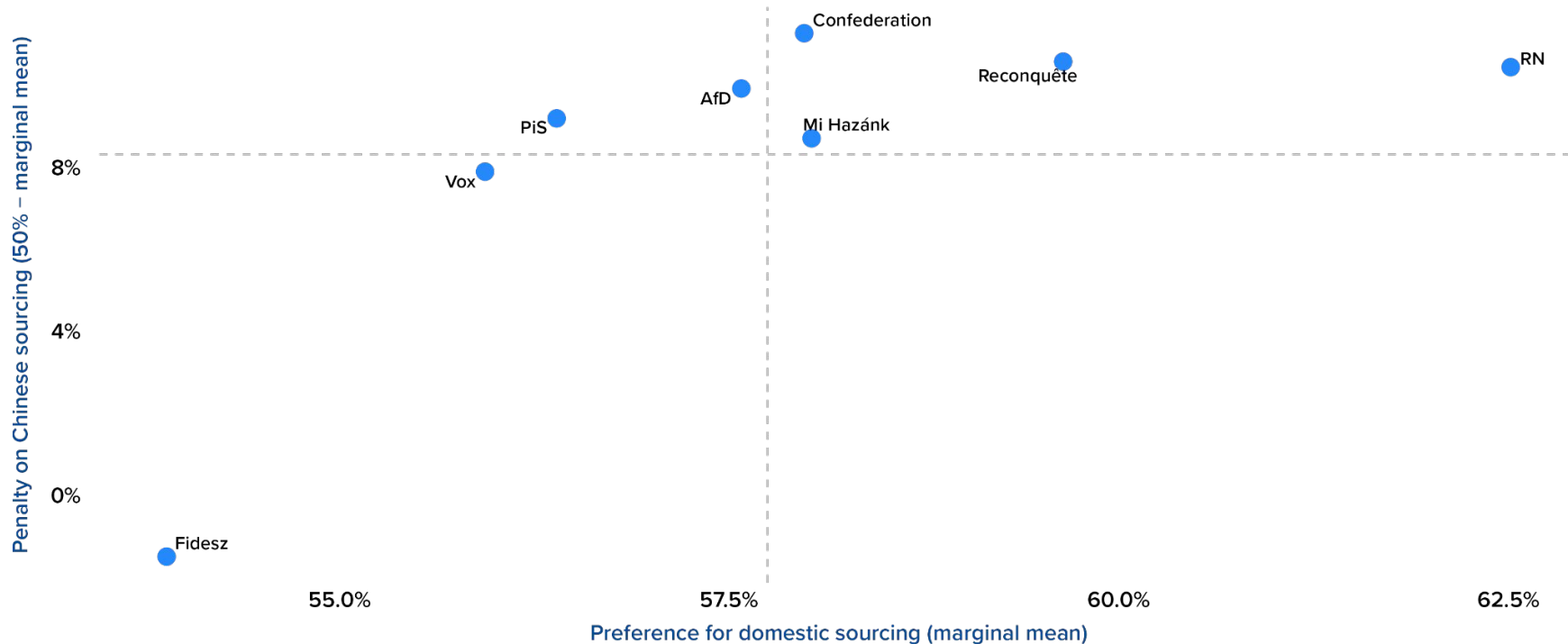




Populist right parties punish energy strategies that depend on Chinese technology; only Fidesz voters are relaxed about Chinese sourcing.

Populist-right parties: domestic-sourcing preference vs penalty on Chinese sourcing

Populist-right parties across the five markets



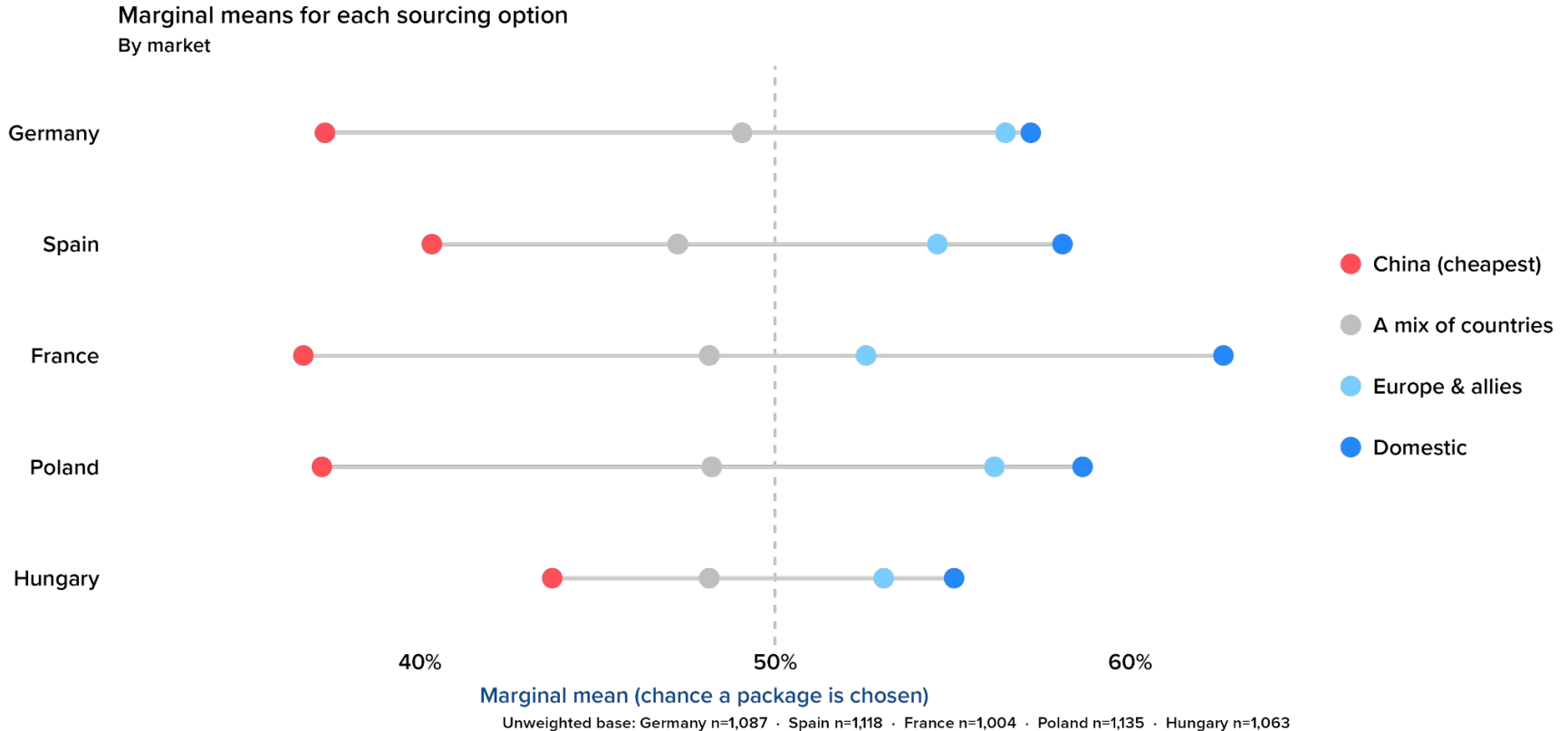
Unweighted base: n = 1,628



Who Europeans want to partner
with?



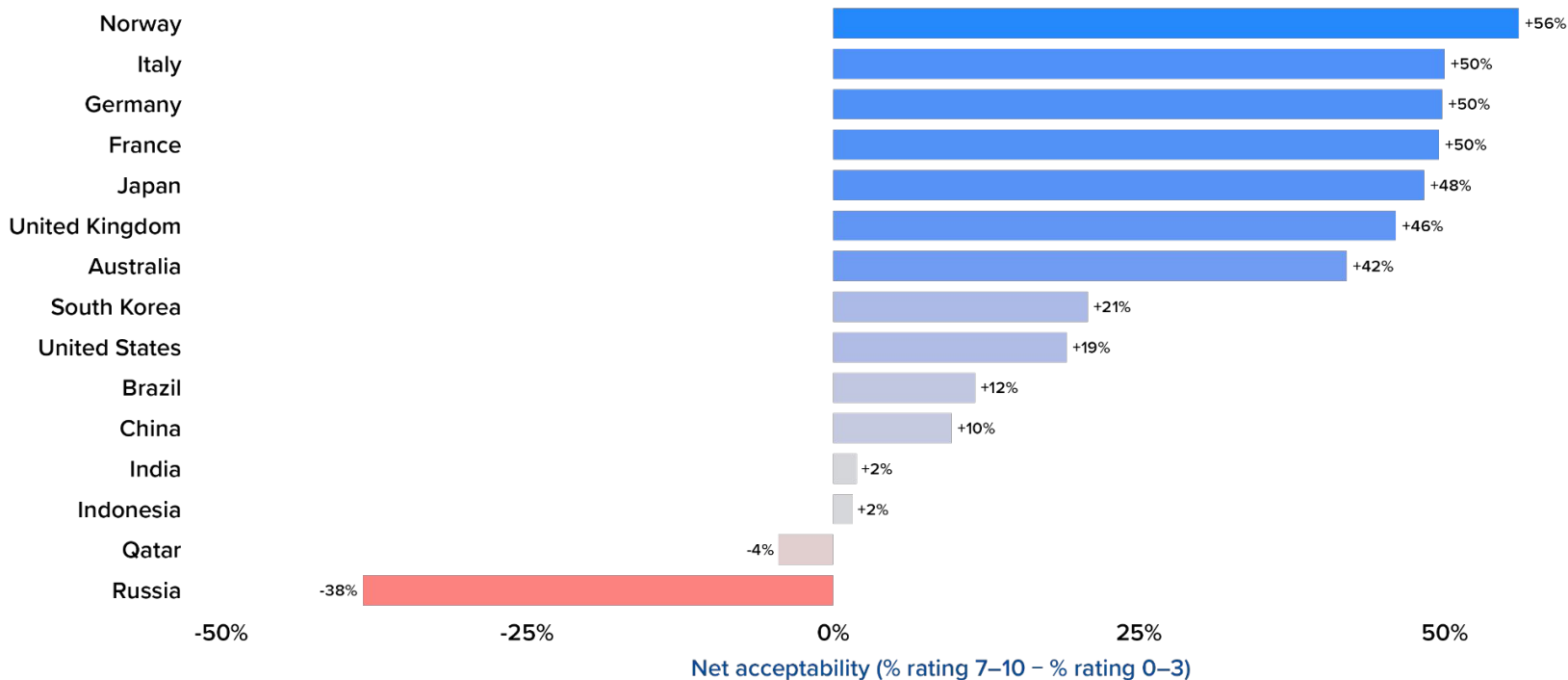
We see a domestic sovereignty premium over a “Europe & allies” approach everywhere but Germany. The premium is greatest in France.





European allies are preferred trading partners, while the US has slipped into a contested middle alongside South Korea.

How acceptable would a new AI, defence or energy trade deal be with each country?
Pooled across markets



Unweighted base: n = 5,407 · excl. Don't know



Hungary is a notable outlier when it comes to acceptability of trading with Russia, while other states have erected a clear firewall.

How acceptable would a new AI, defence or energy trade deal be with each country?

Net acceptability of trade deals, by market

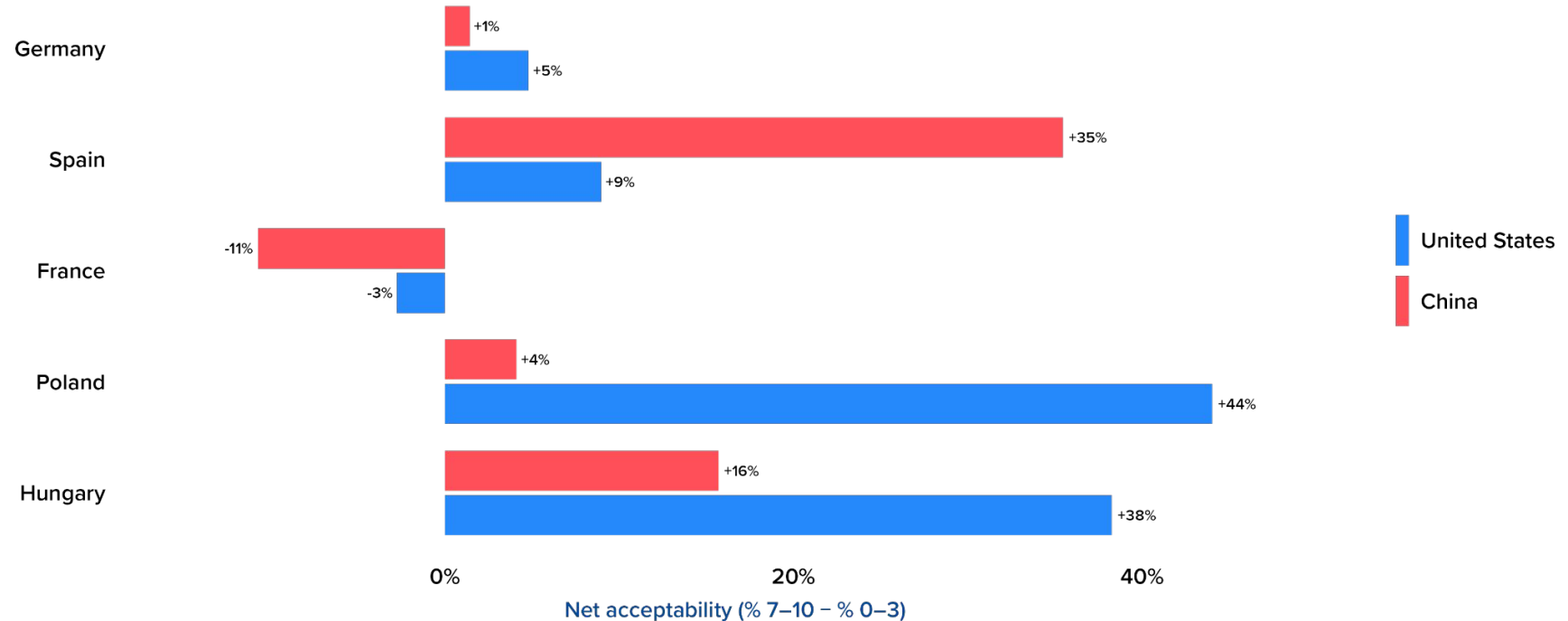
Norway	+68	+61	+47	+61	+41
Italy	+56	+58	+45	+48	+42
Germany	NaN	+63	+49	+37	+50
France	+61	+58	NaN	+43	+36
Japan	+48	+58	+32	+56	+46
United Kingdom	+50	+46	+39	+49	+44
Australia	+55	+52	+30	+40	+31
South Korea	+26	+26	+8	+27	+15
United States	+5	+9	-3	+44	+38
Brazil	+24	+17	-1	+13	+4
China	+1	+35	-11	+4	+16
India	+15	+5	-6	-4	-2
Indonesia	+8	+7	-6	+2	-4
Qatar	-9	-4	-12	+1	+1
Russia	-40	-31	-52	-63	-6
	Germany	Spain	France	Poland	Hungary

Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063



Western and Eastern Europe is divided on allies in a bipolar world. Spain rates China above the US, while Poland and Hungary lean the other way.

How acceptable would a new AI, defence or energy trade deal be with each country?
United States vs China, by market

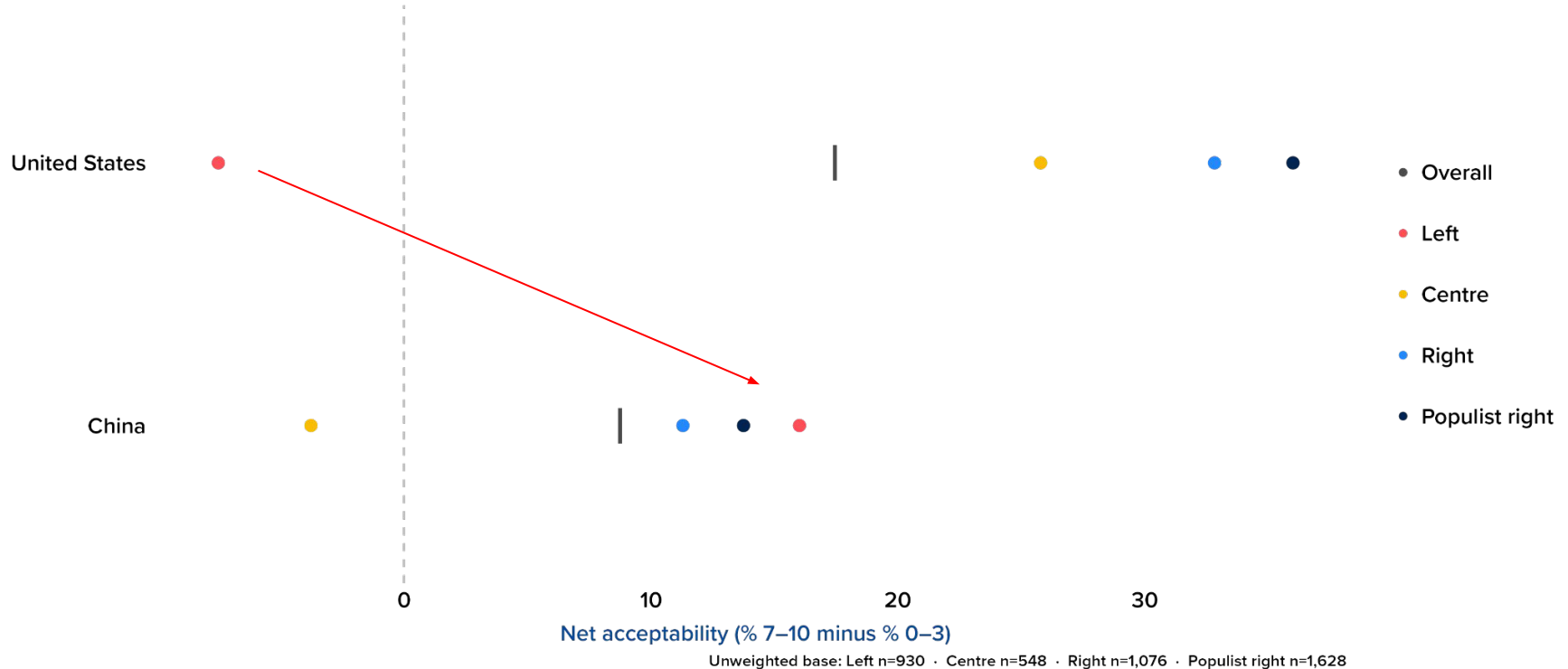


Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063



Preference is deeply partisan. The left is cool on a US deal and warm on China.

How acceptable would a new AI, defence or energy trade deal be with each country?
China vs the United States, by voting-intention family



How awareness impacts sentiment towards China



To evaluate the impact of raising awareness about Chinese dependence, we conducted a **split-sample experiment**.

- Respondents were randomly assigned 50/50. Group A (control) sees no information and answers 'cold'. Group B (informed) sees the primer below before the same questions.
- Comparing Group A and Group B on every subsequent question gives the cold vs. informed reading; the difference between them shows the empirical measure of 'narrative risk'.



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Preview Mode

Before the next questions, here is some factual background. Many of the same critical minerals and components, such as lithium-ion batteries and rare-earth magnets, are used across several industries. They go into clean-energy technologies like solar panels, electric vehicles, wind turbines and grid equipment; into the data centres and power systems behind artificial intelligence (AI); and into some defence equipment.

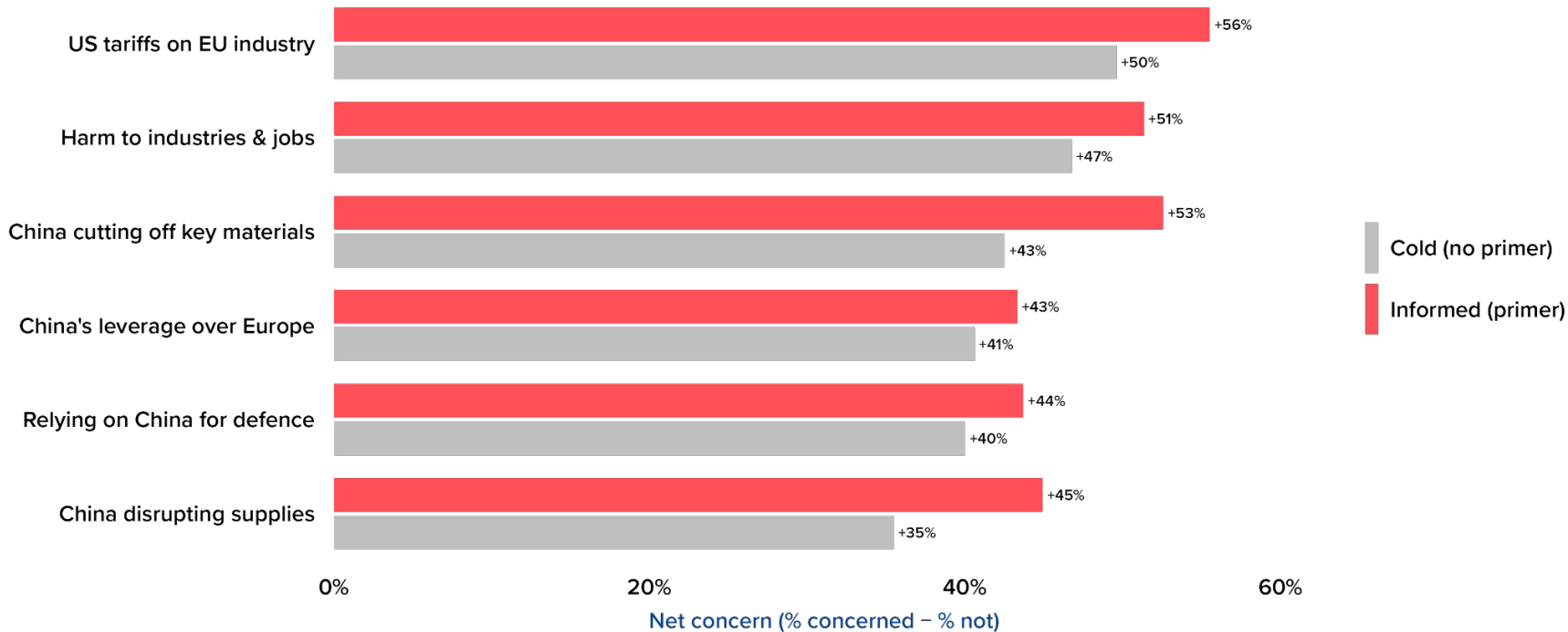
China plays a major role in the supply chains for many of these inputs. In 2024, it supplied around 98% of Europe's solar panels, 88% of its lithium-ion batteries and 61% of its inverters, and it produces over 90% of the world's rare-earth magnets.



Giving people a short factual primer on China dependence **lifts concern across every single risk**, but small effect means concern is already high.

How concerned are you about each of the following for your country?

Net concern before vs after a short factual primer on China dependence

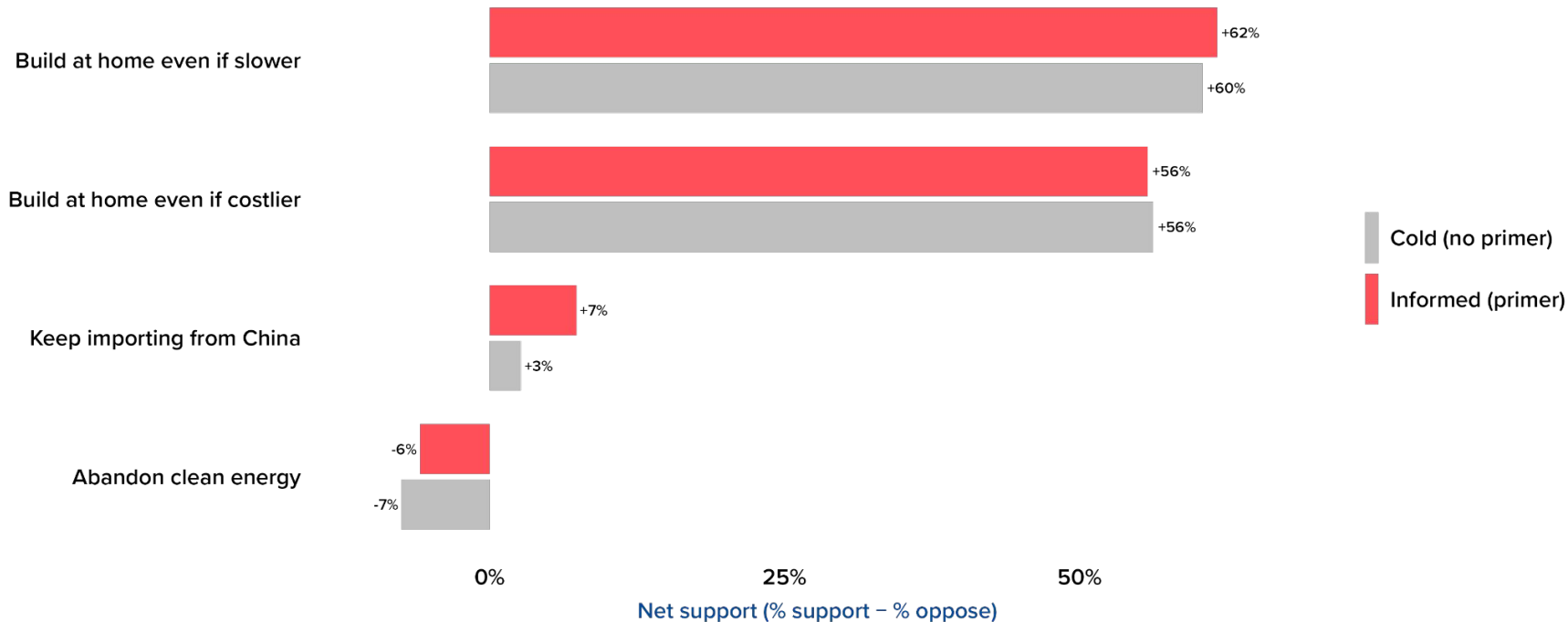


Unweighted base: cold n = 2,733 · informed n = 2,674



Yet the policy preference itself barely moves. The build-at-home preference has robust underlying support without the primer.

Support or oppose each of these responses to relying on China for clean-energy technology
Net support before vs after the same factual primer



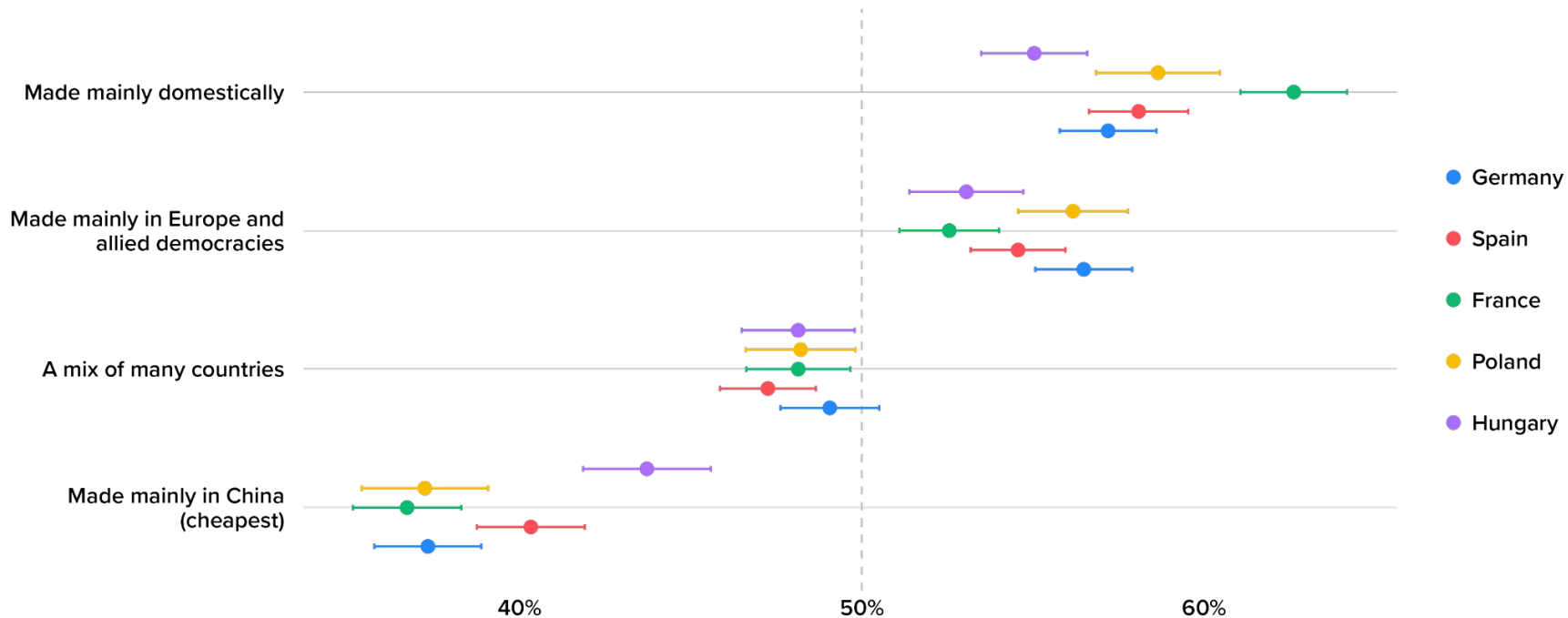
Unweighted base: cold n = 2,733 · informed n = 2,674



Appendix

Where energy technology is made and sourced

By market

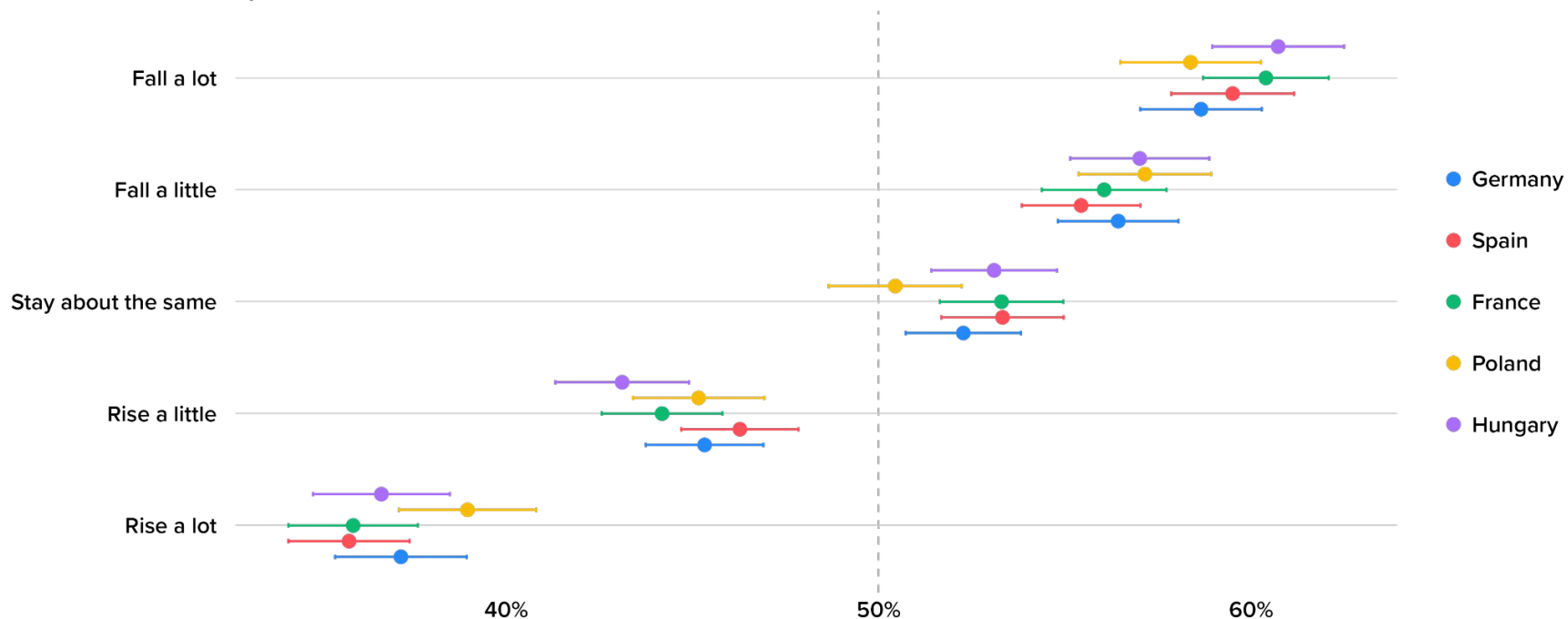


Marginal mean (probability a package is chosen)

Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063

The effect on your household energy bills

By market

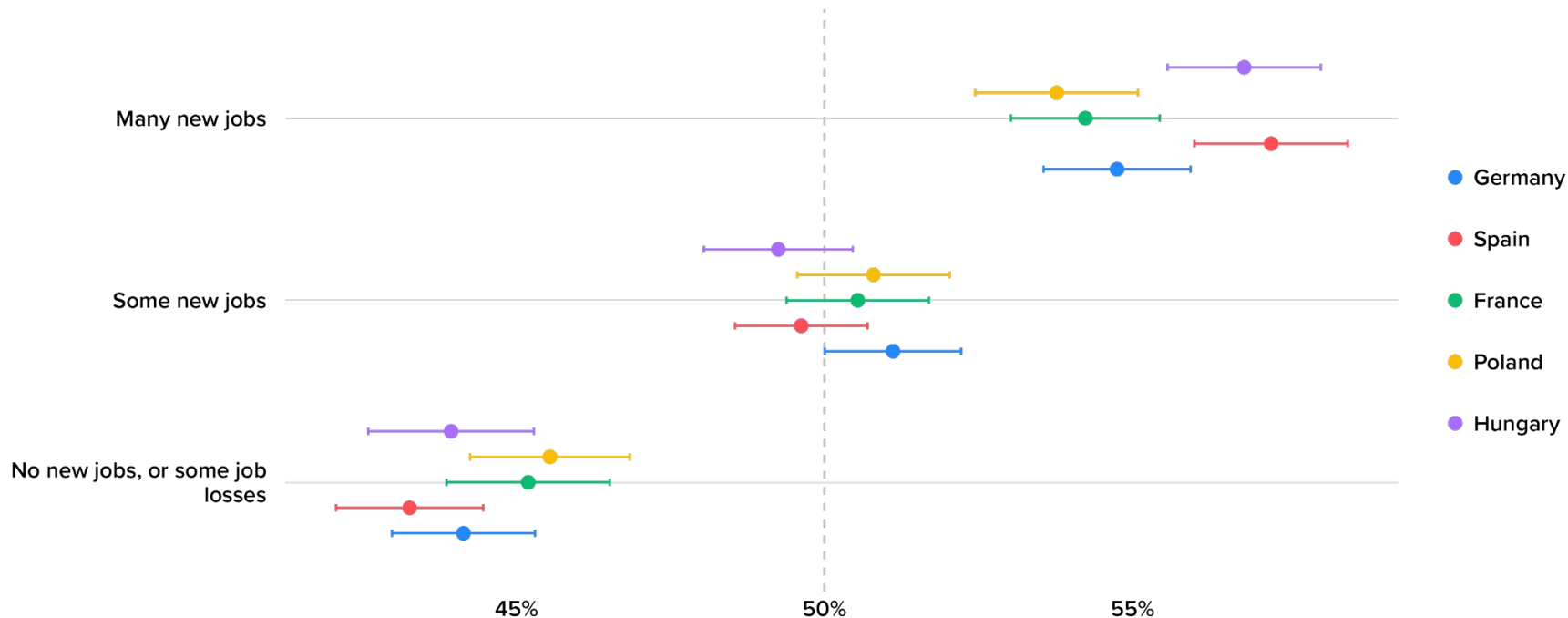


Marginal mean (probability a package is chosen)

Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063

New manufacturing jobs at home

By market

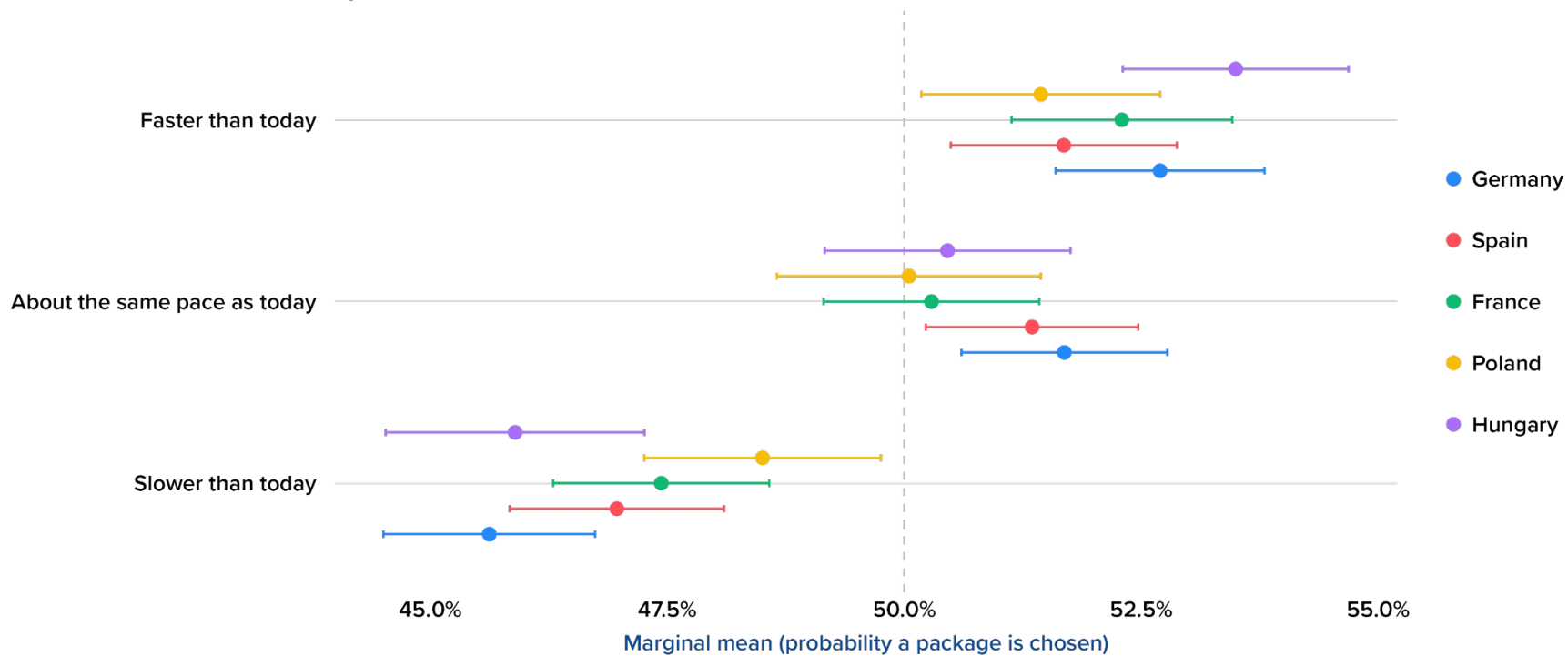


Marginal mean (probability a package is chosen)

Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063

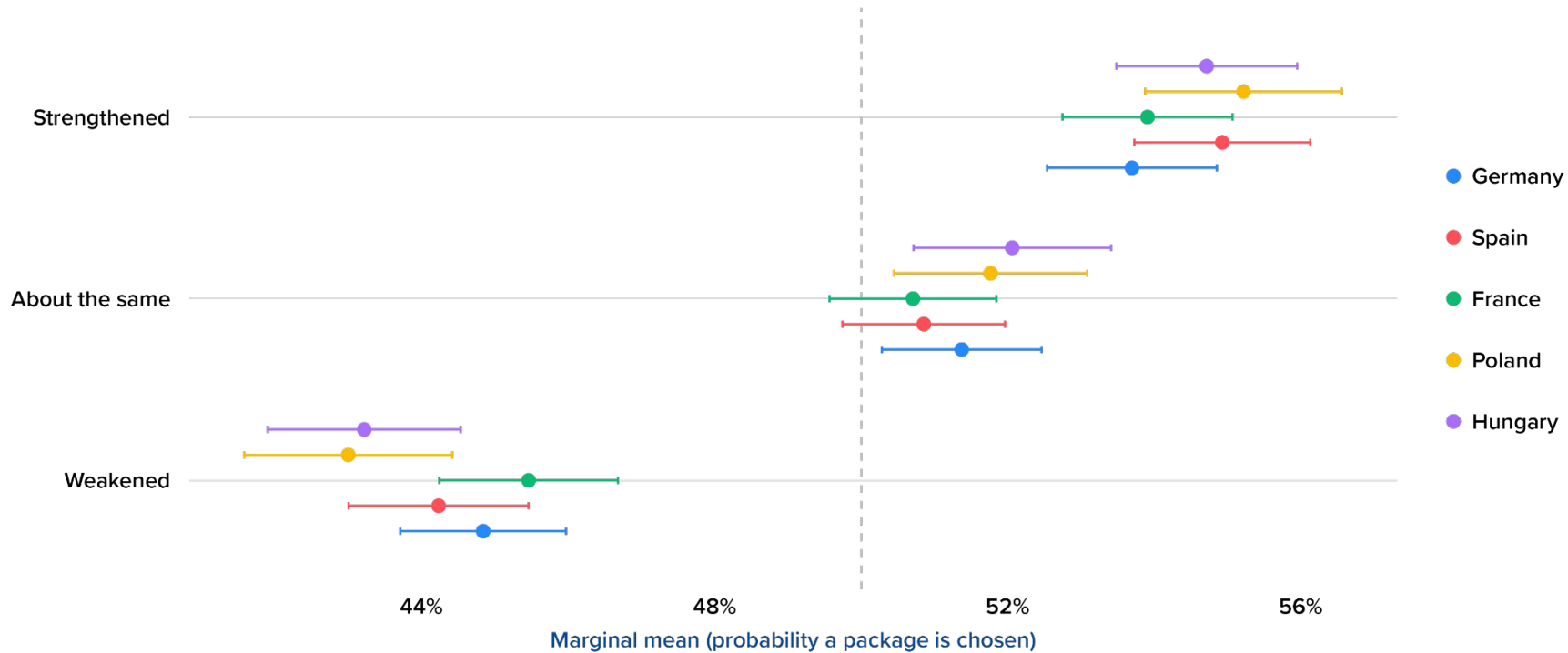
The pace of the clean-energy rollout

By market



Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063

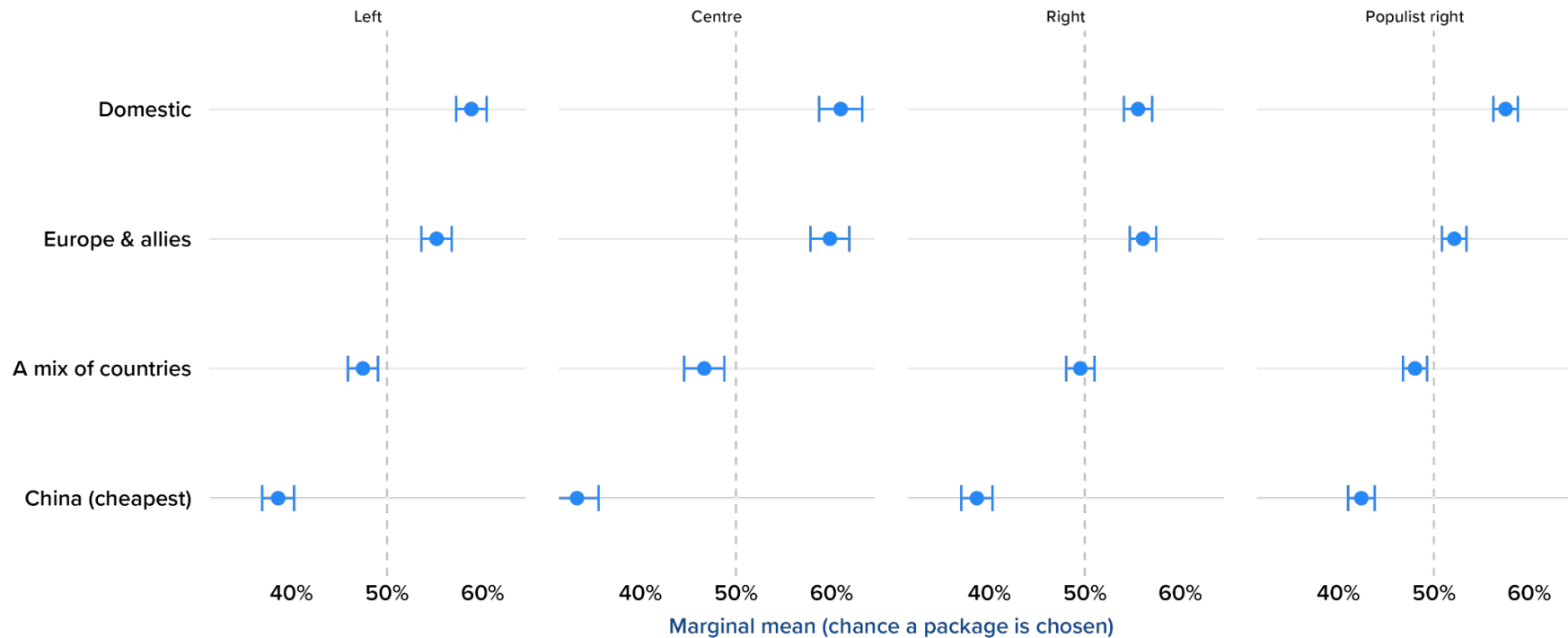
Security of supply for defence and critical equipment By market



Unweighted base: Germany n=1,087 · Spain n=1,118 · France n=1,004 · Poland n=1,135 · Hungary n=1,063

Marginal means for how energy technology is sourced

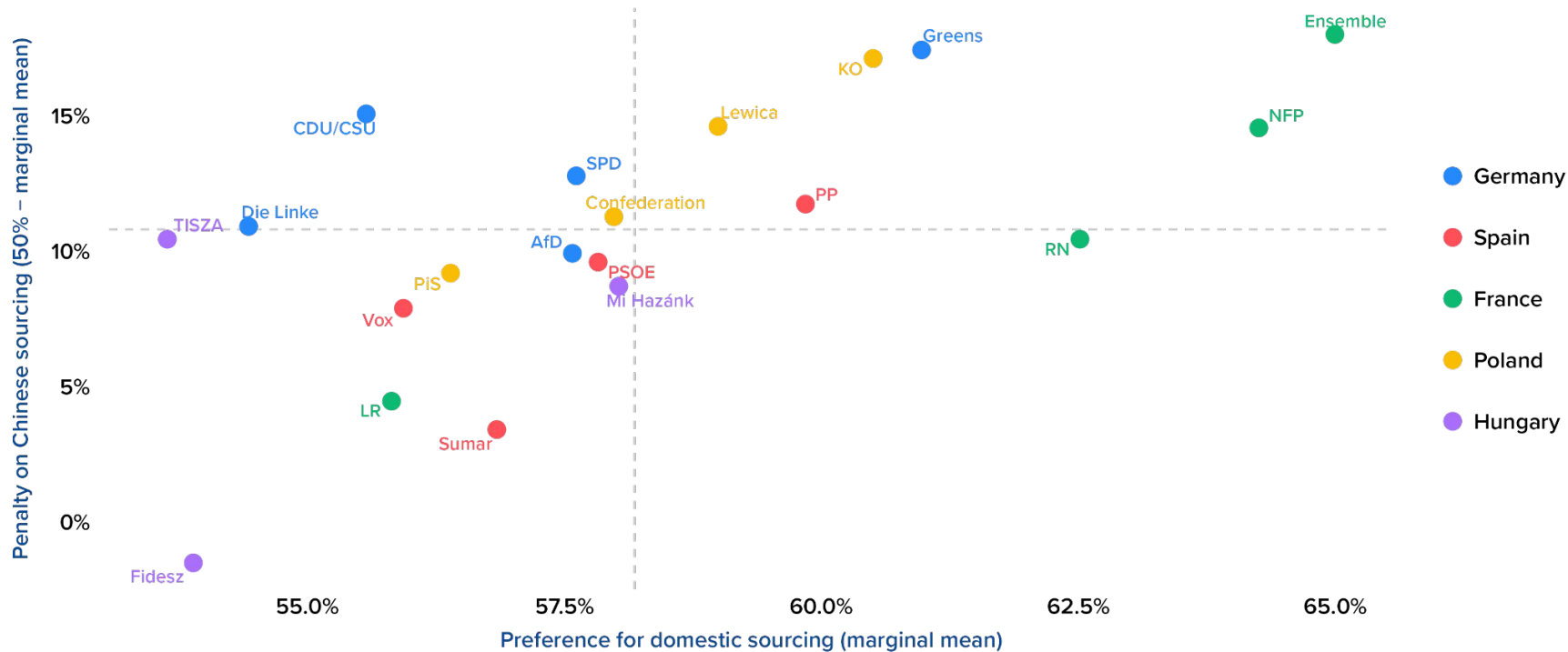
By voting-intention family



Unweighted base: Left n=930 · Centre n=548 · Right n=1,076 · Populist right n=1,628

All parties: domestic-sourcing preference vs penalty on Chinese sourcing

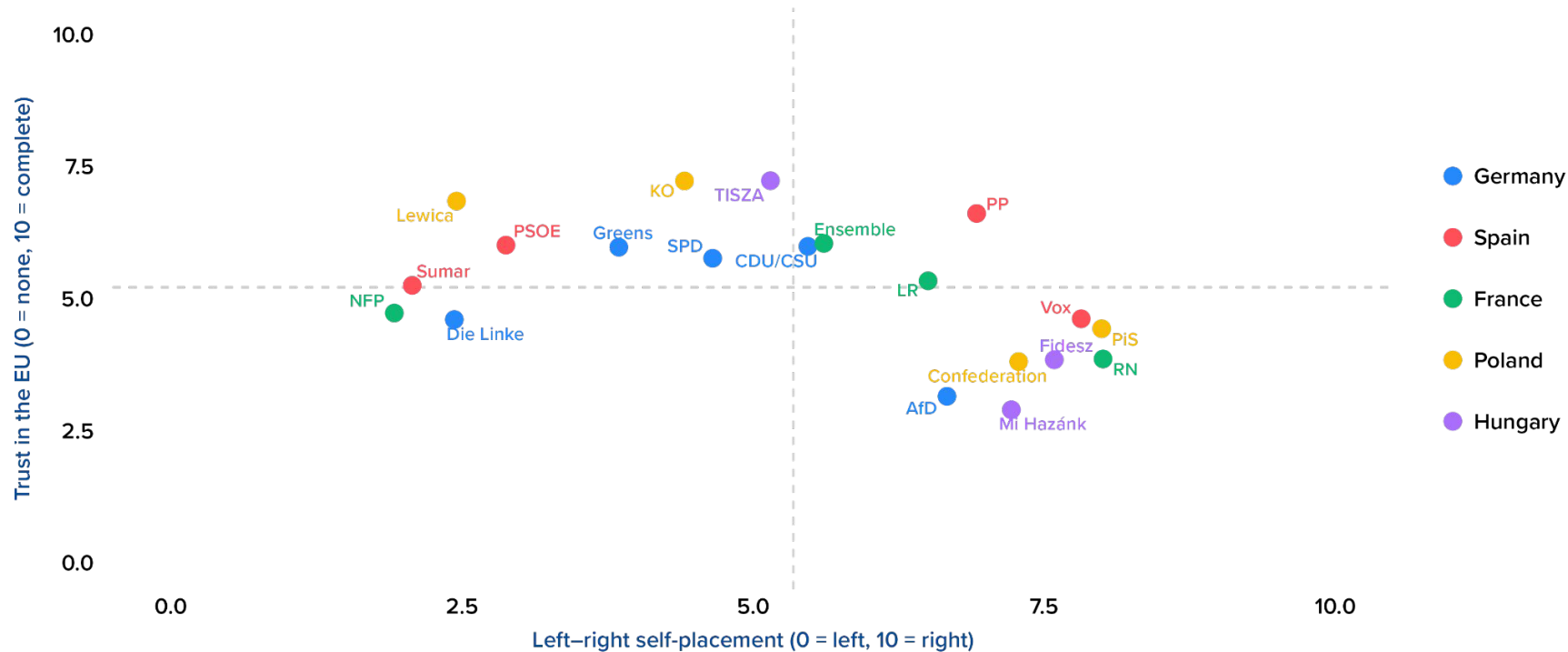
By market



Unweighted base: n = 4,019

All parties: left–right self-placement vs trust in the EU

By market



Unweighted base: n = 4,019

www.focaldata.com



Contact

Jack Peacock
Research Manager
jackpeacock@focaldata.com

Matt Chennells
Associate Director
matt@focaldata.com

James Kanagasooriam
Chief Research Officer
james@focaldata.com