

European Methane Regulation Survey

SUMMARY FINDINGS

Poland, Netherlands, Italy, Germany, Czech Republic, France.



September 2026



METHODOLOGY

01

METHODOLOGY

GENERAL OBJECTIVE

Assess public attitudes, perceptions, and support for a regulation requiring the disclosure of the origin of oil and gas imports in 6 countries of the European Union



METHODOLOGY

- Quantitative methodology based on online application surveys
- Non-probabilistic sampling controlling quotas by country, Gender and age groups



SURVEY DATA COLLECTION METHOD

- Online survey
- Conducted via Ipsos online panel (certified)



TARGET POPULATION

- General population
- Adults aged 18+
- National coverage



SAMPLE

- 1,000 respondents per country
- National coverage

Country	Sample
Italy	1000
Germany	1000
France	1000
Czech Republic	1000
Poland	1000
Netherlands	1000
Total	6000

MAIN FINDINGS

02

KEY FINDINGS

Strong support for methane transparency and accountability gives the new regulation a solid legitimacy base, despite low prior awareness of the policy

Climate change is a tangible reality for most citizens, creating a favourable context for methane action

Awareness of both methane and the regulation remains limited, constraining initial support: only 15% to 35% have heard of the EU methane regulation

Support rises substantially when citizens understand methane's climate impact and the regulation's purpose: 73% support tracking and disclosing the origin of imported oil and gas, 69% support applying methane standards to imports, and 66% support their government implementing the law.

Legitimacy remains robust despite economic concerns: energy prices are among the top public concerns across all countries, and 68% of supporters would still back the policy even if household energy costs increased by up to 1%

¿What it means?

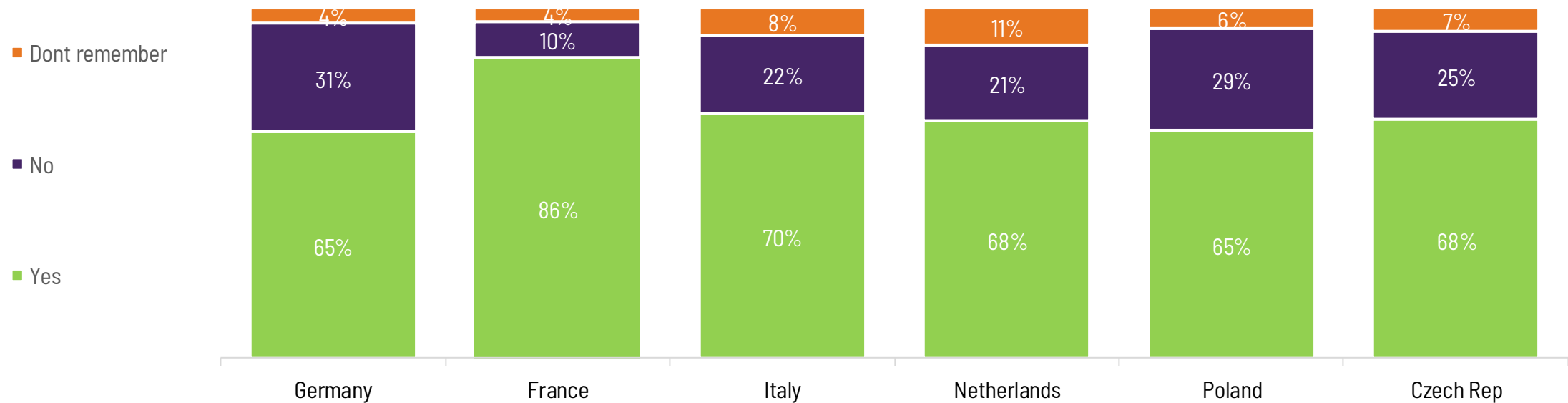
Across the six countries, public legitimacy for methane regulation is primarily driven by climate and accountability considerations and becomes significantly stronger when people receive information about methane emissions and the policy's objectives.

CLIMATE CHANGE AS A VISIBLE REALITY

EXPERIENCE OF UNUSUALLY SEVERE WEATHER EVENTS

In all countries, most of the people felt extreme weather conditions in the last two years

70%
Average

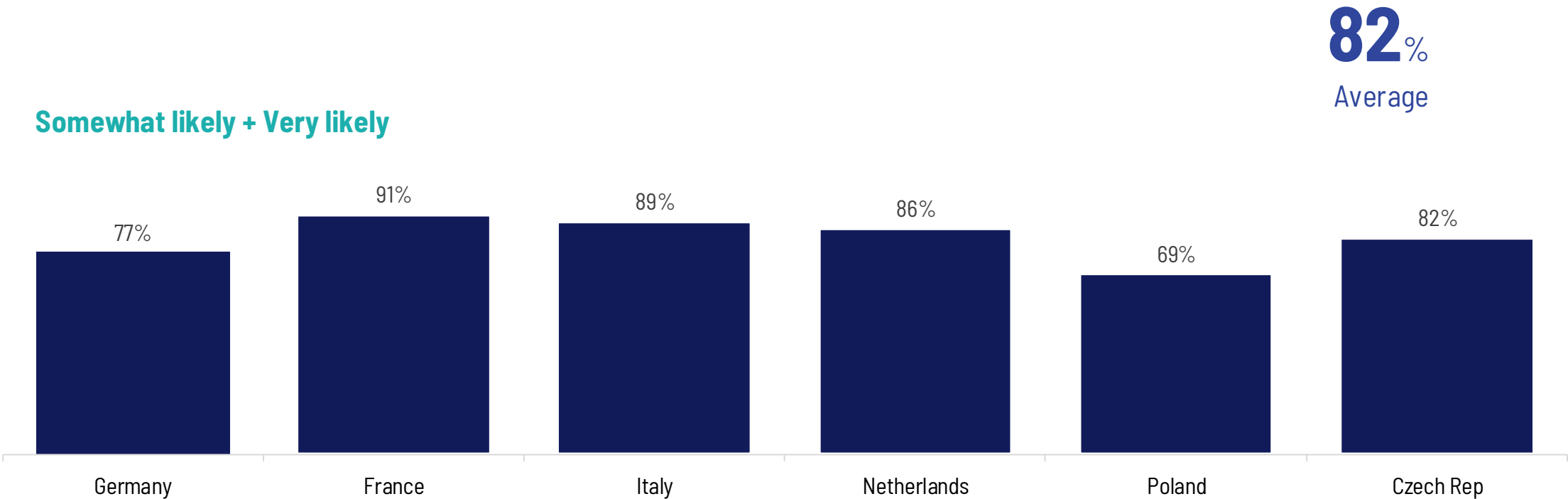


Have you personally experienced a heatwave or extreme weather event in the past two years that you felt was unusually severe?

Base: Total sample; N=1,000 per country

PERCEIVED LINK BETWEEN EXTREME HEAT AND CLIMATE CHANGE

Majority believes the record-breaking heat of this summer is related to the climate change



This summer, Europe is experiencing record-breaking heat. Do you think this hot weather was, or was not, a result of climate change?

Base: Total sample; n=1,000 per country

TOP CONCERNS AND ENERGY COST PERCEPTIONS

TOP CONCERNS

Energy prices are among the top concerns across all countries. Especially high relevance in Czech Republic, Poland and The Netherlands.

	GERMANY	CZECH REP.	ITALY	FRANCE	POLAND	NTHLANDS	TOTAL
Rising prices for goods and services	37%	44%	39%	37%	31%	40%	37%
Energy prices and bills	20%	32%	22%	25%	33%	27%	27%
Crime and violence	22%	21%	33%	25%	11%	20%	21%
Healthcare	17%	9%	25%	21%	23%	16%	20%
Immigration	23%	18%	16%	18%	20%	26%	19%
War	16%	18%	12%	9%	27%	14%	18%
Environmental problems	21%	14%	19%	31%	8%	26%	17%
The economy	21%	15%	11%	16%	11%	9%	14%
National security	9%	10%	5%	7%	17%	9%	11%
Unemployment	5%	12%	12%	6%	13%	4%	10%
Dependence on foreign supplies of fossil fuels	8%	6%	6%	5%	6%	10%	6%

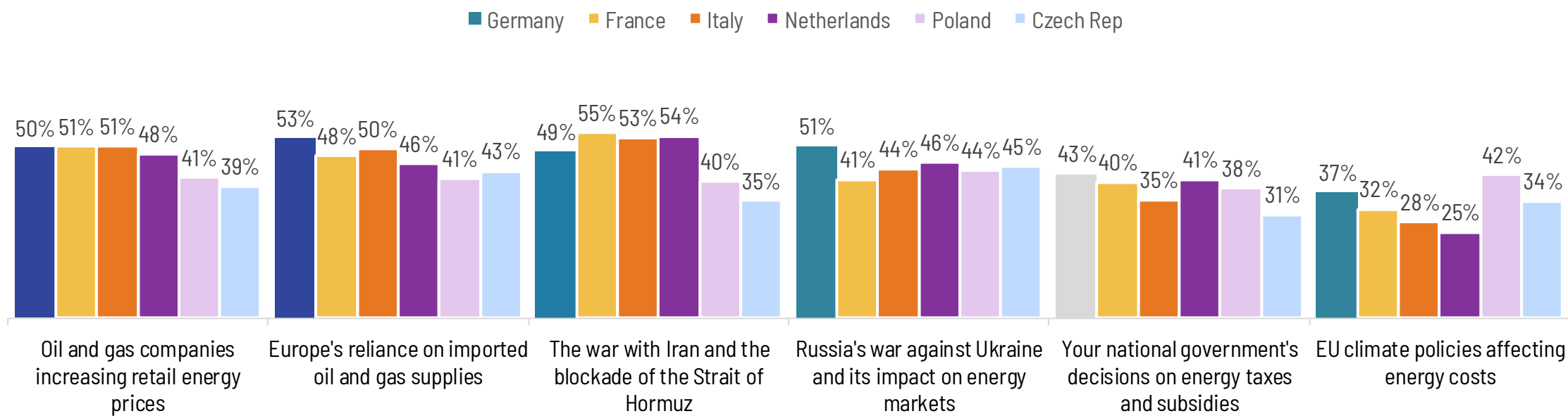
Which three of the following are you most worried about in [COUNTRY] today?

Base: Total sample; n=1,000 per country

Multiple choice question, allowing up to 3 selections from 11 options.

PERCEIVED IMPACT ON ENERGY COSTS

A range of factors are perceived as contributing to rising energy costs; Overall, national regulation and EU climate policies are not perceived as the main factors



Thinking about your household energy bill over the past year, how much, if at all, do you think each of the following has affected the amount you pay for energy?

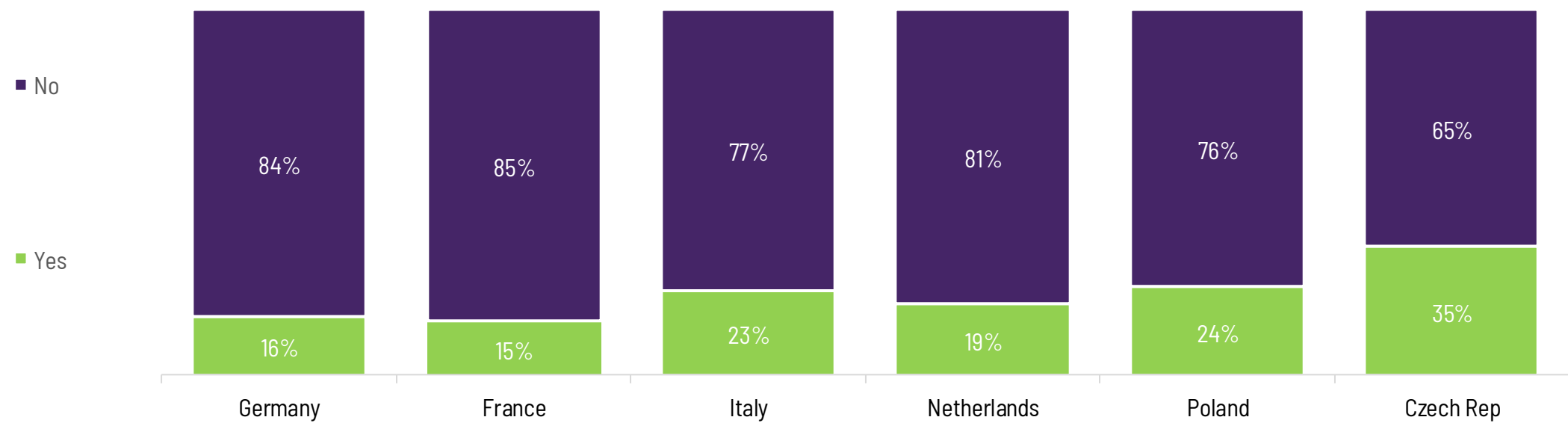
Base: Total sample; n=1,000 per country

AWARENESS AND SUPPORT OF EU LAW

AWARENESS OF EU METHANE REGULATIONS

The new policy is known by only a small share of the population; the Czech Republic stands out as the country with highest level of awareness

22%
Average awareness

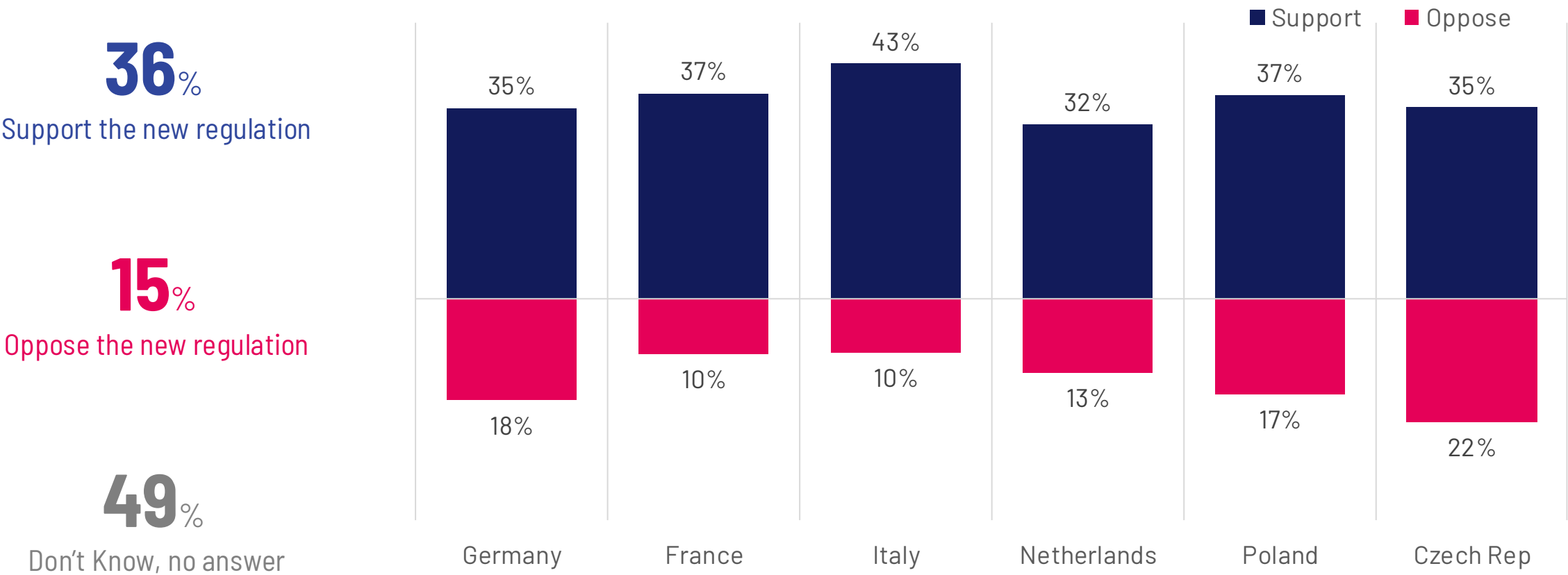


Have you heard or read about a new policy that requires countries supplying oil and gas to the EU to comply with the same methane rules as producers inside the EU?

Base: Total sample; n=1,000 per country

SUPPORT FOR THE NEW EU METHANE REGULATIONS

The new policy is supported by 1 in 3 persons; Majority cannot decide whether to support or oppose the law because of lack of awareness



According to what you know you Strongly support, somewhat support, somewhat oppose, strongly oppose, the EU methane regulation?

Base: Total sample; n=1,000 per country

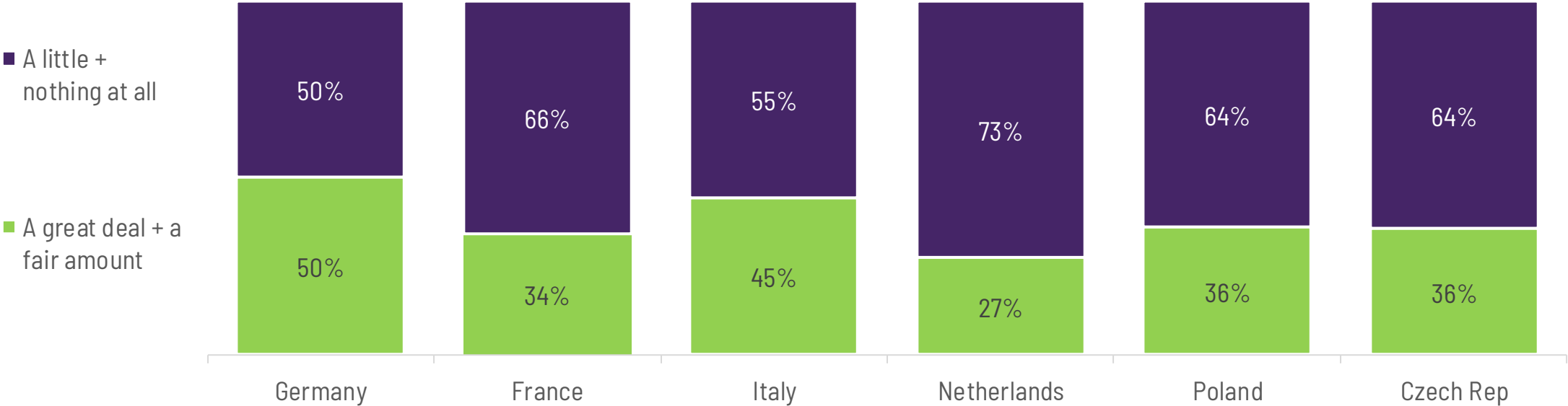
METHANE: THE CHALLENGE TO COMMUNICATE THE IMPACT ON CLIMATE CHANGE

AWARENESS OF METHANE AS A CAUSE OF CLIMATE CHANGE

In Awareness of methane's role in climate change remains limited across countries

61%

A Little + nothing at all

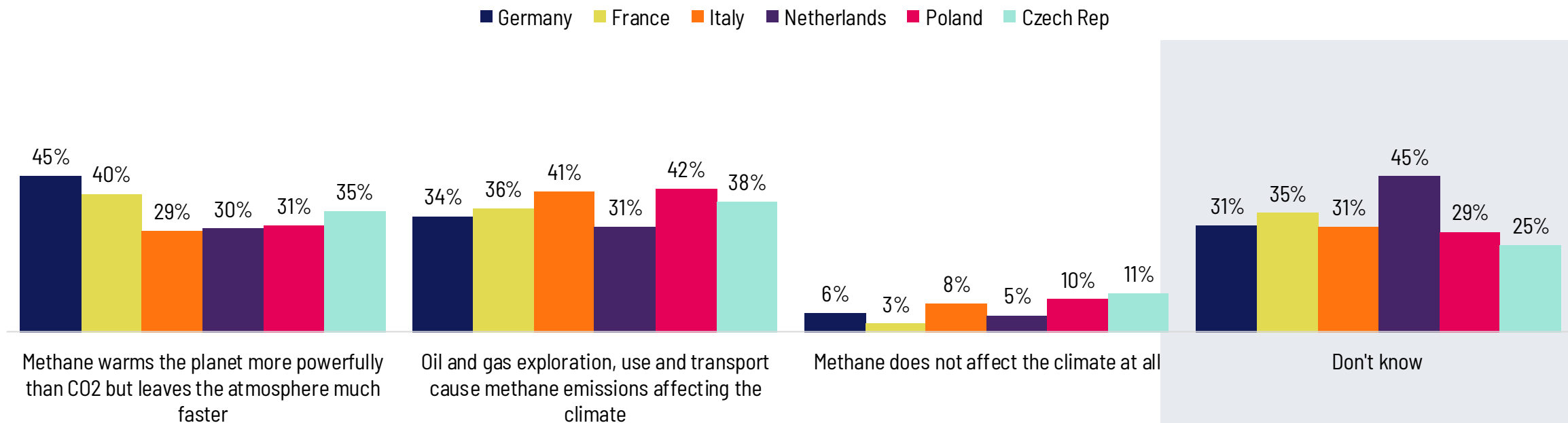


Before today, how much had you heard about methane as a cause of climate change?

Base: Total sample; n=1,000 per country

KNOWLEDGE OF METHANE IMPACT

Around one-third are unsure about methane's impact on climate change

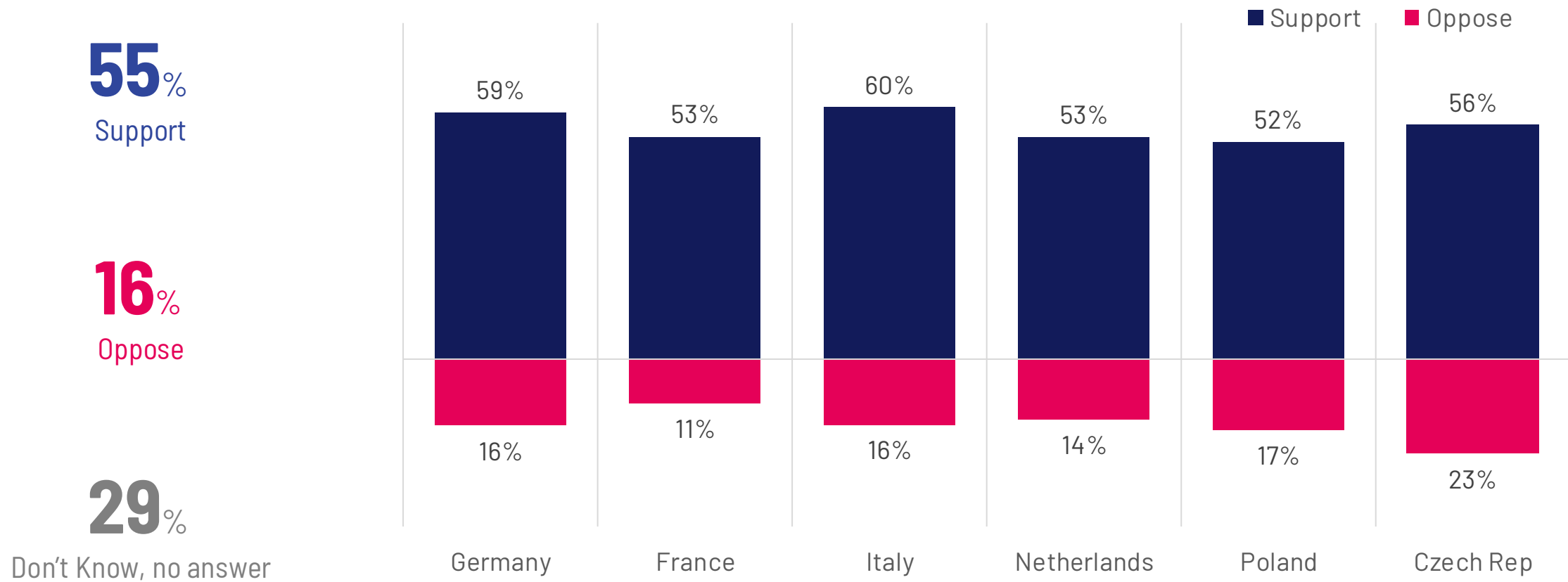


As far as know, which of these statements about methane are true?

Base: Total sample; n=1,000 per country

ATTITUDES TOWARD ACTIONS TO REDUCE METHANE EMISSIONS

The good news is that Despite limited knowledge, 55% support the idea to reduce methane emissions

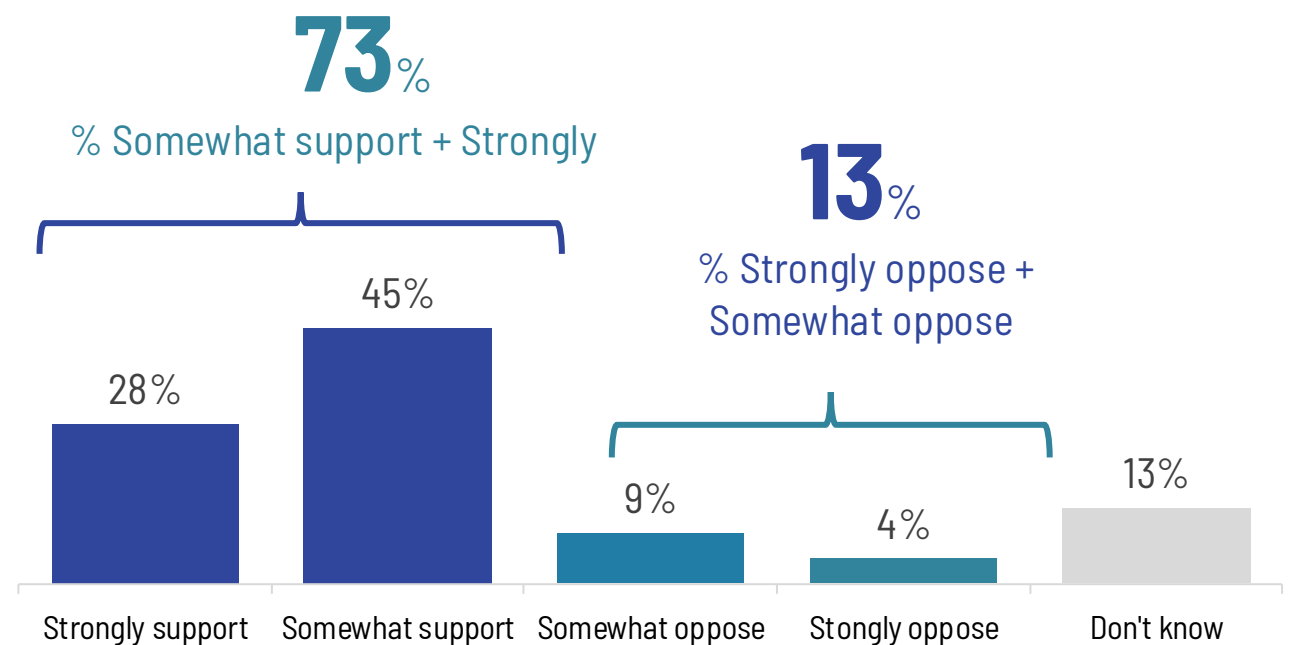


To what extent do you agree or disagree with the actions being taken to reduce methane emissions?
Base: Total sample; n=1,000 per country

SUPPORT TO DISCLOSING THE ORIGIN OF OIL

SUPPORT FOR TRACKING AND DISCLOSING THE ORIGIN OF IMPORTED OIL AND GAS

"Methane traps more heat than CO2 in the short term, so cutting methane emissions can slow global warming more quickly than cutting CO2 alone. The EU has adopted a law making it mandatory for oil and gas companies to reduce avoidable methane emissions."



After receiving information about methane emissions, 73% support the idea of disclosing the origin of oil

How much would you support or oppose Europe requiring that the origin of imported oil and gas be tracked down and published — so buyers can compare suppliers to their environmental record and suppliers can be held accountable?

Base: Total sample; n=1,000 per country

SUPPORT FOR TRACKING AND DISCLOSING THE ORIGIN OF IMPORTED OIL AND GAS

Italy and Czech Republic show highest level of support

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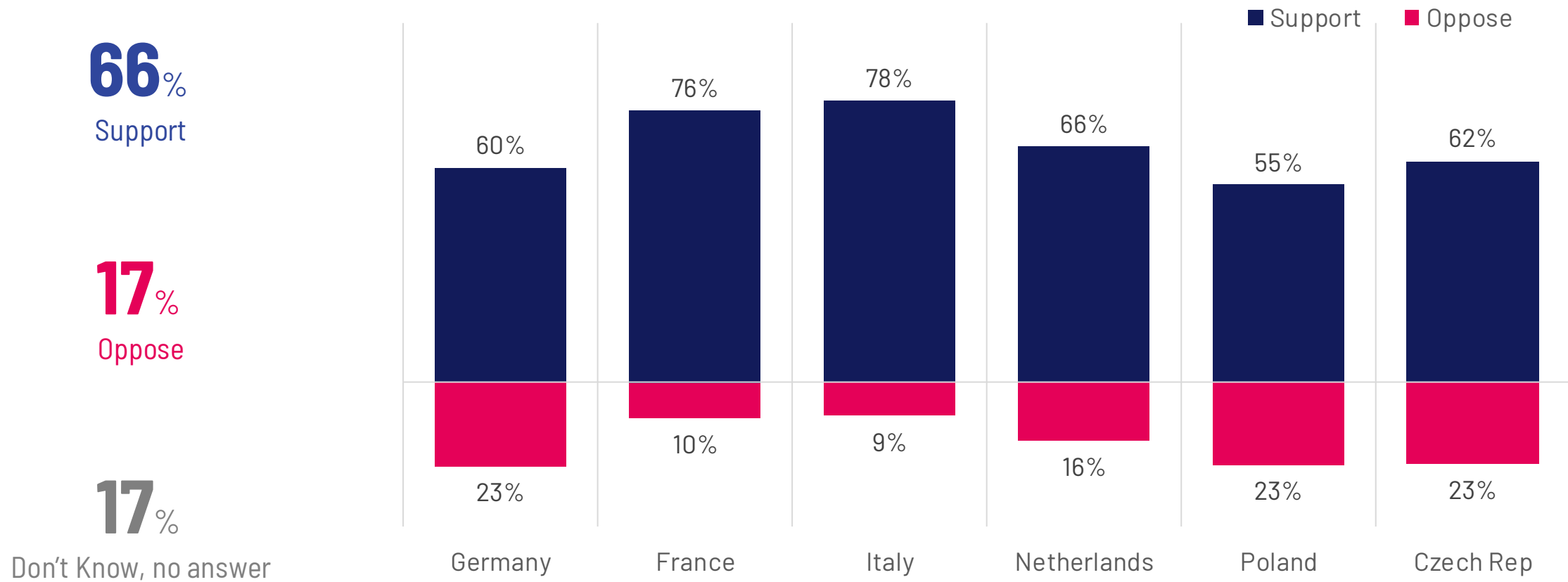
	GERMANY	CZECH REP.	ITALY	FRANCE	POLAND	NTHLANDS
Strongly support	23%	35%	34%	34%	21%	23%
Somewhat support	42%	48%	50%	41%	44%	45%
Somewhat oppose	12%	5%	5%	7%	10%	15%
Strongly oppose	7%	2%	2%	4%	7%	5%
Don't know	16%	10%	10%	14%	18%	12%
Strongly + somewhat support	65%	83%	84%	75%	65%	68%
Strongly + somewhat oppose	19%	7%	7%	12%	17%	19%

How much would you support or oppose Europe requiring that the origin of imported oil and gas be tracked down and published — so buyers can compare suppliers to their environmental record and suppliers can be held accountable?

Base: Total sample; n=1,000 per country

SUPPORT FOR GOVERNMENT IMPLEMENTATION OF THE LAW

In this context, the support rises to two-thirds of respondents; France and Italy show the highest level of support

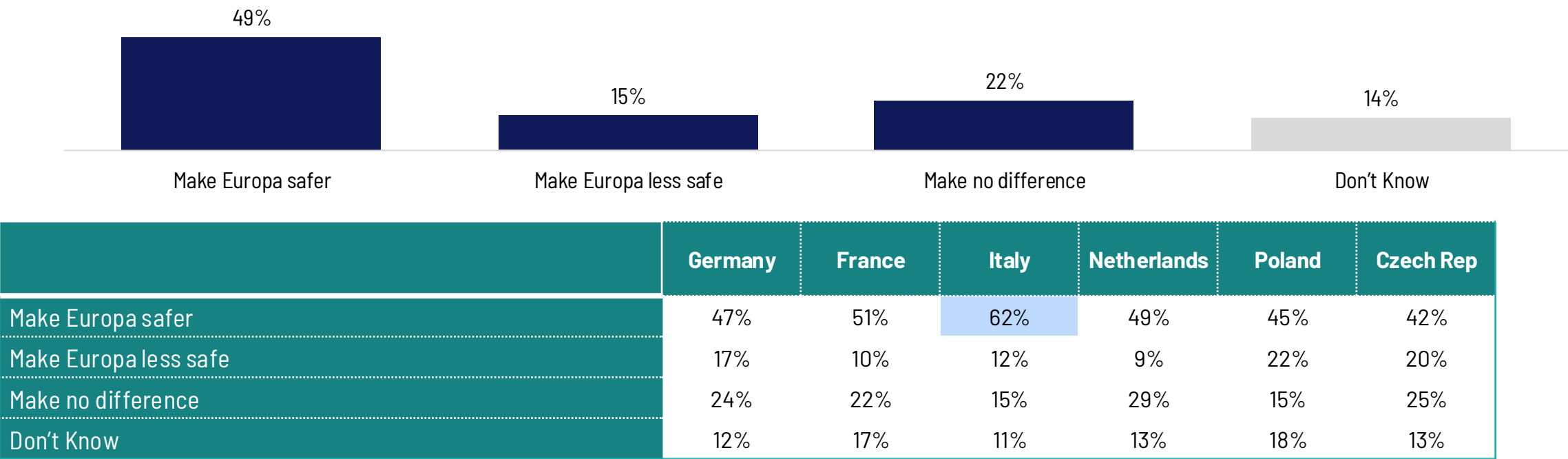


To what extent do you agree or disagree that (YOUR COUNTRY) government should implement this law?
Base: Total sample, N=1.000

ENERGY SECURITY AND UNITED STATE SUGGESTION

IMPACT ON SECURITY OF REDUCING EUROPE’S DEPENDENCE ON IMPORTED OIL AND GAS

Overall, the idea of reducing dependence is associated with more security for Europe



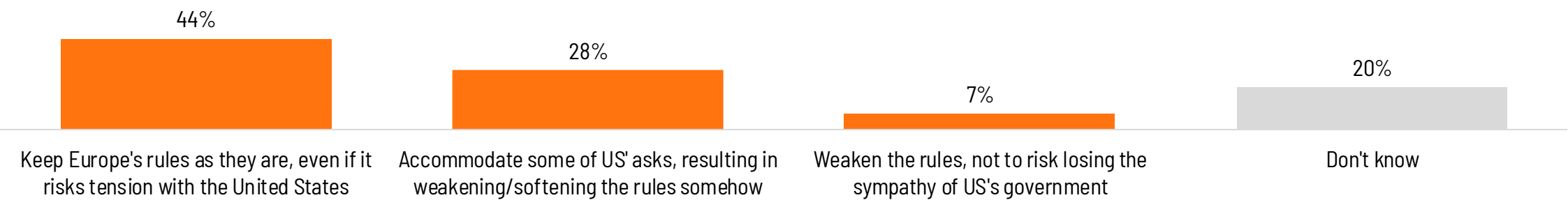
Imagine Europe reduced its dependence on imported oil and gas. Would this make Europe more safe, less safe, or make no difference?

Base: Total sample; n=1,000 per country

Significantly higher/lower than other segments at the 95% confidence level.

PREFERRED RESPONSE TO U.S. ADVICE ON EU METHANE POLICY

Majority support the law even if it risks tension with USA



	Germany	France	Italy	Netherlands	Poland	Czech Rep
Keep the European rules unchanged, even if this risks tensions with the United States	43%	53%	52%	44%	29%	39%
Accommodate some of the US demands, which would mean somewhat weakening or softening the rules	30%	21%	24%	28%	38%	34%
Weaken the rules so as not to risk losing the goodwill of the US authorities	7%	6%	5%	7%	13%	9%
Don't know	19%	19%	18%	20%	20%	18%

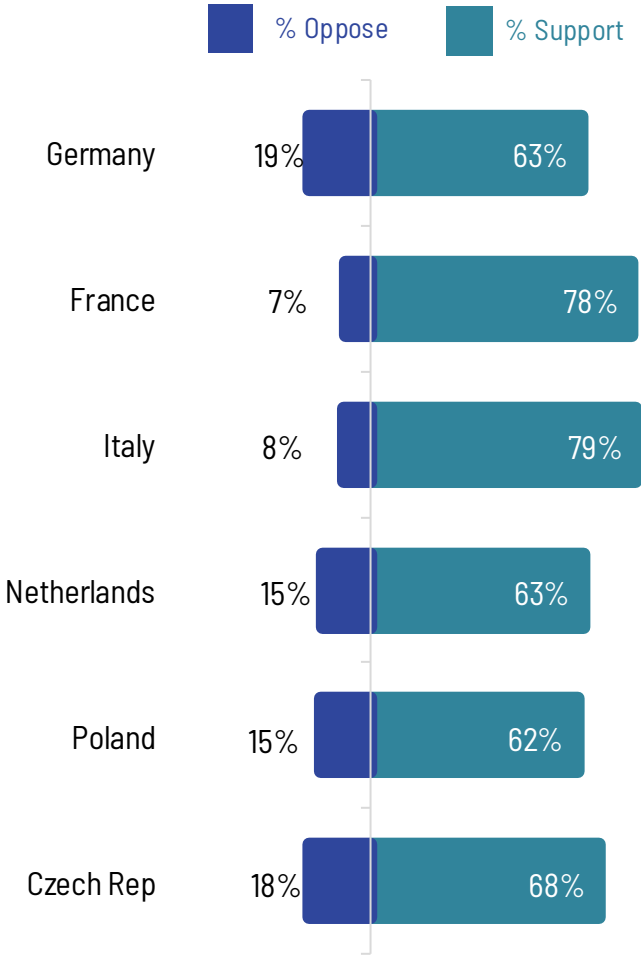
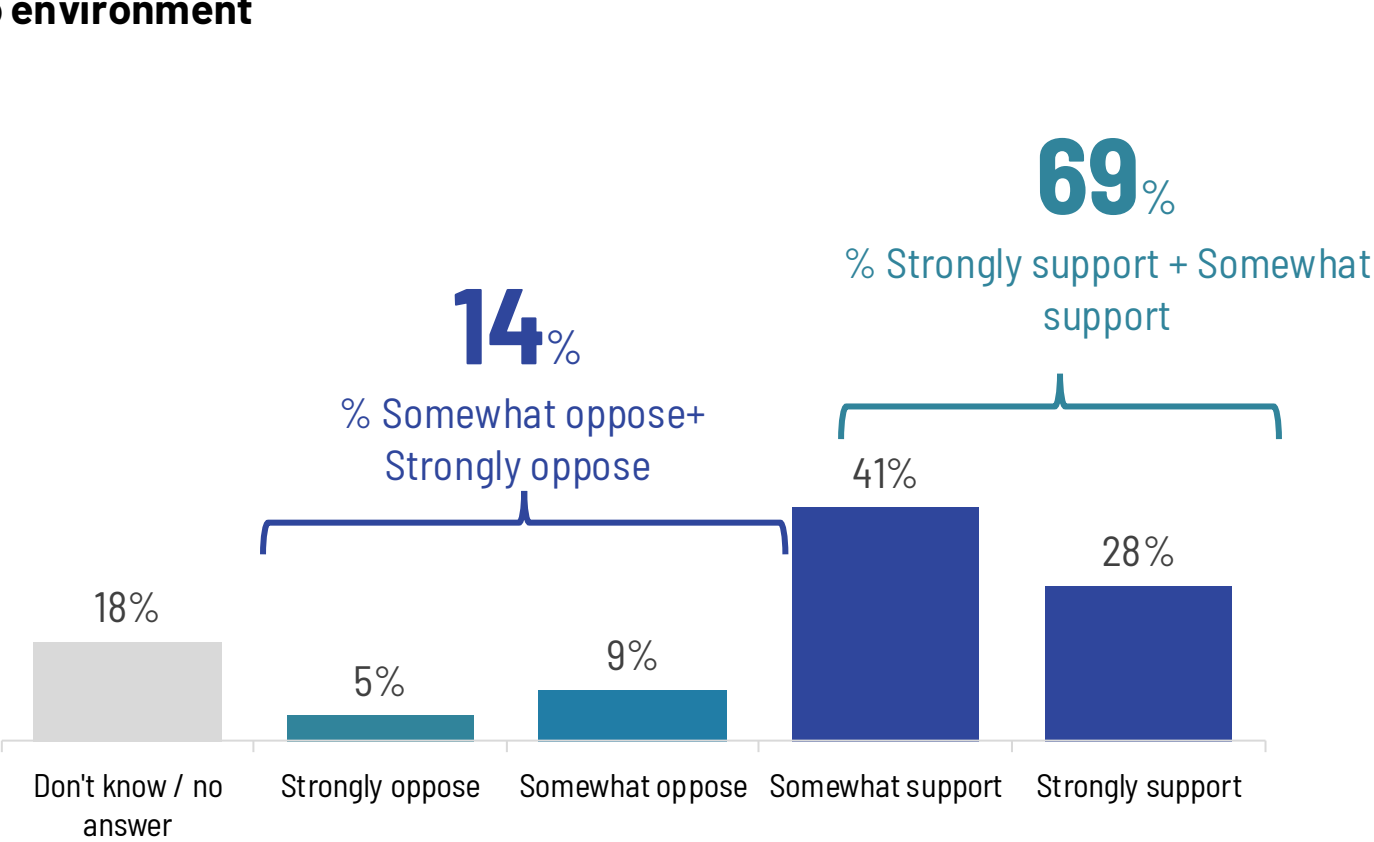
The United States has expressed concerns about the EU methane policy’s and has suggested to weaken its rules on methane pollution from imported oil and gas and has suggested it could sell its gas elsewhere. What should [COUNTRY] do

Base: Total sample; n=1,000 per country

RULE SUPPORT AFTER INFORMATION

SUPPORT FOR EU METHANE REGULATIONS ON IMPORTED OIL AND GAS

The new policy is supported by 69% after people understand the impact of Methane and what the new regulations means to environment

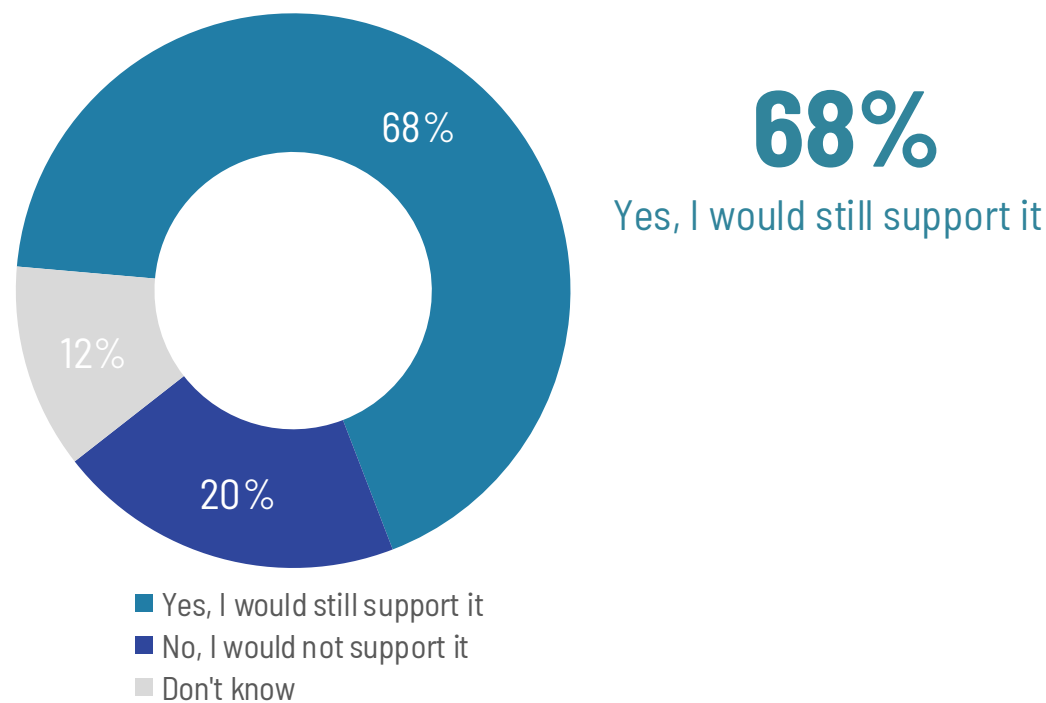


The EU imports most of its oil and gas from other countries. Would you support or oppose a regulation that requires countries supplying oil and gas to the EU to comply with the same methane pollution rules as producers inside the EU?

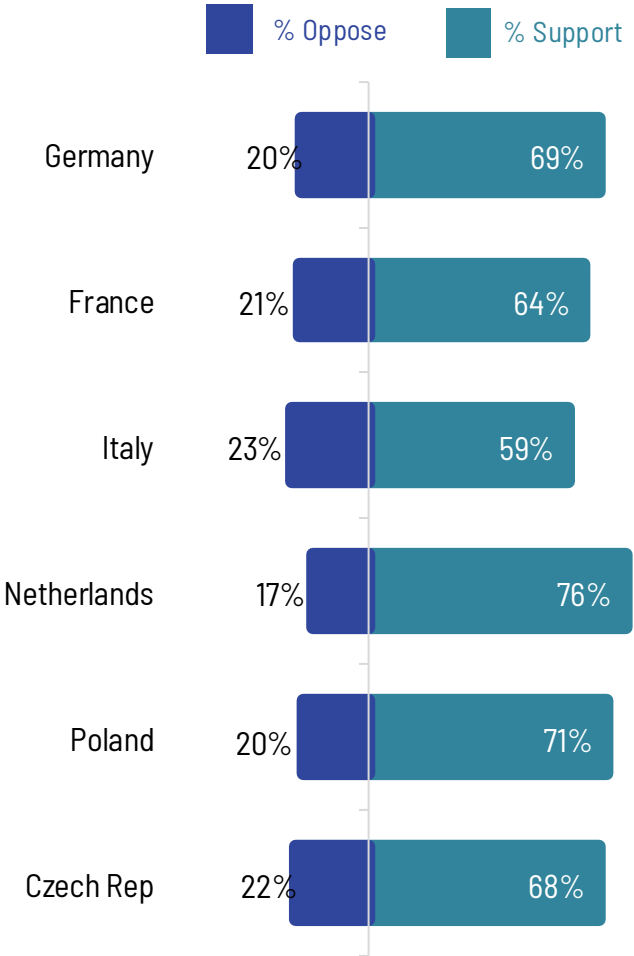
Base: Total sample, ==1,000 respondents per country

SUPPORT FOR THE POLICY DESPITE A POTENTIAL INCREASE IN ENERGY COSTS

People are concerned about personal economy and energy bills, but just one in five supporters would withdraw support if costs increased by 1%.



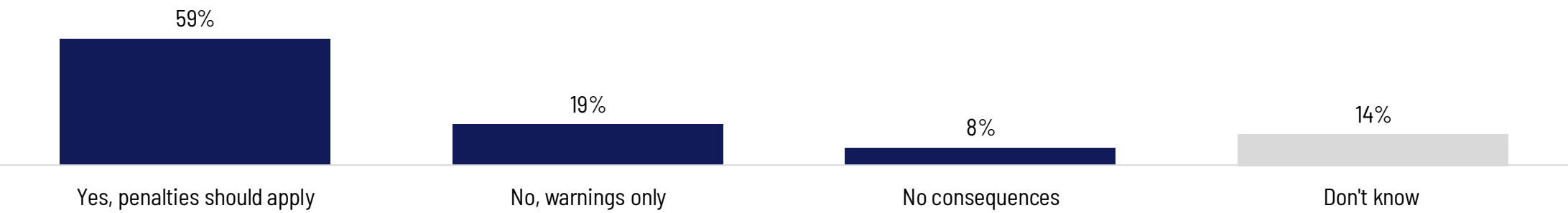
If this policy increased your household energy costs by up to 1%, would you still support it?
Base: Only people to Support rules)



DECISIONS AND ACCOUNTABILITY

SUPPORT FOR PENALTIES FOR NON-COMPLIANCE WITH THE RULES

Penalties are strongly support by respondents. France and Italy show the strongest support for penalties



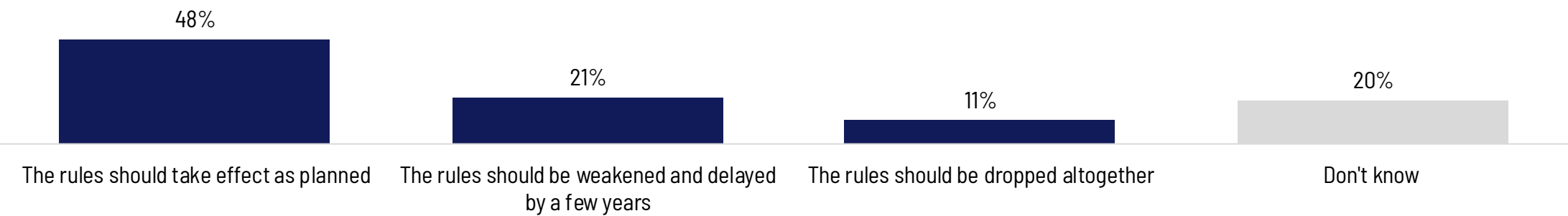
%	Germany	France	Italy	Netherlands	Poland	Czech Rep
Yes, penalties should apply	53%	72%	71%	58%	45%	56%
No, warnings only	20%	13%	13%	20%	24%	24%
No consequences	13%	4%	4%	8%	12%	9%
Don't know	14%	11%	12%	14%	20%	11%

If a company selling oil or gas to Europe breaks these methane rules, should it face penalties, or not?

Base: Total sample; n=1,000 per country

PREFERRED POSITION ON THE TIMING OF THE LAW

1 in 2 persons believes that rule should take effect with no delay



%	Germany	France	Italy	Netherlands	Poland	Czech Rep
The rules should take effect as planned	44%	57%	57%	49%	37%	46%
The rules should be weakened and delayed by a few years	23%	16%	15%	21%	27%	24%
The rules should be dropped altogether	14%	6%	7%	11%	15%	13%
Don't know	19%	21%	21%	19%	21%	17%

Some governments want to delay and weaken these rules because of energy security concerns. Others say they should take effect as planned. Which comes closer to your view?

Base: Total sample; n=1,000 per country

European Methane Regulation Survey

Main Findings

Poland, the Netherlands, Italy, Germany, the Czech Republic, France.



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