Project Tempo is a non-partisan organisation which delivers positive change by unlocking the fastest pathways to a sustainable and productive society.

Our new approach finds ways to square growth, productivity and decarbonisation within a nation’s political and economic realities. We understand there are no one-size-fits-all solutions. Our focus is on tailored solutions that align with national priorities and work for people.

Our ethos is a dispassionate pursuit of what works. We develop transformative — but politically viable — strategies. By embracing the nuances of the political economy, we deliver pro-growth, pro-worker, pro-climate solutions benefiting all of society.

Project Tempo is conducting EU-wide research ahead of the European elections as well as in-depth county programmes in France, Italy and Poland.

projecttempo.com
The shift from fossil to clean energy will be one of the defining trends of the first half of the 21st century.

We know that economic prosperity can be decoupled from greenhouse gas emissions and that this evolution presents major economic opportunities. The United States, the European Union and other major economies already see the transition as a chance to boost economic competitiveness and reduce dependence on China. They are now locked in a competition to lead the world in nascent industries, capture investment and market share, and raise their growth rates. Yet questions remain over whether the scale of these opportunities will match the costs, disruption and political challenges associated with emissions reduction.

Over the last twenty years, climate change has soared in political salience. This has been reflected in major policy interventions, including the global Paris Climate Accords, the EU Green Deal, and the Inflation Reduction Act in the US. Decision-makers agree that we need to fundamentally change our energy systems, our lifestyles, and our economies so we can reduce emissions and avoid the worst impacts of climate change.

Governments are already delivering several of the easy solutions. Now, the energy and climate policy agenda is now shifting to a second, more difficult phase, that will affect people’s everyday lives. As this agenda shifts from a
technocratic concern to a national political issue, it faces growing head winds.

In this report - a first from Project Tempo - we are publishing our latest political research. It examines how a critical group, The Forgotten Voter, is now structurally important across European political systems. It explains how, by understanding the values driving this group, political leaders and policymakers can find new pathways to unlock prosperous and productive economies that deliver positive change.

The Forgotten Voter feels economically insecure and alienated from the more liberal parts of society. They vote on a values basis rather than a traditional Left vs. Right divide. They want change but don’t trust politicians to deliver it. Although this group feels like politicians don’t speak for people like them, the remain politically active and now have a structural importance in European democracies.

By supporting populist and other anti-system parties, this group is destabilising historic electoral coalitions and helping forge political re-alignments. Though many of these parties may not rise to govern outright, their ability to mobilise this disproportionately swingable section of the electorate has given them an oversized influence over electoral outcomes.

When it comes to implementing climate and energy transition policies, the Forgotten Voter is increasingly dictating the pace of change. Forgotten Voters have driven a backlash against recent green policies, which points to a structural disconnect between policy prescriptions and voter attitudes. That Dutch farmers were up in arms over nitrogen rules, that the Bundestag reversed course on Germany’s gas boiler ban, and that President Macron called for a “pause” on new EU environmental legislation were not one-offs. They are part of a growing trend. Many people, and especially the Forgotten Voters, feel that government policies are forcing a transition that is costing them money and disrupting their lives.

As we set out in this report, an overwhelming majority of the public support the ends - they like the ambitious climate targets set out by political leaders, they want to do the right thing and they want their governments to “own the future”. But that does not mean they support the means - there is little appetite to make personal sacrifices.

The disconnect between leaders and voters, set against a backdrop of continued pressure on living standards, polarising activism and a series of poorly designed policies, has made the energy and climate transition an increasingly treacherous issue for politicians. While politicians saw setting climate targets as politically low-risk and high-reward, they are coming to see these targets’ implementation as the exact opposite.

Recommendations

1. The transition must be seen as an economic opportunity, rather than just an environmental problem
2. Voters must see the trade offs linked to the ‘new system’ as more appealing than those of the ‘old system’
3. Policy shifts must reflect national priorities, not international mandates
4. The ‘system’ must be seen to carry the burden of change, not individuals
5. Transition plans must account for comparative advantage, not assume a uniform rate of change
The Forgotten Voter and their political relevance
Through this pan-EU research project, Project Tempo sought to understand the extent to which The Forgotten Voter exists in each EU market and their importance in the political system. We looked beyond surface-level attitudes and built a deep understanding of how the underlying values of this group are shaping electoral and policy trends.

This report follows Project Tempo’s pilots in the UK and Australia. In those, we analysed The Forgotten Voter in each political system and sought to understand their impact on the political and policy landscape. In both markets, the Forgotten Voter played a pivotal role in the political dynamics of the country. They were shaping electoral outcomes and dictating the pace of change when it came to the implementation of climate and energy transition policies. These voters were supportive of the ambition but not of the means. They did not believe these policies would benefit them.

By understanding The Forgotten Voter, re-designing policy solutions specifically with them in mind, and broadening the narrative for change away from climate, we were able to construct new pathways for change. These created an opportunity to unlock and accelerate the potential economic and environmental opportunities of the climate and energy transition.

Building on these pilots, we hypothesised that The Forgotten Voter is a group with structural importance across a wider range of Western democracies, which have undergone similar changes in recent decades. These are voters that feel economically and politically disenfranchised; are more susceptible to change their vote in opposition to the ‘system’; not currently climate engaged but mobilisable around climate policy, both positively and negatively, when framed in a certain way; and hold significant sway over electoral outcomes. This latest work substantiates our hypothesis, showing the Forgotten Voter to be a structural factor in political systems across Europe.

Methodology
Project Tempo surveyed approximately 50,000 people across all markets in the EU and the UK bar Cyprus, Luxembourg and Malta. In each market, we recruited a nationally representative sample which ranged between 1,500 and 2,000 completes per market. Survey length was 15 minutes and available for those 18+.

Through a series of data regressions, we designed a values map that plots values on an x-y axis. The questions used in the modelling were based on the political and social values of respondents. We also created a rule-based segmentation based on the level of political and economic engagement within each market.
At a national level, the density of The Forgotten Voter varies. On average, they make up between 20-30% of active voters, with the highest percentage in Netherlands (27%) and lowest in Bulgaria (18%) (see Fig 1). When building our audience segmentation, we discounted the part of the electorate that is completely disengaged from politics. These are people who do not and will not vote and therefore are less relevant to election outcomes. On average, this group accounts for between 0-10%.
The Forgotten Voter feels disenfranchised by the current ‘system’ which is failing to live up to their expectations of prosperity and security. This sense of disenfranchisement stems from a collapse of trust in the political and economic systems underpinning their country. They feel underrepresented by mainstream politics, left behind by the economic system and ignored by climate advocates.

Why Are They Forgotten?
These voters feel abandoned by mainstream parties which have moved away from their values, left behind by the economic system and ignored by climate advocates.

Why Do They Matter?
They have driven recent backlash against climate policies. But they can be mobilised to support climate policies, if they are designed and framed with their interests and values in mind.

How Did We Find Them?
We discovered this group through a UK pilot in 2020/1. We found a similar group in Australia in 2021/2. We hypothesised that they exist in a cross-section of Western democracies. Through this major pan-EU research study, we have now identified this group as structurally important across European political systems.

The Forgotten Voter feels disenfranchised by the current ‘system’ which is failing to live up to their expectations of prosperity and security. This sense of disenfranchisement stems from a collapse of trust in the political and economic systems underpinning their country. They feel underrepresented by mainstream politics, left behind by economic shifts, including globalisation, and shut out by the more liberal parts of society.

Nation by nation, this group believe their opportunities for a good life are dwindling, along with their sense of agency to change this trajectory. An overwhelming 97% of Forgotten Voters (average across all markets) believe the country is going in the wrong direction (see Fig 2). This highlights how pessimistic they are about the future and why they want to see change.

Approximately 50% of Forgotten Voters (average across all markets) say they are struggling financially, compared to others (see Fig 3). This sense of relative misfortune may not always correspond with facts, but the perception is pervasive. They believe that they...
I voted for Meloni because she was the only candidate that to me offered change to what we have now. I voted for her because she was the only one that I thought could offer jobs and growth.

Forgotten Voter, November 2023
Despite their feeling of political and economic disenfranchisement, the Forgotten Voter has not given up. Having voted in the past (94% on average across all markets) and having the intention of doing so in the future (87% on average across all markets), they are politically active. But they are also politically homeless - and with this, they are often (and sometimes unknowingly) powerbrokers in determining election outcomes.

The Forgotten Voter is more likely to be a swing voter, compared to the national average. We see this reflected across almost all European markets we surveyed, with the exceptions of Belgium, France and Sweden (see Fig 4).

While the degree to which they are more likely to swing may seem small, the way The Forgotten Voter challenges traditional electoral coalitions (as highlighted in Fig 5) makes them more significant. The Forgotten Voter’s propensity to change their vote is not driven by a traditional Left vs Right political divide (see Fig 6) but by a values-based divide. They reject parties that represent a system which they believe has failed them. Increasingly, they vote for candidates who speak to people like them, who offer the system-wide change they are looking for, and who promise a break from the political mainstream.

"I'd vote for a party of politicians, that weren’t politicians."

Forgotten Voter, November 2023
The Netherlands
The Forgotten Voter Creates a Political Earthquake

The Dutch general election on 22nd November 2023 sent shockwaves across Europe. Riding a bitter debate about immigration, Geert Wilders’ Party for Freedom (PVV) stormed to victory. They won 37 of 150 seats in the lower house, becoming the largest party. While the result may have surprised commentators, it was indicated by our findings. Across the countries we surveyed, the Netherlands has the highest proportion of Forgotten Voters: 27% of the electorate. When we look at the Project Tempo values map, we see that the PVV has positioned itself at the epicentre of this group’s belief system.

In an election campaign, events matter. The last government had fallen because of a dispute over migration policy. After 7th October and the subsequent debate about immigration, the PVV’s poll ratings rose significantly. For the other parties, this is a lesson in the risks of imitating your opponent. Voters identified the immigration issue with the PVV. So when the other parties decided to also run their campaigns on immigration, they increased the issue’s salience, which encouraged voters to support the strongest version. As Jean Marie Le Pen once said, voters prefer the original to the copy.

Although the PVV won and may form part of the next government, the Dutch result was also a reminder that the Forgotten Voter is not always attracted to extremes. The centre right VVD party’s suggestion that they could form a government with PVV was key. By indicating that Wilders had been “detoxified”, the VVD gave some of their supporters the green light to switch.

Amidst the PVV’s success, the emergence of Peter Omtzigt’s New Social Contract party suggests a different way forward. Although he was disadvantaged by the campaign’s focus on immigration, his “radical centrist” platform of doing politics differently won 13% of the vote. This shows the Forgotten Voter can be attracted to centre-right or centre-left parties - but only if they can articulate a substantively “new politics”.

Dutch Values Map
The Forgotten Voter, the climate movement and political parties

[Diagram showing the Dutch Values Map with various parties and values plotted.]
Values-based issues are being used to mobilise Forgotten Voters. Parties from across the political spectrum are seeking to understand, speak to and mobilise the Forgotten Voter for political gain. This group are not necessarily populists, but they are sympathetic to the challenge that they feel only populist and “anti-system” parties are currently offering. Our correspondence analysis (Fig 5) corroborates this. Disruptive parties are positioning themselves as the representatives of the Forgotten Voter’s values, while mainstream parties are catering for views closer to the country average. In our model, “disruptive parties” include both the hard right-wing and communist/socialist ends of the spectrum; “single issue parties” include the agrarians and other special interests; and the “mainstream parties” include traditional social democratic, conservative, liberal, Christian democratic and green/ecologist ideologies.

**Methodology**

A correspondence analysis is a statistical tool that plots the residual relationship between variables, to understand the uniqueness of the responses. This chart shows the relationship between voter values and groups of political parties. The closer the two are plotted, the more unique and similar they are; the further away, the more distinct they are.

Our methodology uses survey questions on subjects like the redistribution of wealth, support for punitive vs. rehabilitative justice, and liberalism on race and sexuality. Through a complex regression analysis and dimension reduction, we can plot electoral segments, political parties or groups of parties on an x-axis, in which the relative distance between plots represents the degree of correspondence or divergence in their values.
The Forgotten Voter - Values, Attitudes and Climate

Demographically, Forgotten Voters have several unifying characteristics. They over-index as middle aged, (61% are between 35-64 years old); tend to have lived in the same areas their whole lives (74% on average across all markets), are more likely to live outside of major cities, and to be non-university graduates (62% non-graduates on average across all markets).

Despite these similarities, however, Forgotten Voters are more identifiable by their values and concerns than by their demographic profile. They think there is structural inequality across their country (40% on average across the markets) and are looking for solutions that will materially improve their lives. International issues are seen as beyond their control, and when they do not visibly affect their personal or national priorities, they fall out of focus.

As a group, the Forgotten Voter is driven by more traditionalist values: concern for their local area; national pride and a sense that national identity is being lost; belief in the unity of the family; and strict attitudes towards crime and punishment. In recent decades, mainstream politics across Europe has appealed to a different value set: that is internationalist in outlook, with more liberal ideals.

Because of this shift, Forgotten Voters feel that people like them, with more traditional values and a nationally rooted identity, are ignored by the mainstream political class.

This plot represents the values of Forgotten Voters across the EU level, their positions relative to non-traditional political parties, and disconnect from climate activists.

The Project Tempo Values Map is a visualisation of the values divide that exists within an electorate, based on their attitudes towards political and social issues.

Our methodology uses survey questions on subjects like the redistribution of wealth, support for punitive vs. rehabilitative justice, and liberality on race and sexuality.

Through a complex regression analysis and dimension reduction, we can allocate a score to an individual, voter group or entire electorate and plot them on an x-y axis.

The x-axis represents the divide between:
- **State intervention**: Favours state intervention in the economy, this could be in the redistribution of wealth or regulation of businesses; and
- **Market freedom**: Favours minimal state intervention in the economy, leaving businesses to meet the needs of consumers and society.

The y-axis represents the divide between:
- **Internationalist**: Has more socially liberal values and a global outlook. They are more likely to be “global citizens”, and to have moved away from where they grew up; and
- **Traditionalist**: Has more socially conservative values and a greater concern for the nation, region, city and town. They are more likely to live in the same place that they were born in.

Using this approach, we plot where Forgotten Voters’ values align with, or diverge from, political parties, key policies and the climate movement.
European Values Map

The Forgotten Voter, the climate movement and the political groups in the European Parliament
Across Europe, parties are standing on a platform of reasserting traditional values. This is attracting even centrist voters who believe that mainstream parties have moved away from them. In Italy, Fratelli d’Italia and the 5 Star Movement are consciously positioning themselves outside the Left-Right continuum. In France and Spain, the Forgotten Voters are being courted by seeming opposites: in France, Rassemblement National and La France Insoumise; and in Spain, by Vox and Podemos. All of these parties are using values as a basis for their campaigns, not traditional economic divisions.

This values divide has implications for climate and energy transition policy. Policymakers need to design and implement policies that win the support of a broad cross-section of society, not just appeal to certain groups.

From a values perspective, The Forgotten Voter sits diametrically opposite to the climate advocates. This means policies that are consciously or unconsciously designed with climate advocates in mind, and underpinned by their values, are unlikely to win support from the Forgotten Voter. This is because the values driving each group are different and the salience of arguments that work for one, such as the moral imperative to act on climate, will not work for the other. This suggests the risk that certain energy and climate transition policies could amplify the sense of values-based polarisation, which would jeopardise the wider agenda.

Forgotten Voters are not climate deniers. They just do not believe that climate policies will benefit them or solve the more pressing issues they face. As such, they are not prepared to pay higher prices, or to make other sacrifices, to tackle climate change. (see Fig 7).

To win the support of the Forgotten Voter, policymakers must offer solutions to their day-to-day problems. They need to design polices that address national and local issues, while also decarbonising the economy. This is a significantly more effective and durable strategy than attempting to convince these voters of the merits of climate action itself.

If policymakers are to deliver sustainable pathways that create prosperity, without emissions growth, they will need to engage Forgotten Voters on issues they care about, and reflect the values they hold dear. Without this, there is a significant and still under-appreciated risk to the climate and energy transition. If the political debate becomes polarised, policy implementation will slow down and we may lose the economic opportunities that the transition can bring.

* We defined climate advocates as respondents who positively responded to the question “the climate movement speaks for people like me”
In the October 2023 elections, the United Right, led by the Law and Justice party, won a plurality of votes but lost its parliamentary majority. The opposition of centre-right Civic Coalition and Third Way and left-wing Lewica secured a vote total of 54%, and are likely to form the next Government.

Turnout was up from 62% in 2019 to 74%, suggesting an electorate mobilised by a desire for change. The opposition’s narrow victory was secured by forming a coalition of progressive voters opposed to Law and Justice on the one hand and Forgotten Voters rejecting the party of power on the other.

Third Way was a crucial vehicle for (especially middle-aged) Law and Justice supporting Forgotten Voters to defect to the opposition. It allowed them to vote against the establishment but in line with more traditional “Polish values”.

Law and Justice threatened the European Union’s climate plans, voting against the ICE phase-out proposal and even suing the Commission over the Fit for 55 package. Civic Coalition pledged to displace coal with renewables in power generation and cut CO2 emissions by 75% before the end of the decade. They presented climate policy as part of the change they were offering – but in a palatable way.

As everywhere else, policy implementation is likely to prove more politically fraught than target setting. The likely new government will have to reckon with opposition from the country’s 80,000 coal miners and a Law and Justice President who holds veto powers until 2025. The new government’s challenge will be to hold their voter coalition together, and avoid the kind of values-based polarisation that would split progressives on the one side and “Forgotten Voters” on the other. The election results should not be interpreted as a sign of some liberal renaissance. Rather, they show how a desire for change can be harnessed against as well as for right-wing populists.
The Forgotten Voter and politics of the EU’s climate change and energy transition
The influence of the Forgotten Voter is already being felt on the policy agenda.

The European Green Deal was introduced in 2019, 11 days after Ursula von der Leyen took office. It was the European Union’s ‘man on the moon’ moment, cementing it as one of the economies with the highest climate ambition. Since then, the EU’s failure to address Forgotten Voters’ concerns has led to a slow-down in policy implementation.

Between 2005 and 2022, the EU reduced emissions from Emissions Trading Scheme (ETS) regulated sites by 38%, largely driven by power sector decarbonisation. The ETS, a “cap and trade” scheme through which polluters pay for the emissions they generate above a pre-defined quota, allowed the power sector transition to happen largely out of sight and out of mind of the ordinary voter. Even though it increased energy bills, the costs have been effectively hidden by the scheme’s design.

The European Green Deal is a package of policy initiatives that act as Europe’s roadmap for achieving climate neutrality by 2050. With this, the EU is now entering the second phase of its climate agenda. Policymakers will have to focus on sectors that directly impact people’s lives including transport, buildings, and agriculture. Inevitably, this will generate more debate.

In the United States, the Biden administration’s approach has been to smooth the politics of the transition through the Inflation Reduction Act, which provides $369bn of subsidies, tax credits and loans to clean energy and technology projects. EU institutions are not in a position to replicate that. In March 2023, the European Commission responded by adopting the Temporary Crisis and Transition Framework, which loosened state aid rules for member states. However, this has created tensions, with poorer member states accusing richer ones of using subsidies to gain a competitive edge and distorting the single market.

Without the fiscal firepower a centralised scheme, EU institutions have little choice but to resort to their main lever: regulation. However, as the transition expands to new sectors, the EU will struggle to conceal the impact of its regulations from individuals. The shift onto the harder parts of the agenda comes at a time when voters are still struggling with the cost of living, and policymakers are increasingly prioritising national security and industrial competitiveness over decarbonisation.

Project Tempo’s Europe-wide research suggests that policies which put the onus on individual-led change, rather than state or market-led change, could provoke a backlash. This would both slow down short-term decarbonisation and jeopardise the agenda in the longer term, by polarising views and increasing the perceived political risks of action.

"Climate change policies are a luxury, and we cannot afford those luxuries right now."

Forgotten Voter, November 2023
In May 2023, French President Emmanuel Macron called for a “pause in European environmental regulation” to protect industrial competitiveness: “we don’t just want to be a green market; we also want to produce green on our soil”. The post-Ukraine energy price shock and new subsidies for American industry have shifted the debate from decarbonisation to competitiveness. There is more scrutiny on the burden that green regulation is placing on business. While the ETS has successfully brought down emissions, it has also placed domestic industry at a structural disadvantage to importers, which face a lower or no carbon tax in their home markets. The EU’s Carbon Border Adjustment Mechanism will levy a carbon price on imports into the EU from 2026, which will mitigate some of the negative competitiveness effects but is likely to raise inflation.

This shift in the debate is already re-shaping policy direction. In 2023, the European Parliament approved a law that would have banned the sale of new internal combustion engine (ICE) vehicles in the EU by 2035. Before the Council of the European Union voted on the law, however, Germany moved to defend its car industry, campaigning for an exemption for synthetic E-fuel powered ICE vehicles. Driven by a fear that Chinese manufacturers had a head-start in the electric car market, the proposal was then backed by Italy, Poland, and the Czech Republic. These countries formed a “blocking minority”, and the exemption was agreed the next month. Similarly, in May 2023, the EU Nature Restoration law, which aims to reverse the decline of Europe’s ecosystems, was opposed by agricultural, fishing and forestry lobbying groups, and by the European Parliament’s agriculture and fisheries committees, which feared the economic repercussions of new regulations.

EU regulations have also created a national backlash. In 2019, the Dutch government unveiled a plan to reduce nitrogen emissions by 50% by 2030, to comply with European Union rules. The measures would have seen 17,600 farmers have to reduce their herds and 11,200 farms close altogether. Dutch farmers felt unfairly treated, fearing they would lose their jobs to foreign producers, not subject to the same regulations. Nationwide protests led later to the formation of the Farmer-citizens movement (BBB), a pro-farmer party. Standing on a platform of blocking the nitrogen rules, the BBB won 20% of the vote in the 2023 provincial elections, becoming the third political force in the country. The European Commission’s decision to grant the Netherlands a two-year derogation rather than the usual four forced a faster rate of change than Dutch farmers were prepared to bear. Farmers felt they were bearing an unfair proportion of the costs and unjustifiable disruption to their way of life. The Netherlands, the second biggest exporter of agricultural commodities globally, was put in a position where domestic producers were placed at a structural disadvantage to importers, reducing national competitiveness. In this case, the EU imposed a rigid mandate and the Dutch Government designed a poor policy. It played into values-based polarisation by associating green policies with sacrifice rather than prosperity in the public imagination, thus diminishing appetite for action.

NO FARMERS NO FOOD !!!
I am tired of my taxes paying for everyone else and worrying about what future my children will have. It is hard to be happy when you’re earning minimum wage. When I was younger I earned a good living that paid for things, but it doesn’t work like that anymore.

Forgotten Voter, September 2023
Backlash has been driven by domestic initiatives, as well as by EU interventions. In April 2023, Germany’s Traffic Light Coalition proposed a ban on the installation of new oil and gas boilers as part of its efforts to reach net zero by 2045. With clean energy heating systems costing up to €20,000 more than oil and gas boilers, the subsidies on offer were not enough to make up the cost differential. 61% of Germans said they were worried about their ability to afford an upgrade and public backlash divided the SPD, Green and FDP coalition partners. The plans were watered down but the episode proved damaging for the Government, which saw its approval ratings fall to just 19%. The German ban placed the onus for change disproportionately on the individual rather than the system. Although there is a segment in Germany prepared to pay a higher price to help tackle climate change, many voters did not want to, or could not afford to, make this sacrifice. Rather than facilitating the change gradually through a strongly market or state-led mechanism, the German government placed the cost of change on consumers. This generated a backlash, especially among Forgotten Voters less willing and able to pay.

Our research shows that on an EU-wide level, the public, and the Forgotten Voter in particular, do not think they should pay for the transition. According to Project Tempo data, the average level of support for banning gas boilers across the countries surveyed is below 50%; this figure drops to 35% among the Forgotten Voter segment [see Fig 8]. By contrast, a majority of the public, including most Forgotten Voters, favour investing in renewable energy which is perceived as a “system-led” change, which is led by the state and the market rather than the individual [see Fig 9].

As the EU and member states shift from the “easy” work of the power sector transition to the “hard” work of the transport, buildings and agriculture transition, they will have to reckon with the public mood in a way they haven’t before. A majority of the public believe they are already doing enough to tackle climate change, suggesting they will resist heavy-handed attempts by government to change their behaviour. To maintain public support, the EU will need to encourage policies that are seen to put the onus of change on the system rather than the individual.
Figure 8
Support for policies
Ban of gas boilers

0% 10% 20% 30% 40% 50%

Austria
Belgium
Bulgaria
Croatia
Czechia
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Latvia
Lithuania
Netherlands
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden
UK

Forotten Voter  Voter Average

Figure 9
Support for policies
Investing in renewable energy

0% 20% 40% 60% 80% 100%

Austria
Belgium
Bulgaria
Croatia
Czechia
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Latvia
Lithuania
Netherlands
Poland
Portugal
Romania
Slovakia
Slovenia
Spain
Sweden
UK

Forotten Voter  Voter Average
As the British Conservative Government approaches its final year before the General Election, it faces a dilemma. Boris Johnson’s 2019 landslide victory was delivered by creating a new coalition: working-class value-driven voters (many of them previously Labour voters) who had supported Brexit, liked Johnson and did not support Labour leader Jeremy Corbyn’s lack of traditional patriotism allied with traditional middle class, socially liberal Conservative voters who may have voted Remain but felt they had no alternative but to support the Conservatives, given their belief that Corbyn was unsuited to be Prime Minister.

Following the collapse of the Johnson administration and the subsequent failure of the Truss government, Prime Minister Rishi Sunak is sitting 20% behind in the opinion polls, after one year in office. In September 2023, as part of an attempt to reset his premiership, Sunak gave a speech at Downing Street laying out a new approach to net zero. It took aim at individually mandated change, including a planned ban on gas boilers, mandatory energy efficiency upgrades to home and the ICE vehicle phase-out date. “It cannot be right” he said, “for Westminster to impose such significant costs on working people especially those who are already struggling to make ends meet and to interfere so much in people’s way of life”.

The political play was to turn net zero into a new dividing line with Labour, with policies that showed the Conservatives to be on the side of ordinary people and Labour to be in the pocket of climate activists like Just Stop Oil. Sunak was attempting to win votes from the working-class, Brexit-supporting Forgotten Voters that are part of the Conservative electoral coalition, by exploiting a values-based polarisation. This is an example of how climate policies are susceptible to weaponisation.

Interestingly, the Prime Minister did not suggest abandoning the net zero target. On the contrary, he reaffirmed the importance of tackling climate change. In policy terms, the changes he announced were an attempt to reassure voters that, with Conservatives in power, they wouldn’t be asked to carry the burden of change.

For example, Sunak announced that the ICE vehicle phase-out date would be pushed back five years to 2035, but the next week the Government backed an ambitious ZEV mandate. From 2024, 22% of cars sold will have to be electric, rising to 80% in 2030. Manufacturers will have to pay the Government £15,000 for every car that does not comply. This places the costs - and risk - of the transition onto business rather than consumers, forcing the market to create the conditions for change.

Although his speech did not move the dial in favour of the Conservatives, the Prime Minister is doubling down. He hopes that new legislation on North Sea oil and gas licensing will finally create a political dividend. If this fails, a future Conservative leadership candidate may say he did not go far enough and pledge to abolish the net zero target altogether.
Conclusions and recommendations
1. The transition must be seen as an economic opportunity, rather than just an environmental problem

In each country, the pace of the climate and energy transition will be dictated by economic reality and political constraints. To unlock the lasting support we need, advocates should hardwire the idea that the transition is a system-wide economic transformation, not just an environmental problem. By applying an economics-first approach, there is the opportunity for the transition to make supply chains more resilient, spur regional development, increase productivity and correct structural inequalities that will shape the political dynamics of the future.

2. Voters must see the trade offs linked to the ‘new system’ as more appealing than those of the ‘old system’

There is wide support for tackling climate change – an overwhelming majority of the public like the ambitious climate targets set out by political leaders, they want to do the right thing and they want their governments to “own the future”. But this is not translating into support for the means to achieve these targets. Policies need to be designed to reflect the concerns and motivations of the largest possible group, not just those of committed supporters. Trade-offs need to be framed to make the new system unlocked by the climate and energy transition, more appealing than the old.

3. Policy shifts must reflect national priorities, not international mandates

Climate policies must align with national political priorities. Internationally agreed mandates that do not account for national dynamics or align with voter priorities will generate backlash that destabilises the wider agenda. International agreements can be an effective mechanism, but greater flexibility and diversity of thinking is needed to ensure policy approaches are rooted in national priorities, and the values and attitudes of the electorate.

4. The ‘system’ must be seen to carry the burden of change, not individuals

Where change has happened out of sight of voters, it has been met with little resistance. More positively, it has built a sense of momentum and deeper support for action. As climate and energy transition policies become more visible and voters are asked to take more direct action, they will need to see their governments creating the conditions for change first. This does not necessarily mean providing subsidies, it can be by creating the market conditions for green alternatives to become genuinely competitive. But voters must not feel like they are being asked to carry the burden, and the risks, of the transition first. The ‘system’ must lead, creating the pathways for ordinary people to follow.

5. Transition plans must account for comparative advantage, not assume a uniform rate of change

To win lasting support, governments will need to reinforce the sense that climate policies are benefitting the country, the economy and people’s lives. This means countries should go faster in sectors where they have a chance to lead – where action visibly boosts competitiveness, productivity and growth – and follow where they will need to rely on others to develop and down-cost new technologies. For the agenda to last, voters will have to associate climate policies with prosperity, not sacrifice. International mandates and national transition plans need to be sufficiently flexible so that governments can adapt and optimise them according to their economic needs.
European Elections
The ‘Secondary’ Election Phenomenon

The European Parliament elections in June 2024 will be a test of political opinion, both EU-wide and in each member state. Academics have identified that these are ‘secondary’ elections. In this respect, they are like the US midterms: voters are making a mid-cycle choice based on the candidates up for election and their platforms but also based on their views about the performance of incumbent parties. ‘Secondary’ elections are seen as low stakes: citizens tend to believe the outcomes won’t materially affect their day-to-day lives, which allows them to vote more instinctively. They also tend to be lower turnout. For political strategists they provide an important mechanism to test messaging, which they can then apply to ‘primary’ elections.

European Parliament elections have historically had a low turnout: 42% in 2014 and 51% in 2019. Interestingly, our survey shows that Forgotten Voters (18% intending to abstain) are more likely to vote in 2024 than the European average (28% intending to abstain). While disillusioned with the economic and political system, they are engaged and want to have a say.

Forgotten Voters are more likely to believe that their nation would be better off outside of the EU (31%), compared to the European average (17%). In focus groups they often speak about their national governments as being powerless to address their day-to-day problems. By moving decision making further away, the EU exacerbates this sense of not being in control.

Climate policies are likely to be used as a wedge issue – both by mainstream parties trying to motivate green voters and by populist parties trying to weaponise them. The ‘secondary’ election environment increases the potential for volatility. To avoid these elections becoming another milestone in polarisation, political parties should present new policies that speak directly to Forgotten Voter concerns. If they fail to do so, it will increase the potential for backlash – and with it the long-term political risks of action, for both European and national politicians.

“We are drowned in Europe. France isn’t the decision-maker on many things these days.”

Forgotten Voter, September 2023
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