



# **ELECTRIFICATION IN THE NORDICS**

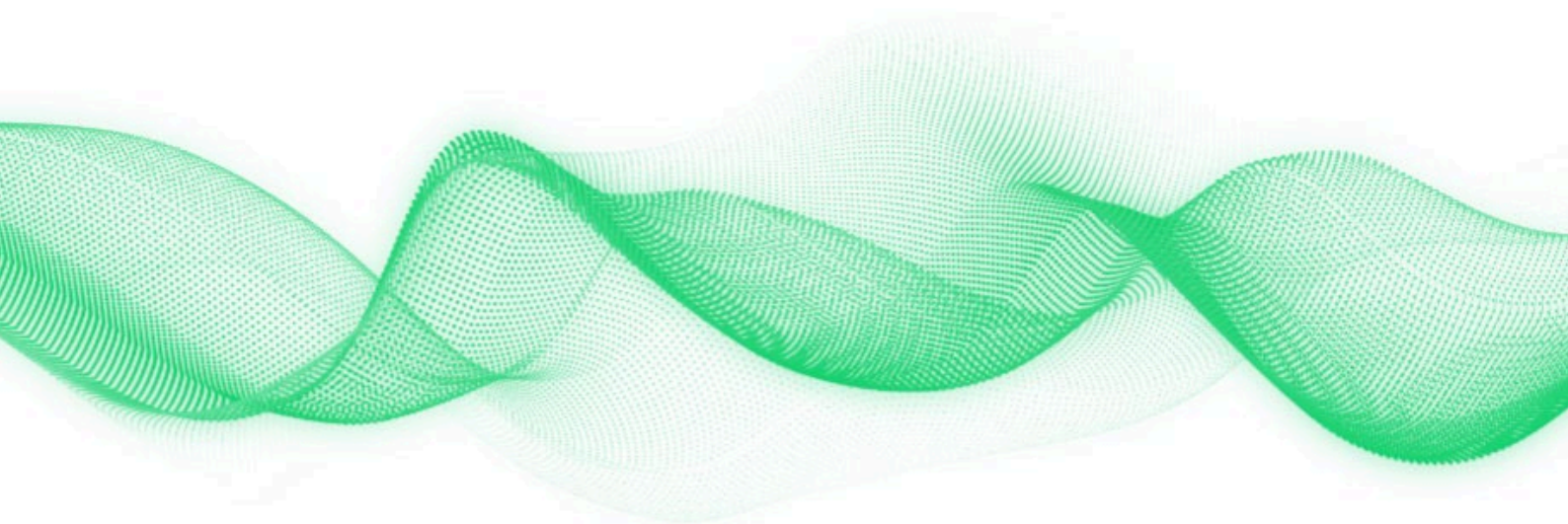
**Summary of Fortum's Electrification surveys in Sweden,  
Finland and Norway**

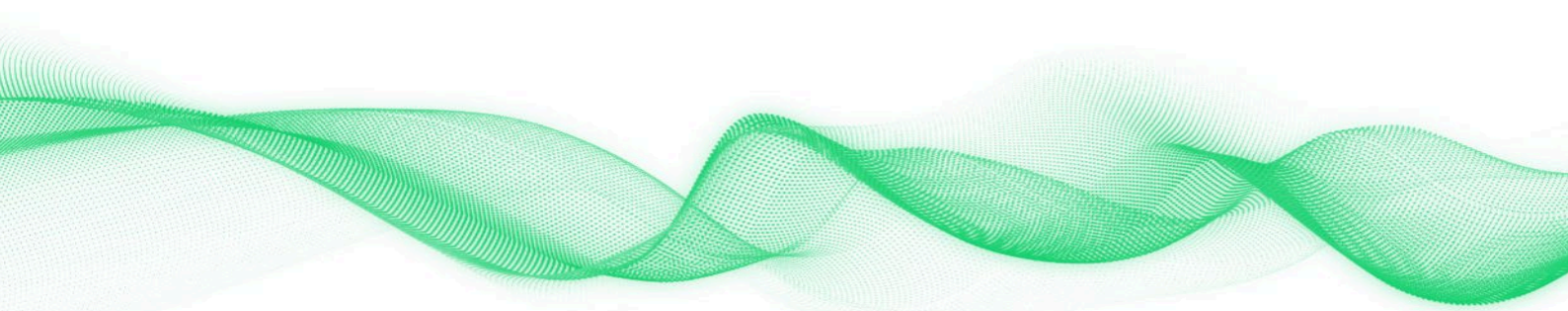
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## Introduction

Electrification is emerging as the central pathway for the EU to strengthen competitiveness and security while not compromising the climate commitments. At the same time, electrification means a major transformation of the entire society. It is not enough for experts and politicians to agree on what needs to be achieved—broad public support is also required to ensure that electrification is seen as desirable. For the transformation to succeed, benefits of electrification—beyond climate impact—must be communicated even more clearly.

In 2025, Fortum commissioned electrification surveys in Sweden, Finland and Norway to ground the debate in citizens' views, surface barriers and motivators, and inform actionable proposals for policymakers, industry, and stakeholders. Together, the three surveys provide insights that connect societal expectations with the policy and market instruments needed to accelerate electrification across the Nordics.

The survey results in the three countries show that public attitudes across the region support the direction of travel, but the transition is not automatic. The chapters below offer English summaries of the national survey findings, which were originally conducted in native languages. They also highlight the main common factors that emerged from these results.

## 1 **Summaries of survey results in Sweden, Finland and Norway**

In Sweden, the [Elektrifieringsbarometern](#) survey was conducted in spring 2025 by Novus. In Finland, Fortum's [Sähköistyvä Suomi](#) survey was fielded in September 2025 by Norstat. In Norway, the [electrification survey](#) was conducted in December 2025 by Ipsos.

This chapter includes summaries of the survey findings in each of the three countries.

### 1.1 **Swedish perspectives: Strong climate motivation but limited economic awareness**

A large majority of Swedes believe electricity production needs to increase significantly—seven out of ten say it must grow by 50% or more to meet future energy needs.

Two-thirds also want to see greater electrification in Sweden. Support is primarily driven by strong engagement in climate and environmental issues. Six out of ten Swedes want to reduce their own climate footprint, and 75% believe society should invest more in environmental sustainability.

At the same time, confidence in reaching national targets is low: only one in ten believes Sweden will fully electrify or reach net zero by 2045. Swedes nevertheless highlight the importance of a robust electricity system and energy self-sufficiency, and they support increased collaboration and electricity trading with other countries, especially Nordic neighbours.

However, few Swedes associate electrification with economic growth, competitiveness or welfare improvements—only about a third believe Sweden's economy will benefit from becoming one of the world's first fossil-free countries.

#### 1.1.1 **Main concerns and motivators**

Electricity prices and household finances are major concerns. Four out of ten Swedes worry they may not be able to pay their electricity bills.

Swedes also find electricity company invoices difficult to understand, and many report a lack of trust and clarity in pricing. One in four believes energy companies hide fees or terms.

A quarter of respondents believe electrification will increase household costs, highlighting a link between knowledge gaps and cost-related hesitation.

Climate and environmental motivations remain the strongest drivers of support, while economic considerations are weaker and less understood.

#### 1.1.2 **Understanding the links between energy, industry and climate targets**

Despite high climate engagement, public awareness of policy, industrial actions and the current electricity mix is limited: 73% do not know what political initiatives are being taken to reach climate goals, and over 80% do not know what industry,

transport and energy companies are doing. Six in ten do not know that Sweden already produces nearly 100% fossil-free electricity.

These knowledge gaps risk undermining support for the transition and illustrate a disconnect between the public's climate motivation and understanding of the system changes required.

### 1.1.3 **Responsibility for implementing electrification**

There is widespread lack of knowledge and distrust surrounding the electricity market. Many Swedes say electricity pricing is difficult to understand, and there are questions about who benefits from electricity taxes.

Seven in ten Swedes believe the **state** bears primary responsibility for implementing electrification. Only 7% believe energy companies are mainly responsible, and 6% assign responsibility to the business sector.

## 1.2 **Finnish perspectives: A positive attitude toward the electrification of society, but national economic opportunities are overlooked**

More than half of Finns view the electrification of society positively. Support is particularly strong among young adults (18–24-year-olds: 63%). Electrification is widely seen as an important national goal, but many Finns are simultaneously concerned about its personal financial impact.

A majority (58%) believe electrification will increase electricity prices, and 45% are worried about price fluctuations. Every third respondent is concerned about growing inequality between households.

Electricity price fluctuations are already part of Finns' daily lives, and only about one in eight respondents are completely unwilling to shift their electricity use based on availability or price.

Although mitigating climate change is seen as a significant motivator to electrify, confidence that Finland will reach its 2035 carbon-neutrality target is low: only 20% consider it likely, while a majority—57%—judge it unlikely.

### 1.2.1 **Main concerns and motivators**

Finns see the most significant benefits of electrification in mitigating climate change (73%) and strengthening energy self-sufficiency (72%). Electrification is therefore perceived as an opportunity for Finland to reduce emissions, increase self-sufficiency, and enhance security of supply.

However, the competitiveness and economic growth benefits of electrification are not well understood: only 32% of Finns say they support electrification because of its positive impact on economic growth.

Electricity prices are a major source of worry, and the question of **how the costs and benefits of electrification should be shared** remains central to public conversation.

Among the respondents, 44% are unwilling to pay higher prices for products or services produced with low-emission energy. Still, some consumers are willing to pay more in specific categories: 31% would pay more for energy-efficient household appliances and 22% would pay more for low-emission or recycled textiles.

### **1.2.2 Understanding the links between energy, industry and climate targets**

Finns clearly understand the climate and energy security rationale for electrification. Public support is grounded in reducing emissions, increasing self-sufficiency, and strengthening national resilience.

However, the competitiveness perspective is still not well internalized. Most people do not associate electrification with improved economic growth or Finland's competitiveness relative to other Nordic countries. Only about a third support electrification for its growth benefits.

### **1.2.3 Responsibility for implementing electrification**

In Finland, the results signal clear expectations for the state bearing the greatest responsibility (36% of the respondents have this opinion), followed by industry and businesses (21%) and energy producers and sellers (13%). Other actors receive limited attribution: the EU 8%, citizens 7%, authorities 6%, and the municipal/regional level 2%.

When asked about the policymakers' role in accelerating the demand for clean products, the most favored option (chosen by 51% of the respondents) was through economic incentives, such as tax breaks or investments subsidies. Steering public procurement towards emission free alternatives was picked up by 31% of Finns. A clear minority (13%) thought that the policymakers should not seek to increase demand for fossil free electricity.

## **1.3 Norwegian perspectives: Broad but cautious support for electrification**

Slightly more than half of the population (54%) believes that Norway needs to transition toward a more electrified society. Support for this view is stronger among men, higher-income groups and urban residents, while rural attitudes are more sceptical.

Norwegian respondents generally agree with the climate-related arguments for electrification, and most see electrification as important for achieving national climate targets. However, confidence in Norway's ability to meet these targets is low—fewer than two in ten believe they will be achieved. At the same time, only about half the population believes for certainty that climate change is caused by humans.

Urban–rural differences remain pronounced: 69% of city residents view electrification as important for climate targets, compared to much lower support in rural areas, where 34% consider it somewhat or very unimportant.

Half of Norwegians are willing to accept environmental impacts if it results in lower electricity prices, demonstrating the central role of cost as a deciding factor in public support.

### **1.3.1 Main concerns and motivators**

Rising electricity prices remain the dominant concern for the Norwegian public, followed closely by impacts on nature. These worries represent significant barriers to broader support for electrification. Additional findings reinforce this: Norwegians identify electricity prices and environmental destruction as the two biggest concerns associated with electrification.

The question of who should bear the costs of electrifying society is also a major point of disagreement. Many Norwegians support the climate rationale but are reluctant to assume additional costs themselves.

A substantial share of the population (88%) sees energy self-sufficiency as the most important aspect of new power development, reflecting heightened concerns about Norway’s resilience in an uncertain global environment. At the same time, only four in ten believe that international power cables improve Norway’s energy security, pointing to skepticism toward cross-border energy integration, with as many as 66% believing that EU/ACER controls too much of Norwegian energy policies.

### **1.3.2 Understanding the links between energy, industry and climate targets**

The vast majority of respondents agree that electrification is necessary to reach climate objectives. Trust in decision-making remains highest for the Government and the Parliament (Storting).

Despite this, knowledge gaps persist: seven in ten Norwegians either do not know or disagree that Norway’s energy consumption is 50% fossil-based, indicating uncertainty about the country’s current energy mix.

There is strong consensus—72% of Norwegians—that the country must build new power generation to electrify society. More than half (56%) are willing to accept environmental impacts to build more renewable energy and retain industry in Norway.

### **1.3.3 Responsibility for implementing electrification**

In Norway, trust in political institutions is relatively high, but trust in energy companies is more mixed. A decisive majority (9 in 10) believe the most important thing a power company can do is communicate clearly and understandably. Norwegians also expect practical tools and real-person support in managing their electricity use.

## 2 Summary of cross-Nordic insights

This chapter summarizes the key findings of the surveys conducted in Sweden, Finland, and Norway. It is worth noting that the surveys included both general inquiries regarding electrification and country-specific topics. Each survey was administered by a separate research agency, with the primary objective of supporting Fortum's stakeholder relations within individual core markets. As a result, possibilities for direct comparison of outcomes are limited; however, several shared themes have emerged across the surveys.

Across the Nordics, public attitudes show broad support for electrification, driven primarily by climate ambition and the desire for secure, reliable energy systems, while economic understanding is consistently weaker in all countries.

Furthermore, in all three countries, people generally accept that electrification is necessary to meet national climate goals, even as confidence in actually achieving those goals remains low.

### 2.1 Main concerns and motivators

Citizens in all markets worry about rising or volatile electricity prices.

- In Sweden, households perceive pricing as complex and fear higher costs.
- In Finland, 58% expect prices to increase, and nearly half worry about volatility.
- In Norway, electricity prices are the top concern, closely followed by nature impacts.

Energy self-sufficiency is a strong motivator region-wide and is especially prominent in Norway, where 88% consider it the most important aspect of new power development.

Public concerns regarding the fairness of the transition, fluctuations in electricity prices, and the distribution of costs associated with electrification remain prominent. Addressing these issues is crucial for maintaining broad public support as the region moves forward with the transition.

### 2.2 Understanding of the links between energy, industry and climate

Across the three countries, people support electrification but do not always fully understand how system-level changes (new power generation, grid expansion, industrial decarbonisation) relate to climate targets and economic outcomes.

The climate and security rationale of electrification is relatively well understood, but the competitiveness dimension remains unclear. Most of the Nordic citizens question whether their country is on track to meet its climate goals.

## 2.3 Responsibility for implementing electrification

Throughout the Nordic region, the responsibility for advancing electrification is generally perceived as being primarily guided by the state and enabled by industry, though each country exhibits its own particular emphasis.

In Sweden, the majority of respondents look to the government to take the lead, expecting clear leadership and coherent policy direction, with energy companies and the broader business sector serving a supportive, yet much less significant, role.

In Finland, while expectations also center on the state, there is a more evident recognition of industry and energy producers as key operational partners, reflecting a cooperative approach to implementation.

In Norway, responsibility and trust are most strongly invested in governmental institutions, such as the Government and the Parliament, with a pronounced emphasis on preserving national control over energy policy. Norwegian respondents also clearly express the importance of power companies communicating in a clear, transparent, and accessible manner.

Across all three countries, citizens and municipalities are generally viewed as less central to the process.

### **More information on the national surveys:**

Electrification in Sweden (website in Swedish): <https://www.fortum.com/se/elektrifiering>

Electrifying Finland (website in Finnish): <https://www.fortum.com/fi/sahkoistyva-suomi>

Electrification survey in Norway (website in Norwegian): <https://www.fortum.com/no/fortum-tar-tempen-pa-energiomstillingen>