



European Green Deal Barometer

Second edition



Institute for
European
Environmental
Policy

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FOREWORD



Faustine Bas-Defossez
Director of External Impact at IEEP

The European Green Deal Barometer is a “confidence barometer”. It tells us what over 300 sustainability experts from across the continent think about the barriers and opportunities for the implementation of the Green Deal. Based on their responses, we define pitfalls and levers to foster implementation. Our Barometer complements existing monitoring tools around the Green Deal, such as the European Commission’s monitoring framework, a key list of headline indicators for monitoring progress towards the Green Deal’s environment and climate goals. Together with the monitoring framework, our Barometer can help to identify the political space for action.

FOSTERING THE COMMUNITY BEHIND THE GREEN DEAL

From the first edition of our Barometer, I was surprised that more than half of the respondents identified themselves as unfamiliar with the Green Deal. Thankfully, familiarity increased considerably in our second edition, where over 70% describe themselves as knowledgeable on the Green Deal. Having a strong stakeholder network to champion the Green Deal agenda is fundamental for its implementation. Thus, we hope to foster the Green Deal community

– in particular outside of Brussels – through a combination of the European Green Deal Barometer, our role in leading Think Sustainable Europe (a pan-European network of sustainability think tanks), and the multi-stakeholder platform Think2030.

BRINGING THE GREEN DEAL TO THE MEMBER STATES

In both editions of our Barometer, sustainability experts consistently identify the lack of commitment by Member States as the biggest obstacle to the implementation of the Green Deal. This is the main reason for our choice to include four national pilot surveys in our second edition. Respondents in the pilot surveys point again to the lack of commitment and consensus among the highest levels of government as the main stumbling block, which should be seen as a call to action to reinforce Green Deal information campaigns in Member States.

We struggled to prompt participation from national experts for the pilot surveys, which in itself may signal a lack of interest in and knowledge of the European Green Deal. For the next edition of the Barometer, we plan to expand the scope of the national surveys to help increase understanding of the Green Deal across Europe.

EXECUTIVE SUMMARY

Launched by way of a 2019 communication from the European Commission, the Green Deal covers several environmental objectives, with the ultimate aim to make the EU climate neutral by 2050. Now in its second edition, the European Green Deal Barometer identifies barriers and opportunities for the implementation of the Green Deal. Picking up on the numerous ongoing negotiations on Green Deal files in the legislative procedure, as well as the impact of the war in Ukraine and the energy price hike, the Barometer paints a picture of the Green Deal as it currently stands.

METHODOLOGY

The European Green Deal Barometer is based on a survey of 314 sustainability experts, of which 95% is based in Europe.

The responses were collected from April to May 2022. The stakeholder sample is diverse – the majority (37%) come from academia and think tanks, 24% represent the private sector, and 21% come from NGOs or foundations.

Respondents from governments, regulatory bodies and multilateral organisations make up the rest of the sample.

Almost two-thirds of stakeholders have been working or studying in the area of EU environmental policy, sustainable development, or corporate responsibility for more than five years.

HIGHLIGHTS

As the current European Commission crosses the halfway point of its mandate, the European Green Deal Barometer shows that **sustainability experts are losing confidence in the ability of the EU institutions to implement the Green Deal by 2024 and reduce emissions by at least 55% by 2030.**

The European Parliament and the Council of the EU are trying to reach agreement on a multitude of proposals, translating the Green Deal into a concrete set of laws. As time passes, however, sustainability experts think that the progress made on each of the thematic areas of the Green Deal backtracks on what the science requires.

KEY FIGURES



45%

think it is unlikely that the Green Deal will be implemented by 2024



35%

think that the lack of commitment by Member States to the Green Deal agenda is the biggest barrier to Green Deal implementation



47%

think it is unlikely that the EU will meet its objective to reduce emissions by at least 55% by 2030



61%

think that the EU institutions will support the Green Deal to a great extent after the 2024 EU elections



Green Deal implementation

Scepticism has increased since 2021. Today, almost half of respondents think it's unlikely that the Green Deal will be implemented by 2024 – up from 30% compared to last year's survey.



War in Ukraine

Respondents see the war in Ukraine as a major obstacle in the short term – 73% think that the war will have a negative impact on Green Deal implementation over the next year.



2024 EU elections

Respondents show more optimism when it comes to the longer-term future of the Green Deal. 61% think that the EU institutions will support the Green Deal after the 2024 EU elections.



Member States

Like last year, more than a third of respondents see the lack of commitment by Member States as the biggest obstacle to Green Deal implementation. Sweden is seen as most committed to the Green Deal, defeating 2021 gold medallist Germany. Romania is seen as least committed to the Green Deal agenda.



Future of food

Only 17% think that the progress made on the transformation of food systems meets what the science requires. This is a major drop from last year, when this figure stood at 49%.



Investing in a green future

As the EU Taxonomy develops, only 34% think that the policy contributes greatly to private sector financing in line with the Green Deal.



Energy transition

When asked where the European Commission should focus its efforts between now and 2024, 39% reply that a clean energy transition should be the priority.



A social Green Deal

Half of experts believe that the social provisions under the Green Deal (Social Climate Fund, Just Transition Fund, etc.) will significantly facilitate implementation.

PRIORITY AREAS VS. PROGRESS MADE

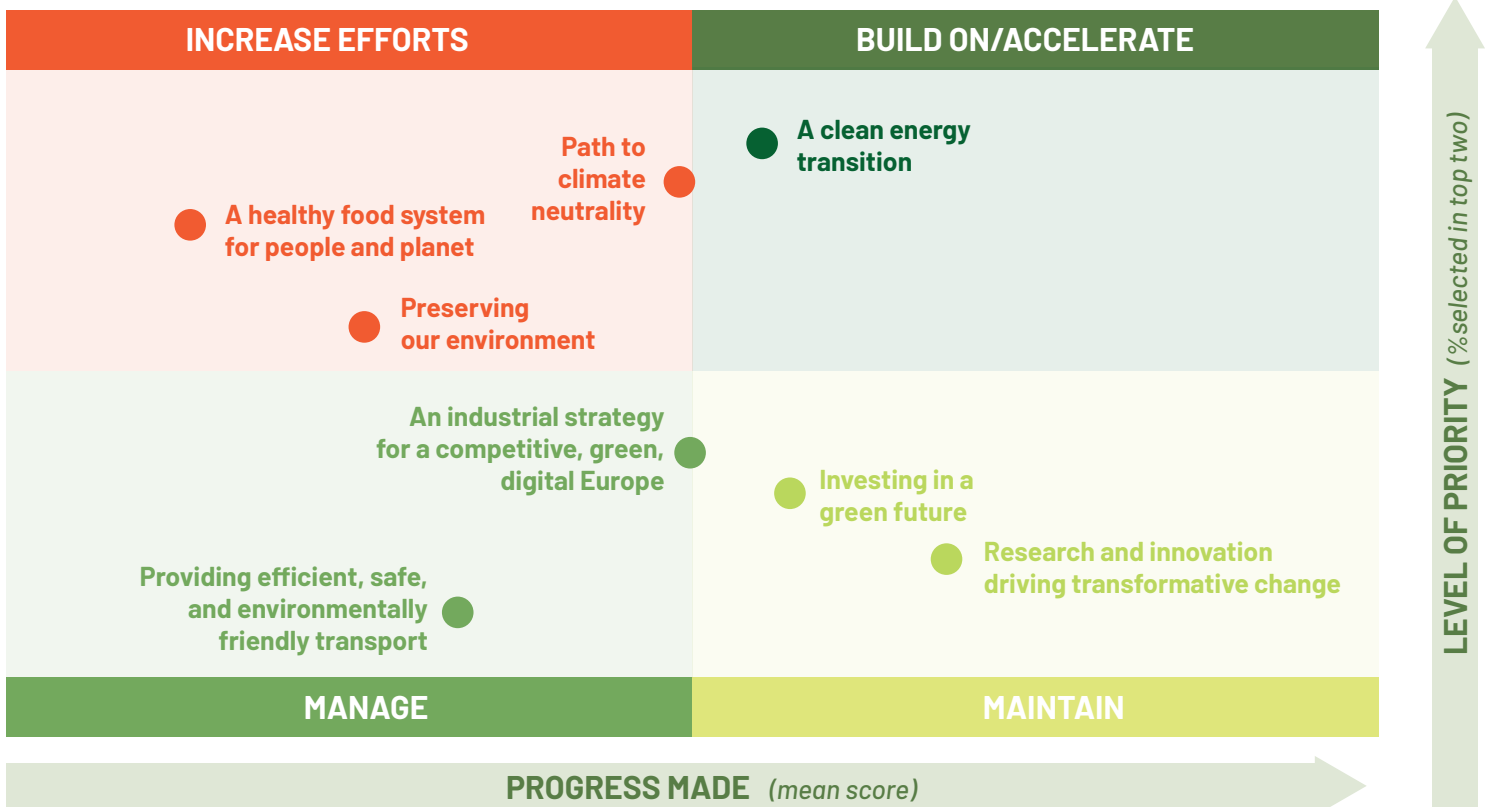


Table combines "How much progress has been made on each of the following thematic areas since the start of the European Green Deal?" and "On which two of the following thematic areas should the European Commission focus its efforts between now and 2024?" questions.

03

THE STATE OF THE EUROPEAN GREEN DEAL

Presented in December 2019, the European Green Deal is an ambitious environmental agenda aimed at systemic change, and is one of six policy priorities that European Commission President Ursula von der Leyen put forward at the start of her mandate. Its central objective is to make the EU climate neutral by the middle of the century.

Since its introduction, policymakers have been busy translating the Green Deal into concrete policy proposals. Table 1 presents a non-exhaustive list of strategies, proposals and budgetary instruments that are currently on the table. Following the agreement on the landmark European Climate Law, the European Commission published the Fit for 55 Package

– a collection of policy proposals meant to align the EU’s climate policy with the objective to reduce emissions by at least 55% by 2030. Measures to protect biodiversity and restore ecosystems are also on the table after some delays. The European Commission proposed the Nature Restoration Law in June, the first of its kind on this scale.

Table 1: Non-exhaustive list of Green Deal-related strategies, proposals and budgetary elements proposed since the start of the Green Deal

Date	Document from the European Commission
January 2020	European Green Deal Investment Plan
January 2020	Proposal for a Regulation establishing the Just Transition Fund (JTF)
March 2020	New Industrial Strategy
March 2020	New Circular Economy Action Plan
March 2020	Proposal for a European Climate Law
May 2020	Farm to Fork Strategy
May 2020	Biodiversity Strategy for 2030
May 2020	Proposal for NextGenerationEU
May 2020	Proposal for the Recovery and Resilience Facility
July 2020	EU Hydrogen Strategy
July 2020	Energy System Integration Strategy
September 2020	Action Plan on Critical Raw Materials
October 2020	Chemicals Strategy for Sustainability
October 2020	Proposal for an 8th Environment Action Programme
October 2020	Methane Strategy
October 2020	Renovation Wave Strategy
October 2020	Proposal for a revision of the Aarhus Regulation
November 2020	Offshore Renewable Energy Strategy
December 2020	Sustainable and Smart Mobility Strategy
December 2020	Proposal for a revision of the Regulation on Guidelines for Trans-European Energy Infrastructure (TEN-E)
December 2020	Proposal for a revision of the Batteries Regulation
February 2021	Climate Adaptation Strategy
April 2021	Organic Production Action Plan
April 2021	Proposal for a Corporate Sustainability Reporting Directive (revision of the Non-Financial Reporting Directive)
May 2021	Blue Economy Strategy
May 2021	Zero Pollution Action Plan
May 2021	Communication on Updating the 2020 New Industrial Strategy
July 2021	Renewed Sustainable Finance Strategy
July 2021	Forest Strategy

Date	Document from the European Commission
July 2021	Roadmap to Planting 3 Billion Trees by 2030
July 2021	Proposal for a revision of the CO2 Emission Standards for New Passenger Cars and Vans
July 2021	Proposal for a revision of the Emissions Trading System (ETS) - Extension to Road Transport, Building and Maritime Sectors
July 2021	Proposal for Amending the Contribution of Aviation to the ETS
July 2021	Proposal for a recast of the Energy Taxation Directive (ETD)
July 2021	Proposal for a Carbon Border Adjustment Mechanism (CBAM)
July 2021	Proposal for a revision of the Effort Sharing Regulation (ESR)
July 2021	Proposal for a revision of the Land Use, Land Use Change, and Forestry Regulation (LULUCF)
July 2021	Proposal for a revision of the Renewable Energy Directive (RED III)
July 2021	Proposal for a recast of the Energy Efficiency Directive (EED)
July 2021	Proposal for an Alternative Fuels Infrastructure Regulation
July 2021	Proposal for a Sustainable Aviation Fuels Regulation (ReFuelEU Aviation)
July 2021	Proposal for a Cleaner Maritime Fuels Regulation (FuelEU Maritime)
July 2021	Proposal for a Regulation for a Social Climate Fund
July 2021	Proposal for a Regulation on European Green Bonds
September 2021	EU Mission Adaptation to Climate Change Implementation Plan
September 2021	EU Mission Restore our Ocean and Waters Implementation Plan
September 2021	EU Mission Climate-Neutral and Smart Cities Implementation Plan
September 2021	EU Mission Soil Deal for Europe Implementation plan
October 2021	Proposal for a revision of the Regulation on Persistent Organic Pollutants
November 2021	Contingency Plan for Ensuring Food Supply and Food Security
November 2021	Soil Strategy for 2030
November 2021	Proposal for a revision of the Regulation on Shipments of Waste
November 2021	Proposal for a Regulation on Deforestation-Free Products
December 2021	Revision of the Third Energy Package for Gas
December 2021	Proposal for a recast of the Energy Performance of Buildings Directive
December 2021	Proposal for a Regulation on Methane Emissions Reduction in the Energy Sector
December 2021	Action Plan on Sustainable Carbon Cycles
December 2021	Proposal for a revision of the Environmental Crime Directive
December 2021	Rail Action Plan
December 2021	Urban Mobility Framework
December 2021	Proposal for a revision of the Regulation on Guidelines for the Trans-European Transport Network (TEN-T)
December 2021	Proposal for a revision of the Intelligent Transport Systems Directive
February 2022	EU Taxonomy Climate Delegated Act
February 2022	Proposal for a Corporate Sustainability Due Diligence Directive
March 2022	EU Strategy for Sustainable and Circular Textiles
March 2022	Proposal for an Ecodesign for Sustainable Products Regulation
March 2022	Proposal for a revision of the Construction Products Regulation

Date	Document from the European Commission
March 2022	Proposal for an Empowering Consumers for the Green Transition Directive
April 2022	Restrictions Roadmap
April 2022	Proposal for a revision of the Industrial Emissions Directive (IED)
April 2022	Proposal for a revision of the European Pollutant Release and Transfer Register Regulation (E-PRTR)
April 2022	Proposal for a revision of the Regulation on Fluorinated Greenhouse Gases
April 2022	Proposal for an Ozone Regulation
May 2022	REPowerEU Plan
May 2022	Solar Energy Strategy
June 2022	Proposal for a revision of the Farm Accountancy Data Network Regulation
June 2022	Proposal for a revision of the Sustainable Use of Pesticides Directive
June 2022	Proposal for a Nature Restoration Law

Own compilation of the authors.

The European Commission has only recently introduced a monitoring framework to keep track of progress towards the 2030 and 2050 environment and climate goals. It includes a set of 26 headline indicators, ranging from indicators for climate change mitigation and adaptation, biodiversity and regenerative circular economy to indicators monitoring various enabling conditions, such as the uptake of green bonds and environmental protection expenditure. While the first report is not due until next year, the monitoring framework fills an important gap by obligating the European Commission to report on progress made towards achieving the Green Deal objectives.

As shown in Table 1, the Commission has presented an impressive number of proposals since the start of the Green Deal. The agenda has survived the COVID-19

pandemic, and survey respondents see almost no remaining impact on the implementation of the Green Deal. The war in Ukraine is the second test of its resilience. The war will refocus some parts of the Green Deal, as decision-makers are presenting it as a long-term response to the current cost-of-living crisis. Now that the EU is facing the first of several difficult winters, decision-makers have the challenging task of sticking to ambitious Green Deal targets as energy prices surge and general inflation hits a high.

There is roughly two years left on the clock until the next European Commission and Parliament begin their mandate. While some major proposals are still expected from the Commission, it is mostly up to the European Parliament and Council to make good on the ambitions of the Green Deal.

¹ **European Commission (2022).** Communication on the monitoring framework for the 8th Environment Action Programme: Measuring progress towards the attainment of the Programme's 2030 and 2050 priority objectives. Available [here](#).

THE VIEWS OF OVER 300 SUSTAINABILITY EXPERTS

IEEP and GlobeScan ran the second Barometer survey to contribute to the debate around the implementation of the Green Deal. Think Sustainable Europe (TSE), the Assembly of the European Regions (AER), Cambridge Institute for Sustainable Leadership (CISL), the European Environment Agency (EEA), the European Environment and Sustainable Development Advisory Councils Network (EEAC), Tetra Pak, and WWF also helped to collect insights from sustainability experts.

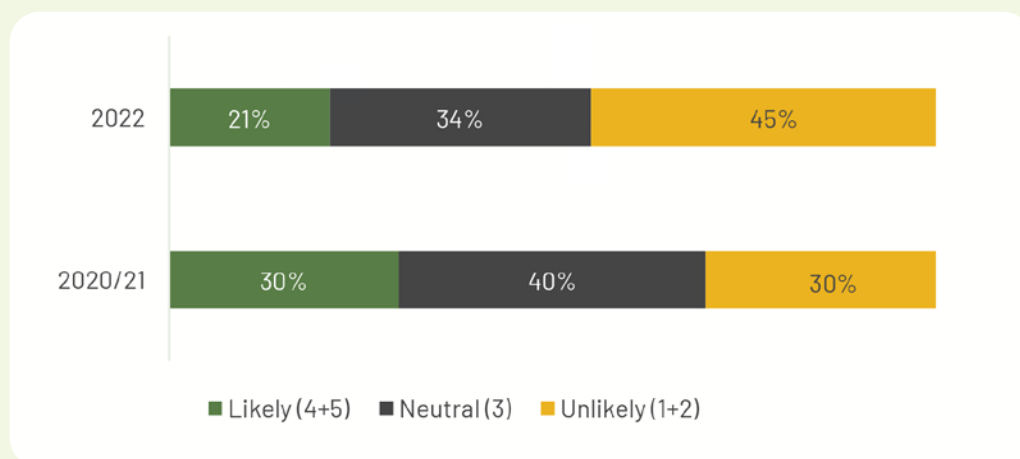
By providing a yearly update, the European Green Deal Barometer aims to closely follow the evolution of problems and synergies across legislative files and sectors, identify barriers and opportunities, and ultimately help with Green Deal delivery. This edition of the Barometer includes a set of four national pilot surveys in France, the Czech Republic, Sweden, and Spain to allow for a better understanding of Green Deal implementation in Member States. The survey consulted a diverse set of stakeholders, including academia and think tanks, the private sector, NGOs, governments, regulatory bodies and foundations. More information about the stakeholder sample can be found in the Annex.

4.1. CONFIDENCE IN GREEN DEAL IMPLEMENTATION DECREASES

On its own, the Green Deal has no legal basis. Based on a 24-page Communication from the European Commission, it merely serves as a roadmap for reaching a climate-neutral Europe by 2050. Therefore, tangible policy to get to climate neutrality must be put in place

as soon as possible, as the future of the Green Deal after the 2024 elections is uncertain. If von der Leyen does not get a second term as Commission President, the next Commission may not adopt the Green Deal as a policy priority.

Likelihood that the European Green Deal will be implemented by 2024, all stakeholders, globally, 2022 vs 2020/21



2022: n=314 / 2020/21: n=295

Please rate the likelihood that the European Green Deal will be implemented by 2024 - that is, translated into science-based targets (SBTs), with corresponding legislation, regulation, and public investment.

Closed question, 5-pt rating scale



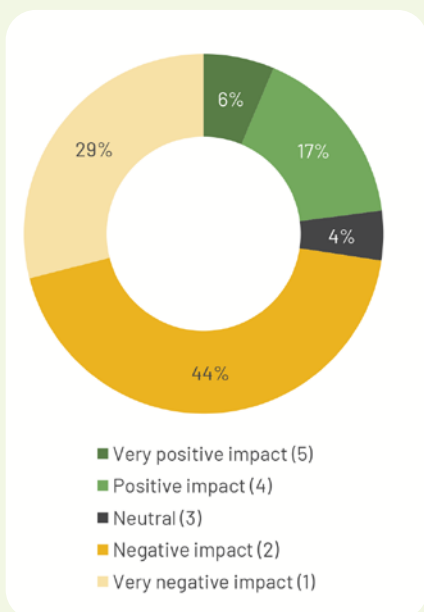
According to the survey, 45% of sustainability experts are losing confidence in the ability of EU institutions to implement the Green Deal by 2024, up from 30% of experts surveyed for the first Barometer survey, conducted between December 2020 and January 2021. This significant

increase may be in part due to the different circumstances in which the surveys took place. Optimism reigned during the first Barometer survey, since the Green Deal had finally begun to take shape after a difficult period of calls for it to be dropped during the initial response to COVID-19.

4.2. IMPACT OF THE WAR IN UKRAINE

Today, the situation is markedly different. As the EU focuses on its response to the war in Ukraine, the political space for action on the Green Deal has shrunk. In this context, 73% of respondents believe that the war in Ukraine will negatively impact the implementation of the Green Deal over the next year.

Respondents describe the return to burning coal and the prospect of fast-tracking new alternative gas infrastructure as the main concerns. Delays in the adoption of policy proposals are also cited, as seen for the Nature Restoration Law and the revision of the Sustainable Use of Pesticides Directive².



Impact of the war in Ukraine on EGD implementation in the short term, all stakeholders, globally, 2022

n=314

What impact will the Russian invasion of Ukraine have on European Green Deal implementation in the short term (over the next 12 months), in your view?
Closed question, 5-pt rating scale

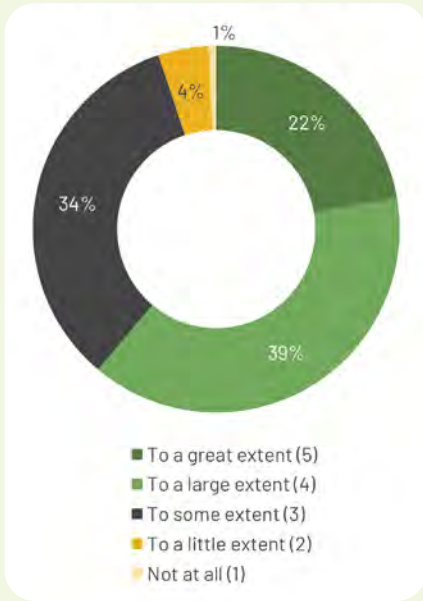


² The proposals for the Nature Restoration Law and the revision of the Sustainable Use of Pesticides Directive were not published yet at the time of the survey.

4.3. THE GREEN DEAL AND THE BALLOT BOX

There is also good news for the future of the Green Deal: six out of ten sustainability experts believe that EU institutions will

continue the Green Deal project after the 2024 election, upholding the idea that it surmounts political cycles.



EU institutions support to EU Green Deal after the 2024 EU elections, all stakeholders, globally, 2022

n=314

In your opinion, to what extent will the EU institutions support the European Green Deal implementation after the EU elections in 2024?
Closed question, 5-pt rating scale



As the steadiest element in the Commission-Parliament-Council tripartite, the European Commission is responsible for extending the life of the Green Deal after 2024. The survey

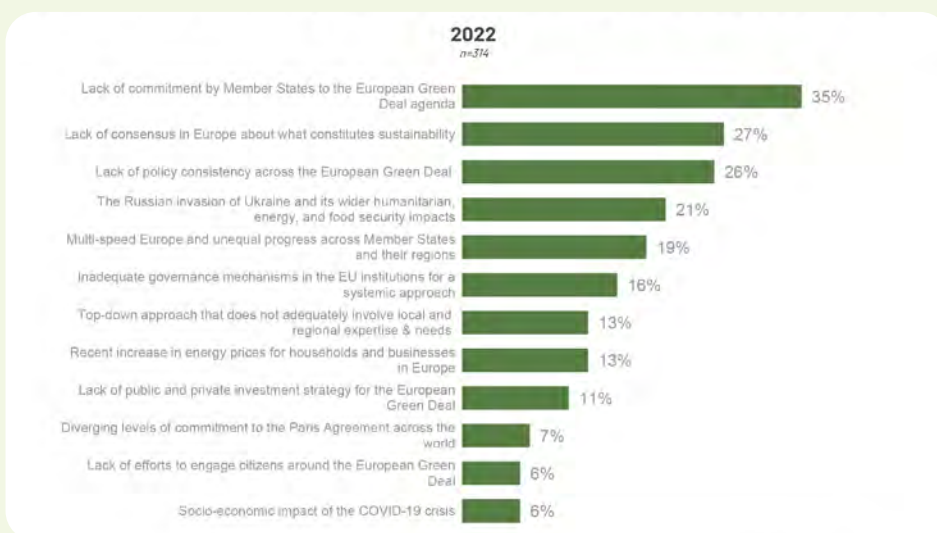
reflects this, with 92% of respondents ranking the European Commission as an important actor in the implementation of the Green Deal.

4.4. MEMBER STATES HINDER GREEN DEAL IMPLEMENTATION

Similar to the first edition of the Barometer, 35% of sustainability experts see a lack of commitment by Member States as the biggest barrier to executing the Green Deal. The role of national and regional

governments will become ever more important as it transforms into a wide-ranging set of policies, emphasising the need to foster ownership of the Green Deal outside of Brussels.

Biggest barriers to implementing the European Green Deal, ranked 1 or 2, all stakeholders, globally, 2022



Which two of the following are the biggest barriers to implementing the European Green Deal? *Closed question, ranking (top two).*



Respondents identify the tension between the environmental, economic, and social dimensions of a sustainable future as the second major roadblock. This is demonstrated by the ongoing heated debate in the European Parliament about the social aspects of the Fit for 55 Package.

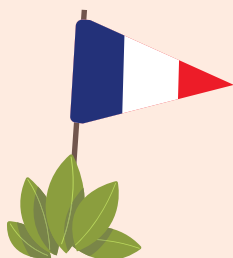
About a quarter of respondents also cite the lack of policy consistency across the Green Deal as a major barrier to implementation. The discrepancies between the Common Agricultural Policy (CAP) and the green objectives in the Farm to Fork Strategy are an obvious example of this.

LEVERAGING THE EU PRESIDENCIES

This year's edition of the Barometer includes national surveys to increase knowledge about Green Deal implementation in France, the Czech Republic, Sweden, and Spain³. As the four Member States to hold the EU Presidency

before the 2024 elections, they play an important role in the implementation of the Green Deal. While this section will become more prominent in the next editions of the Barometer, this year serves as a pilot phase.

FRANCE



The survey took place as French voters went to the polls to elect their next President and National Assembly. While only one third of the respondents viewed the government in place at that time as committed to the Green Deal, 62% felt like the elections would bring about positive change. French respondents see an EU focus on climate policy as a way to increase backing for the Green Deal. France was in charge of finalising Council positions on the Fit for 55 Package during its EU Presidency in the first half of the year, which might have boosted the profile of the Green Deal at home.

SWEDEN



Sweden aims for climate neutrality by 2045 at the latest – five years earlier than the EU target. The country is perceived as the Member State most committed to the Green Deal in the general survey. However, only one third of Swedish respondents think that their government is dedicated to the Green Deal agenda, and they see the lack of political commitment and consensus as the biggest obstacle to Green Deal implementation. At the time of the survey, most of them did not think the general elections on 11 September this year would bring positive change in this regard.

³ The pilot surveys were not translated in national languages and have a smaller number of respondents (France: n=34, Czech Republic: n=13, Sweden: n=12, and Spain: n=21).

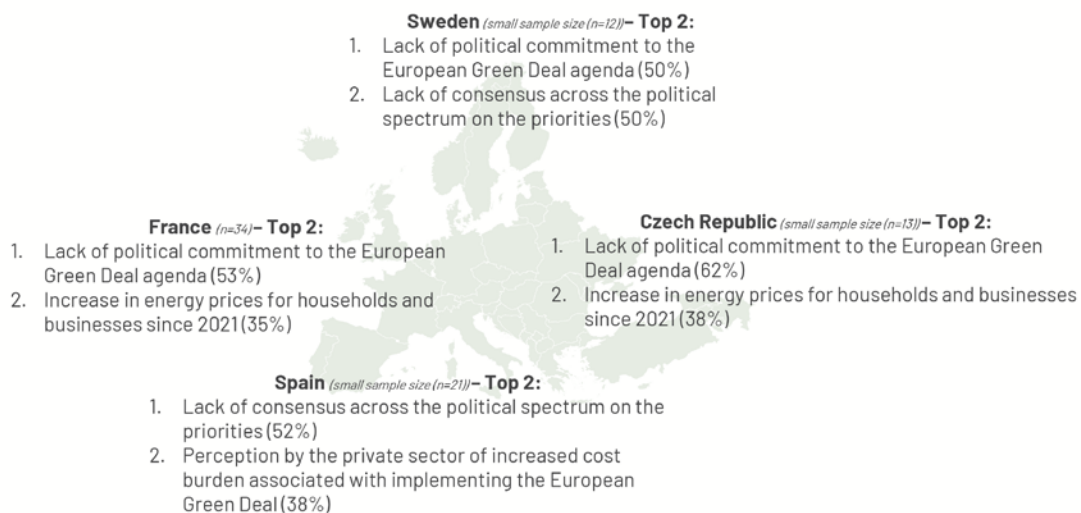
THE CZECH REPUBLIC



As the current holder of the EU Presidency, the Czech Republic will help coordinate the EU response to the energy crisis. Respondents view the increase in energy prices as one of the main obstacles to Green Deal implementation in their country, and thus they expect decisive action on the EU stage. However, sustainability experts from the Czech Republic have little trust in the ability of their government to implement the Green Deal: more than 60% of the respondents believe that there is a lack of political commitment from their Government to the Green Deal, and more than a third fear that the increase in energy prices will become a barrier to its implementation. They also see no improvements for the future: six out of ten Czech respondents believe the next national elections will not change the situation.

Czech respondents see civil society organisations as the biggest advocate for the Green Deal in their country. Civil society organisations also come out on top in France, Sweden and Spain, which should be seen as encouragement for larger civil society organisations to shift more resources towards campaigning for the Green Deal at the national level.

Barriers to implementing the European Green Deal in France, the Czech Republic, Sweden and Spain, ranked 1 or 2



Which two of the following are the biggest barriers to implementing the European Green Deal in your country? Please pick two in order of importance from the list below. Closed question, Top 2 ranked choices.



SPAIN



Spanish respondents believe that the EU should focus its efforts on fostering a healthy food system to help increase national support for the Green Deal. This is similar to France, where respondents rank a healthy food system in the top two areas to promote the Green Deal to citizens. Interestingly, these two countries are also the EU's agricultural powerhouses.

Spanish sustainability experts also see industry as an important actor to get on board. They identify resistance from the private sector as one of the main roadblocks to implementation in the country.

More than 60% of Spanish respondents believe that their government is committed to the Green Deal agenda. However, a majority of respondents (52%) expect the results of the next general elections in Spain in December 2023 to have a negative impact on the national implementation of the Green Deal. These national elections represent a pivotal milestone: they come just before the European Parliament elections and before the new Commission begins its mandate. Furthermore, as Spain will take on the EU Presidency right after Sweden, it could use its stint to boost the Green Deal in this period of electioneering.

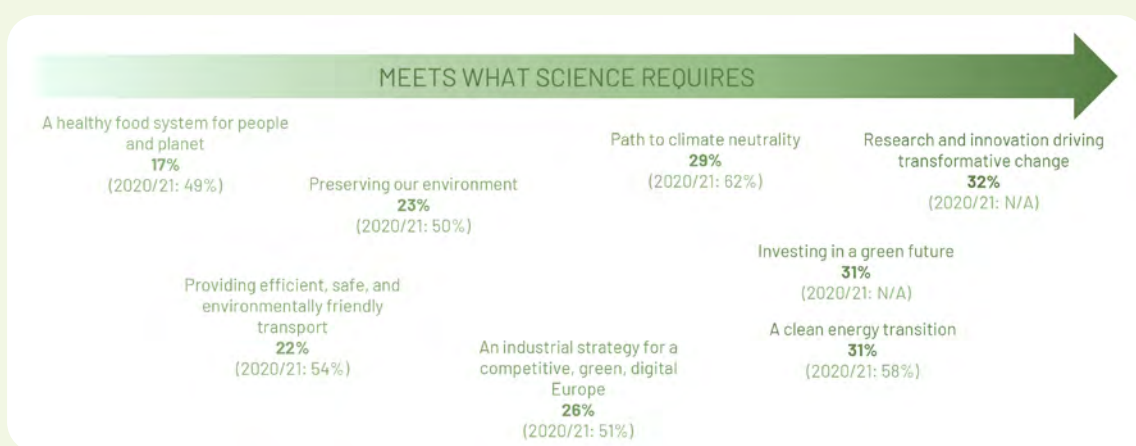
	France	Czech Republic	Sweden	Spain
Respondents who see their government as committed to the Green Deal	32%	8%	33%	62%
Respondents that believe the next national elections will positively impact Green Deal implementation	62%	23%	17%	14%
Stakeholder rated as doing the most to drive progress on the Green Deal in respondents' country	Civil society organisations	Civil society organisations	Civil society organisations	Civil society organisations
Stakeholder rated as doing the least to drive progress on the Green Deal in respondents' country	National parliament	National parliament	Citizens	Private sector
Areas the EU should focus on more to increase support for the Green Deal in respondents' country	<ul style="list-style-type: none"> • Path to climate neutrality • A healthy food system for people and planet 	<ul style="list-style-type: none"> • A clean energy transition • Preserving our environment 	<ul style="list-style-type: none"> • Investing in a green future • Path to climate neutrality 	<ul style="list-style-type: none"> • A healthy food system for people and planet • An industrial strategy for a competitive, green, digital Europe

4.5. THE GREEN DEAL NEEDS TO LIVE UP TO THE SCIENCE

Since the Green Deal is a broad sustainability agenda, the Barometer survey asked respondents for their views on its different thematic areas. The survey brought to light that the science-policy gap has widened

considerably in each area compared to the first edition of the Barometer, suggesting that in Green Deal proposals, science often takes a backseat to what is politically feasible.

Extent to which EU Green Deal proposals meet what science requires, "Well" and "Very well" (4+5 on a 5-pt scale), all stakeholders, globally, 2022



2022: n=314. 2020/21: n=294

How well do you think the progress made in each of these thematic areas since the start of the European Green Deal currently meets what science requires?

Closed question, 5-pt rating scale.



The change in respondents' views on the science-policy gap can be partially attributed to the relatively abstract aims from the 2019 Green Deal Communication having been translated into concrete, comprehensive policy proposals. By seeing these aims elaborated, respondents are better able to judge whether the proposals really meet what the science requires. More importantly, negotiations on policy files have sometimes pushed the initial content of the Commission's proposals away from what the science requires and closer to short-term political concerns.

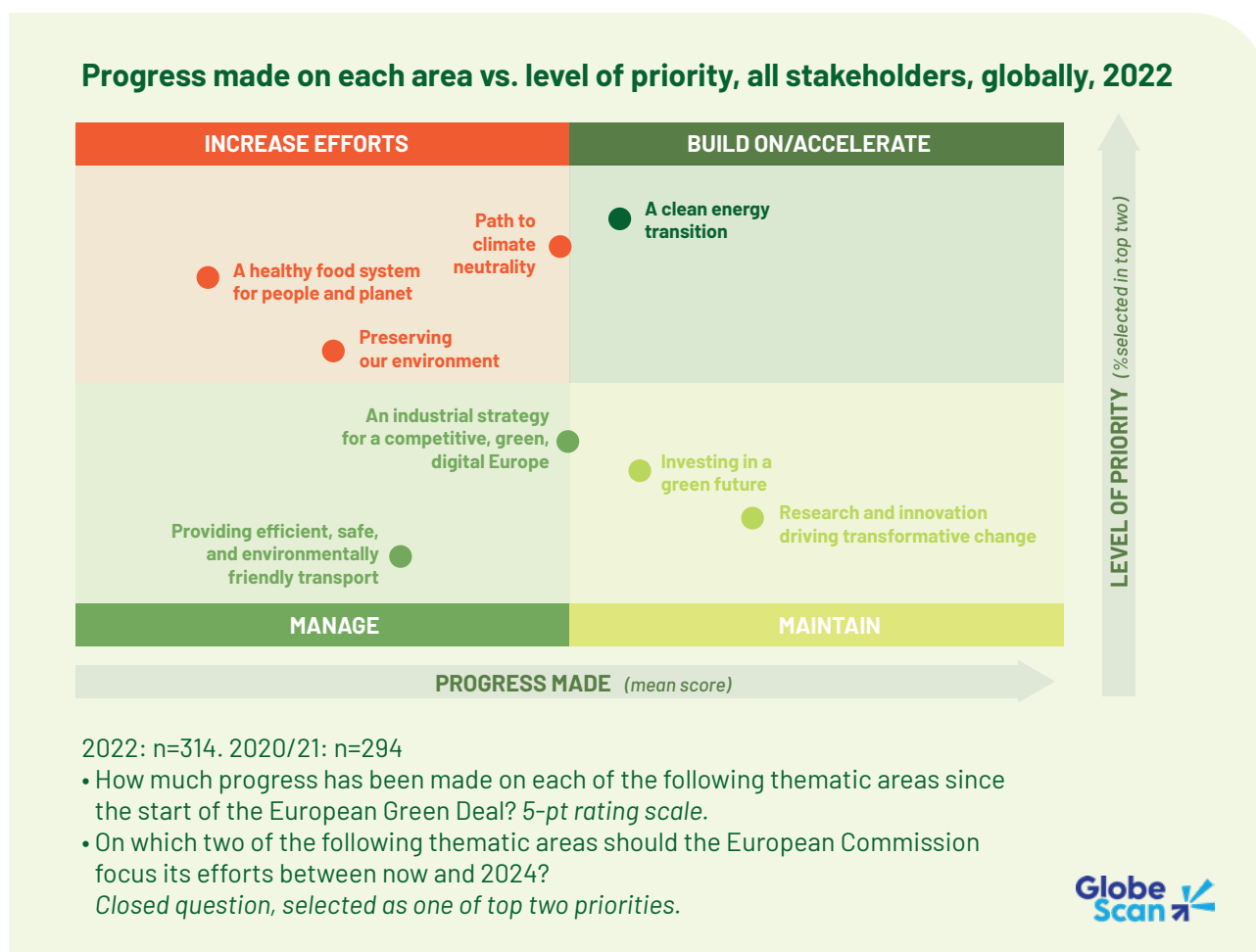
As more proposals are put on the table, sustainability experts were also able to gain a better understanding of whether the proposed targets will put the EU on track towards its overarching objective of reaching climate neutrality by 2050.

This is reflected in the Barometer survey: 72% of experts rate themselves as familiar with the Green Deal, as opposed to 48% in the first edition. The survey also shows that respondents who are familiar with the Green Deal are more likely to say that progress has been made towards its implementation.

4.6. DEEP DIVE: THE THEMATIC AREAS OF THE GREEN DEAL

The European Commission groups its Green Deal work in several action areas⁵. They are:

- Path to climate neutrality
- A healthy food system for people and planet
- A clean energy transition
- Preserving our environment
- Investing in a green future
- An industrial strategy for a competitive, green, digital Europe
- Providing efficient, safe and environmentally friendly transport
- Research and innovation driving transformative change



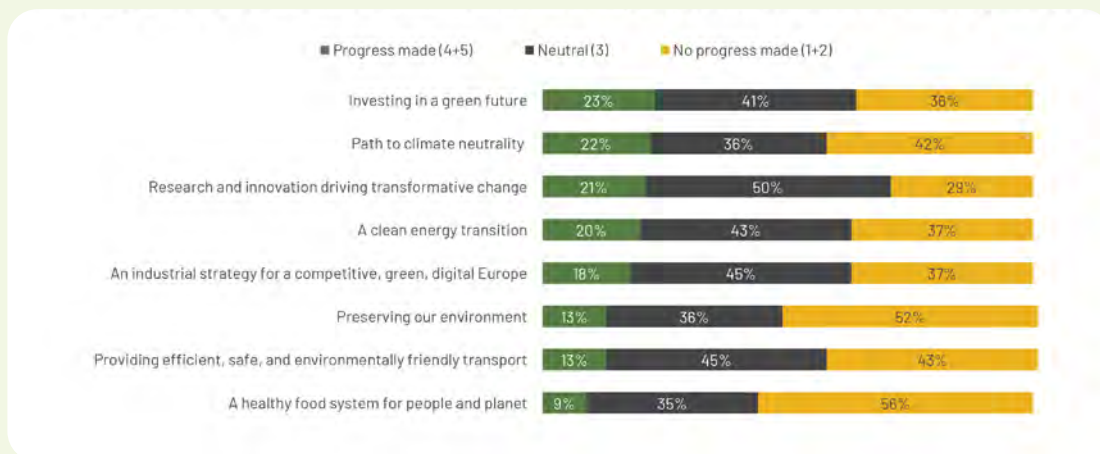
The above figure shows that progress is uneven across the board. Sustainability experts see some progress on files related to the clean energy transition and innovation. They also believe the Union is moving on financing the Green Deal agenda, but progress on files such as the transformation of food systems and the preservation of the environment are seen as stagnant. Given the interconnectedness of the Green Deal agenda and the equal urgency of the climate

and biodiversity crises, uneven progress is cause for concern. Sustainability experts therefore recommend increasing efforts on the transformation of food systems and preservation of the environment, as well as prioritising the overarching climate neutrality objective.

Overall, only a minority of sustainability experts see significant developments in any area since the beginning of the Green Deal.

⁵ European Commission (2019). A European Green Deal. Available [here](#)

Progress made on each area since the start of the European Green Deal, all stakeholders, globally, 2022



n=314

How much progress has been made on each of the following thematic areas since the start of the European Green Deal? 5-pt rating scale.

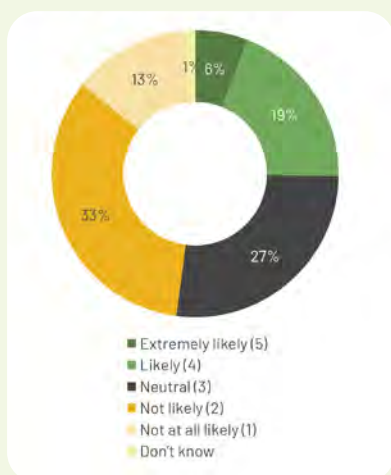


> PATH TO CLIMATE NEUTRALITY

The co-legislators reached agreement on the European Climate Law in April 2021, legally binding the EU to its objective of climate neutrality by 2050. Finalised in record time,

the European Climate Law also formalised the EU's aim of reducing greenhouse gas emissions by at least 55% by 2030 compared to 1990 levels.

Likelihood that EU will meet its objective to reduce emissions by at least 55 percent by 2030, those who selected "path to climate neutrality," globally, 2022



n=135

In your opinion, how likely is it that the EU will meet its objective to reduce emissions by at least 55% by 2050? Closed question, 5-pt rating scale



The European Environment Agency (EEA) estimates that net greenhouse gas emissions in the EU's 27 Member States were 34% lower in 2020 compared to 1990. While the COVID-19 pandemic was in full swing that year, the 2020 numbers confirm a downward trend that was established even before the pandemic⁶. Sustainability experts are

however not convinced that the EU can fulfil the 2030 target – almost half of respondents think it is unlikely that the EU will reduce its greenhouse gas emissions by at least 55% by the end of the decade. This signals a need for increased efforts across all sectors of the economy and swift implementation of the legislation currently on the table.

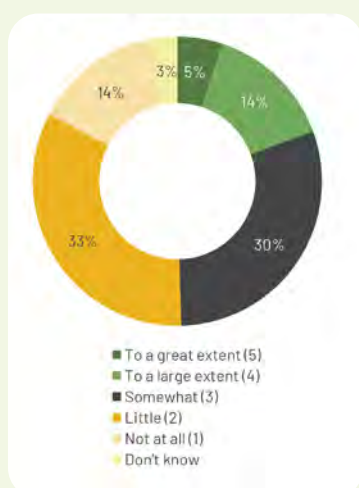
> A HEALTHY FOOD SYSTEM FOR PEOPLE AND PLANET

Strikingly, only 9% of respondents believe that progress has been made on the transition to sustainable food systems since the start of the Green Deal.

There are several reasons that can explain this result. First, the latest developments around the draft Common Agricultural Policy (CAP) Strategic Plans might have

played a role in the experts' assessment. Last year's agreement on the 2023-2027 CAP is generally seen as diverging from the objectives set in the Farm to Fork Strategy. 47% of sustainability experts believe that Member States' CAP Strategic Plans will not or will only marginally contribute to meeting the targets under the Green Deal.

Extent to which the CAP Strategic Plans contribute to meeting the objectives of the EGD on the Farm to Fork Strategy, those who selected "a healthy food system for people and planet," globally, 2022



n=139

To what extent will the CAP Strategic Plans contribute to meeting the objectives of the European Green Deal on the Farm to Fork Strategy?

Closed question, 5-pt rating scale



⁶ European Environment Agency (2021). Trends and Projections in Europe 2021. Available [here](#).

Second, the exemptions on existing environmental requirements that were requested by the Member States following Russia's invasion of Ukraine such as the production of crops on fallow land that is part of Ecological Focus Areas, are also likely to have triggered pessimism in the expert community. Finally, many actions under the May 2020 Farm to Fork Strategy, were only planned to kick off from 2022 onwards, and some proposals incurred a delay ⁷.

The European Commission plans to propose an overarching legislative framework for sustainable food systems by the end of 2023. Today, the transition to sustainable food and

agriculture still lacks a guiding framework akin to what the European Climate Law provides for the overhaul of the EU's climate and energy policy architecture.

Emissions from the agricultural sector in 2020 remain at about the same levels as they were in 2005⁸, and €100 billion of funds set aside for climate action under the last CAP had little impact on emissions⁹. Urgent action is required to align the CAP with the Green Deal, and in particular the Farm to Fork Strategy. The European Commission should be wary of prematurely approving national CAP Strategic Plans that are not in line with the overarching objectives of the Green Deal.

> A CLEAN ENERGY TRANSITION

Despite the publication of the Fit for 55 Package in 2021, just 20% of respondents think that the EU has made any meaningful advancement towards a clean energy system. There is no consensus among sustainability experts on whether the Fit for 55 Package meets what the science requires: 36% say it does, 29% say it doesn't, and another 33% is ambivalent.

REPowerEU, the European Commission's plan to reduce dependence on Russian

fossil fuels, introduces the option to increase the targets for renewable energy and energy efficiency. The European Parliament's Industry, Research and Energy (ITRE) Committee backs the higher targets. This increase in ambition is positive, and respondents see the clean energy transition as the number one policy area that the European Commission should focus on between now and 2024, making the case that the Green Deal is the best long-term solution to the current energy crisis.

> PRESERVING OUR ENVIRONMENT

Only 13% of respondents believe progress has been made towards protecting the environment and oceans since the start of the Green Deal. Many responded that there have been no significant developments towards the targets and commitments of the Biodiversity Strategy, and that they

were expecting the most from the Nature Restoration Law¹⁰. The war in Ukraine caused a delay in the publication of that proposal, which was originally planned for March and eventually came out in June. While the Green Deal has an explicit focus on climate action, the 2019 Communication

⁷ European Commission (2020). Timeline of Farm to Fork Actions. Available [here](#).

⁸ European Environment Agency (2021). Trends and Projections in Europe 2021. Available [here](#).

⁹ European Court of Auditors (2021). Common Agricultural Policy and climate – Half of EU climate spending but farm emissions are not decreasing. Available [here](#).

¹⁰ The proposal for the Nature Restoration Law had not been published at the time of the survey.

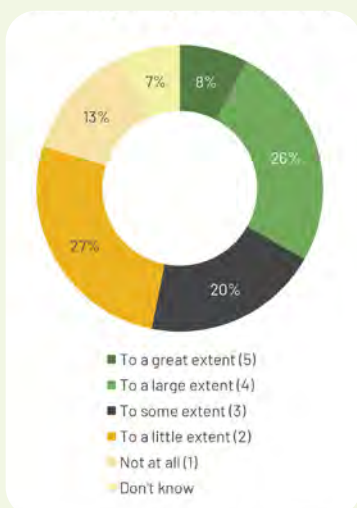
from the European Commission emphasises that it “also aims to protect, conserve and enhance the EU’s natural capital.” Restoring ecosystems is not only good for biodiversity, but also for climate, people and the economy.

The benefits of nature restoration are far greater than the costs – yet 43% of the respondents think that the EU will do nothing or only very little to deliver the necessary biodiversity funding between today and 2027.

> INVESTING IN A GREEN FUTURE

Respondents’ opinions on biodiversity funding are reflected in their general views on financing for the Green Deal: only 23% believe progress has been made in this area. The European Commission has pledged to mobilise at least €1 trillion in sustainable investments over the next decade. The

Commission estimates that to achieve the previous 2030 target of reducing greenhouse gas emissions by 40%, an additional €260 billion of investments per year is needed¹¹. With the new 2030 target of a 55% reduction of greenhouse gas emissions, even greater annual investments will be needed.



Extent to which EU taxonomy for sustainable activities contributes to private sector financing in line with the EGD, those who selected “investing in a green future,” globally, 2022

n=90

To what extent does the EU taxonomy for sustainable activities contribute to private sector financing in line with the European Green Deal?

Closed question, 5-pt rating scale



The EU Taxonomy, a classification system intended to help investors understand whether their investments are sustainable, could help the EU increase sustainable investments. 40% of respondents think the EU Taxonomy contributes nothing, or little, to private sector financing in line with the Green Deal. This could partially be explained by

the Commission’s introduction of a Delegated Act to the EU Taxonomy in the beginning of the year which designated nuclear and gas as sustainable investments. Nevertheless, this result should be seen as a call to action for the private sector, which respondents see as the second most important actor in implementing the Green Deal at the national level.

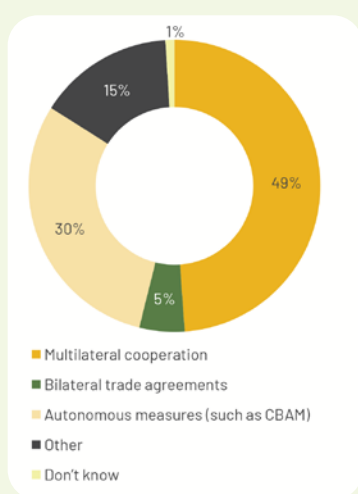
¹¹ European Commission (2020). Communication on the Sustainable Europe Investment Plan. Available [here](#).

> AN INDUSTRIAL STRATEGY FOR A COMPETITIVE, GREEN, DIGITAL EUROPE

Reaching climate neutrality by 2050 will be impossible without a complete reorientation of Europe's industry, including a shift to a green building sector and a phase-out of the internal combustion engine. The New Industrial Strategy for Europe aims to hit

several birds with one stone: help industry reduce their carbon footprint by providing affordable, clean technology solutions, develop alternative business models, and boost global competitiveness.

Most effective way for the EU to implement a green industrial strategy, those who selected "an industrial strategy for a competitive, green, digital Europe," globally, 2022



n=90

In your opinion, what would be the most effective way for the EU to implement a green industrial strategy?
Single choice



France, one of the drivers of the Industrial Strategy, used its EU Presidency in the first half of the year to advance on this topic. Reaching an agreement on the Carbon Border Adjustment Mechanism (CBAM) was a top priority for the French Presidency, but conclusion of the file is in the hands of the Czech Presidency. CBAM, a climate measure designed to prevent carbon leakage, is seen

as a powerful tool by sustainability experts – 62% say that the EU should significantly expand CBAM. However, when asked what the most effective way for the EU would be to implement the Industrial Strategy, half of respondents favour multilateral cooperation – demonstrating that the European Commission should focus on an effective trade component in the Green Deal.

> RESEARCH AND INNOVATION DRIVING TRANSFORMATIVE CHANGE

Respondents are most positive about the developments in this area, with 32% believing that the progress made since the start of the Green Deal meets what science requires. Innovative partnerships are at the top of the agenda for the Commission. The European Battery Alliance, which aims to create a competitive and sustainable manufacturing value chain in Europe,

reached €127 billion of investment at the end of 2021¹², putting Europe on the map as a global production hotspot and prompting the Commission to explore similar partnerships in other areas, such as hydrogen. The Horizon Europe Missions are also an interesting development, especially given that four out of five Missions focus on the climate and biodiversity crises.

> PROVIDING EFFICIENT, SAFE AND ENVIRONMENTALLY FRIENDLY TRANSPORT

The transport sector is the second-largest source of greenhouse gas emissions in the EU. Emissions in the transport sector were 14% lower in 2020 compared to 2005, but that reduction can be attributed to a drop in passenger road transport as citizens worked from home during the lockdowns¹³. A focus on transport policy is needed as emissions are projected to remain the same if no extra measures are put in place. Sustainability experts recognise that there remains a lot to be done, with only 13% observing significant progress in transport policy since the start of the European Green Deal.

The Fit for 55 Package includes several

proposals to reduce emissions in the road, maritime and aviation transport sectors. They include an extension of the Emissions Trading System to the road transport sector and measures to stimulate the uptake of more sustainable fuels in the aviation and maritime sectors. The centrepiece is a proposal for more stringent performance standards for cars and vans, which effectively comes down to a ban of new combustion engine vehicles as of 2035. Switching the value chain of automotive production to electric vehicles in a short period of time is a serious undertaking, and half of the panel believe that European car manufacturers are poorly prepared.

¹² European Commission (2020). Communication on the Sustainable Europe Investment Plan. Available [here](#).

¹³ European Environment Agency (2021). Trends and Projections in Europe 2021. Available [here](#).

4.7. RECOMMENDATIONS FOR ACCELERATING GREEN DEAL IMPLEMENTATION

4.7.1. OWN THE NARRATIVE

Sustainability experts consistently rank the European Commission as the most important EU actor in the implementation of the Green Deal. As six out of ten respondents believe the EU institutions will continue to endorse the Green Deal after the 2024 elections, there is an opening for the Commission to further profile itself as the owner of the Green Deal and control the political narrative. While the first half year of the war in Ukraine has seen some members of the College of Commissioners speak out against the Green Deal, now is the time to unite everyone in the Commission behind the fact that the Green Deal is the sole long-term solution to the current crises.

Sustainability experts across Europe see a healthier environment for present and future generations as the number one benefit arising from implementation of the Green Deal. As the main driver of the Green Deal narrative, the European Commission should do more to portray the Green Deal as a truly positive and transformative agenda. A rethinking of the European Climate Pact would be a good start to further involve citizens in the Green Deal project.

4.7.2. LOCALISE THE GREEN DEAL

As in the first edition of the Barometer, respondents rank the lack of commitment by Member States as the biggest obstacle in implementing the Green Deal. Given that the Green Deal will ultimately come to life in Member States, it is crucial that the agenda is known, promoted, and championed outside of Brussels. Civil society organisations can play a key role

here: they consistently come out on top as the strongest stakeholder in driving progress on the Green Deal in all four of the national pilot surveys in France, the Czech Republic, Sweden and Spain. Training national and regional civil servants on the Green Deal through mandatory modules could increase understanding of the agenda, instil a sense of ownership, and eventually ensure implementation.

4.7.3. BRING THE PRIVATE SECTOR ON BOARD

Half of the respondents from the private sector believe it is unlikely that the Green Deal will be implemented by 2024. However, according to the survey results, the private sector is also the stakeholder group least familiar with the Green Deal agenda. As a vital partner in implementing the Green Deal, more time and strategic consideration should go towards making progressive private sector companies a partner in the green transformation of the EU economy.

4.7.4. CENTRING THE SOCIAL DIMENSION

Debates about climate and energy policy have largely shifted from questions about technological feasibility to talks on making the transition socially and politically acceptable. For example, in negotiations concerning the Fit for 55 Package, the Social Climate Fund and extension of the Emissions Trading System (ETS) to the road transport and building sectors are the cause of fierce debate. Half of the respondents believe that the current social provisions of the Green Deal, such as the Just Transition Fund and the Social Climate Fund, will significantly facilitate implementation.

However, respondents view the lack of consensus about what a sustainable future entails – and more specifically which socio-economic compromises are accepted – as the second biggest stumbling block for the Green Deal, making the case for better guidance on getting the social dimension of the agenda right. In that regard, the Commission should look into an Office of

Climate Justice Accountability, as proposed by the Union of Justice¹⁴, to “identify and eliminate barriers to inclusion, investigate dubious practices, monitor the progress of the green transition and require all environmental legislation or regulation introduced by the European Union to receive an equity score created by climate experts and community organisers.”

¹⁴ Union of Justice. How To Centre Racial Justice in the European Green Deal: 5 Proposals from Union of Justice. Available [here](#).

An aerial photograph of a wind farm situated in a dense, green forest. The wind turbines are white with three blades each. A dirt road winds through the trees, and a circular clearing is visible around one of the turbines. The overall scene is vibrant and green, symbolizing renewable energy in a natural setting.

05

RECOMMENDATIONS FROM THINK SUSTAINABLE EUROPE ON FIT FOR 55, CBAM, FARM TO FORK AND THE NATURE RESTORATION LAW

To complement the survey, the Think Sustainable Europe (TSE) network prepared four policy briefs that identify concrete policy recommendations relevant to the Trio Presidency (France, the Czech Republic, Sweden) and Spain for advancing on the implementation of the Green Deal. The four policy briefs were finalised after the Think2030 conference, during which the authors took in comments and feedback from the stakeholders in attendance¹⁴.

This section presents several of the recommendations that IEEP and TSE identified, considering the input of Think2030 partners. Please [click here](#) to read the policy briefs and their complete sets of recommendations.



FIT FOR 55 AND CLIMATE TARGETS: TOWARDS A JUST TRANSITION

Half of the survey respondents believe that the current social provisions of the Green Deal will facilitate its implementation.

> FOCUS ON NEW INFRASTRUCTURE TO ACHIEVE FIT FOR 55 TARGETS

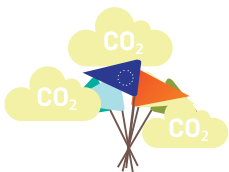
Lack of infrastructure that facilitates switching to more sustainable habits in the long term is a bottleneck. This should be addressed by speeding up the rollout of sustainable transport and energy infrastructure, using the Social Climate Fund and unused Recovery and Resilience Facility (RRF) funds as identified in the REPowerEU plan. Targeted infrastructure

investments should support fairness and social acceptance.

> TARGET SUPPORT TO THE MOST VULNERABLE CITIZENS

The ambitious proposals in terms of carbon pricing, budget expenditures and regulations as presented in the Fit for 55 Package should deliver on both climate objectives and social justice. Revenues generated by the proposed carbon pricing instruments should be used to compensate lower-income households, stimulate energy renovations, and encourage the development of affordable public transport.

> The full policy brief **'Delivering climate targets: How can EU policy support a just transition?'** is available [here](#).



AN AMBITIOUS AND FAIR CARBON BORDER ADJUSTMENT MECHANISM

A majority (62%) of the survey respondents believe that CBAM should be significantly expanded to support the green and just transition in the EU and globally.

> RAISE THE BAR FOR CBAM TO BE A WTO-COMPATIBLE CLIMATE INSTRUMENT

CBAM must be designed to mirror the Emissions Trading System (ETS), meaning that the introduction of CBAM and the withdrawal of free ETS allowances should take place at the same pace to avoid double protection. The EU should also refrain from

any form of exceptional treatment for EU exporters of products covered by CBAM during its implementation phase until these issues can be discussed in the appropriate international forums.

> PUT IN PLACE A ROBUST VERIFICATION SYSTEM

To maintain its environmental integrity and avoid carbon leakage, CBAM must not be circumvented by importers, and enforcement by EU authorities should be data-based and non-discriminatory.

¹⁴ The third edition of the Think2030 conference was organised by IEEP and IDDRI and hosted by Sciences Po. It took place in Paris on 29 and 30 June. The conference report is available [here](#).

> **FOSTER INTERNATIONAL COORDINATION ON CARBON PRICING SCHEMES**

The EU's next steps will be crucial to ensure that constructive responses to CBAM prevail. Therefore, it is important for the upcoming Presidencies of the Council to identify and employ the right channels for cooperation on key issues such as setting global standards for green public procurement.

> The full policy brief '**State of the EU CBAM after the French Presidency: A reality check**' is available [here](#).

> **ENSURE THAT CBAM IS INTERNATIONALLY FAIR BY REDISTRIBUTING ITS DIRECT REVENUES**

To ensure that CBAM will not represent a disproportionate burden for the EU's most vulnerable trading partners, it is of the utmost importance that the EU uses CBAM's direct resources to increase its contribution to the financing of decarbonisation projects in least developed countries (LDCs).



TOWARDS A SUSTAINABLE FOOD SYSTEM IN THE EU

Only 9% of survey respondents believe that progress has been made on the transition to sustainable food systems since the start of the Green Deal. At the same time, they identify the transformation of food systems as an area of high priority. The upcoming Sustainable Food System Framework Law represents an important milestone.

> **ENSURE THE SUSTAINABLE FOOD SYSTEMS LAW IS AN "UMBRELLA" LAW, WITH THE CAP BECOMING ONE OF ITS DAUGHTER LAWS**

The key objectives of the law would thus be embedded in agricultural policy, increasing the chance of coherence and meaningful delivery on the ground. In particular, spending under the CAP should be fully aligned with the objectives of the Sustainable Food Systems Law.

> **REDUCE THE TOTAL ANIMAL PROTEIN INTAKE OF EU CONSUMERS AND THE COMPETITION BETWEEN FOOD**

PRODUCTION FOR HUMANS AND FEED FOR ANIMALS

The average consumption of animal proteins per capita in the EU is double what is needed to cover nutritional requirements and nearly 60% of all cereals and 75% of all oilseed crops consumed in the EU are used for animal feed. Transforming EU animal farming is therefore a key component of the sustainable food system of the future.

> **INSTALL A MULTI-LEVEL GOVERNANCE STRUCTURE**

Sizeable elements of the food system are either regulated at the national level or are a matter of shared competence. National action by Member States should be a substantial component of the new governance and policy architecture of the Sustainable Food Systems Law. Introducing national action plans as part of the architecture of the law could be a mechanism to achieve this.

> The full policy brief '**Towards a Sustainable Food Systems Framework Law**' is available [here](#).



RESTORE EU ECOSYSTEMS BY IMPLEMENTING THE PROPOSED NATURE RESTORATION LAW

According to the survey results, the majority of experts note no or limited progress towards the targets and commitments of the Biodiversity Strategy. The recently proposed Nature Restoration Law could prevent further ecosystem degradation and is seen as a positive development.

> ESTABLISH AN ADEQUATE GOVERNANCE FRAMEWORK AND ENFORCEMENT MECHANISM

Since nature restoration provides a wide range of co-benefits which support the delivery of many EU policy objectives, Member States should ensure the involvement of all relevant stakeholders in the development of national restoration plans, including public authorities responsible for related policy areas. The process should be transparent and allow for citizen scrutiny and participation.

The new Nature Restoration Law must be drafted in a way that enables the European Commission and European Court of Justice to trigger legal action against Member States which are failing to meet their obligations. It

must therefore contain clear and measurable targets for the Member States and specify how compliance will be checked.

> PROVIDE TECHNICAL GUIDANCE

Member States will require technical guidance to successfully implement the upcoming regulation. Together with the European Commission, they should start developing common methods for assessing the condition of habitats not covered by the Habitats Directive, such that further quantitative restoration targets can be adopted by 2030 at the latest to achieve the objective of restoring all EU ecosystems in need of restoration by 2050.

> SECURE ADEQUATE FUNDING

Adequate funding is a prerequisite for successful implementation of the upcoming regulation. Member States should make use of all the available opportunities to finance restoration actions through the EU funds in the current programming period, and EU funding for nature restoration should be stepped up in the next programming period.

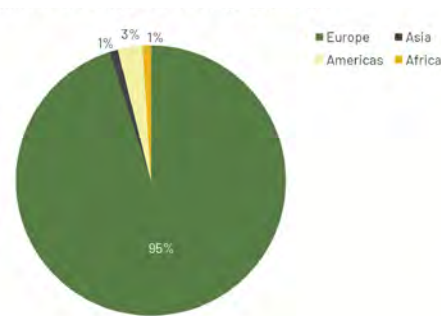
> The full policy brief '**Restoring EU ecosystems: Recommendations for the successful implementation of the proposed EU Nature Restoration Law**' is available [here](#).

ANNEX – STAKEHOLDER SAMPLE

The European Green Deal Barometer is based on a survey of 314 sustainability experts, of which 95% is based in Europe. The breakdown of regional representation is as follows:

Overview of Stakeholder Sample

Stakeholder sample overview by region, 2022



Stakeholder sample within Europe, 2022

A breakdown of regional representation within the total, European sample only (n=300)



In which count, yare you mainly basednrop down menu, single choice

The responses were collected from April to May 2022. The stakeholder sample is diverse – the majority (37%) come from academia and think tanks, 24% represent the private sector, and 21% come from NGOs and foundations. Respondents from governments, regulatory bodies and multilateral organisations make up the rest of the sample.

Almost two-thirds of stakeholders have been working or studying in the area of environmental policy, sustainable development, or corporate responsibility for more than five years.



THE INSTITUTE FOR EUROPEAN ENVIRONMENTAL POLICY (IEEP)

is a sustainability think tank.

Working with stakeholders across EU institutions, international bodies, academia, civil society and industry, our team of economists, scientists and lawyers produce evidence-based research and policy insight. As a not-for-profit organisation with 45 years of experience, we are committed to advancing impact-driven sustainability policy across the EU and the world.

The survey of the European Green Deal Barometer has been conducted with the support of GlobeScan:



For more information about IEEP, visit www.ieep.eu or follow us on **Twitter @IEEP_eu** and **LinkedIn**.

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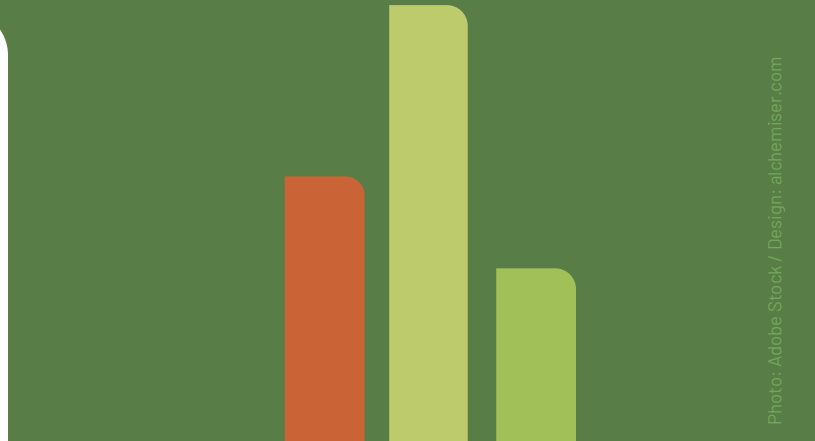


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SURVEY PARTNERS

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