



2021

EUROPEAN GREEN DEAL BAROMETER



Institute for
European
Environmental
Policy



THINK 2030

Launched by IEEP and its partners in 2018, Think2030 is an evidence-based, non-partisan platform of leading policy experts from European think tanks, civil society, the private sector, and local authorities.

Think2030's key objective is to identify science-policy solutions for a more sustainable Europe.

#THINK2030



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 over 40 years of experience, we are committed to advancing impact-driven sustainability policy across the EU and the world.

For more information about IEEP, visit www.ieep.eu or follow us on Twitter [@IEEP_eu](https://twitter.com/IEEP_eu) and [LinkedIn](https://www.linkedin.com/company/ieep).



GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs, and governmental organizations to meet strategic objectives across reputation, sustainability, and purpose.

Established in 1987, we have offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo, and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation. Learn more at www.globescan.com.

DISCLAIMER

The arguments expressed in this report are solely those of the authors and do not reflect the opinion of any other party.

THE REPORT SHOULD BE CITED AS FOLLOWS

Charveriat C. and Holme C. (2021). European Green Deal Barometer 2021. Institute for European Environmental Policy and GlobeScan, Brussels and Paris.

CORRESPONDING AUTHORS

Céline Charveriat (ccharveriat@ieep.eu) and Caroline Holme (caroline.holme@globescan.com)

ACKNOWLEDGEMENTS

Top right cover photo © Jörg Farys / WWF

We gratefully acknowledge the role of the Think2030 survey partners in helping collect the insights of the sustainability experts that led to this report.



This work has been produced with the financial support of the LIFE Programme of the European Union. The paper reflects only the views of its authors and not the donors.

TABLE OF CONTENTS

Executive summary	6
The state of the European Green Deal one year on	11
The view from close to 300 sustainability experts	16
Uneven progress across the thematic pillars of the European Green deal	17
The pandemic as an accelerator of the transition?	18
The European Green Deal as an opportunity for Europe	19
Mobilising industry for a clean and circular economy as a catalyser for the European Green Deal	20
Food systems, biodiversity and zero pollution as the Achilles heels of the European Green Deal?	21
A lack of commitment by Member States to the European Green Deal agenda	22
Mind the science-policy gap	23
Awareness raising and consensus building around the European Green Deal	24
A marathon rather than a sprint	26
Key actors	27
Policy recommendations	29
Financing the transition	30
Mobilising industry for a clean and circular economy	30
From farm to fork	31
Preserving and restoring ecosystems and biodiversity	31
Leaving no one behind	31
Global challenges	32
Governance of the European Green Deal	32
Methodological note	34



1

Executive summary

The **2021 European Green Deal Barometer**, published by the Institute for European Environmental Policy (IEEP) and GlobeScan, is the first survey of its kind, providing a snapshot of the views of nearly 300 sustainability experts on the progress made in implementing the European Green Deal.

The survey builds on the outcomes of the **Think2030** conference, held during the German Presidency of the EU at the end of 2020, where participants identified a series of priority policy recommendations to accelerate the Green Deal's implementation.

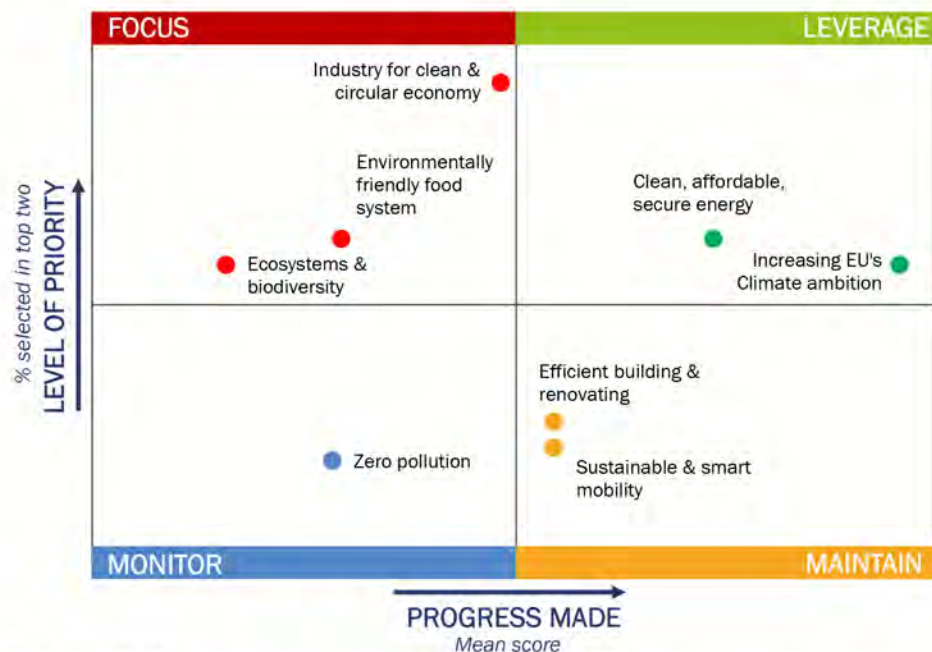
This annual European Green Deal Barometer, together with forthcoming data analysis and thematic progress dashboards – and the continued expert engagement around policy recommendations through the [Think2030 platform](#) – will form the basis of a European Green Deal Progress Report to be published in 2022.

First, the good news. Respondents see the **greatest amount of progress** made in **'increasing the EU's climate ambition for 2030 and 2050'** followed by **'supplying clean, affordable, and secure energy'**. This reflects the priority that the European Commission of President Ursula von der Leyen has given to achieving agreements on the objective of carbon neutrality by 2050, and increasing the EU's 2030 greenhouse gas reduction target.¹

Even as the EU struggles to recover from the COVID-19 crisis, **stakeholders are cautiously optimistic about the green transition**: almost half of the expert respondents think that the pandemic has accelerated the green transition overall and 14 per cent think that it has been significantly accelerated.

However, respondents find that **progress is highly uneven across the thematic pillars of the European Green Deal** with the perception of progress within the climate dossier contrasting strongly with that of the 'farm to fork', 'zero pollution' and 'preserving and restoring ecosystems and biodiversity' pillars.

Priority Areas vs Progress Made



Base: n=294
 Question: Q16. Which two of the following should be prioritised by the European Commission as key catalysts for implementing the whole deal? Closed question, selected as one of top two priorities.
 Question: Q15. How much progress has been made on each of the following areas? Closed question, 5-pt rating scale, mean score.

¹ At the time of writing, the trilogue negotiations on the Climate Law are ongoing.

From a scientific point of view, it is important to highlight the indivisibility of the Green Deal agenda. In agriculture, for instance, there is conclusive evidence to demonstrate that it would be impossible to reach carbon neutrality without substantial progress in these three lagging-behind areas.²

Accounting for the relative lack of progress in Green Deal implementation in areas beyond climate and energy, respondents identified a series of key challenges that must be overcome, including:

- **A lack of commitment by the Member States to the Green Deal agenda**, which is seen by respondents as the biggest barrier to implementation, followed by inadequate governance mechanisms and unequal progress across the EU Member States.
- **A gap between science and legislative proposals or investments on the table**: When asked whether European Green Deal proposals meet well what science requires, only 62% believe this is the case for increasing the EU's climate ambition and this figure falls as low as 49% for the 'farm to fork' strategy and 45% for the zero-pollution ambition. This suggests that political feasibility remains the fundamental driver for EC proposals, rather than scientific evidence about planetary boundaries.
- **The lack of awareness-raising and consensus-building around the European Green Deal**: less than half of the respondents felt that they were familiar with the European Green Deal as a whole. Even more concerning is the fact that government stakeholders and regulators are the least familiar with it – with less than four in ten saying they are familiar with the European Green Deal.
- **The need to see through the implementation of the European Green Deal beyond the mandate of the current Commission**, with seven out of 10 respondents believing that the Green Deal implementation will not be finished by 2024.

² Lóránt A & Allen B (2019) Net-zero agriculture in 2050: how to get there? Report by the Institute for European Environmental Policy. <https://ieep.eu/publications/net-zero-agriculture-in-2050-how-to-get-there>

Opportunities and policy recommendations:

Respondents identified **key opportunities** for the EU associated with successful Green Deal implementation. Driving **low carbon, circular and resilient supply chains** was seen as the most positive opportunity, followed by **increasing private sector investment and accountability**, and boosting the **EU's global competitiveness and leadership**.

In terms of the specific strands of the green deal, respondents think that the European institutions should focus in 2021 on **mobilising industry for a clean and circular economy, on the 'farm to fork' strategy and on biodiversity** – high priority areas where insufficient progress has been made to-date – while continuing to leverage successes in energy and climate policy.

Based on the policy recommendations generated through the most recent Think2030 conference (www.think2030.eu), respondents also prioritised the following **10 policy recommendations** to the EU institutions and Member States to accelerate Green Deal implementation beyond the relative progress achieved to date in the areas of energy and climate policy:

Financing the transition:

- Ensure that the award and use of EU recovery funds are focused on low-carbon and environmental projects

Mobilising industry for a clean and circular economy:

- Mainstream a circular economy approach in the EU industrial strategy
- Develop a comprehensive European policy for sustainable consumption— including an ambitious reduction target in per-capita material footprint by 2050

Farm to fork:

- Align the post-2020 Common Agricultural Policy (CAP) reform with the 'farm to fork' strategy, and ensure overall alignment of national CAP strategic plans with the EU's long-term sustainability strategies

Preserving and restoring ecosystems and biodiversity:

- Boost investment in nature-based solutions by defining and applying criteria for economic activities that contribute to protecting biodiversity and ecosystems

Leaving no one behind:

- Ensure social and territorial inclusion by offering guidance on how to enable local and regional authorities to adopt an integrated approach to the European Green Deal implementation
- Provide and act on long-term assessments of current public policy to ensure intergenerational equity

Global challenges:

- Champion circular-economy related trade cooperation and diplomacy to position the EU as a global environmental sustainability standard-setter and market creator

Governance of the European Green Deal:

- Develop a harmonised and SDG aligned monitoring framework to track progress on implementation of the European Green Deal



2

The state of the European Green Deal one year on

Launched through a communication of the European Commission on the 19th of December 2019 and endorsed at the highest political levels in EU Member States through conclusions of the European Council, the European Green Deal is an ambitious agenda designed to address Europe's inability to reach most of its environmental objectives and to address the growing concerns of its citizens.

According to the conclusions of the 2020 State and Outlook of the European Environment (SOER) report, the most comprehensive assessment of its kind, Europe is not on track to achieve its sustainability vision of **'living well within the limits of the**

planet’. In fact, as shown in Table 1, barring more radical changes, the EU will likely fail to achieve 22 out of 29 objectives of the 7th Environment Action Programme (EAP) launched in 2013.³

Table 1: EU progress towards thematic priority objectives under the 7th Environment Action Programme, based on Table S.1 Environmental Indicator Report 2018

Key headings of the European Green Deal	Prospects for reaching Europe’s 2020 objectives in this area (based on EEA assessment of progress under the 7 th EAP) ⁴
Increasing the EU’s climate ambition for 2030 and 2050	
Number of countries that have a climate change adaptation plan	
Total GHG trends and projections	
Supplying clean, affordable and secure energy	
– Progress on energy efficiency	
– Energy consumption by households	
– Share of renewable energy in gross final energy consumption	
Mobilising industry for a clean and circular economy	
– Resource productivity	
– Waste generation in Europe	
– Recycling of municipal waste	
– Use of freshwater resources	
– Employment and added value in the green sector	
Building and renovating in an energy and resource-efficient way	
	No objective in 7 th EAP
A zero-pollution ambition for a toxic-free environment	
– Consumption of chemicals, by hazard class	
– Exposure to environmental noise	
– Emissions of main air pollutants in Europe	

³ 7th Environmental Action Plan <https://ec.europa.eu/environment/action-programme/>

⁴ Green indicates that Europe is likely to meet its objective, orange indicates uncertainty, red indicates it is unlikely that the objective will be reached. Extracted from table S.1 indicator scoreboard of the 7th environmental action Programme thematic priority objective, EEA, Environmental indicator report 2018

– Status of surface waters	
– Bathing water quality	
Preserving and restoring ecosystems and biodiversity	
– Exposure of terrestrial ecosystems to eutrophication due to air pollution	
– Forest stock	
– Abundance and distribution of selected species (birds and butterflies)	
– Status of marine fish and shellfish in European seas	
– Species of European interest	
– Habitats of European interest	
From farm to fork, a fair healthy and environmentally friendly food system	
– Total sales of pesticides	
– Animal product consumption	
– Land take	
– Gross nutrient balance in agricultural land: nitrogen	
Accelerating the shift to sustainable and smart mobility	
– Exceedance of air pollution standards in urban areas	
– GHG from transport	
Financing the transition	
– Share of environmental and labour taxes in total tax revenues	
– Environmental protection expenditure in Europe	
Leaving no one behind	
	No objective in 7 th EAP
Mobilising research and fostering innovation	
	No objective in 7 th EAP

While the European Green Deal covers several environmental objectives, the von der Leyen Commission has so far prioritised the objective of carbon neutrality by 2050, with the intermediate goal of a net reduction of greenhouse gas (GHG) emissions of 55% below 1990 levels by 2030. It has also attempted to resolve the long-standing debate between growth and the environment by calling the European Green Deal Europe's new growth strategy.

In the context of the COVID-19 crisis, the European Green Deal, along with digitalisation, has also become a key priority for public investments for Europe’s recovery from the pandemic. In a self-assessment of progress published in December 2020, the European Commission concludes the following:

“In the first 100 days of the mandate, we presented the European Green Deal and its first building blocks: we committed to making Europe the first carbon-neutral continent by 2050. [...] With this initiative, the EU has embarked on the **greatest transition by design** in its history. [...] Europe needs a **new growth strategy** that transforms the Union into a modern, resource-efficient and competitive economy that works for people.”

This self-assessment also specifies that 94 proposals from the EC had been adopted and 189 were still pending after the first 12 months of its mandate.⁵ This achievement, quite impressive by EU standards, reflects the ambition of the current Commission as well as the unprecedented external context. The European Commission highlights the following 17 proposals under the heading of the European Green Deal, see Table 2.

Table 2: European Green Deal proposals as of January 2021

Date	Name	Type of proposal	Status as of 31 January 2021
14.01	European Green Deal Investment plan	Budget	Negotiations ongoing
	Just Transition Mechanism	Funds	Adopted, ongoing till 2027
04.03	European Climate Law	Regulation	EC reviewing by June 2021
	European Climate Pact	Initiative	To be launched in 2021
10.03	EU Industrial Strategy	Strategy	Adopted in March 2020
11.03	Circular Economy Action Plan	Action plan	Adopted in March 2020
20.05	Biodiversity Strategy	Strategy	Adopted in May 2020
	Farm to Fork Strategy		
27.05	Next Generation EU	Budget	EC to commit the Funds
08.07	EU Strategy for Energy System Integration	Strategy	Adopted in July 2020
	Hydrogen Strategy	Strategy	Adopted in July 2020

⁵ Von der Leyen Commission: one year on. https://ec.europa.eu/info/about-european-commission/what-european-commission-does/delivering-political-priorities/first-year-von-der-leyen-commission_en

21.07	Recovery Plan and Multi-annual Financial Framework (21-27)	Budget	Adopted, ongoing till 2027
17.09	55% net emissions reductions below 1990 by 2030	Regulation	Under negotiation at Council and Parliament
14.10	Renovation Wave Strategy EU Chemicals Strategy Methane Strategy	Strategy	Published in October 2020



3

The view from close to 300 sustainability experts

To contribute to the debate regarding the state of the European Green Deal one year after its launch, IEEP and Globescan ran a pan-European survey, with support from the Think Sustainable Europe network, the European Environmental Agency (EEA), Climate Action Network Europe (CAN Europe), WWF European Policy Office (WWF EPO), Cambridge Institute for Sustainable Leadership (CISL), the Assembly of European Regions (AER), the European Environment and Sustainable Development Advisory Councils Network (EEAC) and the Climate Alliance.

3.1

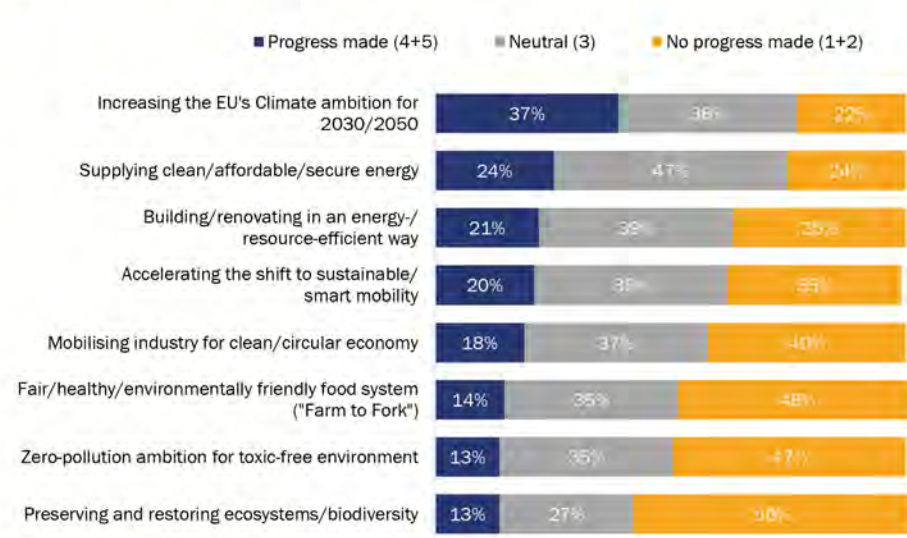
The purpose of the survey was to gauge the potential pathways for delivering on the European Green Deal objectives by collecting views on the top issues and priorities from a diverse set of stakeholders, including governments and regulators, research institutes, academia, non-governmental organisations, non-profits, foundations, and the private sector. The survey is set to become an annual or biannual series to analyse the progress and identify further gaps and opportunities, serving as a “confidence barometer” on the European Green Deal implementation. The details of the respondents and the methodology can be found in the Annex.

Uneven progress across the thematic pillars of the European Green deal

Stakeholders see the greatest amount of progress made in **“Increasing the EU’s climate ambition for 2030 and 2050”** followed by **“Suppling clean, affordable, and secure energy.”**

Such a positive assessment is good news for the European Commission which made the climate law, and the -55% 2030 target the cornerstone of its Green Deal implementation strategy.

Progress Made on Each Area



Base: n=295
 Question: Q15, How much progress has been made on each of the following areas? Closed question, 5-pt rating scale.

However, the perception of progress within the climate dossier contrasts with “Preserving and restoring ecosystems and biodiversity” where **nearly six in ten believe that no progress has been made**, even though the EC’s new proposal is by far the most ambitious in this regard.

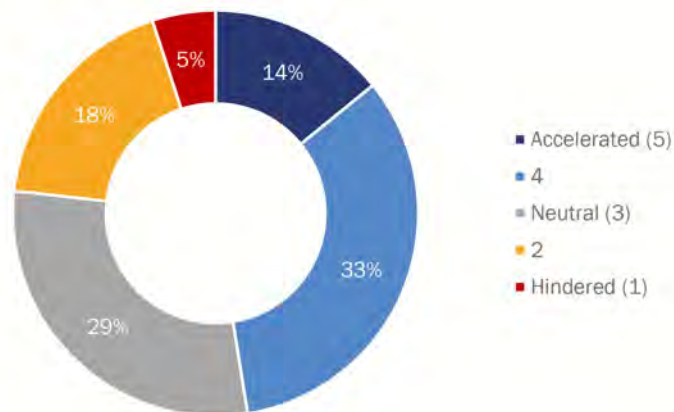
This might be due to the disappointing outcomes of the ongoing CAP discussion (whose negative impact on biodiversity is well-researched) or doubts about the levels of funding for implementation of the biodiversity strategy or support by Member States of the new EC proposals.

3.2

The pandemic as an accelerator of the transition?

Almost half of the experts who responded to the survey see the pandemic as an accelerator for the green transition, while only 5% believe the pandemic has significantly hindered the implementation of the European Green Deal.

Impact of the Pandemic on the EU Sustainability Agenda



Base: n=295
Question: Q13. In your opinion, what will be the impact of the pandemic on the EU sustainability agenda and the green transition? Closed questions, 5-pt rating scale.

At the same time, survey respondents identify the current recessionary context as the fourth biggest barrier to the implementation of the European Green Deal. To address this challenge, a key recommendation of this report is to ensure that the award and

use of recovery funds are focused on low-carbon and environmental projects.

In this regard, preliminary data provides a mixed picture. While UNEP's 2020 Emission gap report shines a rather positive light on the EU's recovery package, it is mostly because the green performance of other key countries' packages has been extremely disappointing⁶ (see Figure A in the Annex).

At a member state level, when analysing the German economic recovery package presented in June 2020, by far the biggest recovery package in Europe, PBL concludes that just over 30% of measures could be deemed as green (see Figure B in the Annex)⁷ In France, support to the agroecological transition will only represent less than 1% of the total recovery package⁸.

3.3

The European Green Deal as an opportunity for Europe

For around four in ten stakeholders, **promoting low-carbon, circular supply chains in key emitting sectors** is among the most positive opportunities that the European Green Deal provides. In addition to this, over a quarter of respondents identify **private sector investment and accountability**, a key agenda item on Europe's agenda in 2021 as a key point of leverage.

The EU's global leadership is a third key opportunity identified by respondents, which makes sense in the current international context in which the new Biden administration creates new opportunities for the internationalization of the European Green Deal. For stakeholders outside Europe, the top opportunity is **strategic independence**—an issue which is now rising on Europe's agenda, with the new concept of "strategic open autonomy".

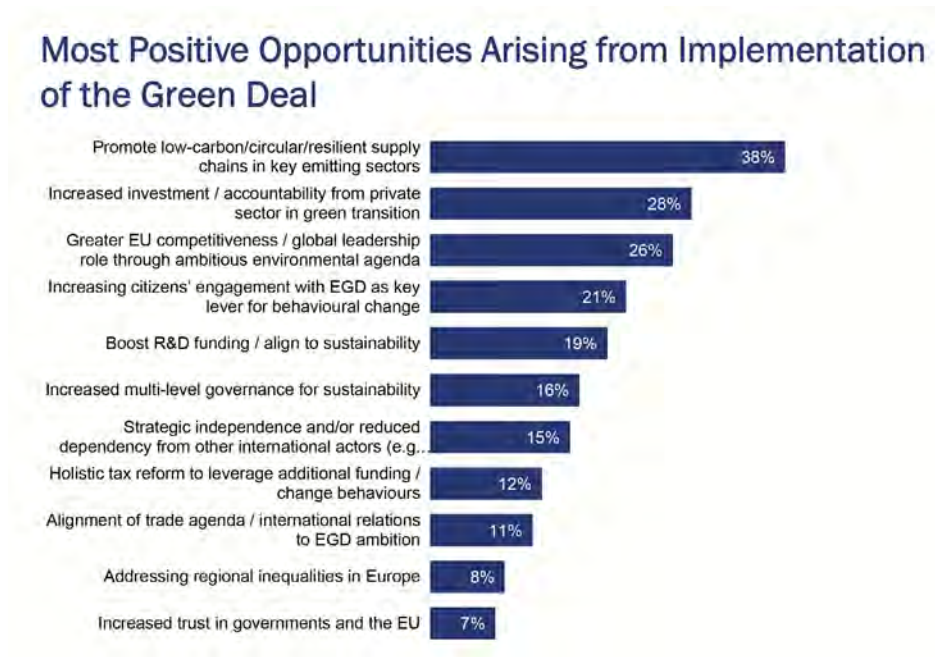
⁶ <https://wedocs.unep.org/xmlui/bitstream/handle/20.500.11822/34430/EGR20ch4.pdf?sequence=3>

⁷ https://www.pbl.nl/sites/default/files/downloads/pbl-new-climate-institute-2020-exploring-the-impact-of-covid-19-pandemic-on-global-emission-projections_4231.pdf

⁸ <https://www.iddri.org/fr/publications-et-evenements/billet-de-blog/un-plan-de-relance-timide-face-aux-enjeux-de-la>

How the EU can best assert its leadership will be a key debate for 2021 in a context marked by the debates around the Carbon Border Adjustment Mechanism (CBAM) and the renewed tensions between the United States and China.

Respondents to the survey recommend that the EU position itself as a global environmental sustainability standard-setter and market creator as well as a champion of the circular economy-related trade cooperation and diplomacy.



Base: n=295
 Question: Q5, Which two of the following are the most positive opportunities that would arise from implementing the Green Deal?
 Closed question, ranking (top two)

3.4

Mobilising industry for a clean and circular economy as a catalyser for the European Green Deal

This importance given to promoting low-carbon, circular, resilient supply chains is consistent with respondents' ranking of priorities for accelerating Green Deal implementation, which see the mobilisation of the industry for a clean and circular economy as the highest priority for Europe. This is also consistent with the fact that respondents see the EU's competitive advantage to primarily be in circular economy solutions and climate-positive solutions in energy.

Priorities For the EU to Catalyse the Whole Deal

% selected as one of top two priorities



Base: n=294

Question: Q16. Which two of the following should be prioritised by the European Commission as key catalysers for implementing the whole deal? Closed question, selected as one of top two priorities.

3.5

Food systems, biodiversity and zero pollution as the Achilles heels of the European Green Deal?

While respondents see food systems and biodiversity as a priority (3rd and 5th in the ranking), progress is also seen as extremely limited and the science-policy gap is a major concern by respondents. **This suggests that these two areas should become a major focus for the European Institutions in 2021.**

One area of concern is that **biodiversity is mostly supported as a priority by NGOs and think tanks, contrary to other stakeholders.** The relative lack of priority given by governments and the private sector to biodiversity does not bode well for the successful implementation of Europe's new strategy in that area and suggests that the European Commission still faces a major barrier in terms of awareness-raising in this area.

In this context, the key recommendation by respondents related to biodiversity is to boost investment in nature-based solutions by defining criteria for economic activities that contribute to protecting biodiversity and ecosystems.

This would certainly help to translate the complexity of the biodiversity agenda into practical actions with which both public authorities and the private sector can engage in the post-COVID recovery context.

In terms of food systems, the key recommendation from the survey is to **align the post-2020 CAP reform with the Farm to Fork strategy**. Given that agriculture is a major driver of biodiversity loss, such alignment would also produce positive benefits for biodiversity.

It is also striking that the **'zero pollution' ambition** is not seen as a priority despite the perceived lack of progress made in this area, which suggests either a lack of familiarity of the respondents with this topic or scepticism about the approach chosen by the European Commission and the EU's ability to make progress. This is quite concerning as this specific file is one of the highest concerns of citizens in terms of health and key to enabling the successful implementation of the biodiversity and 'Farm to Fork' strategies.

3.6

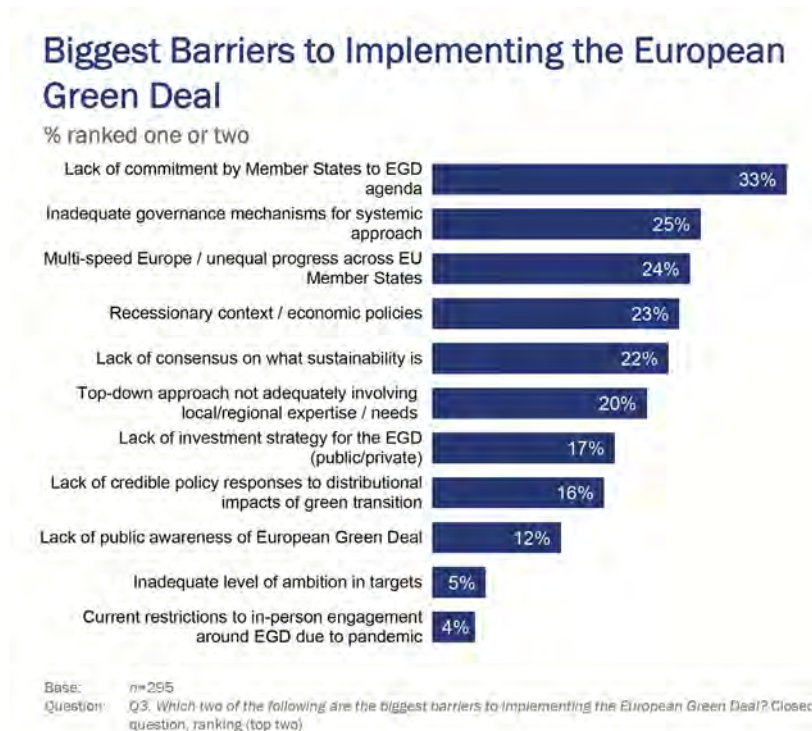
A lack of commitment by the Member States to the European Green Deal agenda

The lack of commitment by the Member States is seen as the biggest barrier to the implementation of the Green Deal. Respondents also believe that governance mechanisms are inadequate for the systemic approach required for the Green Deal implementation.

Respondents also noted different levels of capacity and willingness amongst the Member States as a cause for concern. More than half of the respondents also think that **Germany and Scandinavian countries** are the most likely to do their fair share to implement the Deal, while Eastern European countries, particularly Poland and Hungary, are seen as the least likely contributors.

However, for respondents from Southern and Eastern Europe, the **unequal progress made across the Member States** stands as the biggest hurdle – suggesting that many countries in these regions feel they are lagging behind.

Biggest barriers to implementing the European Green Deal, ranked 1 or 2, all stakeholders, globally, 2020/21



3.7

Mind the science-policy gap

The survey signals concern about the **gap between – on the one hand – the ambitious discourse of the Green Deal and the requirements of science-based policy-making, and – on the other hand – the reality of the legislative proposals or investments on the table.**

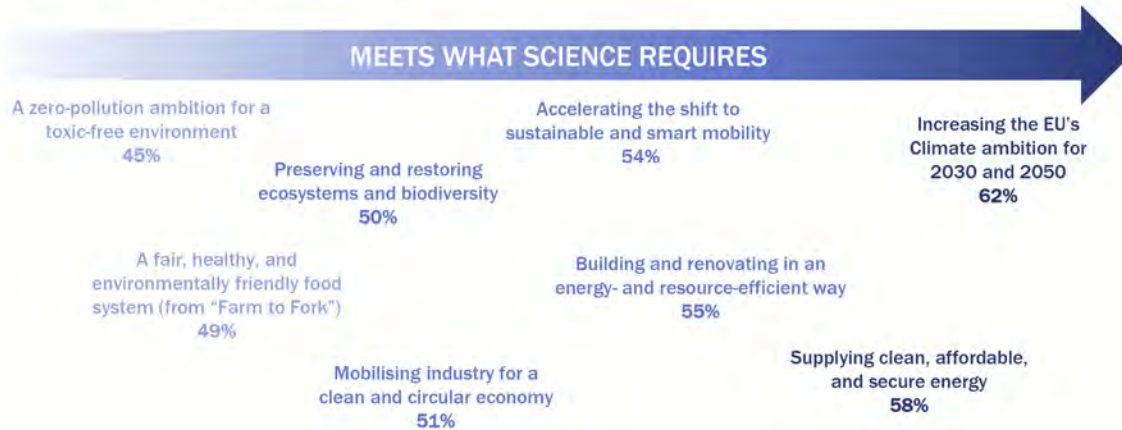
Among the biggest gaps identified by respondents was the discrepancy between the CAP reform orientation within the ongoing trilogues and the objectives of the 'Farm to Fork' and biodiversity strategies.

This suggests that despite the European Green Deal, Member States' strong push for maintaining the status quo and business-as-usual are still winning over the need for strategic changes in our food systems.

The largest gap of all between the requirements of science and the Green Deal proposals was seen in relation to the ‘zero pollution’ ambition.

Extent to Which EU Green Deal Proposals Meet What Science Requires

“Well” and “Very well” (4+5 on a 5-pt scale)



Base: n=294

Question: Q14. We are now going to explore some of the current European Green Deal proposals. How well do you think each of the following proposals currently meet what science requires? Closed question, 5-pt rating scale.

3.8

Awareness raising and consensus-building around the European Green Deal

Given the nature of the survey partners and their constituencies, which are largely sustainability experts, it is striking to realise that less than half of the respondents felt that they were familiar with the European Green Deal as a whole. Even more concerning is the fact that **government stakeholders and regulators are the least familiar with the European Green Deal** – with less than four in ten saying they are familiar with the European Green Deal. One hypothesis is that regulators believe that the European Green Deal is a top-down agenda, that has been poorly communicated with a lack of clarity on implementation plans explaining the interlinkages and sequencing between the various pieces of EU legislation and their implementation at the national level has not yet been thought through in enough details.

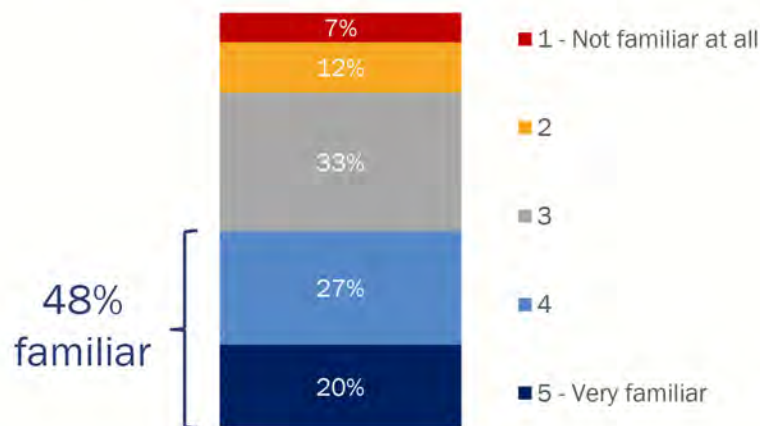
It is also notable that those most familiar with the European Green Deal are also those most positive about progress being made. This should encourage the European Commission to invest

more in this area as a strategy to gain support for its agenda, especially amongst governments of Member States. It is also important to note that views differ widely between different regions of Europe and stakeholders suggesting that **consensus-building** remains critical.

If sustainability experts are not familiar with the European Green Deal, it is highly likely that ordinary citizens are totally in the dark regarding the European Green Deal. Respondents from Eastern and Southern Europe see the **engagement of citizens** as one of the top three opportunities to implement the European Green Deal.

Given the transformative ambition of the European Green Deal, this suggests that the European Commission and the Member

Familiarity with the European Green Deal



Base: n=295
Question: Q1. How familiar are you with the European Green Deal (as presented by Ursula von der Leyen in 2019)? Closed question, 5-pt rating scale

States, together with other key stakeholders such as local authorities, businesses, NGOs, the knowledge community and trade unions, have a **major challenge** ahead.

The recently launched **Climate Pact** could be an opportunity to bridge the gap, as well as the Future of Europe conference process. Key lessons from past awareness-raising campaigns must be fully reflected upon. For example, 'megaphone' communication campaigns, which risk being perceived as marketing attempts for Europe, are very unlikely to succeed.

3.9

Instead, putting the citizen at the centre of the European Green Deal through direct empowerment of relevant intermediaries (such as grassroots CSOs working at the local level within Member States) within European Green Deal communication campaigns, innovative democratic consultative mechanisms at Member State and local level (such as the *convention citoyenne* in France), new citizen engagement strategies (such as the European Commission's hackathon⁹) and greater direct actionability for the European Green Deal for citizens (for instance a European Green Deal bond accessible to all citizens) are options worth considering.

A marathon rather than a sprint

The European Green Deal requires transformative change in many sectors as well as integrated implementation plans at the European, national and local level.

In fact, 7 out of 10 respondents think **it is unlikely for the European Green Deal to be implemented by 2024**. Respondents in Northern European countries express the most reservations about the European Green Deal being implemented by 2024.

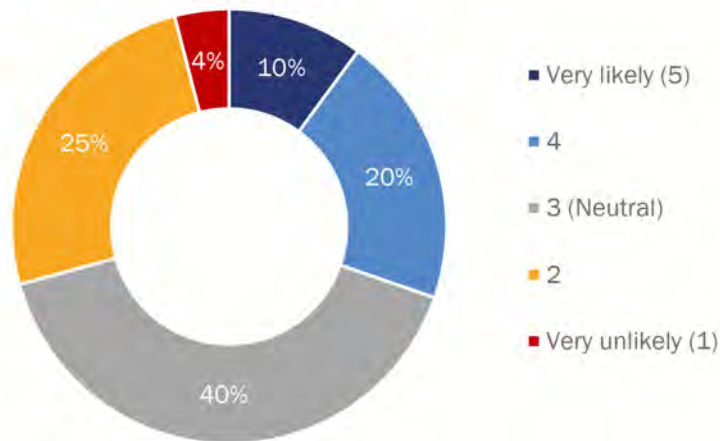
In contrast, Eastern European¹⁰ respondents, as well as stakeholders outside of Europe, are more positive. Government stakeholders are the most sceptical about the likelihood of the European Green Deal being implemented by 2024, with only one in five thinking it will be implemented in this timespan. In contrast, around a third of academics and corporates think implementation by 2024 is likely.

⁹ (On 12 and 13 February 2021, the European Commission organised the "Objectif Green Deal" Hackathon open to 18–30-year-olds in France. The challenge was to inform the population about the European Green Deal for Europe. More than 140 participants took part and 47 projects got submitted, https://ec.europa.eu/france/events/20210212/hackathon_objectif_green_deal_fr

¹⁰ All outcomes regarding Eastern Europe (24 respondents) need to be interpreted with caution as the survey sample is too small to be significant.

Except for policy issues that have a 2030 target, there is an ongoing debate as to what will happen with other European Green Deal initiatives at the end of the European Commission, in 2024. This is why many voices, including some member states, are calling for an extension of the European Green Deal to 2030, with a review before the end of the current Commission.

Likelihood the European Green Deal will be Implemented by 2024



Base: n=295
 Question: Q2. 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

3.10

Key actors

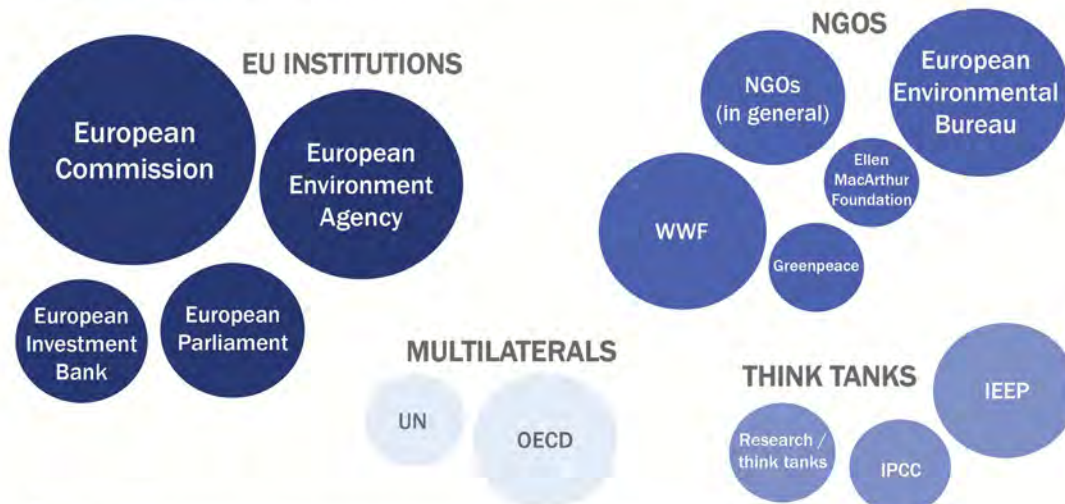
Almost 9 in 10 consider the European Commission to be important in implementing the European Green Deal by 2024, followed by European Parliament and the European Council. It will continue to be a major challenge for the European Commission in 2021 to relate to both the Parliament and the Council in such a way that it avoids a watering down of European Green Deal proposals or continuous postponement of key decisions. This will be particularly difficult in a political context that will be marked by the German elections in September 2021.

Over 9 in 10 consider the Member States to be important in the implementation of the European Green Deal by 2024, followed by the private sector, local and regional authorities and citizens. Organisations perceived as the most effective in supporting the implementation so far also include institutions like

the European Environment Agency, NGOs and think tanks, as shown below.

Organisations that Have Been Most Effective in Helping Implement the Green Deal

Verbatims, total mentions, grouped according to organisation type
The larger the bubble, the greater frequency of mentions



Base: n=295
Question: Q9. Please name any specific organisations (private or public sector) that have been most effective in helping implement the European Green Deal. Open question, unprompted.



4

Policy recommendations

Respondents were asked to prioritise policy recommendations for accelerating Green Deal's implementation in currently overlooked areas, which were identified at last year's Think2030 conference¹¹ (see details of the questions in the full version of the survey). The resulting **top 10 recommendations are as follows:**

¹¹ The [second Think2030 conference](#) took place online on 16 and 17 November 2020. It was organised by the Ecologic Institute, the Institute for European Environmental Policy and TMG – Think Tank for Sustainability.

Financing the transition:

- **Ensure that the award and use of recovery funds are focused on low-carbon and environmental projects:** Economic evidence suggests that investments in areas such as energy efficiency retrofits, renewable energy deployment, power grid reinforcements, zero-emissions transport, wetland and peatland restoration and reforestation could all be highly effective at getting European economies and employment rapidly going again. They also have the benefit of supporting regionally dispersed employment opportunities, with a low risk of jobs being offshored. However, a robust scrutiny regime will be essential to ensure that stimulus investments are genuinely directed towards activities with a positive climate and environmental impact.

Mobilising industry for a clean and circular economy:

- **Mainstream a circular economy approach in the EU industrial strategy:** Increasing global competitiveness of European industries is a key objective of the new EU Industrial Strategy for a green and digital Europe¹². To further mainstream and substantiate this approach in the revised proposal of the EU Industrial Strategy foreseen for late April 2021, further clarifications are needed on how such a change can be achieved.
- **Develop a comprehensive European policy for sustainable consumption—with an ambitious reduction target in per-capita material footprint by 2050.**¹³ If increased consumption is met with today's business models, even with the continuation of current patterns of relative resource decoupling, global resource use would triple by 2050 compared to a 2000 baseline,¹⁴ with Europe being a major contributor to this trend. The development of a sustainable consumption policy could be kickstarted through a communication on sustainable consumption, to be developed as part of Europe's strategy for

¹² European Commission, [European industrial strategy 2020: using the green and digital transformations to empower industry and small and medium-sized enterprises \(SMEs\)](#) (2020)

¹³ Add a footnote on methodologies

¹⁴ <https://files.wri.org/s3fs-public/elephant-in-the-boardroom.pdf>

promoting a new European Way of Life, as part of Europe's new consumer agenda, which calls for empowering consumers during the green transition.

From farm to fork:

- **Align the post-2020 CAP reform with the 'Farm to Fork' strategy, and ensure overall alignment of national CAP strategic plans with the EU's long-term sustainability strategies:** Phasing out environmentally harmful subsidies will be key as well as aligning any remaining subsidies in line with carbon neutrality. CAP strategic plans (CSPs) offer a unique opportunity to bridge different strategic objectives and goals together and support their implementation through one of the largest funding and delivery mechanisms available in the EU.

Preserving and restoring ecosystems and biodiversity:

- **Boost investment in nature-based solutions by defining and applying criteria for economic activities that contribute to protecting biodiversity and ecosystems:** Building from the taxonomy Regulation by adopting clear thresholds and criteria for economic activities that cause no significant harm and substantially contribute to protecting and restoring biodiversity and ecosystems is essential to leverage both public and private investments in nature-based solutions.

Leaving no one behind:

- **Ensure social and territorial inclusion by offering guidance on how to enable local and regional authorities to adopt an integrated approach to Green Deal implementation:** The EU could offer guidance on how to enable local and regional authorities to adopt a genuinely integrated approach that addresses a range of shared challenges more coherently and effectively. This could help to feed a healthy democratic debate, particularly in Central and Eastern Europe about the best allocation of responsibilities between governments and help to guide the principle of subsidiarity within countries.
- **Provide and act on long-term assessments of current public policy to ensure intergenerational equity:** The goal of

which should be to provide detailed estimates of the social, economic and environmental costs passed onto young and future generations depending on the levels of current climate action. This should be achieved through modelling various policy interactions under a variety of sustainability narratives (i.e. BAU, Green Growth¹⁵, European Green Deal, Post-Growth) to identify synergies, trade-offs and co-dependencies (direct or implied).

Global challenges:

- **Champion circular-economy related trade cooperation and diplomacy:** Cooperation on the circular economy, aimed at positioning the EU as a global environmental sustainability standard-setter and market creator, will provide a concrete and powerful way forward for the implementation of EU FTA's sustainable development objectives. It will support both the global circular economy and the 'greening' of EU trade more broadly. This would both benefit the EU's own shift to circularity (e.g. ensure imports matching with EU standards) and also help to demonstrate EU leadership in promoting sustainable trade globally.

Governance of the European Green Deal:

- **Develop a harmonized and SDG aligned monitoring framework to track progress on implementation of the European Green Deal:** Headline indicators must be developed and implemented as part of one coherent set of indicators on the six priorities of the European Commission. This enhanced, SDG-aligned monitoring framework could be introduced by the end of 2021 and must be coherent with other monitoring processes (e.g. 8th EAP and the semester) for the European Green Deal specifically, the indicator framework should include two types of indicators: (a) indicators measuring the distance to targets and (b) indicators monitoring means of implementation.

¹⁵ D'Alessandro, S., Cieplinski, A., Distefano, T. and Dittmer, K., 2020. Feasible alternatives to green growth. *Nature Sustainability*, 3(4), pp.329-335.

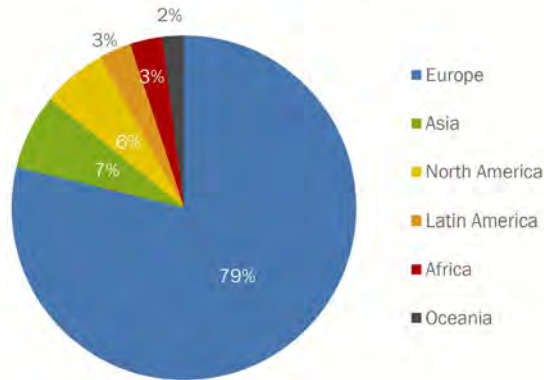
Methodological note

The responses were collected from December 2020 to January 2021 via an online survey. In total 295 sustainability experts participated, the majority of whom are based in Europe although there was also representation from Asia, North and Latin America, Africa and Oceania.

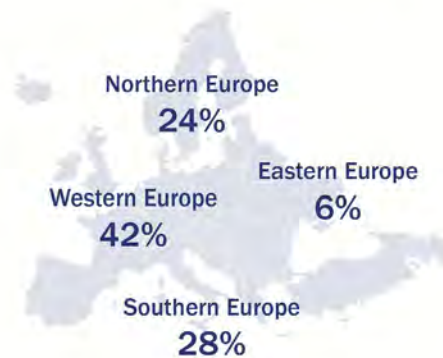
Stakeholder type varied and included those from governments and regulators, academia and think tanks, corporates and industry, regional or international organisations as well as non-governmental organisations, non-profits and foundations. Over half of the sample have been working or studying in the area of EU environmental policy, sustainable development or corporate responsibility for over 10 years, and the majority had multiple years of experience in these areas.

Stakeholder Sample by Geographical Breakdown

Stakeholder sample overview by region (n=295)

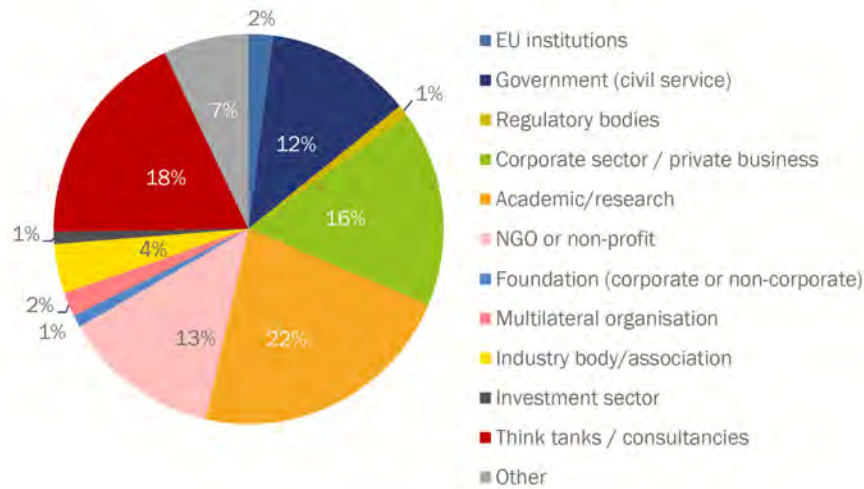


Stakeholder sample within Europe (n=231)



Base: All stakeholders (n=295); European stakeholders (n=231)
 Question: Q39. In which country are you mainly based? Drop down menu, single choice

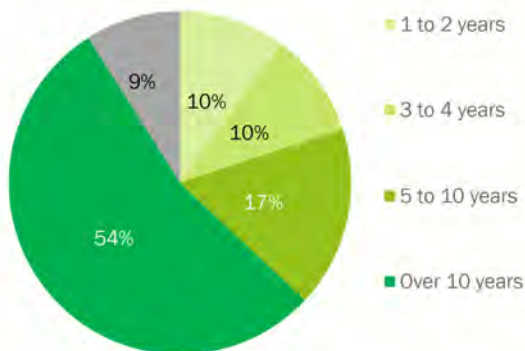
Stakeholder Sample by Type



Base: n=295
 Question: Q38. Which one of the following best describes the sector in which you work?
 Closed question, single choice

Stakeholder Sample by Experience and Area of Expertise

Number of years of experience in sustainability



Base: n=295
 Question: Q40. I have been working or studying in the area of EU environmental policy, sustainable development, or corporate responsibility for [...] Closed question, single choice / Q41. In which of the following broad areas do you have expertise? Closed question, multiple choice

Top five fields of expertise

Sustainability **49%**
 Environment **47%**
 Agriculture **19%**
 Governance **14%**
 Energy **14%**

Figure A: Non-exhaustive overview of total fiscal rescue and recovery measures of G20 members with high-carbon, neutral and low-carbon effects as a share of 2019 GDP (Emissions Gap Report 2020, UNEP)



Note: Oxford Recovery Project refers to the Oxford University Recovery Project (OUPER).

All announcements by the European Council on the NextGenerationEU recovery fund and additional green climate change-related spending in the 2021–2027 Multiannual Financial Framework remain preliminary as at October 2020.

Sources: Climate Action Tracker (2020); IMF (2020a); IMF (2020b); O’Callaghan et al. (2020); Vivid Economics (2020a). Climate Action Tracker data from August 2020, Vivid Economics from August 2020, IMF from September 2020 and Oxford from November 2020.

Figure B: Economic recovery measures in Germany's fiscal stimulus package of 3 June 2020, classified by 'colour type' and sector. (Exploring the impact of the COVID-19 pandemic on global emission projections, PBL Netherlands Environmental Assessment Agency)

