European Green Deal Barometer

Think2030 Survey

Prepared by GlobeScan Incorporated

April 2021

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Introduction, Methodology, and Sample

Background and Objectives

The purpose of the survey is 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 will likely become an annual or biannual series to analyse the progress and identify further gaps and opportunities, serving as a “confidence barometer” on the Green Deal implementation.

The survey forms an integral part of the Think2030 platform, an evidence-based, non-partisan platform of policy experts that aims to become the convenor of the Green Deal Community.

The results of the survey will feed into the Think2030 synthesis paper – a report that collates the findings of the research produced as part of the second Think2030 conference and provides policymakers with clear recommendations on how to achieve climate neutrality for the Europe continent.

Survey Partners

GLOBESCAN

Institute for European Environmental Policy

CAN
CLIMATE ACTION NETWORK
Europe

AER
Assembly of European Regions

ecologic

EEAC

WWF

Climate Alliance

European Environment Agency

UNIVERSITY OF CAMBRIDGE
INSTITUTE FOR
SUSTAINABILITY LEADERSHIP

Methodology

Questionnaire flow and overview

The survey was conducted between December 9th, 2020 and January 25th, 2021. The questionnaire was structured around four distinct sections as outlined below.

01

Macro questions – for annual/biennial tracking

- Familiarity with the EU Green Deal
- Likelihood that the EU Green Deal will be implemented
- Barriers to implementation
- Opportunities arising from the EU Green Deal
- European countries most/ least likely to do their fair share
- Most important organisations and stakeholders for Green Deal implementation

02

Topical and meso questions

- Best EU competitive advantage in sustainability
- Impact of pandemic on EU sustainability agenda
- Extent to which Green Deal proposals meet scientific requirements
- Progress made on Green Deal proposals
- Key catalysers of EU Green Deal

03

Micro questions – deep dive on 10 topics

- EU priorities across following topics: sustainable recovery, environmental sovereignty and security, low-carbon and circular industry, social inclusion in the low-carbon transition, trade in support of circular economy, targets and indicators for Green Deal implementation, overconsumption, sustainable food systems, climate-biodiversity synergies, future generations

04

Demographics

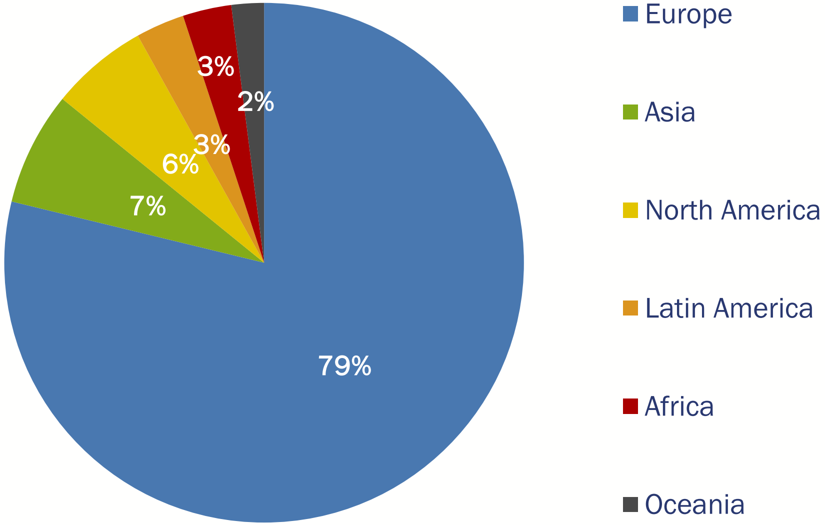
- Stakeholder type
- Region
- Sustainability experience
- Fields of expertise

Overview of Stakeholder Sample

Geographical breakdown

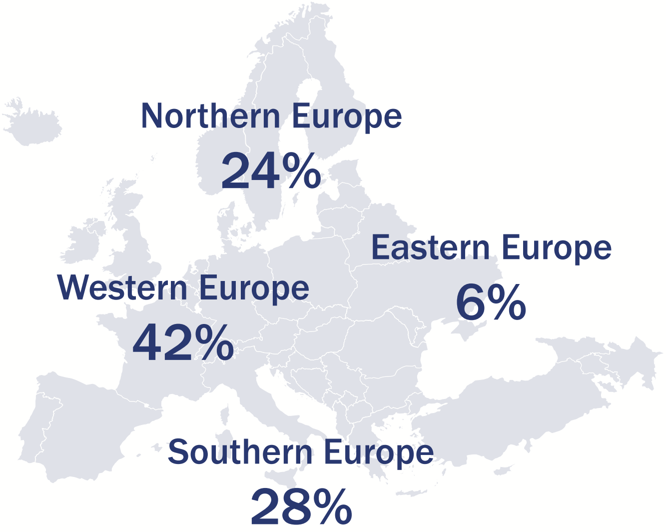
TOTAL SAMPLE
295

Stakeholder sample overview by region, 2020/21



Stakeholder sample within Europe, 2020/21

A breakdown of regional representation within the total, European sample only (n=231)



Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: All stakeholders (*n*=295); European stakeholders (*n*=231)
Question: *Q39. In which country are you mainly based?* Drop down menu, single choice

Overview of Stakeholder Sample

Stakeholder type

TOTAL SAMPLE
295

GOVERNMENTS/REGULATORS
13%
(*n*=39)

REGIONAL/INTERNATIONAL ORGANISATIONS
4%*
(*n*=11)

ACADEMIA / THINK TANKS
40%
(*n*=119)

NGOS / NON-PROFITS / FOUNDATIONS
14%
(*n*=42)

CORPORATE/INDUSTRY
21%
(*n*=62)

Other stakeholders: 8% (other, media, labour / trade union)
*Caution: small sample size (*n*=11)

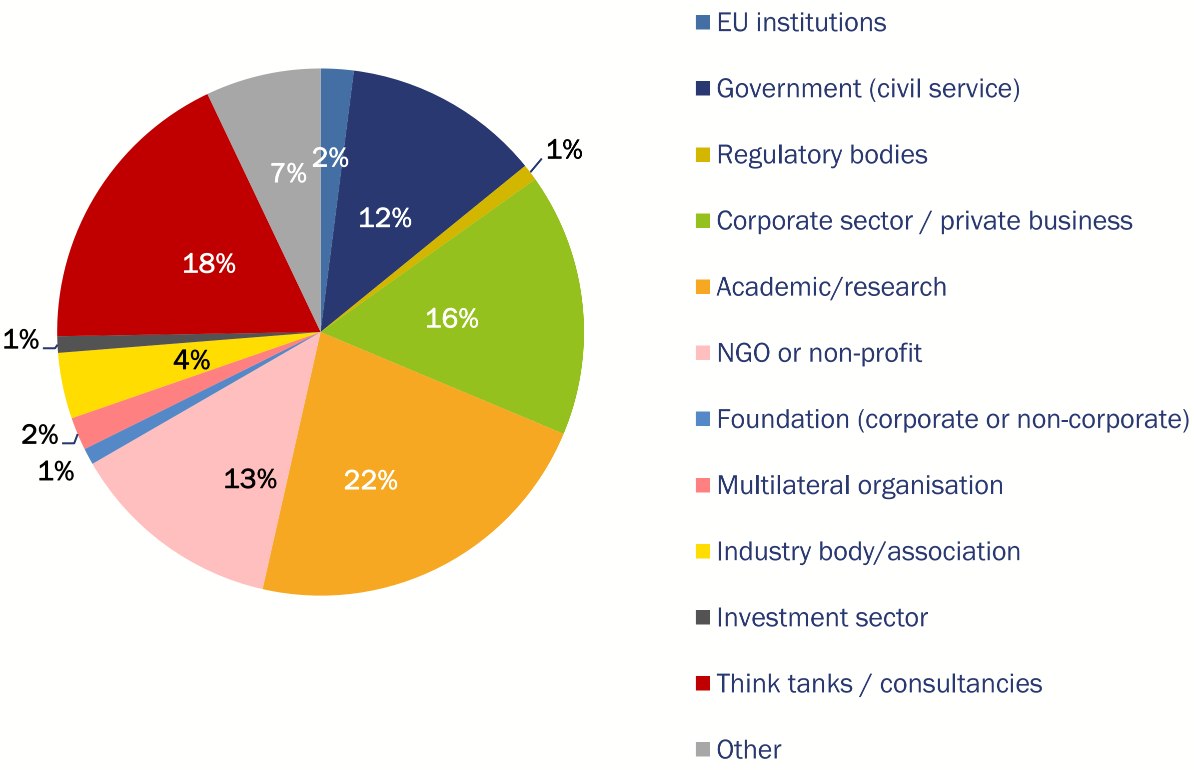
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q38. Which one of the following best describes the sector in which you work?* Closed question, single choice

Overview of Stakeholder Sample

Detailed stakeholder types

TOTAL SAMPLE
295

Stakeholder sample overview by type, globally, 2020/21

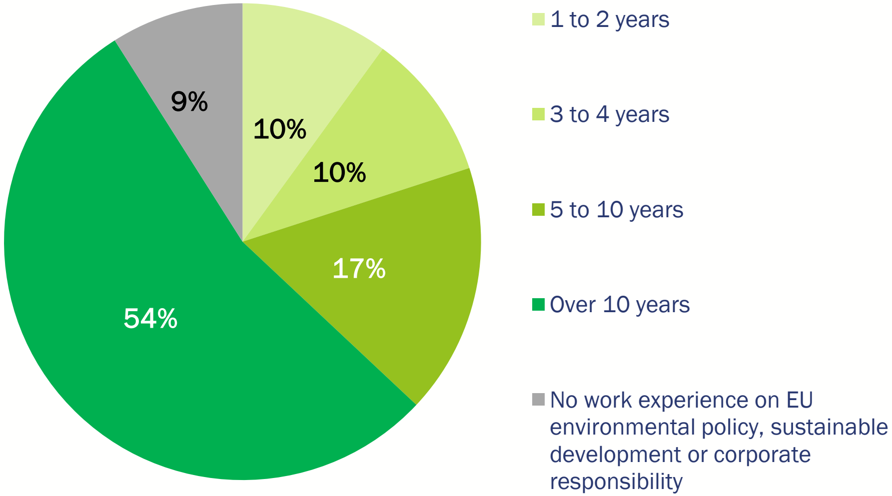


Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q38. Which one of the following best describes the sector in which you work?* Closed question, single choice

Overview of Stakeholder Sample

Sustainability experience and fields of expertise

Number of years of experience in sustainability, globally, 2020/21



Top five fields of expertise, globally, 2020/21

1. Sustainability **49%**
2. Environment **47%**
3. Agriculture **19%**
4. Governance **14%**
5. Energy **14%**

Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base:	*n*=294
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

Familiarity with the European Green Deal

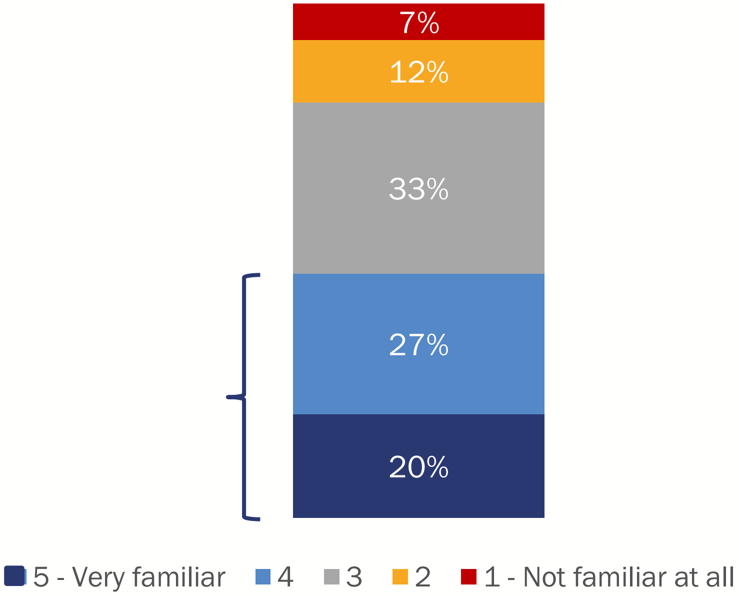
Almost half are familiar with the EU Green Deal

In total, just under half say they are familiar with the European Green Deal and a further third give a neutral score, which suggests that they have some knowledge of the Deal. Only 7 percent say they are not familiar at all.

Familiarity with European Green Deal, all stakeholders, globally, 2020/21

48%

are familiar with the European Green Deal



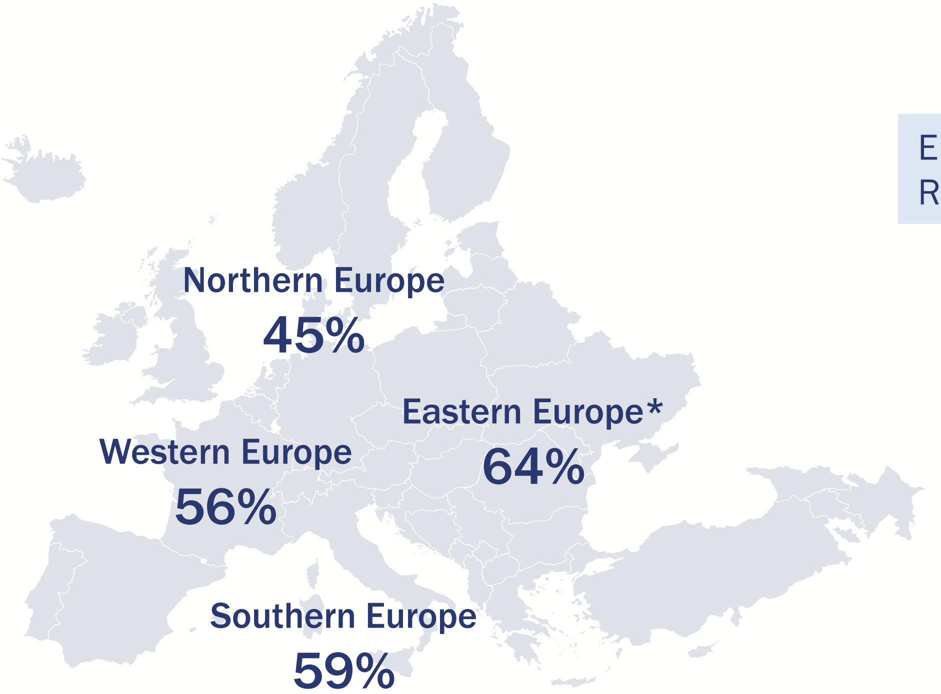
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q1. How familiar are you with the European Green Deal (as presented by Ursula von der Leyen in 2019)?* Closed question, 5-pt rating scale

Familiarity with the European Green Deal

Those in Northern Europe are the least familiar with the Deal

Those in Northern Europe are the least familiar with the European Green Deal while those in Eastern European countries are the most familiar (although the sample is small). Unsurprisingly, those in Europe are more familiar with the Deal overall compared to stakeholders outside of Europe.

Familiarity with European Green Deal (4+5 on a 5-pt scale), all stakeholders, by region, Europe, 2020/21



Europe: **55%**
Rest of World: **22%**

*Caution: small sample size (*n*=14)

Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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

Familiarity with the European Green Deal

Academia and think tanks are the most familiar group; government is the least

Surprisingly, government stakeholders and regulators are the least familiar with the European Green Deal – with only a third of them saying they are familiar with the Green Deal, against about half of other stakeholders. Academia and think tanks appear as the most knowledgeable.

Familiarity with European Green Deal (4+5 on a 5-pt scale), by stakeholder group, globally, 2020/21

48%

are familiar with the European Green Deal

36% GOVERNMENTS/REGULATORS

45% REGIONAL/INTERNATIONAL ORGANISATIONS*

55% ACADEMIA/THINK TANKS

48% NGOS/NON-PROFITS/ FOUNDATIONS

44% CORPORATE/INDUSTRY

*Caution: small sample size (*n*=11)

🟩 Most familiar 🟥 Least familiar

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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*

Summary, Conclusions & Implications

Summary of Findings

MACRO QUESTIONS

- **Just under half of those surveyed are familiar with the European Green Deal** (48%) – there is room to improve knowledge relating to the Deal, particularly among government representatives who claim the lowest level of familiarity. Stakeholders in Europe are more familiar with the Deal overall compared to stakeholders outside of Europe.
- **Only a third of respondents think it is likely the Green Deal will be implemented by 2024**, while the same proportion believe it is unlikely that it will be implemented in this timespan. This finding suggests that many stakeholders are aware of the barriers that need to be overcome in order to implement the Deal.
- The greatest opportunities arising from implementation are promoting **low-carbon, circular supply chains** in key emitting sectors; **private sector investment** and accountability; and **EU global leadership**. Respondents in Southern and Eastern Europe also note citizens' engagement and a boost in R&D funding as key opportunities.
- The biggest barriers are a **lack of commitment from Member States**; **inadequate governance mechanisms**; and **multi-speed Europe** (the latter being particularly true in Southern and Eastern Europe).
- **Germany** and **Scandinavian countries** are seen as being most likely to do their **fair share in the implementation**. In contrast, a number of **Eastern European countries are perceived as being less likely** to do their fair share.
- The **EU Commission** is **considered to be the most important institution** to implement the Deal, closely followed by the EU Parliament and Council of the EU. The EU Commission is also spontaneously mentioned most often as an organisation that has been effective in implementation thus far, followed by the European Environmental Agency and European Environmental Bureau.
- **Governments as well as local and regional authorities** are considered to be **important stakeholders** for implementing the Deal. The role of citizens receives more mixed views and even more so for partner countries. Those outside of Europe are more likely to note the importance of partner countries.

Summary of Findings

MESO & TOPICAL QUESTIONS

TOPICAL

- The EU's competitive advantage according to respondents lies primarily in **circular economy and climate-positive solutions**, but there are differing opinions across stakeholder groups (e.g., NGOs highlight green cities and social justice). However, the difference in priority levels given across many of the areas is not large, suggesting that it is important for the EU to keep all of the areas in mind in the future.

- More respondents believe that the **COVID-19 pandemic has accelerated the green transition** rather than hindered it – the EU can take advantage of this to drive the Deal forward.

MESO

- The proposals around **climate and energy are thought to best meet what science requires,** whereas respondents have more mixed views on whether the proposals around zero pollution and sustainable food systems actually meet science-based objectives.

- Stakeholders see the **greatest amount of progress made** in the areas around increasing **climate ambition** and **suppling clean, affordable, and secure energy**. **Perceived progress**, however, is **limited in almost all the areas** – particularly in ecosystems and biodiversity. Stakeholders who are more familiar with the Deal tend to be more positive regarding progress in many areas.

- A **clean and circular economy is the top priority for the EU to catalyse the whole deal**, followed by clean energy and an environmentally friendly food system.

- **Climate and energy are seen as the EU's strengths to leverage** – all are given high priority status and progress made is strong relative to other areas. In contrast, **biodiversity, food systems, and industry for circular economy are key focus areas** – they are considered high priorities, but progress made is relatively weak.

Key Conclusions and Implications

01

Climate is at the core of the EU's agenda

This area is perceived to be most aligned with science and has the greatest progress made. It is also described as a top competitive advantage for the EU and is a priority area. The EU should continue to leverage its ambitions around climate.

02

Circularity is a key focus area for the EU

This area is identified as the top priority for the EU, but stakeholders see relatively little progress made. Circularity is also thought to be the top opportunity arising from Deal implementation. Action in this area is crucial.

03

Perspective and expectations vary according to stakeholder group

For example, biodiversity and sustainable food systems are high on the agenda for academia and NGOs/non-profits. Taking a deeper look at the different priorities and expectations for each group is therefore important to build consensus around the European Green Deal.

04

Greater progress can be made in all areas

There is room to improve progress made so far in all aspects of the Deal. Boosting progress made is also likely to help increase stakeholder perceptions of the likelihood of implementation of the Deal by 2024. Increasing familiarity with the Deal through stakeholder communication and engagement can help to improve perceptions of progress.

Key Conclusions and Implications

05

EU institutions are crucial to implementation, alongside other organisations & actors

EU institutions are seen to be very important in terms of their role in implementation, but others are also deemed important, including Member States, NGOs, citizens, and the private sector. A collaborative approach is needed, with multi-stakeholder partnerships established and strengthened.

06

An aligned approach to implementation is required

With the greatest barriers cited as being a lack of commitment by Member States, lack of a systemic governance approach, and unequal progress across countries, it is essential that implementation is harmonised and integrated across Europe.

07

The pandemic is an opportunity to accelerate the green transition

The EU can use the post-recovery period to drive the green agenda forward.

08

The EU's green transition must be inclusive

While the survey focuses on environmental challenges, some stakeholders also mention the need to address social inequalities within the transition. With much of GlobeScan's own research showing increasing concern around inequality, it is crucial that future planning and action around the Deal tackles environmental and social challenges altogether – thereby ensuring a just and equitable transition.

Macro Findings

Benchmarks on Implementation, Barriers, Opportunities, Roles

Likelihood of Implementation by 2024

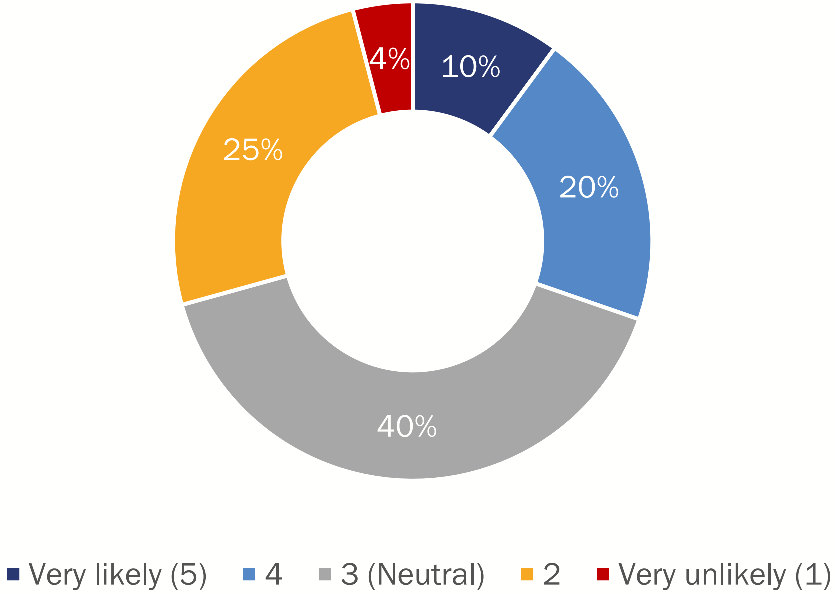
Three in ten think it is likely the EU Green Deal will be implemented by 2024

Only a third of respondents think it is likely the Green Deal will be implemented by 2024 while the same proportion believe it is unlikely that it will be implemented in this timespan.

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

30%

think it is likely the European Green Deal will be implemented by 2024



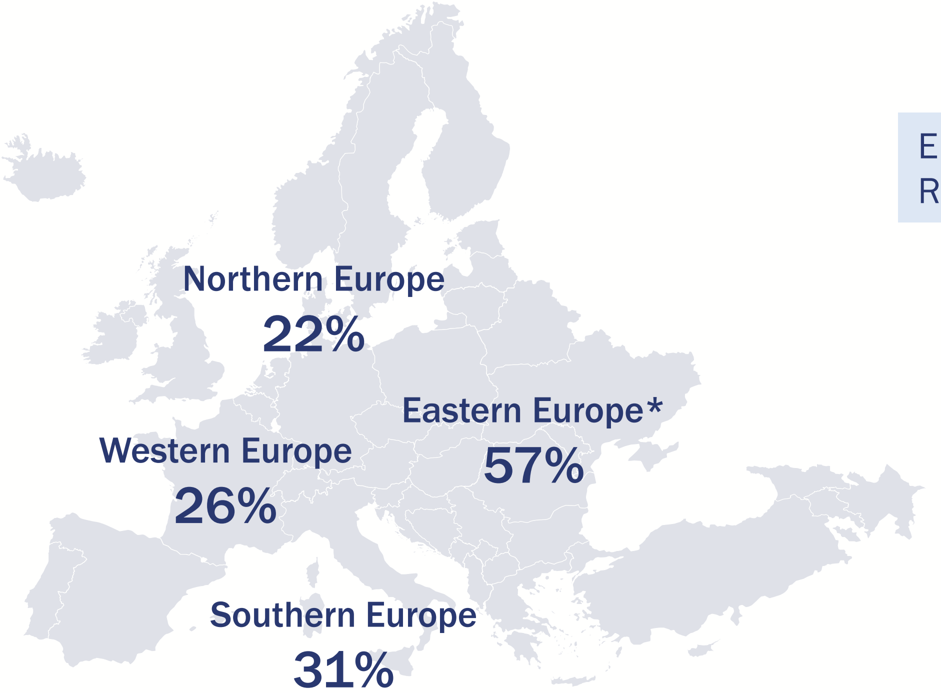
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q2. Please rate the likelihood that the European Green Deal will be implemented by 2024 – that is, translated into science-based targets (SBTs), with corresponding legislation, regulation, and public investment.* Closed question, 5-pt rating scale

Likelihood of Implementation by 2024

Those in Northern Europe are more sceptical regarding implementation by 2024

Northern European countries express the most reservations about the EU Green Deal being implemented by 2024. In contrast, Eastern European stakeholders appear more positive regarding deal implementation. Stakeholders outside of Europe are also more positive than those in Europe.

Likelihood the European Green Deal will be implemented by 2024, (4+5 on a 5-pt scale), Europe, 2020/21



Europe: **28%**
Rest of World: **38%**

*Caution: small sample size (*n*=14)

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=231
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

Likelihood of Implementation by 2024

Corporates are most likely to think the deal will be implemented by 2024

Government stakeholders are the most sceptical about the likelihood of the EU 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.

Likelihood the European Green Deal will be implemented by 2024, (4+5 on a 5-pt scale), by stakeholder group, globally, 2020/21

30%

think it is likely the European Green Deal will be implemented by 2024

21% GOVERNMENTS/REGULATORS

27% REGIONAL/INTERNATIONAL ORGANISATIONS*

31% ACADEMIA/THINK TANKS

26% NGOS/NON-PROFITS/ FOUNDATIONS

35% CORPORATE/INDUSTRY

🟩 Highest likelihood 🟥 Lowest likelihood

*Caution: small sample size (*n*=11)

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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

Green Deal Opportunities

Supply chain transition, private sector investment and EU leadership are key opportunities

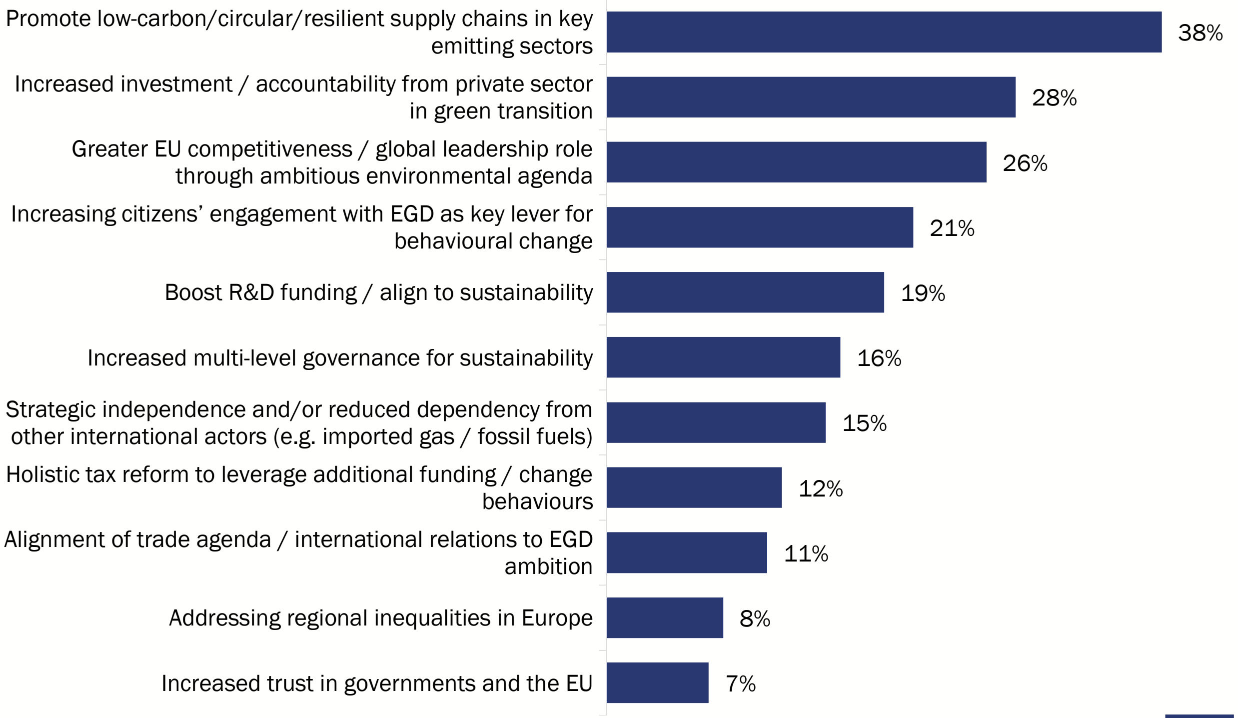
For around four in ten stakeholders, promoting low-carbon, circular supply chains in key emitting sectors is among the most positive opportunities that the Green Deal provides. In addition to this, over a quarter of respondents identify private sector investment and accountability as well as EU global leadership as key opportunities. For stakeholders outside Europe, the top opportunity is strategic independence.

Most positive opportunities arising from the implementation of European Green Deal, ranked 1 or 2, all stakeholders, globally, 2020/21

1 Promote low-carbon, circular, and resilient supply chains in key emitting sectors – 38%

2 Increased investment and accountability from the private sector in the green transition – 28%

3 Greater EU competitiveness / global leadership role through ambitious environmental agenda – 26%



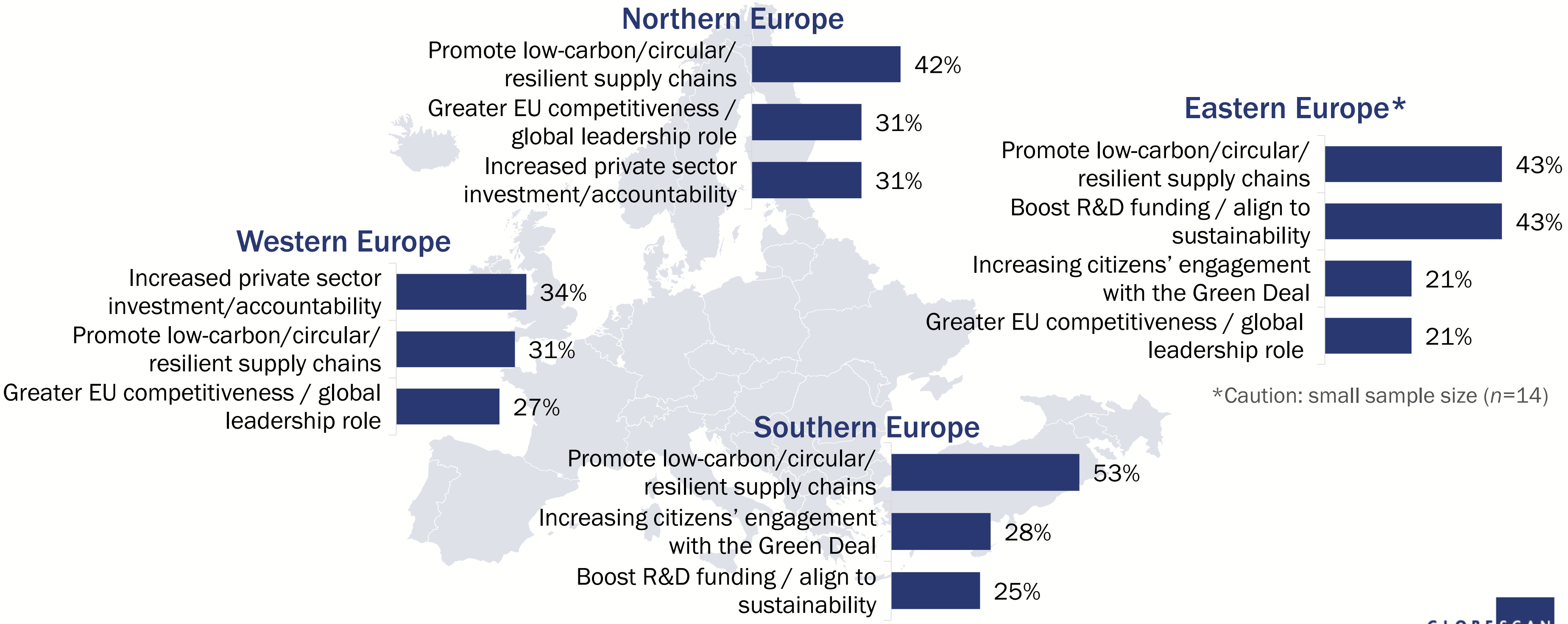
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q5. Which two of the following are the most positive opportunities that would arise from implementing the Green Deal?* Closed question, ranking (top two)

Green Deal Opportunities

R&D funding and citizens’ engagement are key opportunities in Southern and Eastern Europe

Across all parts of Europe, the promotion of low-carbon, circular supply chains is identified as one of the biggest opportunities arising from deal implementation. While EU global leadership and private sector investment are also pointed to by a third of stakeholders in Northern and Western Europe, respondents in Southern and Eastern Europe tend to view citizens’ engagement and R&D funding as greater opportunities.

Most positive opportunities arising from the implementation of European Green Deal, ranked 1 or 2, by region, Europe, 2020/21



*Caution: small sample size (*n*=14)

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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)

Barriers to Green Deal Implementation

Lack of commitment and governance issues identified as biggest hurdles

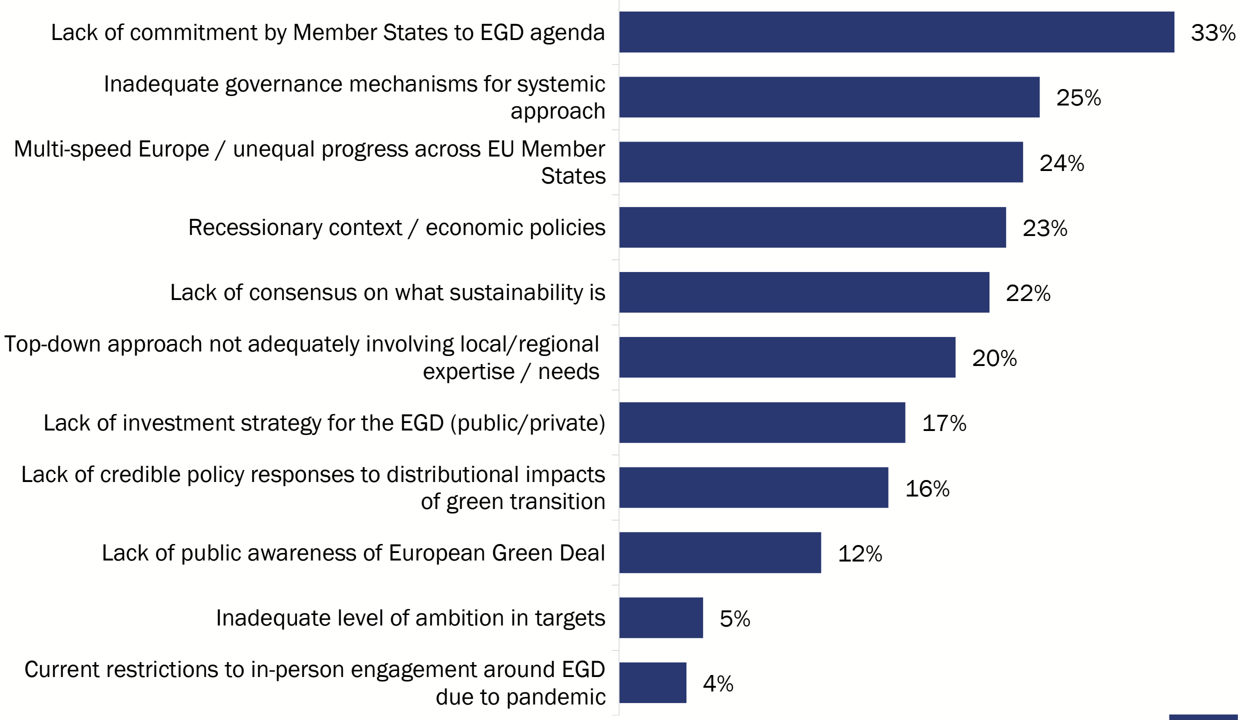
A third of stakeholders point to the lack of commitment by Member States as one of the biggest barriers to Green Deal implementation. One-quarter also identify the lack of a "systemic governance" approach and the ongoing unequal progress across Member States as significant hurdles to implementing the deal. For stakeholders outside Europe, the biggest barrier is the current recessionary context and economic policies.

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

1 **Lack of commitment by Member States to the EGD agenda** – 33%

2 **Inadequate governance mechanisms for systemic approach** – 25%

3 **Multi-speed Europe and unequal progress across EU Member States** – 24%



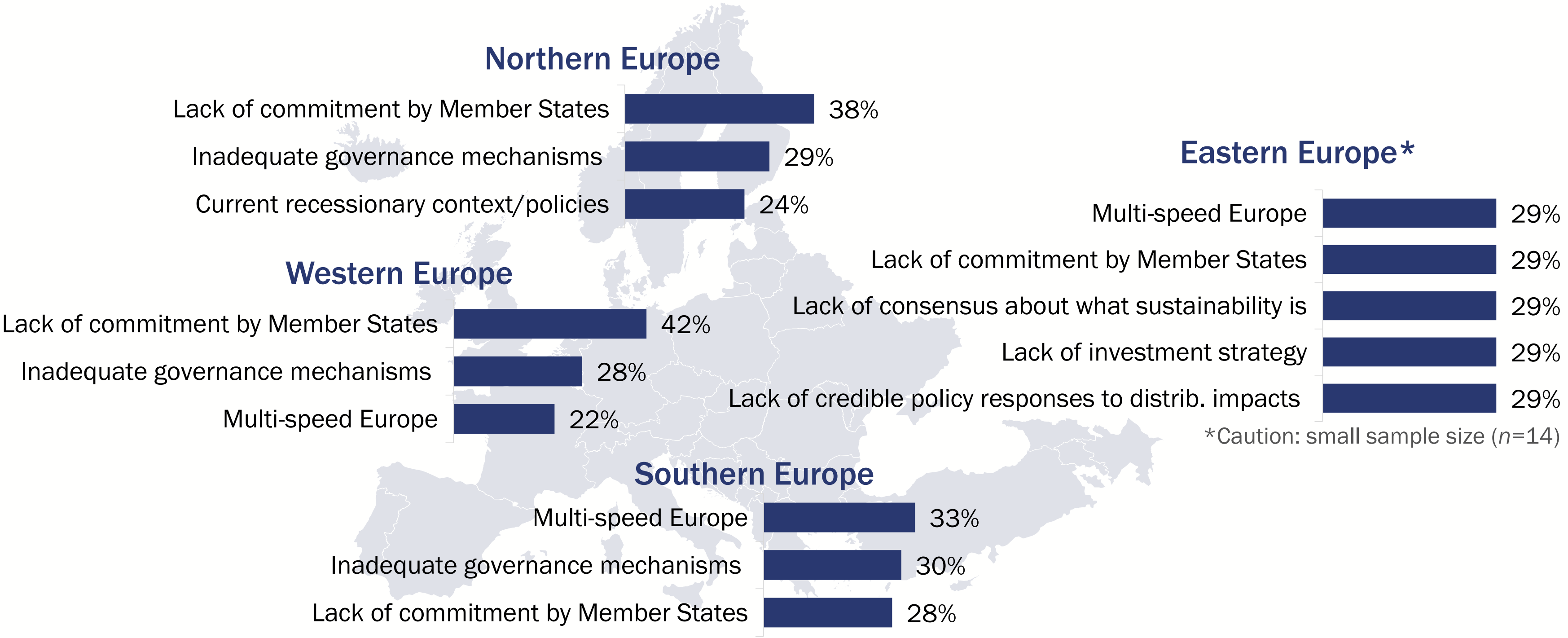
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q3. Which two of the following are the biggest barriers to implementing the European Green Deal?* Closed question, ranking (top two)

Barriers to Green Deal Implementation

Multi-speed Europe identified as biggest barrier in Southern and Eastern Europe

Overall, the lack of commitment by Member States and the governance mechanisms currently in place are recognised as the biggest barriers to implementing the Green Deal across Europe. However, for stakeholders from Southern and Eastern Europe, the unequal progress made across 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, by region, Europe, 2020/21



*Caution: small sample size (*n*=14)

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)

Base: *n*=295

Question: *Q3. Which two of the following are the biggest barriers to implementing the European Green Deal?* Closed question, ranking (top two)

Countries Most and Least Likely to Do Their Fair Share

Germany is most likely to do its share to implement the deal; Poland and Hungary are least likely

More than half of stakeholders point to Germany and Scandinavian countries as being the most likely to do their fair share to implement the deal. In contrast, Eastern European countries are pinpointed as the least-likely contributors, particularly Poland and Hungary.

Countries most likely to do their fair share to implement the European Green Deal, total mentions, all stakeholders, globally, 2020/21

Germany 63%

Sweden 62%

Denmark 55%

Finland 50%

Netherlands 43%

Countries least likely to do their fair share to implement the European Green Deal, total mentions, all stakeholders, globally, 2020/21

Poland 52%

Hungary 52%

Bulgaria 33%

Romania 31%

Greece 22%

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)

Base: *n*=295 at Q7; *n*=294 at Q8

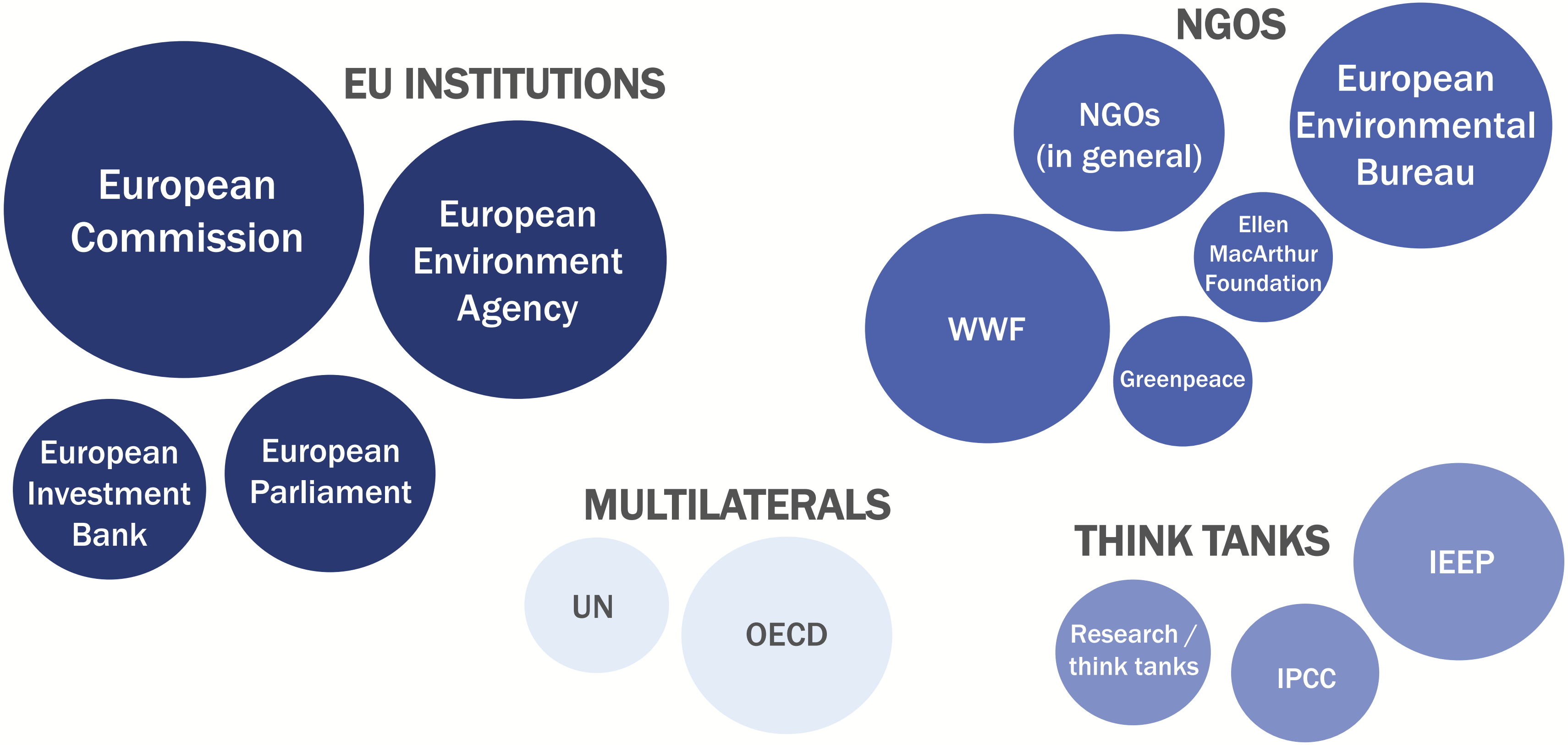
Question: *Q7. Which European countries are most likely to do their fair share to implement the European Green Deal?* Closed question, multiple choice / *Q8. Which European countries are least likely to do their fair share to implement the European Green Deal?* Closed question, multiple choice

Organisations that Have Been Effective in Implementation

EU institutions and NGOs are considered as most helpful in implementing the deal

Verbatims, globally, total mentions, grouped according to organisation type, 2020/21

The larger the bubble, the greater frequency of mentions



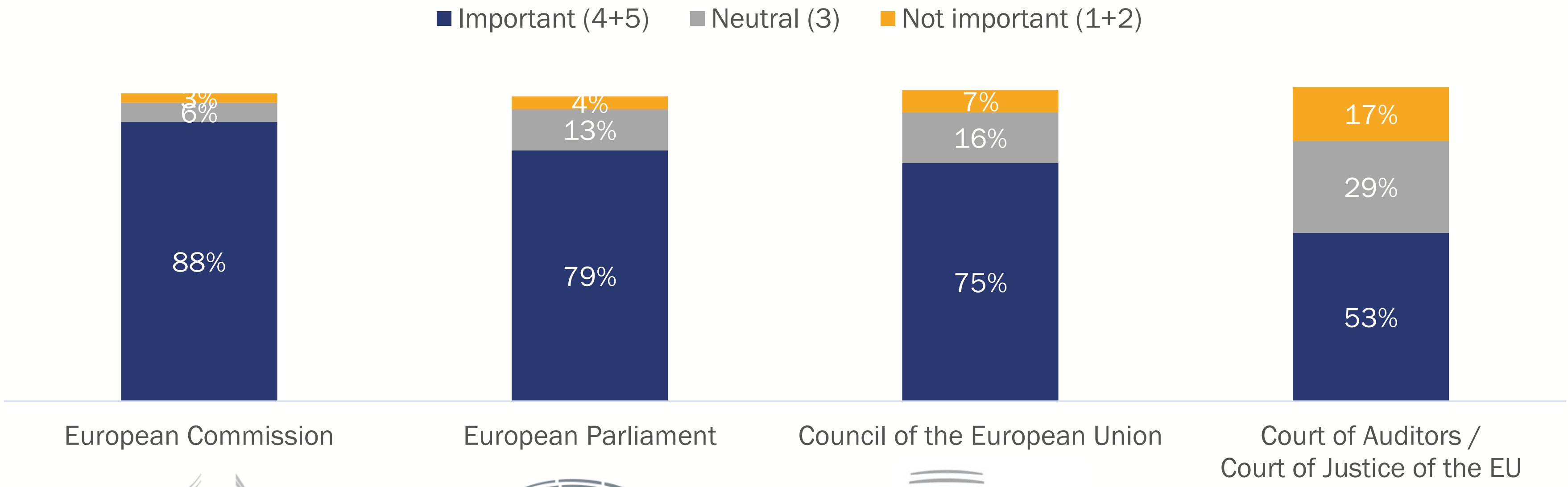
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q9. Please name any specific organisations (private or public sector) that have been most effective in helping implement the European Green Deal.* Open question, unprompted.

Importance of Institutions in Implementation

The European Commission is considered the most important for implementation

Almost nine in ten consider the European Commission important in implementing the EU Green Deal by 2024 – this is endorsed by the finding that the European Commission is mentioned most often as the organisation that has been effective in the implementation of the deal. The Court of Auditors and Court of Justice of the EU is thought to be the least important institution of those shown, with just over half of the sample considering it important.

Importance of institutions in implementing the European Green Deal by 2024, all stakeholders, globally, 2020/21



Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q10. How important will the role of each of the following types of institutions be in making progress toward implementing the European Green Deal by 2024?* Closed question, 5-pt rating scale.

Importance of Institutions in Implementation

Governments are most positive about the role of institutions in implementing the deal

Governments and regulators are the most positive stakeholder group when it comes to rating the importance of EU institutions in implementing the EU Green Deal by 2024. On the other hand, and surprisingly, regional and international organisations are least convinced – particularly regarding the Council of the European Union and the Court of Auditor and Court of Justice of the EU.

Importance of institutions in implementing the European Green Deal by 2024 (“Important,” 4+5 on a 5-pt scale), by stakeholder group, globally, 2020/21

	European Commission	European Parliament	Council of the European Union	CURIA RATIONUM CVRIA
GOVERNMENTS/ REGULATORS	97% 🟩	85% 🟩	82% 🟩	54%
REGIONAL/INTERNATIONAL ORGANISATIONS*	91%	73% 🟥	55% 🟥	18% 🟥
ACADEMIA / THINK TANKS	82% 🟥	79%	76%	55%
NGOS / NON-PROFITS / FOUNDATIONS	90%	81%	79%	62% 🟩
CORPORATE/INDUSTRY	94%	74%	68%	44%

*Caution: small sample size (*n*=11)

🟩 Highest score 🟥 Lowest score

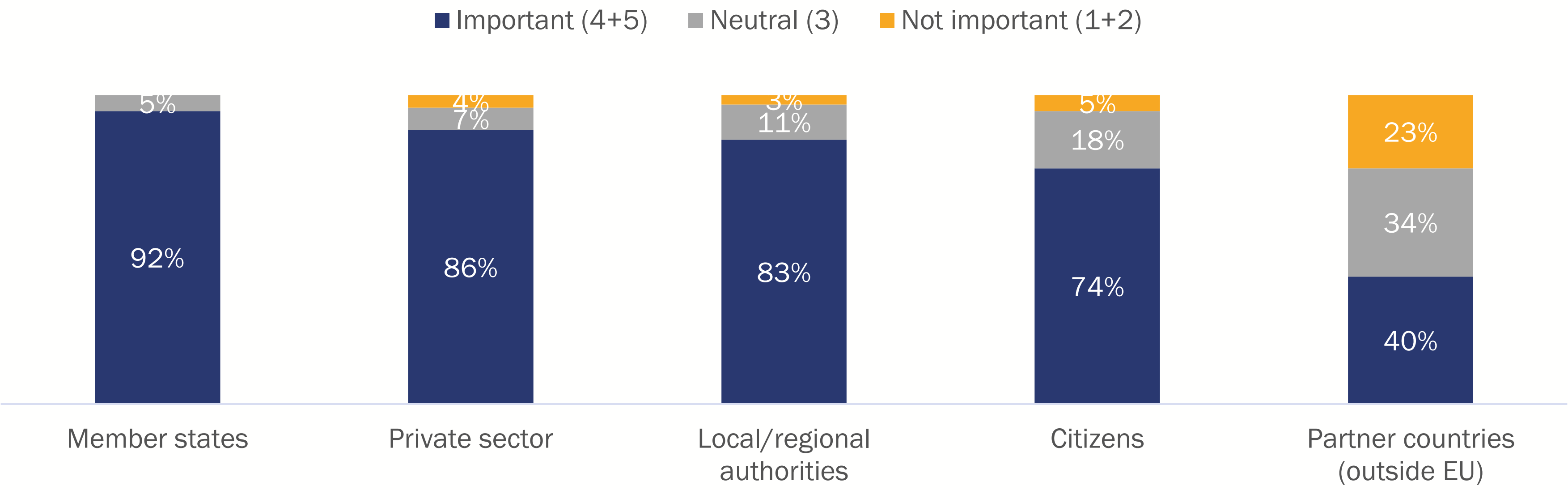
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q10. How important will the role of each of the following types of institutions be in making progress toward implementing the European Green Deal by 2024? Closed question, 5-pt rating scale.*

Importance of Stakeholders in Implementation

Member States are viewed as most important and partner countries as the least

Over nine in ten consider Member States to be important in the implementation of the EU Green Deal by 2024, making this the most important stakeholder group of those shown. Partner countries (outside EU) are considered the least important stakeholders, with only four in ten saying they are important. Unsurprisingly, stakeholders outside Europe are significantly more likely to say that partner countries (outside the EU) are important than stakeholders in Europe (55% compared to 36%, respectively).

Importance of stakeholders in implementing the European Green Deal by 2024, all stakeholders, globally, 2020/21



Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q11. How important will the role of each of the following stakeholders be to implementing the European Green Deal?* Closed question, 5-pt rating scale.

Importance of Stakeholders in Implementation

Citizens and partner countries remain important for several stakeholder groups

While Member States, local and regional authorities, as well as the private sector are recognised as key stakeholders across all groups, citizens are also considered as important by governments, corporates, and non-profits alike. While partner countries are less often pointed to, more than half of government stakeholders believe they are particularly important in implementing the European Green Deal.

Importance of stakeholders in implementing the European Green Deal by 2024 ("Important," 4+5 on a 5-pt scale), by stakeholder group, globally, 2020/21

	MEMBER STATES	PRIVATE SECTOR	LOCAL & REGIONAL AUTHORITIES	CITIZENS	PARTNER COUNTRIES
GOVERNMENTS/ REGULATORS	95%	90%	87%	82%	51%
REGIONAL/INTERNATIONAL ORGANISATIONS*	100%	91%	91%	45%	27%
ACADEMIA / THINK TANKS	88%	82%	79%	68%	35%
NGOS / NON-PROFITS / FOUNDATION	98%	88%	86%	81%	38%
CORPORATE/INDUSTRY	92%	90%	85%	84%	47%

*Caution: small sample size (*n*=11)

🟩 Highest score 🟥 Lowest score

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q11. How important will the role of each of the following stakeholders be to implementing the European Green Deal?* Closed question, 5-pt rating scale.

Meso Findings

Progress, Priorities, and Topical Issues

How Well Proposals Meet What Science Requires

Climate and energy proposals are most effective in meeting what science requires

When asked to identify EU proposals which best meet what science requires, a majority of stakeholders point to climate and energy proposals. In contrast, respondents are more mixed on whether EU proposals around zero pollution and sustainable food systems actually meet science-based objectives.

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, 2020/21

MEETS WHAT SCIENCE REQUIRES

A zero-pollution ambition for a toxic-free environment
45%

A fair, healthy, and environmentally friendly food system (from "Farm to Fork")
49%

Preserving and restoring ecosystems and biodiversity
50%

Mobilising industry for a clean and circular economy
51%

Accelerating the shift to sustainable and smart mobility
54%

Building and renovating in an energy- and resource-efficient way
55%

Supplying clean, affordable, and secure energy
58%

Increasing the EU's Climate ambition for 2030 and 2050
62%

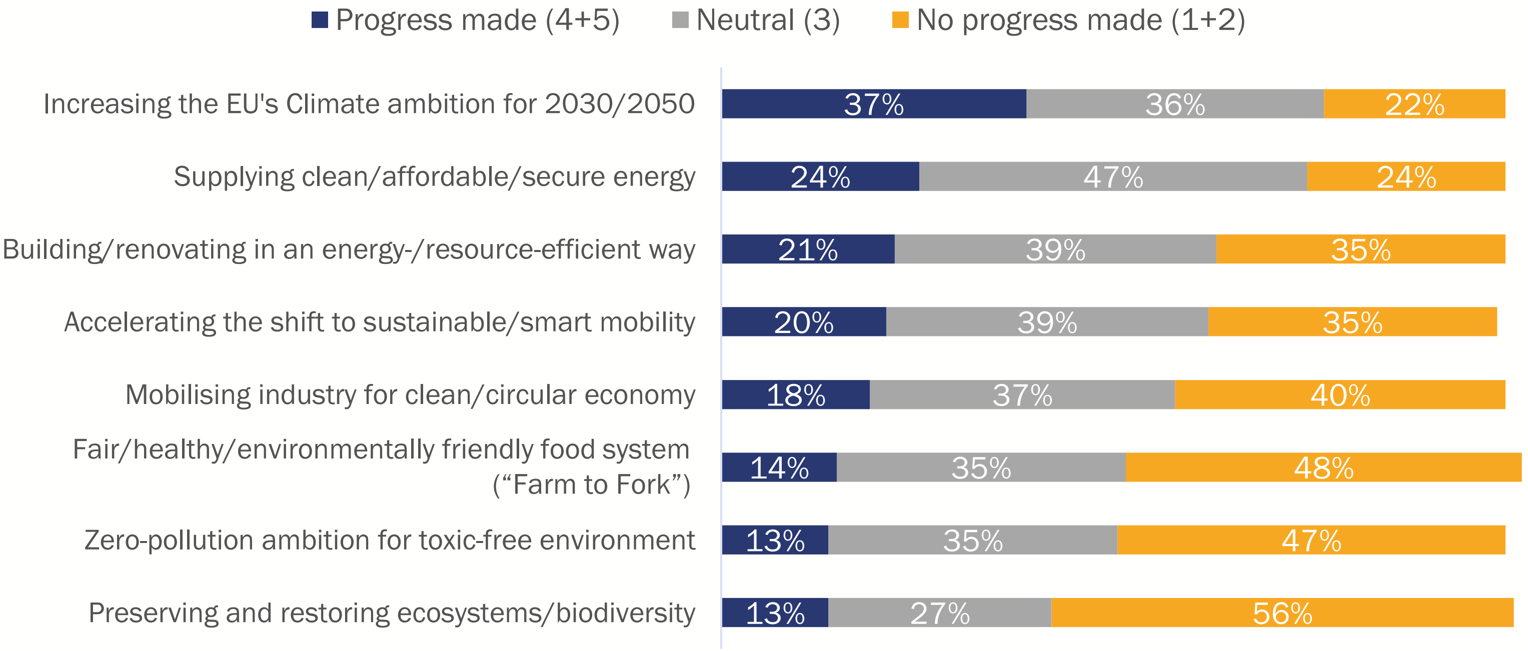
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=294
Question: *Q14. We are now going to explore some of the current European Green Deal proposals. How well do you think each of the following proposals currently meet what science requires?* Closed question, 5-pt rating scale.

Progress Made on Each Proposal

Similarly, climate and energy are areas where most progress has been made

Stakeholders see the greatest amount of progress made in the area of “Increasing the EU’s Climate Ambition for 2030 and 2050” followed by “Suppling clean, affordable, and secure energy.” Perceived progress, however, is limited in almost all the areas. This is particularly true for “Preserving and restoring ecosystems and biodiversity” where nearly six in ten believe that no progress has been made. There is room for progress in all areas. Stakeholders in Eastern Europe are more positive about progress made overall.

Progress made on each area, all stakeholders, globally, 2020/21



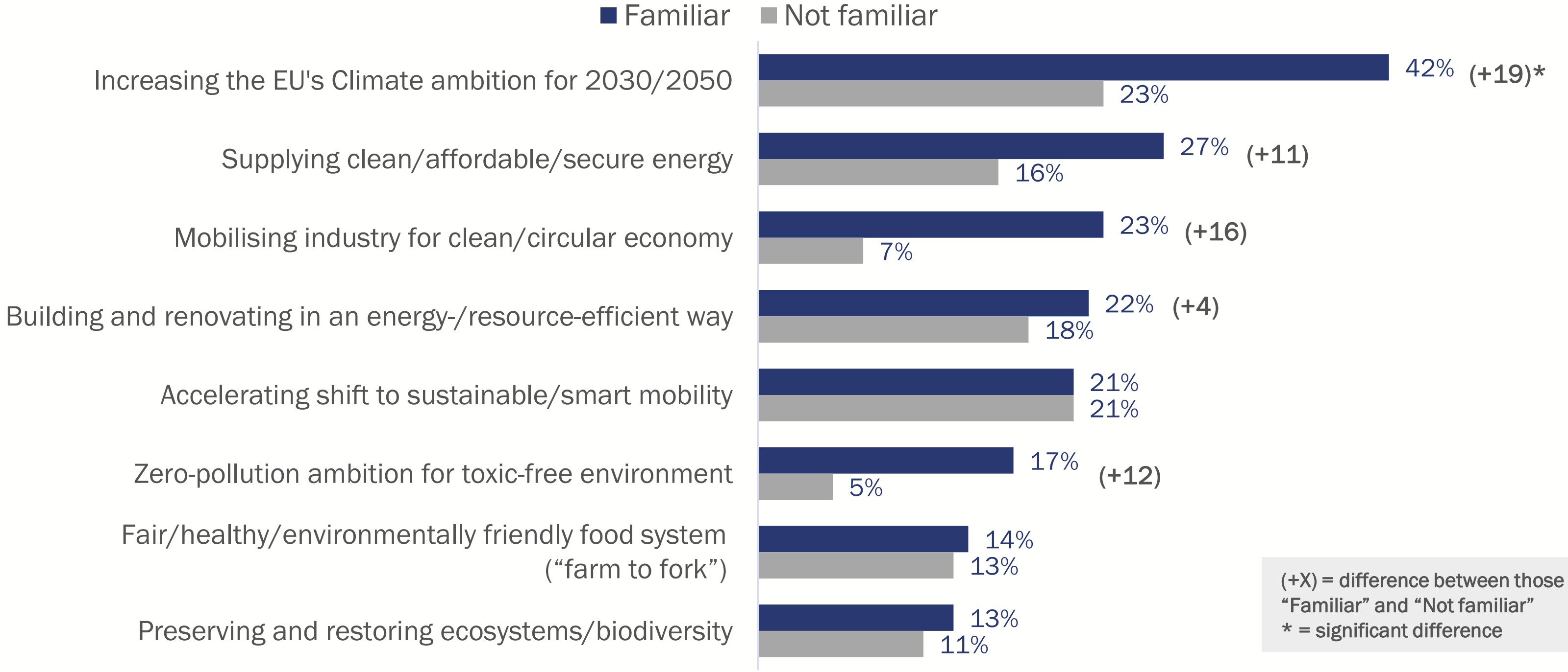
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q15. How much progress has been made on each of the following areas?* Closed question, 5-pt rating scale.

Progress Made in Each Proposal by Level of Familiarity

Views on progress made increase with level of familiarity in many areas

Stakeholders who previously stated that they are familiar with the EU Green Deal are often more likely to say that progress has been made in many of the areas. This is particularly true in the area of climate, where over four in ten of those familiar say that progress has been made, a difference of nineteen percentage points compared to those who are not familiar with the Deal.

Progress made on each area, all stakeholders, "Progress made" (4+5 on a 5-pt scale), comparison between those familiar and not familiar with the EU Green Deal, globally, 2020/21



(+X) = difference between those "Familiar" and "Not familiar"
* = significant difference

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q15. How much progress has been made on each of the following areas?* Closed question, 5-pt rating scale.

Priorities For the EU to Catalyse the Whole Deal

Circular economy is the top priority to catalyse the deal, ahead of energy and climate

Stakeholders see the top priority for the EU to catalyse the EU Green Deal as “Mobilising industry for a clean and circular economy,” with “A zero-pollution ambition for a toxic-free environment” considered the lowest priority area. However, the difference in the priority level given across many of the areas is not large, suggesting that it is important for the EU to keep all the areas in mind in the future.

Priorities for the EU to catalyse the whole deal (selected as one of top two priorities), all stakeholders, globally, 2020/21

1	Mobilising industry for a clean and circular economy	42%
2	Supplying clean, affordable, and secure energy	30%
3	A fair, healthy, and environmentally friendly food system (“Farm to Fork”)	30%
4	Increasing the EU’s Climate ambition for 2030 and 2050	28%
5	Preserving and restoring ecosystems and biodiversity	28%
6	Building and renovating in an energy- and resource-efficient way	16%
7	Accelerating the shift to sustainable and smart mobility	14%
8	A zero-pollution ambition for a toxic-free environment	13%

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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.

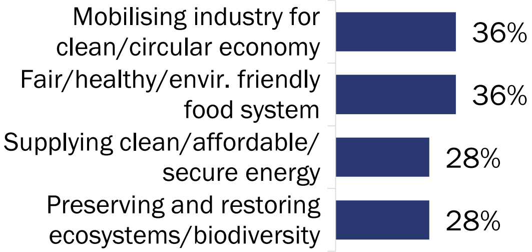
Priorities for the EU to Catalyse the Whole Deal

Food systems are important for various groups; biodiversity for non-profits and academia

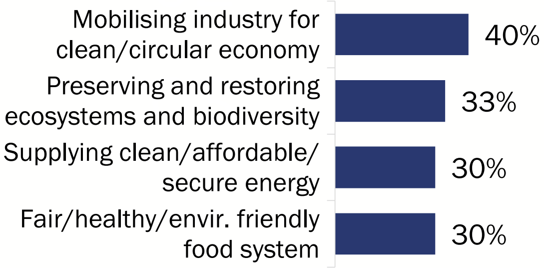
While circular economy and energy supply are identified as a priorities across all stakeholder types, other areas are also pointed to by several groups. Shifting to more sustainable food systems counts among the top three priorities for governments, academics, and NGOs alike. In addition to this, biodiversity protection is the first priority for non-profits and the second priority for academia and think tanks.

Top three for the EU to catalyse the whole deal, by stakeholder group, globally, 2020/21

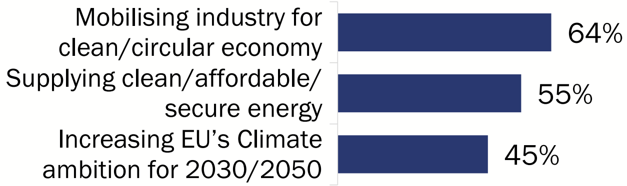
GOVERNMENTS/REGULATORS



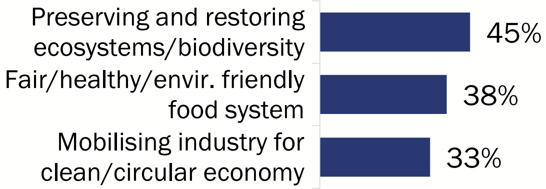
ACADEMIA / THINK TANKS



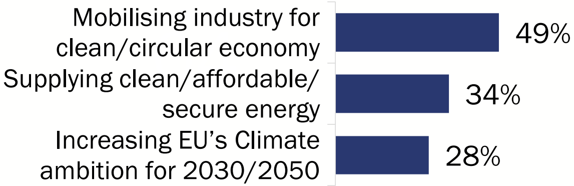
REGIONAL/INTERNATIONAL ORGANISATIONS*



NGOS / NON-PROFITS / FOUNDATIONS



CORPORATE/INDUSTRY

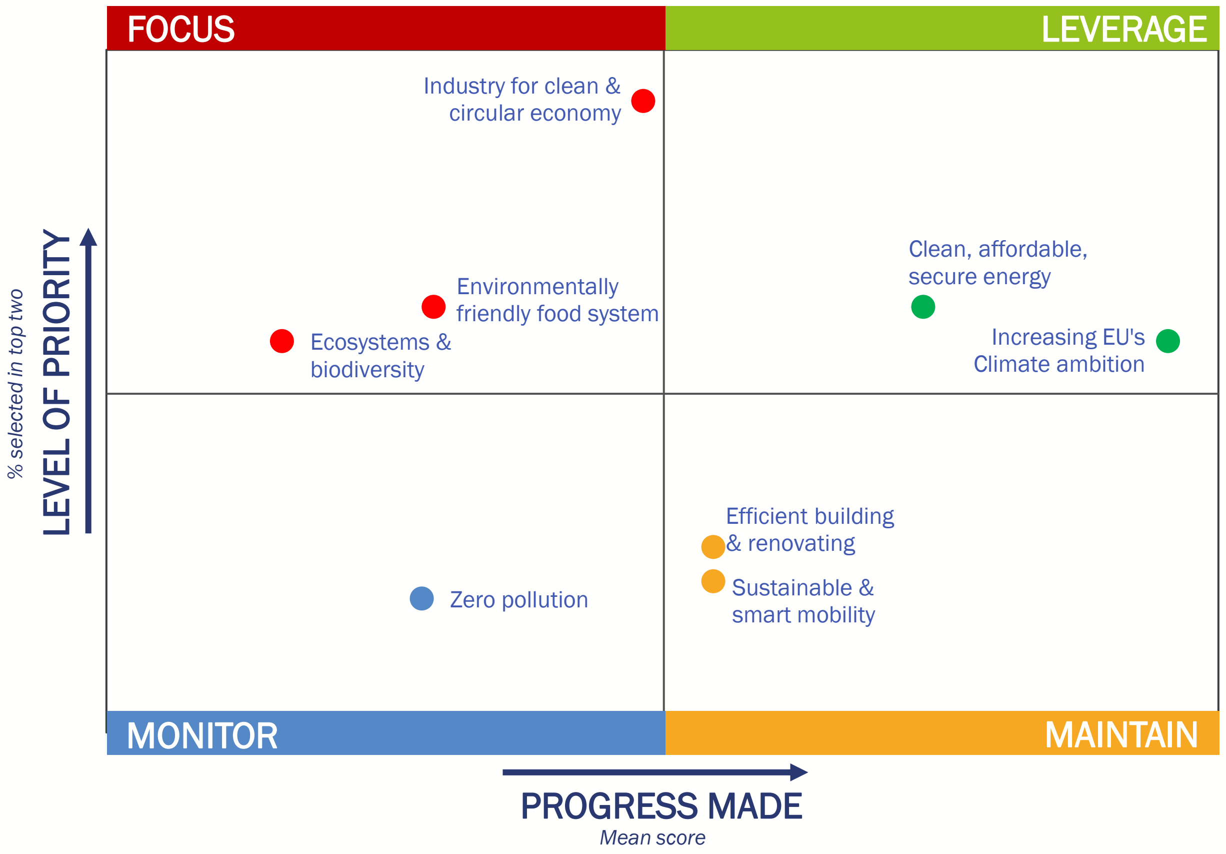


*Caution: small sample size (*n*=11)

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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.

Priority Areas vs Progress Made

Circular economy, food systems, and biodiversity are key focus areas for the EU



LEVERAGE: Climate ambition and Clean, affordable, and secure energy are the top strengths to leverage moving forward. Both of these areas are given relatively high priority status and they have seen the greatest amount of progress made.

FOCUS: The top areas for the EU to focus on are Environmentally friendly food system, Ecosystems and biodiversity, and in particular, Circular economy. These are all seen to be top priorities but progress made has been relatively weak. Action in these areas is considered to be more urgent than in others.

MONITOR: Stakeholders see little progress made in the area of Zero pollution, but it is currently seen as the lowest priority area. However, the priority level could change in the future, so it is important to monitor this.

MAINTAIN: For both Efficient building and renovating and Sustainable and smart mobility, stakeholders see some progress made but these are not currently priority areas. Activity around these topics should be maintained.

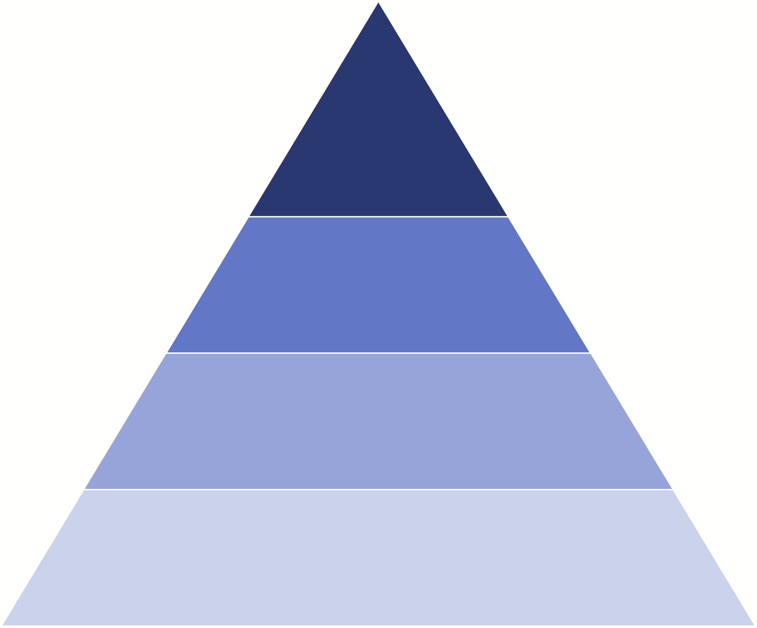
Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base:	*n*=294
Question:	*Q16. Which two of the following should be prioritised by the European Commission as key catalysers for implementing the whole deal?* Closed question, selected as one of top two priorities.
Question:	*Q15. How much progress has been made on each of the following areas?* Closed question, 5-pt rating scale, mean score.

EU Competitive Advantage

Circular economy and climate-positive solutions are the EU's best competitive advantages

The EU's competitive advantage is thought to primarily be in circular economy solutions and climate-positive solutions in energy. Nature-based solutions and water scarcity are considered to be areas where the EU has the least competitive advantage. None of the areas shown, however, are selected as a top advantage by the majority of stakeholders, suggesting that there is scope for the EU to prioritise.

Best competitive advantage for the EU, selected as one of top two advantages, all stakeholders, globally, 2020/21



Circular economy solutions 45%
Climate-positive solutions in energy 34%

Green technology 25%
Green cities 23%
Sustainable food systems 22%

Green mobility 16%
Social justice 17%

Nature-based solutions 14%
Water scarcity 4%

Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base:	*n*=295
Question:	*Q12. Which of the following are areas where the EU can get the best competitive advantage? Closed questions, selected as one of the top two advantages.*

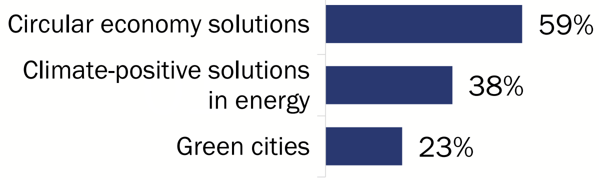
EU Competitive Advantage

Circular economy and climate-positive solutions are the top advantage for most groups; NGOs consider green cities and social justice to be key advantages

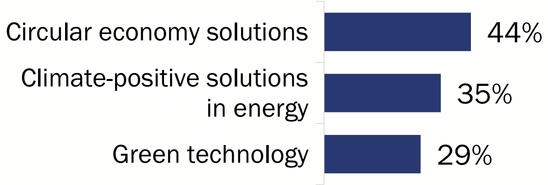
All stakeholder groups rank Circular economy and Climate-positive solutions first and second respectively, except for NGOs who consider Green cities to be the EU's top competitive advantage. NGOs are also the only group to rank Social justice within their top three. Green technology is considered more of an advantage among academia, corporates, and regional/international organisations.

Top three ranking of best competitive advantage for the EU, by stakeholder group, globally, 2020/21

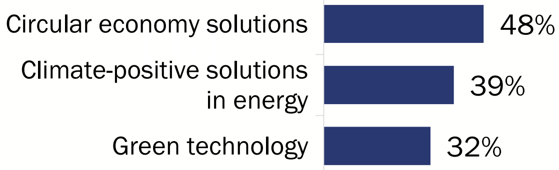
GOVERNMENTS/REGULATORS



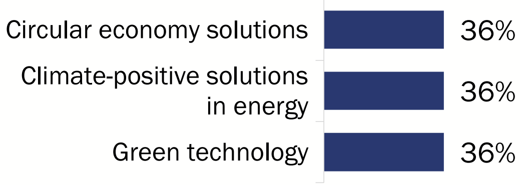
ACADEMIA / THINK TANKS



CORPORATE/INDUSTRY



REGIONAL/INTERNATIONAL ORGANISATIONS*



NGOS / NON-PROFITS / FOUNDATIONS

*Caution: small sample size (*n*=11)

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q12. Which of the following are areas where the EU can get the best competitive advantage? Closed questions, selected as one of the top two advantages.*

Impact of the Pandemic on EU Sustainability Agenda

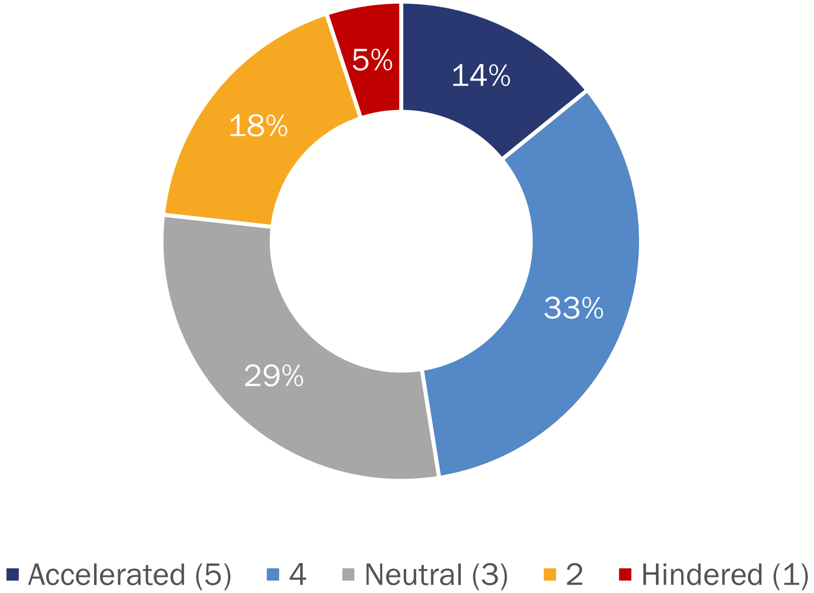
Almost half think the pandemic has accelerated the green transition

Stakeholders are optimistic about the green transition post-pandemic, with almost half of the sample thinking that the pandemic has accelerated the green transition overall and 14 percent saying that it has been significantly accelerated. Only 5 percent of the sample believe that the pandemic has significantly hindered the green transition.

Impact of the pandemic on the EU sustainability agenda, all stakeholders, globally, 2020/21

47%

think the pandemic has accelerated the green transition



Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
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.

Micro Findings

Deep Dive into 10 Think2030 Topics

Selection of Topics

Food systems and circular economy are the most known by stakeholders

Respondents selected a variety of topics on which to give their perspectives, with “Addressing environmental challenges from ‘farm to fork’” being the most popular topic and “Environmental sovereignty and security under the Green Deal” the least popular.

Frequency of topics selected by stakeholders to share their perspectives on, all stakeholders, globally, 2020/21

46%	Addressing environmental challenges from “Farm to Fork”
44%	A low-carbon and circular industry for Europe
40%	Trade in support of circular economy, sustainable development, and green recovery
40%	Fostering climate-biodiversity synergies through nature-based solutions
37%	Addressing overconsumption through the European Green Deal
37%	Social inclusion in the low-carbon transition
36%	Building Europe for future generations
36%	Delivering a sustainable, durable, and inclusive recovery for Europe
35%	Targets and indicators for a meaningful implementation of the European Green Deal
21%	Environmental sovereignty and security under the Green Deal

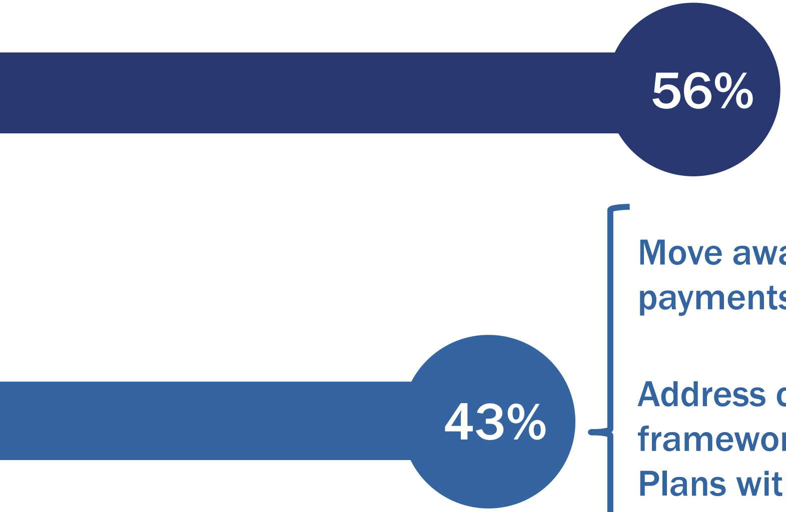
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=295
Question: *Q17. Please select topics on which you wish to share your perspectives from the following list.* Closed question.

Addressing Environmental Challenges from “Farm to Fork”

At the top of the agenda: aligning the post-2020 CAP reform with the F2F Strategy

For more than half of respondents, promoting the shift toward a sustainable food system in the EU requires first and foremost to align the post-2020 CAP reform with the “Farm to Fork” strategy – and to ensure overall alignment of agriculture plans with the EU’s long-term strategies.

Top three priorities to promote the shift toward a sustainable food system, combined mentions, globally, 2020/21



Align the post-2020 CAP reform with the Farm to Fork Strategy, and ensure overall alignment of agriculture plans with the EU’s long-term strategies

Move away from CAP direct support toward multi-annual and results-based payments combined with knowledge transfer, advice, and innovation

Address consumption together with production in the EU’s new legal framework for sustainable food systems, complementing CAP Strategic Plans with Food Policy Strategic Plans

Engage stakeholders and citizens in the design and implementation of food and farming policies through citizen assemblies and other forums

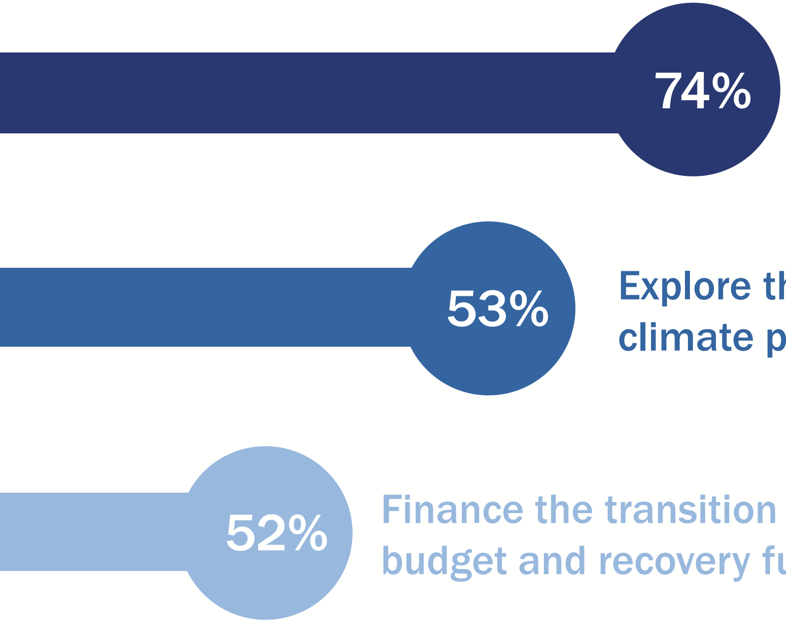
Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base:	*n*=136
Question:	*Q32. What should the EU focus on to promote the shift towards a sustainable food system – from farm to fork?* Closed question, selected as one of top 3 recommendations.

A Low-carbon and Circular Industry for Europe

A need to embed circularity into the EU Industrial Strategy

Mainstreaming a circular economy approach in the EU Industrial Strategy is the top priority identified by stakeholders to support the shift toward a low-carbon and circular industry in Europe.

Top three priorities to support the shift toward a low-carbon and circular industry, combined mentions, globally, 2020/21



74% Mainstream a circular economy approach in the EU Industrial Strategy

53% Explore the potential of the circular economy in EU climate policies such as the upcoming Climate Law

52% Finance the transition through the EU budget and recovery fund

Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=130
Question: *Q22. What should the EU focus on to support the shift toward a low-carbon and circular industry?* Closed question, selected as one of top three recommendations.

Trade in Support of Circular Economy and the Green Recovery

The next step: championing circular economy-related trade cooperation and diplomacy

To foster a green recovery and the transition to a circular economy, the EU trade policy is expected to focus on championing circular economy-related trade cooperation and diplomacy – both in the context of WTO and also as part of wider EU foreign and development cooperation policy linked to trade.

Top three priorities to foster a green recovery and the transition to a circular economy, combined mentions, globally, 2020/21

Champion circular economy-related trade cooperation and diplomacy

Champion agreement on circular product and production standards, supported by trade-facilitation mechanisms

Facilitating trade in circular economy services, hand in hand with products

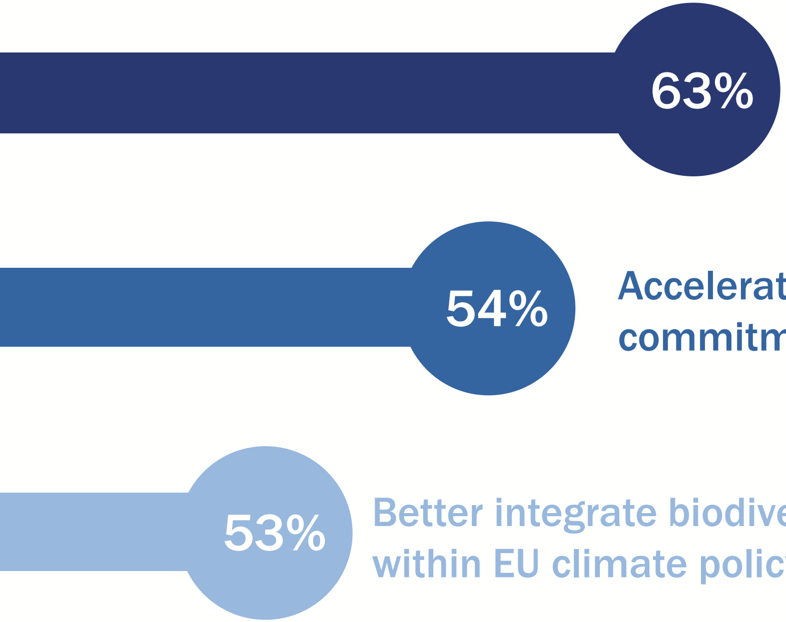
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=116
Question: *Q26. What should the EU trade policy focus on to foster a green recovery and the transition to a circular economy?* Closed question, selected as one of top three recommendations.

Fostering Climate–Biodiversity Synergies through Nature-based Solutions

Investing in nature-based solutions stands as a priority

When it comes to fostering climate-biodiversity synergies, boosting investment in nature-based solutions (by defining criteria for economic activities that substantially contribute to protecting biodiversity and ecosystems) appears as a priority for a large majority of stakeholders.

Top three priorities to foster synergies between biodiversity and climate at European level, combined mentions, globally, 2020/21



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

Accelerate the implementation of key EU legal commitments requiring nature-based solutions

Better integrate biodiversity commitments within EU climate policy and investments

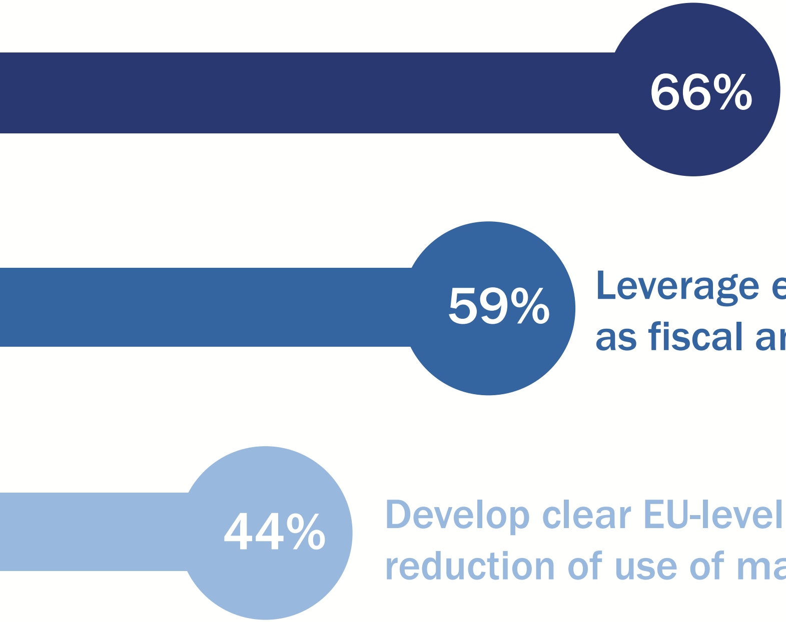
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=117
Question: *Q34. What should the EU focus on to foster synergies between biodiversity and climate at European level?* Closed question, selected as one of top three recommendations.

Addressing Overconsumption through the European Green Deal

Important stakeholder expectations around an EU-wide policy for sustainable consumption

Two-thirds of respondents believe that to address overconsumption in Europe, a comprehensive European policy for sustainable consumption must be developed – covering nutrition, mobility, housing, and lifestyles. The target should be to reduce per-capita material footprint by 80 percent by 2050.

Top three priorities to help address overconsumption across countries, combined mentions, globally, 2020/21



Develop a comprehensive European policy for sustainable consumption – with 80% reduction target in per-capita material footprint by 2050

Leverage environmental tax reform using EU levers such as fiscal and economic coordination instruments

Develop clear EU-level targets concerning the reduction of use of materials

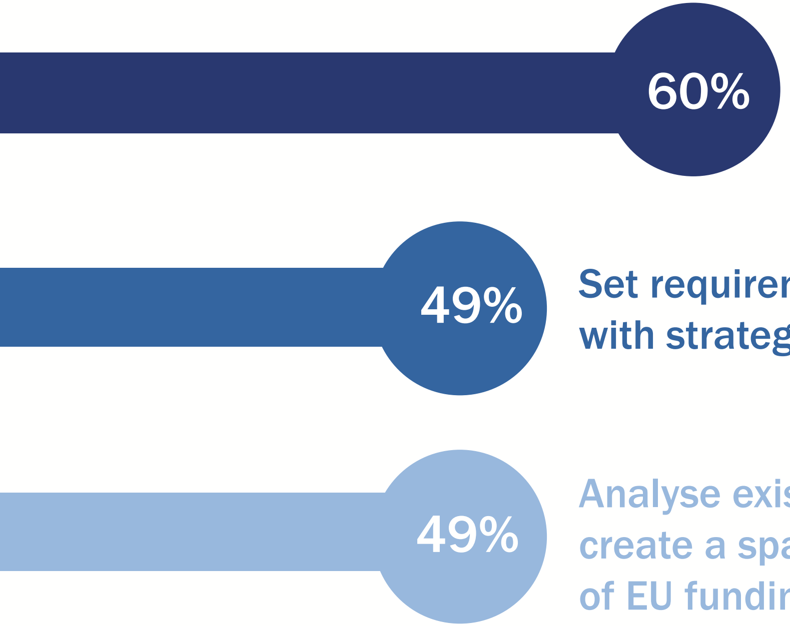
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=109
Question: *Q30. What measures should the EU prioritise to help address overconsumption across countries?* Closed question, selected as one of top three recommendations.

Social Inclusion in the Low-carbon Transition

An aligned and integrated approach between the EU and regional/local authorities is crucial

To support social inclusion in the low carbon transition, six in ten see enabling local and regional authorities to adopt an integrated approach as the top priority. Just under half also select the need to ensure alignment between the EU and regional/local authorities in strategic planning and using EU funding to strengthen national and local financial mechanisms.

Top three priorities to support social inclusion in the low-carbon transition, combined mentions, globally, 2020/21



60% Offer guidance on how to enable local and regional authorities to adopt an integrated approach

49% Set requirements that EU investments should result from or align with strategic planning documents of regional/local authorities

49% Analyse existing national and local financing mechanisms and create a space to strengthen them through additional allocation of EU funding

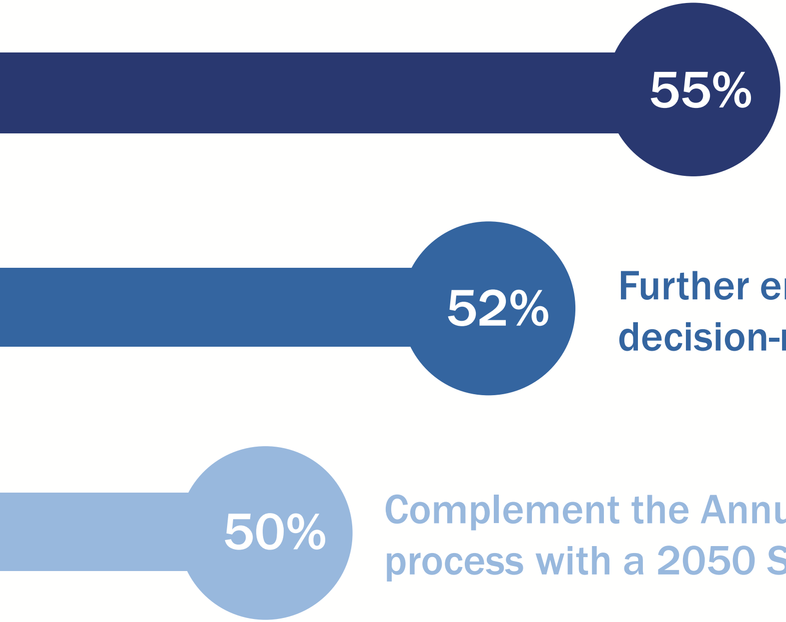
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=107
Question: *Q24. What should the EU Cohesion Policy focus on to support social inclusion in the low-carbon transition?* Closed question, selected as one of top three recommendations.

Building Europe for Future Generations

A long-term perspective and engagement with young people when looking to the future

The top three priorities identified by around half of the sample to ensure a sustainable future for the next generation are to provide long-term impact assessments of current public policy, engage young people in decision-making, and create a 2050 Strategy for Sustainable Prosperity to complement the Annual Growth Strategy process.

Top three priorities to ensure a sustainable future for young generations, combined mentions, globally, 2020/21



55% Provide long-term impact assessments of current public policy

52% Further engage with the youth in policy- and decision-making

50% Complement the Annual Sustainable Growth Strategy process with a 2050 Strategy for Sustainable Prosperity

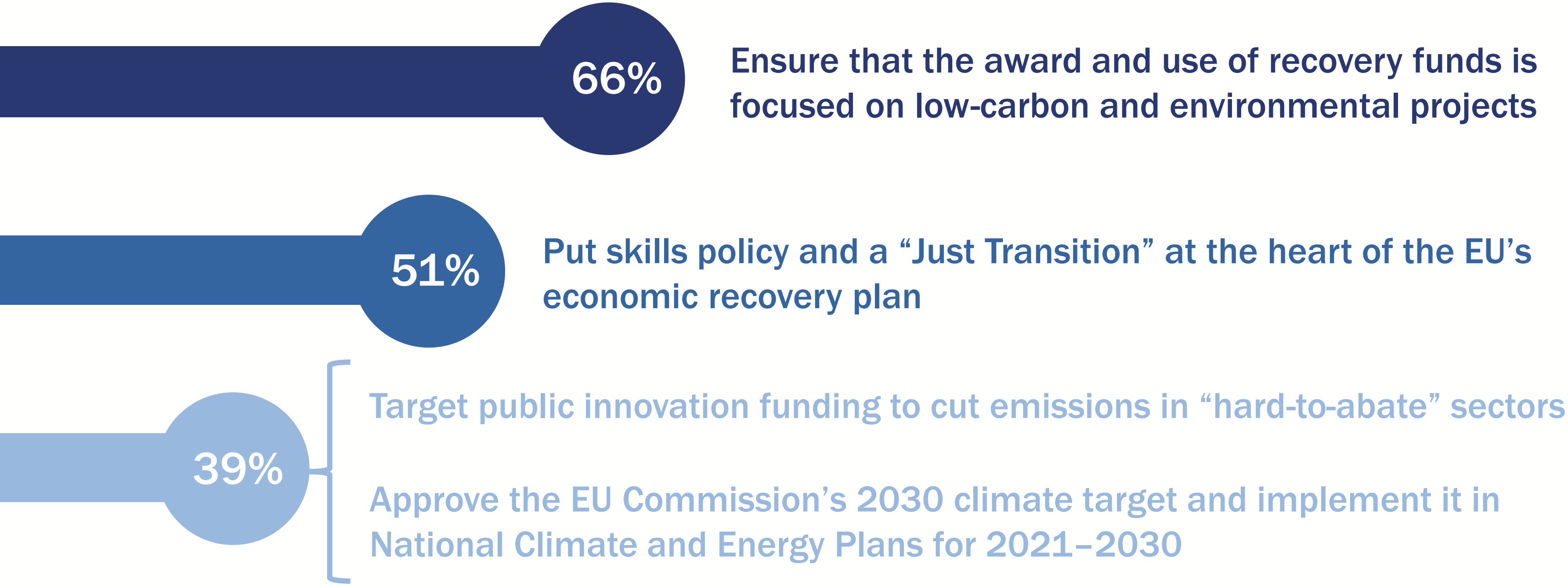
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=105
Question: *Q36. What should the EU prioritise to ensure a sustainable future for young generations?* Closed question, selected as one of top three recommendations.

Delivering a Sustainable, Durable, and Inclusive Recovery for Europe

Recovery plans and funding should have an environmental and just focus

Two-thirds of the sample see the top priority for a sustainable, durable, and inclusive post-COVID recovery to be ensuring that low-carbon and environmental projects are prioritised in the allocation of recovery funds. Just over half note the need to place a “Just Transition” at the core of the recovery plan. Proactive, environmentally focused, and inclusive governance are seen as central to the recovery.

Top three priorities to ensure a sustainable, durable and inclusive post-COVID recovery, combined mentions, globally, 2020/21



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

Put skills policy and a “Just Transition” at the heart of the EU’s economic recovery plan

Target public innovation funding to cut emissions in “hard-to-abate” sectors

Approve the EU Commission’s 2030 climate target and implement it in National Climate and Energy Plans for 2021–2030

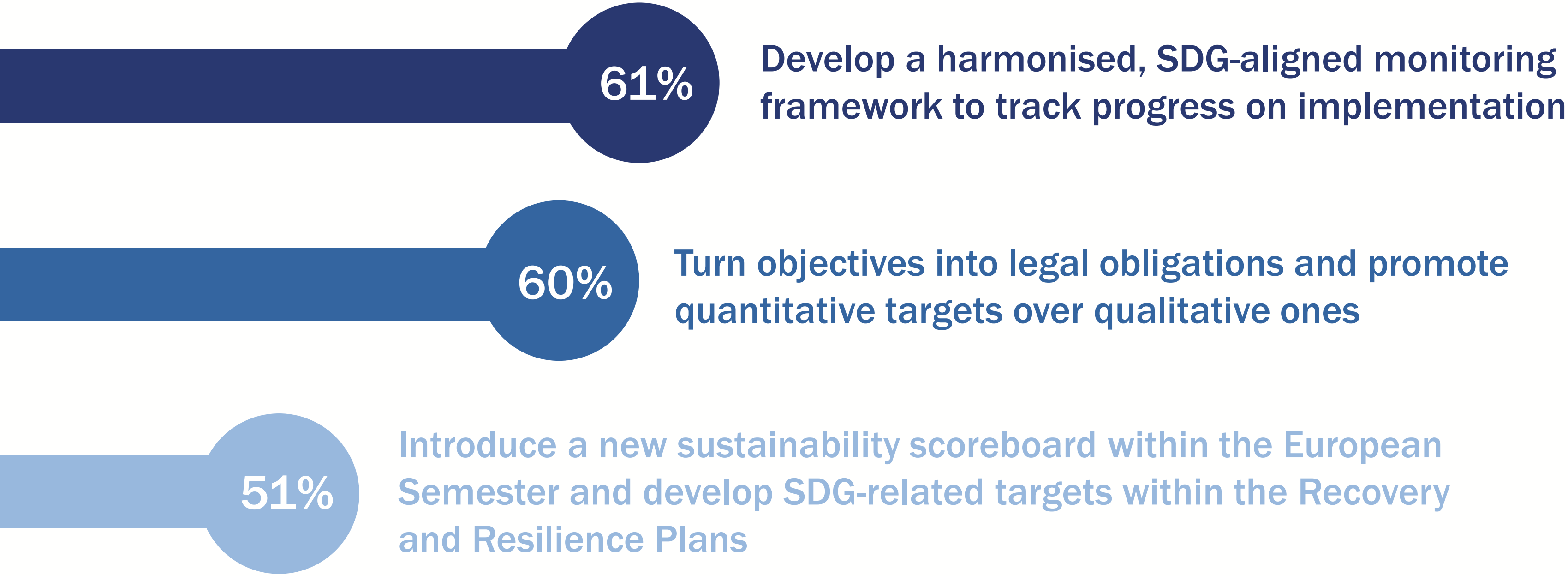
Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base:	*n*=105
Question:	*Q18. What should the EU focus on to ensure a sustainable, durable, and inclusive post-COVID recovery?* Closed question, selected as one of top three recommendations.

Targets and Indicators for a Meaningful Implementation

Targets should be SDG-aligned, legally binding, and set within an overarching framework

In order to monitor the implementation of the EU Green Deal, six in ten think the main priorities should be to develop a harmonised, SDG-aligned framework to track progress and to turn objectives into legal obligations. Overall, targets and indicators should be largely quantitative, legally binding, aligned within an overarching framework, and regularly monitored.

Top three priorities to monitor the implementation of the European Green Deal, combined mentions, globally, 2020/21



Develop a harmonised, SDG-aligned monitoring framework to track progress on implementation

Turn objectives into legal obligations and promote quantitative targets over qualitative ones

Introduce a new sustainability scoreboard within the European Semester and develop SDG-related targets within the Recovery and Resilience Plans

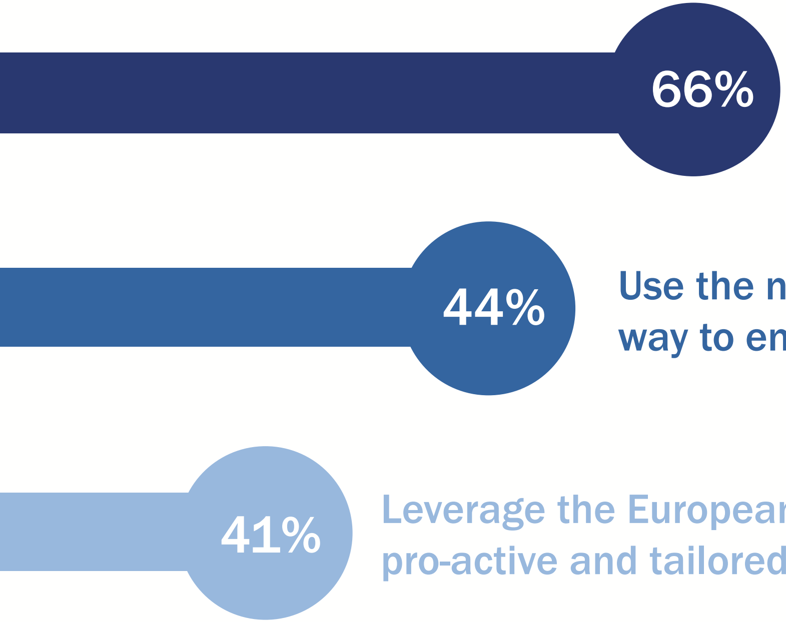
Source: Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base: *n*=104
Question: *Q28. What measures should the EU prioritise to monitor the implementation of the European Green Deal?* Closed question, selected as one of top three recommendations.

Environmental Sovereignty and Security under the Green Deal

Positioning the EU as the global environmental standard setter is key

To ensure environmental sovereignty and security under the Green Deal, two-thirds say that the EU should be positioned as the global environmental/ sustainability standard setter and market creator. Over four in ten also believe that the EU should use its progress in circular models to encourage EU partner countries to move forward and also to leverage the Green Deal in foreign policy.

Top three priorities to ensure environmental sovereignty and security under the Green Deal, combined mentions, globally, 2020/21



Position the EU as the global environmental/ sustainability standard setter and as market creator

Use the new EU circular and deforestation-free model as a way to encourage EU partner countries to move forward

Leverage the European Green Deal for foreign policy through pro-active and tailored diplomatic and policy action

Source:	Think2030 Survey on the European Green Deal (GlobeScan, 2020/21)
Base:	*n*=61
Question:	Q20. *What should the EU focus on to ensure environmental sovereignty and security under the Green Deal?* Closed question, selected as one of top 3 recommendations.

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evidence and ideas. applied

Thank You

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