

# European Green Deal Barometer

Fourth edition

May 2024



Institute for  
European  
Environmental  
Policy



# TABLE OF CONTENTS

<b>01</b>	Foreword	3
<b>02</b>	Executive summary	4
<b>03</b>	General assessment	6
<b>04</b>	The 2024 EU elections and the future of the EGD	20
<b>05</b>	State of play of EU Green Deal policies	27
<b>06</b>	Case studies: Leveraging the EU Presidencies	38
<b>07</b>	External impacts of the EGD	46
<b>08</b>	Recommendations	53



# Foreword

For the fourth year, the Green Deal Barometer has established itself as a flagship publication gathering the opinions of 300 environmental and sustainability experts in the European Union and beyond. IEEP's European Green Deal Barometer is based on a large-scale survey which analyses the progress (or lack of) of the European Green Deal files and policies.

As the five-year legislative term of the present EU Commission comes to a close, it is worthwhile to consider the point of view of experts in their fields with regards to how they envisage the future of the Green Deal.

At a time when global warming is already en-route to exceeding 1.5 degrees, which was the limit set at the Paris Climate Summit in 2015 for the rest of century, and while most of our planetary boundaries are already being surpassed on an annual basis, it would seem evident for the EU, as one of the pioneers of climate change mitigation, to continue to act as the forerunner in sustainability.

Until last year, this logic worked quite well, whereby the EU institutions together with the Member States adopted almost a hundred new legislative acts that will now have to be transformed into concrete actions at the national level. The past few months have shown, however, that this environmental and climate consciousness is starting to erode, and that many of the already achieved compromises and agreements are being questioned by industry, farmers and Member States.

What started as a German precedent, when revising the EU ban regarding the sales of new combustion engine cars, is now becoming a norm in the EU Council, which has on multiple



**By Eero Yrjö-Koskinen,  
IEEP Executive Director**

occasions reopened trilogue results that were supposedly agreed upon by the European Parliament and the Council. This has created increasing uncertainty throughout the entire EU decision-making process, which has now become ever more susceptible to external pressures. This includes populist movements and private sector interests, which have shown relatively little interest in the inter-generational approach that was introduced by the current European Commission.

IEEP believes that the European Green Deal has to be complemented with additional measures that integrate financial support and social equity in its implementation. The next five-year legislative period will be decisive in determining whether Europe will be able to meet the climate and biodiversity targets set in Paris in 2015 and Montreal in 2023.

Europe is currently not on track to achieving any of these objectives, as highlighted in the European Environment Agency's monitoring report on progress towards the 8th EAP objectives. The time has come to show that we intend to do so, and that we are not prepared to jeopardise the future of our next generations due to short-term interests.

# Executive Summary

The European Commission launched the European Green Deal in December 2019 with the objective of achieving climate neutrality in the European Union by 2050. Depicted as a green growth strategy, it includes a set of policy initiatives requiring changes in all the sectors of our economy while improving people's well-being and securing a healthy planet for future generations. The fourth edition of the European Green Deal Barometer assesses the progress of the Green Deal's policy in the past four years and identifies trends with previous editions, keeping a special focus on what will come after the 2024 EU elections and the thematic areas of the Green Deal that should be taken forward according to the EU sustainability experts. Also, this edition covers five case-study countries (Czechia, France, Poland, Spain and Sweden) and monitors the external impact of the Green Deal.

## METHODOLOGY

Savanta interviewed 312 sustainability experts world-wide via a 20-minute online survey. Over eight in ten (88%, n=276) live in EU countries. Just over one in ten (12%, n=36) live in countries outside the EU. The stakeholder sample is diverse, with respondents being evenly balanced across academia and think tanks (24%), policy and politics (24%), NGOs and foundations (24%) and the private sector (22%). The remaining 6% of respondents work in trade unions, media and uncategorised organisations. Six in ten (63%) respondents have worked in a sustainability-related role for at least five years.

Fieldwork took place between 4 January and 26 February 2024.

## HIGHLIGHTS

Most sustainability experts believe that the European Green Deal will exhibit at least moderate resilience following the 2024 European elections. However, while experts have faith that the EGD will persist, they believe it will likely do so in a weakened or more constrained form. Less than 10% of experts believe the 2024 European elections will have a positive impact on the Green Deal. However, experts do not expect the Green Deal to be abandoned, and a majority of EU experts remains confident that the EGD agenda will be enacted as legislation. Also, almost all experts living outside the EU also agree that the implemented EGD will have an impact on a global scale.

**7%**



experts think the 2024 European elections will have a positive impact on the implementation of the Green Deal.

**53%**



stating the European Green Deal will be very to moderately resilient following the 2024 elections.

**62%**



EU experts anticipate the Green Deal agenda might narrow or weaken after the 2024 elections.

**69%**



experts think the overall external impact of the European Green Deal is positive.





### **Climate mitigation and the path to climate neutrality**



Experts are divided on whether the target set for 2040 is sufficient for the EU to achieve the objectives of the Paris Agreement, with nearly half (47%) thinking that it is and a slightly lower proportion (43%) thinking it isn't sufficient.



### **Protecting and restoring ecosystems and biodiversity**



Over two thirds of experts believe the Nature Restoration Law will have a moderate-to-full impact (67%), on the restoration of biodiversity in the European Union.



### **Ensuring a socially just transition**



Almost half (45%) of those with expertise on ensuring a just transition believe progress made towards mainstreaming the principle since 2019 has been poor. Four in ten (40%) EU experts believe that this area should be one of the top two priorities of the Commission after 2024.



### **A fair and sustainable food and farming system**



Three quarters (75%) of those with expertise on issues surrounding a sustainable food and farming system believe that progress made since 2019 has been poor. Increasing financial support for farmers to transition towards sustainable agricultural practices (59%) is seen by the experts as one of the most necessary measures to achieve a more environmental and climate-friendly EU agriculture policy.



### **Supplying decarbonised, affordable and secure energy**



Over a third (34%) believe that progress has been good, making this the one policy area where those with expertise are more positive than negative on the progress being made. However, only 1 in 10 (10%) experts think the current version of the Electricity Market Reform protects citizens from future energy crises or price spikes to a great extent/completely.

# 1

# General assessment

**European Green Deal Barometer**  
Fourth edition (2024)



With the launch of the European Green Deal in December 2019, a new phase of environmental policies began for the EU, establishing ambitious targets and setting the example for the world in tackling the climate crisis. Since then, the European Commission has presented a series of legislative proposals, strategies, and budgetary instruments covering various aspects to enable the transition towards a climate-neutral continent (see Table 1).

Hundreds of laws were finalised, and we will see the effects of their implementation in the coming years. Significant progress was made in some areas, such as in the energy and transport sectors, thanks to the comprehensive Fit for 55 Package. This was possible for two main reasons.

Firstly, some areas had to be prioritised due to the political circumstances, as happened following the outbreak of the war in Ukraine.

The EU took a clear and cohesive position on the need to become independent from Russian gas and adopted initiatives such as REPowerEU, aimed at boosting the deployment of renewable energy.

Secondly, EU legislators were able to reach agreements on certain files more easily than others, which on the contrary have been highly polarised. For example, the Sustainable use of pesticides regulation (eventually withdrawn) or the Nature Restoration Law proposal (still under discussion), was the focus of strong political and ideological attacks, often scientifically unfounded.

For some dossiers, negotiations were lengthy and debated, and in order to reach a final agreement, ambitions were highly undermined.



For instance, the Industrial Emission Directive, reducing pollutant emissions from industry, has been considerably watered down compared to the Commission's revised proposal. In particular, regarding the farm industry, the scope of application was substantially reduced following the decision to remove cattle and to barely update the thresholds for other livestock.

On the other hand, it is regrettable that some important pieces of legislation have been abandoned, such as the Framework for a sustainable food system and the full animal welfare package. Furthermore, little action has been taken to foster the "Blue economy", which concerns industries and sectors related to oceans, seas and coasts.

To support the assessment towards the 2030 climate targets, the European Environment Agency (EEA) is tasked with providing an annual review of progress under the 8th Environmental Action Programme.<sup>3</sup> Last December, the EEA published the first monitoring report, which is based on a set of 28 headline indicators, selected by the Commission following a public consultation. The report revealed serious failure risks on most objectives.

The most concerning data regard the indicators on energy consumption and consumption footprint, as well as the greenhouse gas emissions in the land use sector, and the transition to organic farming, whose targets are considered very unlikely to be reached.

Some positive findings are related to the overall emission targets, and the reduction of premature deaths from air pollution. A positive increase in the share of green employment and green economy was also recognised, making it likely that these targets will be met by 2030.<sup>4</sup> Nevertheless, the overall outcome is rather alarming and should spur the EU ambition to make sure of realising the green transition across all areas.

On the next page, we have compiled a non-exhaustive list of proposals related to the Green Deal and published by the European Commission since 2019, to indicate the multi-faceted nature of the EGD. This is contained in Table 1.

---

<sup>3</sup> See [here](#) the 8th Environment action programme to 2030

<sup>4</sup> See [here](#) the full "Monitoring report on progress towards the 8th EAP objectives 2023 edition".



**Table 1 : Non-exhaustive list of relevant strategies, proposals and budgetary instruments published since the start of the Green Deal.**

Date	Document from the European Commission
<b>2020</b>	
<b>January</b>	European Green Deal Investment Plan
	Proposal for a Regulation establishing the Just Transition Fund (JTF)
<b>March</b>	New Industrial Strategy
	New Circular Economy Action Plan
	Proposal for a European Climate Law
<b>May</b>	Farm to Fork Strategy
	Biodiversity Strategy for 2030
	Proposal for NextGenerationEU
	Proposal for the Recovery and Resilience Facility
<b>July</b>	EU Hydrogen Strategy
	Energy System Integration Strategy
<b>September</b>	Action Plan on Critical Raw Materials
<b>October</b>	Chemicals Strategy for Sustainability
	Proposal for an 8th Environment Action Programme
	Methane Strategy

<b>October</b>	Renovation Wave Strategy
	Proposal for a revision of the Aarhus Regulation
<b>November</b>	Offshore Renewable Energy Strategy
<b>December</b>	Sustainable and Smart Mobility Strategy
	Proposal for a revision of the Regulation on Guidelines for Trans-European Energy Infrastructure (TEN-E)
	Proposal for a revision of the Batteries Regulation
<b>2021</b>	
<b>February</b>	Climate Adaptation Strategy
<b>April</b>	Organic Production Action Plan
	Proposal for a Corporate Sustainability Reporting Directive (revision of the Non-Financial Reporting Directive)
<b>May</b>	Blue Economy Strategy
	Zero Pollution Action Plan
	Communication on Updating the 2020 New Industrial Strategy
<b>July</b>	Renewed Sustainable Finance Strategy
	Forest Strategy
	Roadmap to Planting 3 Billion Trees by 2030
	Proposal for a revision of the CO2 Emission Standards for New Passenger Cars and Vans



<b>July</b>	Proposal for a revision of the Emissions Trading System (ETS) – Extension to Road Transport, Building and Maritime Sectors
	Proposal for Amending the Contribution of Aviation to the ETS
	Proposal for a recast of the Energy Taxation Directive (ETD)
	Proposal for a Carbon Border Adjustment Mechanism (CBAM)
	Proposal for a revision of the Effort Sharing Regulation (ESR)
	Proposal for a revision of the Land Use, Land Use Change, and Forestry Regulation (LULUCF)
	Proposal for a revision of the Renewable Energy Directive (RED III)
	Proposal for a recast of the Energy Efficiency Directive (EED)
	Proposal for an Alternative Fuels Infrastructure Regulation
	Proposal for a Sustainable Aviation Fuels Regulation (ReFuelEU Aviation)
	Proposal for a Cleaner Maritime Fuels Regulation (FuelEU Maritime)
	Proposal for a Regulation for a Social Climate Fund
	Proposal for a Regulation on European Green Bonds
<b>September</b>	EU Mission Adaptation to Climate Change Implementation Plan
	EU Mission Restore our Ocean and Waters Implementation Plan
	EU Mission Climate-Neutral and Smart Cities Implementation Plan
	EU Mission Soil Deal for Europe Implementation plan

<b>October</b>	Proposal for a revision of the Regulation on Persistent Organic Pollutants
<b>November</b>	Contingency Plan for Ensuring Food Supply and Food Security
	Soil Strategy for 2030
	Proposal for a revision of the Regulation on Shipments of Waste
	Proposal for a Regulation on Deforestation-Free Products
<b>December</b>	Revision of the Third Energy Package for Gas
	Proposal for a recast of the Energy Performance of Buildings Directive
	Proposal for a Regulation on Methane Emissions Reduction in the Energy Sector
	Action Plan on Sustainable Carbon Cycles
<b>2022</b>	
<b>February</b>	EU Taxonomy Climate Delegated Act
	Proposal for a Corporate Sustainability Due Diligence Directive
<b>March</b>	EU Strategy for Sustainable and Circular Textiles
	Proposal for an Ecodesign for Sustainable Products Regulation
	Proposal for a revision of the Construction Products Regulation
	Proposal for an Empowering Consumers for the Green Transition Directive
<b>April</b>	Restrictions Roadmap
	Proposal for a revision of the Industrial Emissions Directive (IED)

<b>April</b>	Proposal for a revision of the European Pollutant Release and Transfer Register Regulation (E-PRTR)
	Proposal for a revision of the Regulation on Fluorinated Greenhouse Gases
	Proposal for an Ozone Regulation
<b>May</b>	REPowerEU Plan
	Solar Energy Strategy
<b>June</b>	Proposal for a revision of the Farm Accountancy Data Network Regulation
	Proposal for a revision of the Sustainable Use of Pesticides Directive
	Proposal for a Nature Restoration Law
<b>July</b>	Monitoring Framework for the 8th Environment Action Programme
<b>September</b>	Environmental Implementation Review
	Regulation on recycled plastic materials and articles intended to come into contact with foods
<b>October</b>	Proposal for a revision of the Ambient Air Quality Directives
	Proposal for a revised Urban Wastewater Treatment Directive
	Proposal for a Directive amending the Water Framework Directive, the Groundwater Directive and the Environmental Quality Standards Directive
<b>November</b>	Framework on biobased, biodegradable and compostable plastics
	Proposal for a revision of EU legislation on Packaging and Packaging Waste
	Proposal for a Regulation on an EU Certification for Carbon Removals



<b>December</b>	Recommendation on a Framework for Safe and Sustainable by Design Chemicals
	Proposal for a revised Regulation on Classification, Labelling and Packaging of Chemicals (CLP)
<b>2023</b>	
<b>January</b>	Revision of the EU Pollinators Initiative
<b>February</b>	Renewable Energy Directive Delegated Acts
	Proposal for a revision of the CO2 Emission Standards for New Heavy-Duty Vehicles
<b>March</b>	Proposal for an amending Regulation to improve the Union's Electricity Market Design
	European Critical Raw Material Act (ECRMA)
	Net Zero Industry Act
	European Hydrogen Bank
	Proposal for a Directive on Common Rules Promoting the Repair of Goods
	Proposal for a Directive on Green Claims
<b>June</b>	Proposal for an amending Directive on ship-source pollution and on the introduction of penalties, including criminal penalties, for pollution offences
<b>July</b>	Proposal for a targeted revision of the Waste Framework Directive focusing on textiles waste
	Proposal for a Soil Monitoring Law
	Proposal for an amending Regulation on plants obtained by certain new genomic techniques and their food and feed

<b>July</b>	Proposal for a Regulation on the accounting of greenhouse gas emissions of transport services
	Proposal for a revision of the Mercury Regulation
	Proposal for an amending Regulation on circularity requirements for vehicle design and on management of end-of-life vehicles
<b>October</b>	Proposal for a Regulation on preventing plastic pellet losses to reduce microplastic pollution
	European Wind Power Action Plan
<b>November</b>	Forest Monitoring Law
<b>December</b>	Proposal for a Regulation on the protection of animals during transport and related operations
	Monitoring report on progress towards the 8th EAP objectives
<b>2024</b>	
<b>February</b>	Communication on 2040 Climate Targets

## 1.1. Confidence in EGD implementation

More than half of EU experts (55%) remain confident that the EU institutions will turn the EGD agenda into approved legislation.

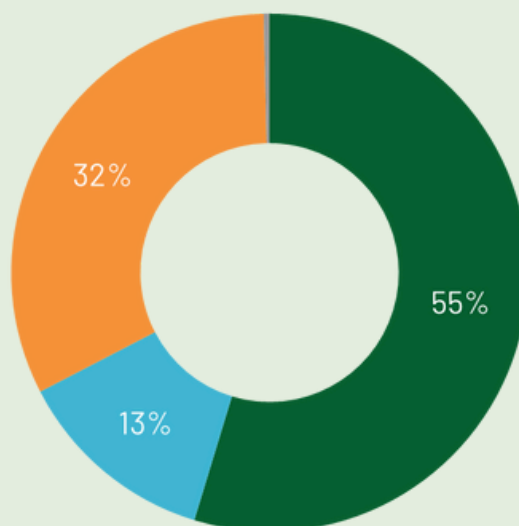
Due to differences in sample size and composition, if we were to compare the full results of this year's Barometer with those from last year, we would need to be cautious about overinterpreting any changes, as they could result from differences in the sample, not changes in opinion. However, we are able to avoid this difficulty by comparing the results from a smaller sample of EU experts (n=89) that took part in both the 2023 and

2024 Barometer surveys. We will refer to them as 'Recontacted experts'.

While a few Recontacted EU experts appear to be less confident in this wave than previously, this difference is not significant.<sup>5</sup> Given the emergence of greater political opposition across the EU towards certain aspects of the EGD, for confidence to remain constant gives us reason for optimism. Even in the face of political headwinds, in the long-term, EU experts on balance continue believe that the European institutions will enact the European Green Deal.

**Chart 1: Confidence that the EU institutions will turn the EGD agenda ambitions into approved legislation**

■ Confident   ■ Neither confident nor unconfident   ■ Not confident   ■ Don't know



Q12. The European Green Deal is a comprehensive agenda with specific environmental ambitions and targets, with the goal of making the EU climate neutral by 2050. How confident are you that the EU institutions will turn these ambitions into approved legislation?

Single code, closed question, five point scale.

Base: EU experts (n=276)

<sup>5</sup> 22% (n=20) were not confident in 2023, whereas 30% (n=27) are not confident in 2024



## 1.2. Opportunities: the importance of climate mitigation and adaptation

EU experts are most likely to choose 'increased climate mitigation and adaptation' as one of the four most important opportunities that would arise as a result of turning the European Green Deal into approved legislation. Six in ten (63%) select this option. Furthermore, when asked to pick

the single biggest opportunity that would arise, almost three in ten (27%) pick this option, far more than selected any of the other options. Addressing climate change therefore remains the most valued result of implementing the EGD.

**Chart 2: Opportunities arising as a result of turning the EGD into approved legislation**



Q15. Which four of the following are the most important opportunities that would arise as a result of turning the European Green Deal into approved legislation?

Multicode, choose up to four options

Base: EU experts (n=276)

## 1.3. Barriers: National governments remain the greatest obstacle

EU experts are most likely to choose ‘insufficient commitment by Member States governments’ as one of the four biggest barriers to turning the EGD into approved legislation, with six in ten (62%) selecting this option (see Chart 3 below). This is a longstanding concern among experts, with ‘insufficient commitment’ also being the most popular choice in previous editions of the Green Deal Barometer. This is also the option experts are most likely to select as the single biggest barrier to the turning the EGD into approved legislation.

Experts also continue to worry about the impact of inflation with just under half (48%) of experts selecting this as one of the four biggest barriers to the implementation of the EGD. In this year’s survey we tested four new barriers. Of those ‘lack of political ownership in the Member States’ and ‘the upcoming European elections’ proved to be important, being selected by almost four in

ten (38%) and almost three in ten EU experts (27%) respectively.

The former adds depth to experts’ concerns about the Member States’ commitment, suggesting that for many (if not a majority of) experts, the issue is not just a lack of drive, but a more fundamental disconnection from the EGD project. Furthermore, it should be a concern that for almost three in ten experts the elections themselves are a barrier, as if popular participation in politics is a barrier to EGD, that implies a certain legitimacy deficit.

As in previous waves we asked experts to propose ‘Other’ barriers that might prevent turning the EGD into approved legislation. Among these, the most common suggestions were pushback from some lobby industries, and some key political parties/groups advocating against the Green Deal.

## 1.4. The commitment of Member States

When asked which three Member States are the most committed to the EGD, the largest proportion of EU experts choose Denmark (43%, see Chart 4 below). The country that experts consider to be least committed to

the EGD is Hungary (62%). These countries were/are most likely to be selected in both categories by the Recontacted EU expert group in 2023 and 2024.

6

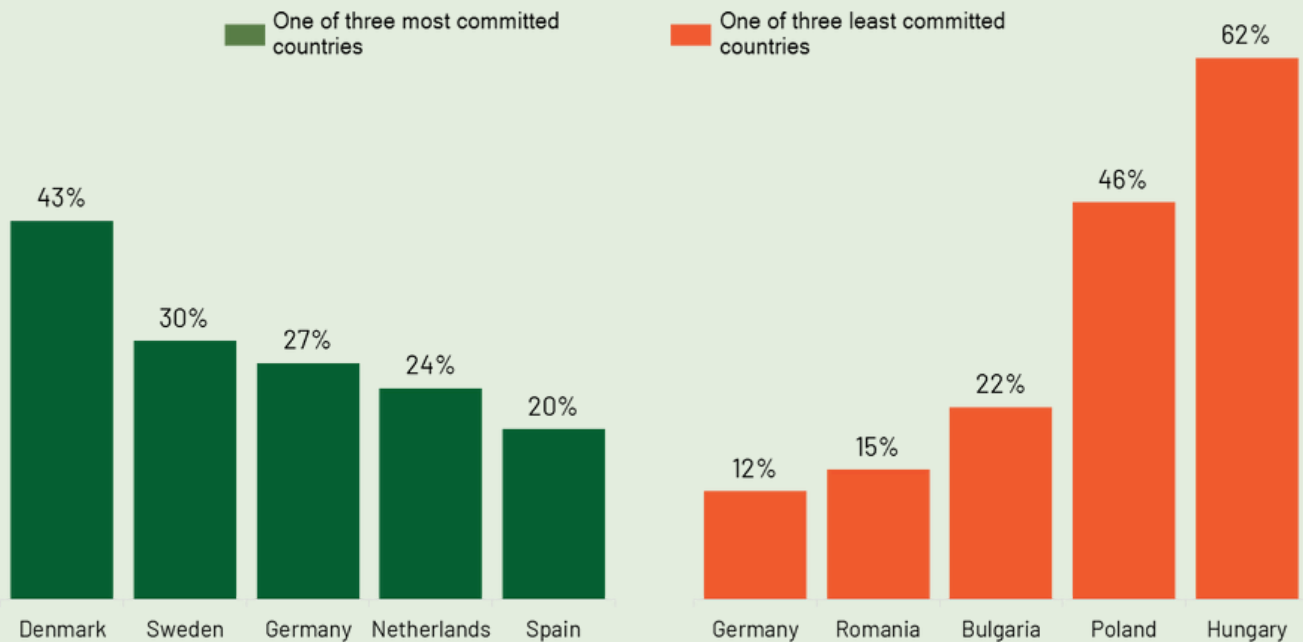
---

<sup>6</sup> 25% of EU experts selected “Don’t know” when asked about the most committed Member States (Q17), and 23% of experts selected “Don’t know” when asked about the least committed Member States (Q19).

**Chart 3: One of the four biggest barriers to turning the EGD into approved legislation**



**Chart 4: The perceived commitment of EU countries to the European Green Deal**



Q17. Which three European countries are most committed to the European Green Deal? / Q19. Which three European countries are least committed to the European Green Deal?  
Multicode, choose up to three options  
Base: EU experts (n=276)

22% (n=20) were not confident in 2023, whereas 30% (n=27) are not confident in 2024



# 2

# The 2024 EU elections and the future of the EGD

**European Green Deal Barometer**  
Fourth edition (2024)

## 2.1. Impact of the 2024 European elections

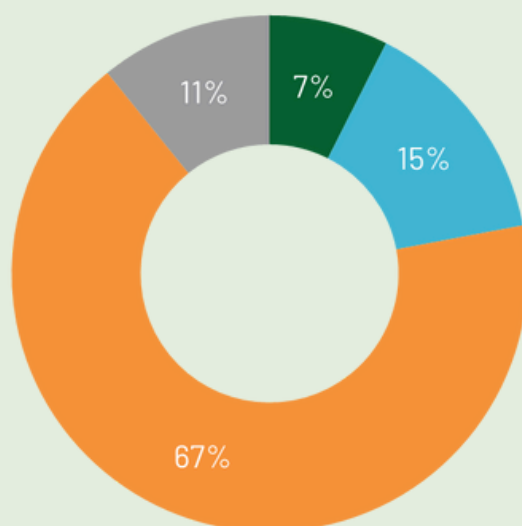
Almost seven in ten (67%) EU experts expect the 2024 EU elections to have a negative impact on the implementation of the European Green Deal. One in five (20%) expect the elections to have a very negative impact. This might be influenced by recent polls showing increasing support for conservative parties across Europe, typically less committed to climate issues.<sup>7</sup>

This finding however should be read in the context of only three in ten (27%) of experts selecting the upcoming elections as one of

the four biggest barriers to EGD implementation. Taken together these figures suggest that while most EU experts are pessimistic about the impact of the elections on the EGD, if asked to assess their relative negative impact alongside other issues, experts on the whole see Member State government-level issues or inflation as bigger problems. As such, while the expected impact of the EU elections is far from ideal, experts do not appear to be treating them as a crisis equal to recent economic disruption.

**Chart 5: The perceived impact of the 2024 EU elections on the implementation of the EGD**

■ Positive ■ Neither negative nor positive ■ Negative ■ Don't know/No impact



WAVE4Q3. In your view, will the 2024 EU elections have a positive, negative or neutral impact, if any, on the implementation of the European Green Deal?

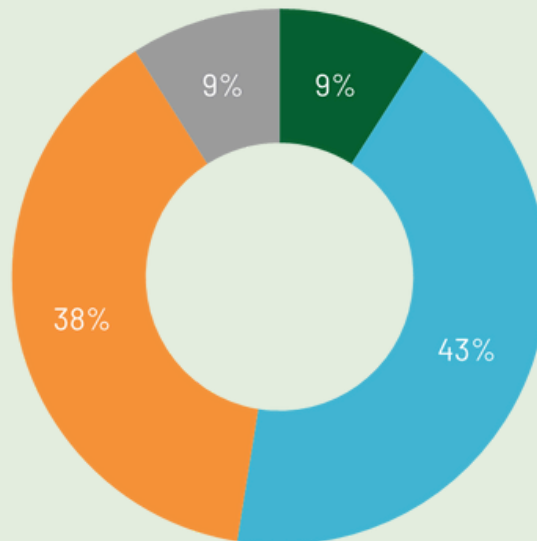
Single code, closed question, five point scale.

Base: EU experts (n=276)

<sup>7</sup> See Europe Elects' EU Election Projection 2024: <https://europeelects.eu/ep2024/>

## Chart 6: The perceived resilience of the EGD agenda following the 2024 European Elections

■ Completely/Very resilient   ■ Moderately resilient   ■ Slightly/Not resilient   ■ Don't know



Q24. How resilient or not resilient will the European Green Deal agenda be following the 2024 European Elections?  
Single code, closed question, five point scale.  
Base: EU experts (n=276)

On a similar note, EU experts' confidence in the resilience of the Green Deal has fallen, compared with a year ago. About half (52%) of EU experts overall state that the agenda will be at least moderately resilient after the 2024 European elections. However, only one in ten (9%) consider the EGD to be very or completely resilient.

Looking at the Recontacted EU experts' views, there has been a significant fall in confidence since last year, with the proportion of Recontacted EU experts believing that the EGD would be very or completely resilient falling from a quarter (24%, n=21) to one in ten (8%, n=7).

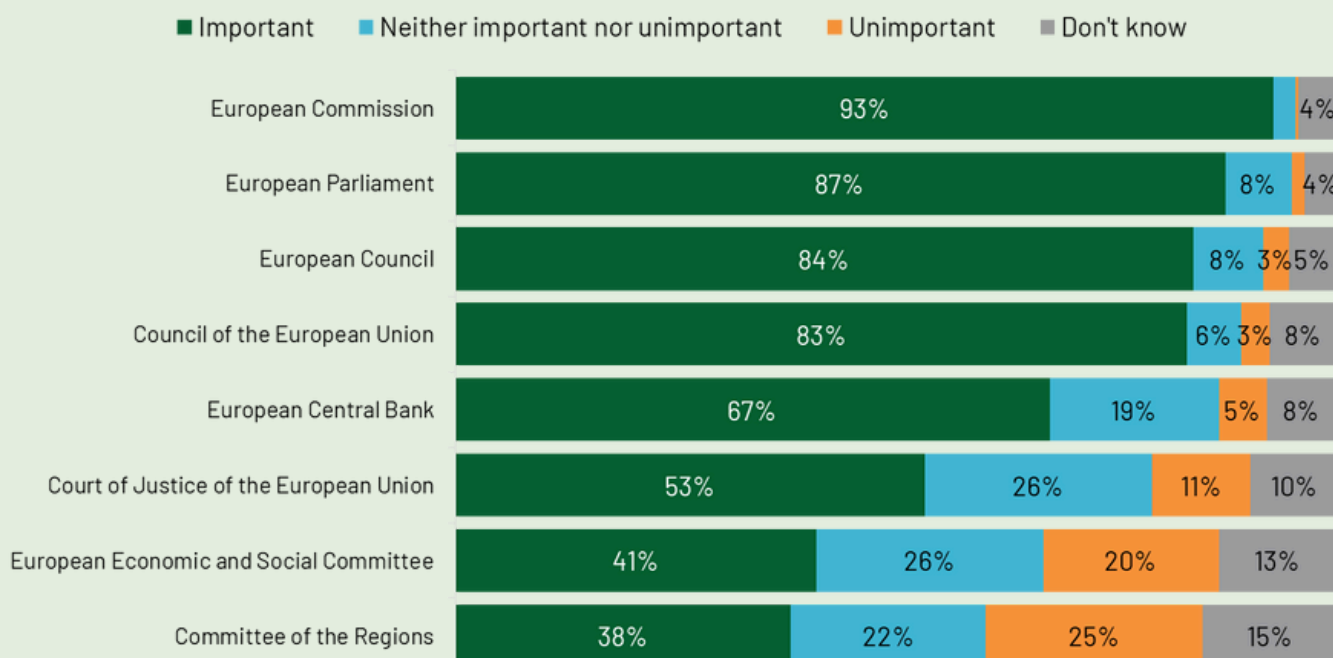
## 2.2. Measuring the importance of EU institutions and other actors for the EGD 's continuation

When asked whether various EU institutions would be important or not for ensuring the continuation of the EGD agenda beyond 2024, almost all experts (93%) reported that the European Commission would be important. The Commission holds the exclusive "right of initiative", and is the only institution responsible for planning and presenting new legislative proposals, which justifies the importance given by respondents.

High proportions also consider the EU legislators, namely the European Parliament

and the Council of the EU (composed by the Ministers), to be important. In addition, the European Council, gathering the Heads of State/Government, is seen as very influential, being the institution that outlines the priorities for the next legislative mandate, in the so-called "EU strategic agenda 2024-2029". EU experts are least likely to consider the Committee of the Regions to be important. However, the proportion that consider it to be important (38%) outweighs the proportion that say it is unimportant (25%).

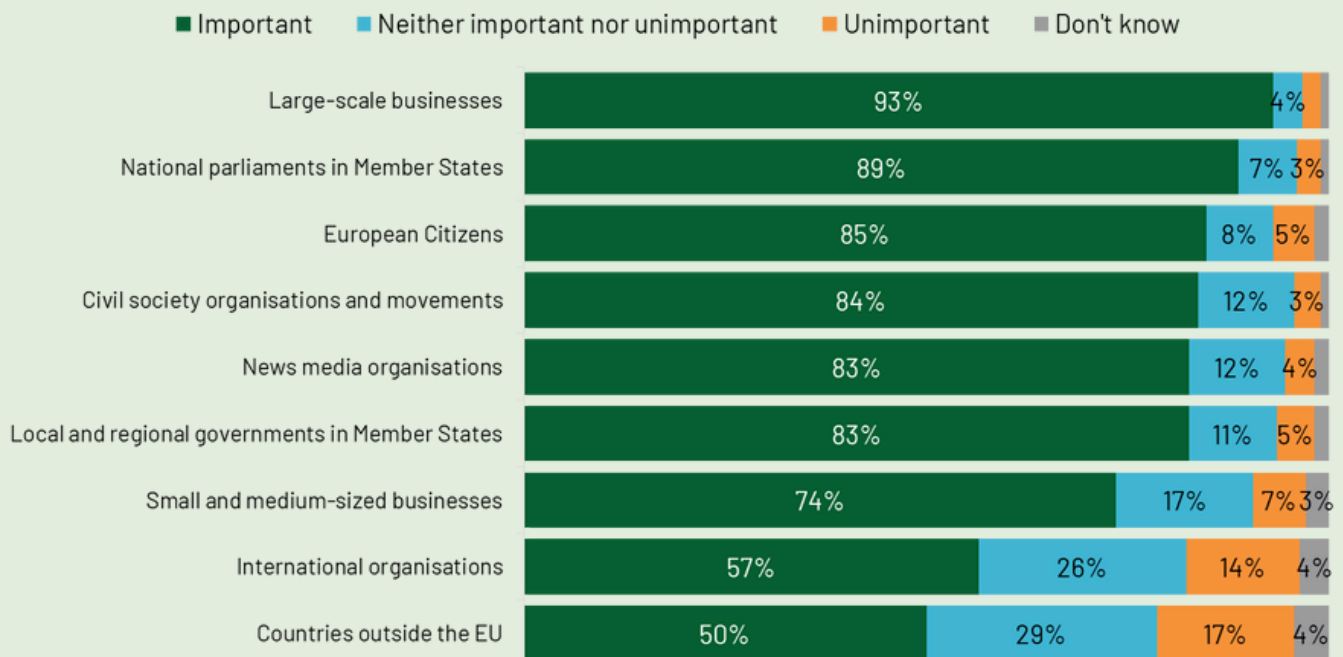
**Chart 7: The importance/unimportance of each EU institution for ensuring the continuation of the EGD**



Q25. How important or unimportant will each of the following EU institutions be for ensuring the continuation of the European Green Deal agenda? (Proportions under 2% not shown to improve visual clarity)  
 Single code, closed question, five point scale, respondent presented with list of statements one at a time.  
 Base: EU experts (n=276)



**Chart 8: The importance/unimportance of the tested actors for ensuring the continuation of the EGD**

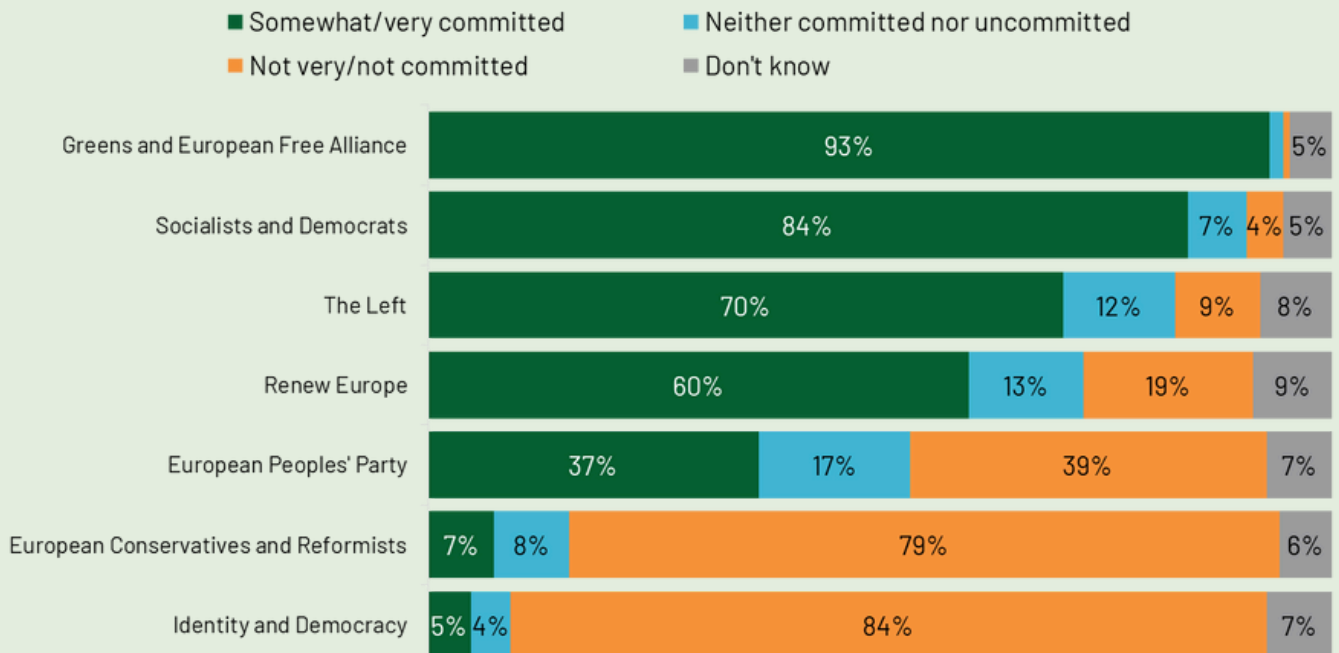


Q26. How important or unimportant will each of the following actors be for ensuring the continuation of the European Green Deal agenda beyond 2024? (Proportions under 2% not shown to improve visual clarity)  
 Single code, closed question, five point scale, respondent presented with list of statements one at a time.  
 Base: EU experts (n=276)

EU experts were also asked about the importance of other stakeholders in ensuring the continuation of the EDG. Nine in ten EU experts consider large-scale businesses (93%) and national parliaments in Member States (89%) to be important. The role of citizens and civil society organisations is also widely recognised (85% and 84% respectively). EU experts are least likely to consider countries outside the EU to be important (50%), most likely due to their limited involvement.

EU experts were also asked about their perceptions of the level of commitment of the EU Parliament’s seven political groups to the EGD agenda after the EU 2024 elections. As was the case last year, EU experts consider green and left-wing groups to be more committed, with the Greens and European Free Alliance most likely to be seen as committed (93%). Identity and Democracy are most likely to be seen as not committed (84%).

**Chart 9: The level of perceived commitment each political group will have to the EGD agenda after the EU 2024 elections**



Q27. How committed do you think each of these political groups will be to the European Green Deal agenda after the EU 2024 elections? (Proportions under 2% not shown to improve visual clarity)  
 Single code, closed question, five point scale, respondent presented with list of statements one at a time.  
 Base: EU experts (n=276)

Looking at the Recontacted EU expert subsample, these findings are mostly consistent with those from last year, albeit with some small and therefore non-significant increases. One significant change however can be seen in attitudes towards the European Conservatives and Reformists group. In 2023 just over a third (36%, n=32)

of Recontacted EU experts thought the ECR would be not committed at all to the EGD agenda. In 2024 over half (53%, n=47) believe this. This is likely to be linked to the group's voting trends in the last few months, which have often opposed the adoption of new environmental and climate files.<sup>8</sup>

<sup>8</sup> See [here](#) the EU Parliament Scoreboard prepared by the Vote for Nature Alliance

## Box 1. Findings on the European parties' manifestos

Most European parties have published their manifestos and nominated their Spitzenkandidaten, officially kicking off the electoral campaign for the 2024 EU elections.

By comparing the level of priority given to climate action in the available manifestos,<sup>9</sup> the respondents' perception of the EP groups' commitment towards the Green Deal agenda is quite well reflected in the parties' political programmes.<sup>10</sup>

The pursuit of climate policies appears to be a top priority for the centre-left and left parties, combined with social policies and the need to ensure a just transition. They all call for the evolution of the EGD into a new Green and Social Deal, with the Left referring to it as a "Green Social Contract". The **Party of European Socialists** (constituting the Socialists & Democrats group) commits to further investments in renewables and to combat energy poverty. They also promote sustainable agriculture with proper means for farmers to sustain the transition, and measures to reduce pesticides to tackle the biodiversity crisis.

The **European Greens** (constituting the Greens/EFA group) push for more ambitious climate targets and strive to improve other areas, besides phasing out fossil fuels and protecting nature, such as circular economy, tackling pollution and increasing green investments. The **European Left** (constituting the Left group) is also in favour of anticipating climate neutrality targets to 2035 and explicitly mentions the need to change the current financing system of the Common Agricultural Policy (CAP).

On the other side of the political spectrum, the liberal parties, namely the **Alliance of Liberals**

and **Democrats for Europe** (ALDE) and the **European Democratic Party** (EDP) - both constituting the Renew Europe group - and the **European Peoples' Party** (constituting the EPP group) mention the need to tackle climate change and to achieve EU climate objectives. Both liberal parties have dedicated sections to fostering sustainable agriculture and protecting biodiversity, placing great emphasis on farmers' protection and benefits.

The **ALDE** has a specific chapter on this topic, stressing the aim to relieve farmers of bureaucratic burden, while incentivising the adoption of sustainable practices. However, there is no explicit reference to the "European Green Deal" in either liberal parties' manifestos. On the other hand, the **EPP** associates climate policies as an opportunity for economic growth, promoting food security and to boost renewable energies, highlighting the key role of the EU in the fight against global warming and as lead on renewables. In addition, the **EPP** (but also the **PES**) mentions climate priorities through the lens of the need to increase EU's competitiveness overall and, in particular, in the twin - green and digital - transition.

Overall, the European Green Deal (even if not explicitly mentioned) remains the point of reference for most parties in terms of improving the resilience towards a more competitive economy. However, Europarties do not address the paradox of asking for further simplification and stop some specific EGD key proposal (especially linked to agriculture and biodiversity), while not undermining the overall coherent approach that could ensure the effective implementation of the Green Deal and a just transition towards a net-zero economy.

9 The manifestos of the European parties can be found at these links: [EPP](#), [PES](#), [ALDE](#) and [EDP](#), [the European Left](#) and the [European Greens](#).

10 Please note that the European Conservatives and Reformists Party (constituting the ECR group) and the Identity and Democracy Party (constituting the ID group) did not publish an EU election manifesto.

11 See [here](#) E3G's analysis of European parties' priorities: "2024 EU election manifestos and climate action"

# 3

## State of play of EU Green Deal policies

A person wearing a white hard hat, sunglasses, a black t-shirt, blue jeans, and a bright yellow high-visibility safety vest with reflective silver stripes is walking away from the camera on a paved path. The path is flanked by rows of solar panels supported by metal structures, extending into the distance under a clear blue sky. The overall scene is bright and sunny.

**European Green Deal Barometer**  
Fourth edition (2024)

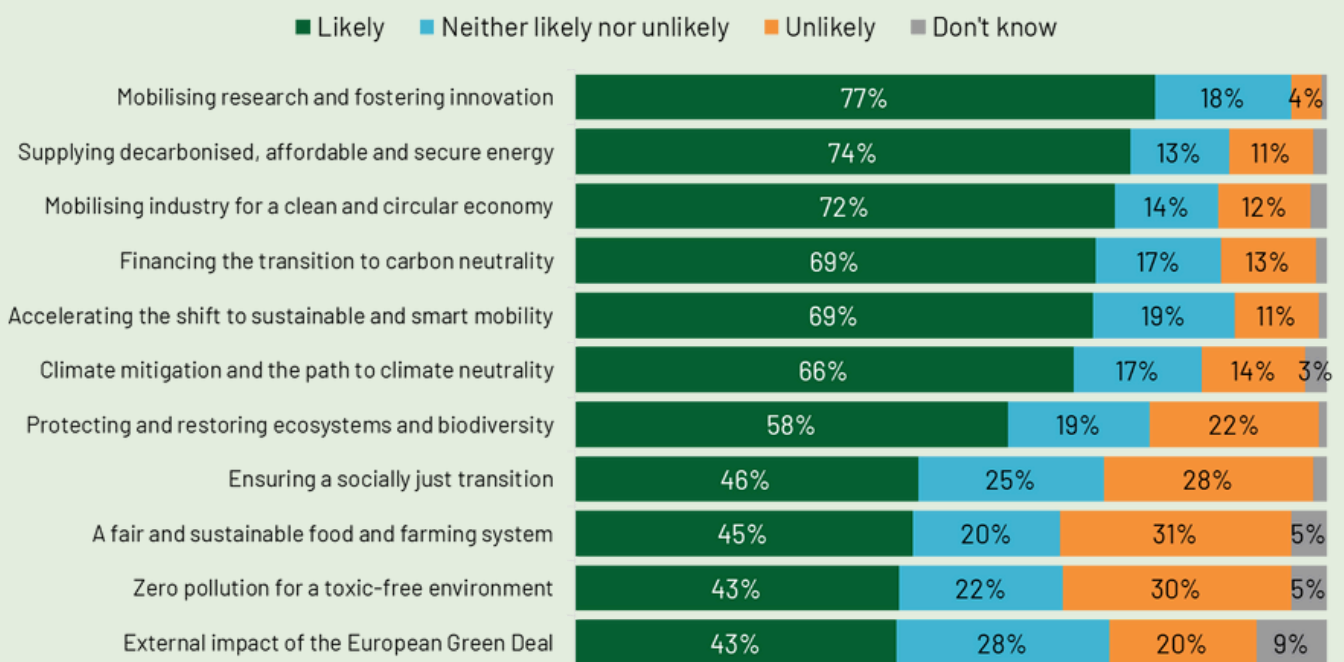


### 3.1. Assessing the progress of the EGD policy areas

EU experts most often select the EGD thematic areas ‘mobilising research and fostering innovation’ and ‘supplying decarbonised, affordable and secure energy’ as being likely, from a scientific perspective, to help the EU achieve climate neutrality by 2050 (77% of EU experts select the former and 74% the latter, while 76% selected each option in 2023).

These are also the policy areas where experts believe there has been the most progress made towards the climate neutrality goals. This suggests that the initiatives carried out by the European Commission in these areas were adequate and that a consensus regarding their importance was established across the EU institutions, during the legislative process.

**Chart 10: The likelihood that each of the policy areas’ targets and objectives will help the EU achieve climate neutrality**

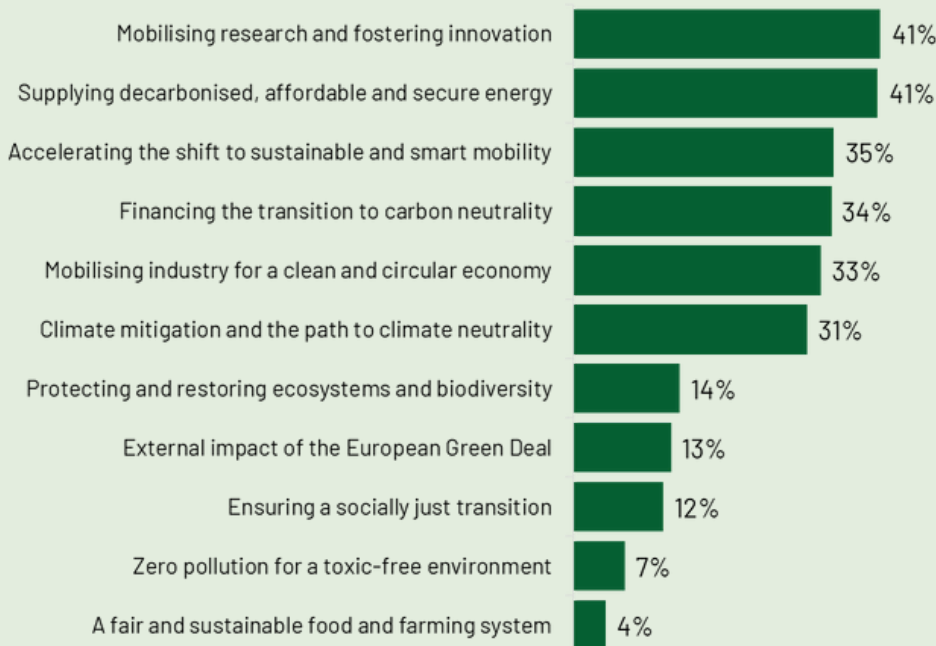


Q21. From a scientific perspective, how likely or unlikely is it that each of the following thematic areas’ targets and objectives, as they currently stand, will help the EU achieve climate neutrality by 2050? (Proportions under 2% not shown to improve visual clarity)

Single code, closed question, five point scale, respondent presented with list of statements one at a time.

Base: EU experts (n=276)

### Chart 11: EGD policy area which has made the most progress towards climate neutrality goals



WAVE4Q1. In which policy areas has there been the most progress towards climate neutrality goals since the publication of the European Green Deal?

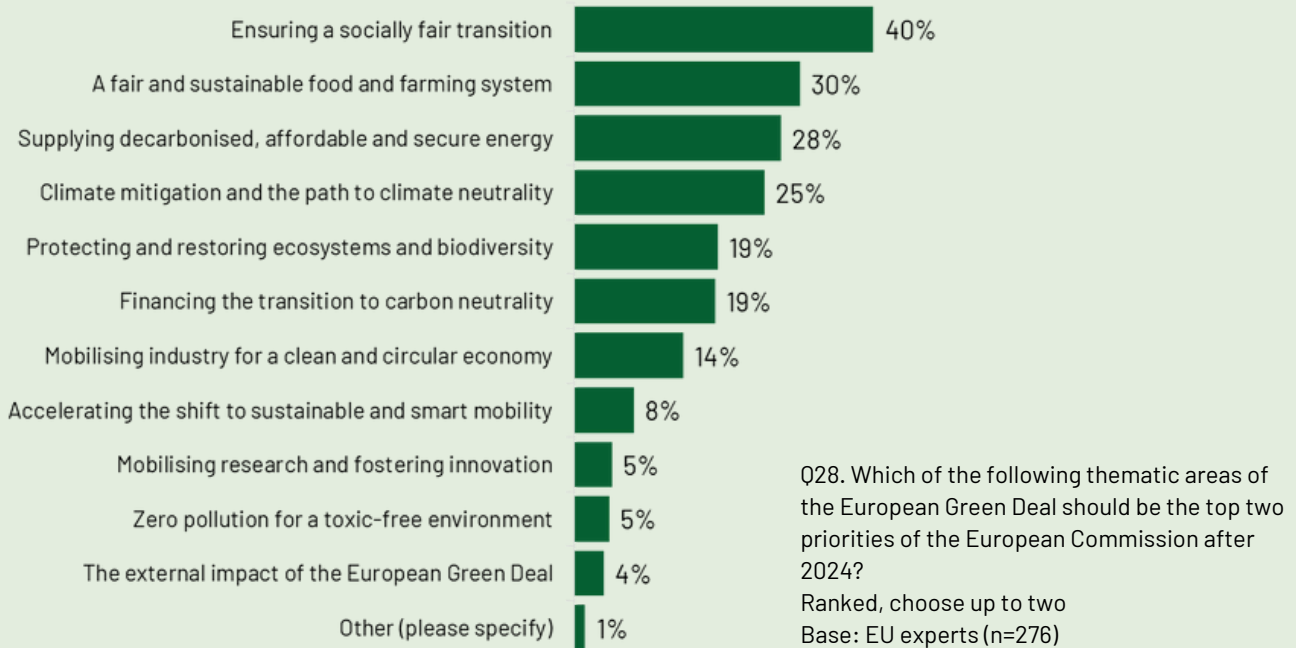
Ranked, choose up to three

Base: EU experts (n=276)

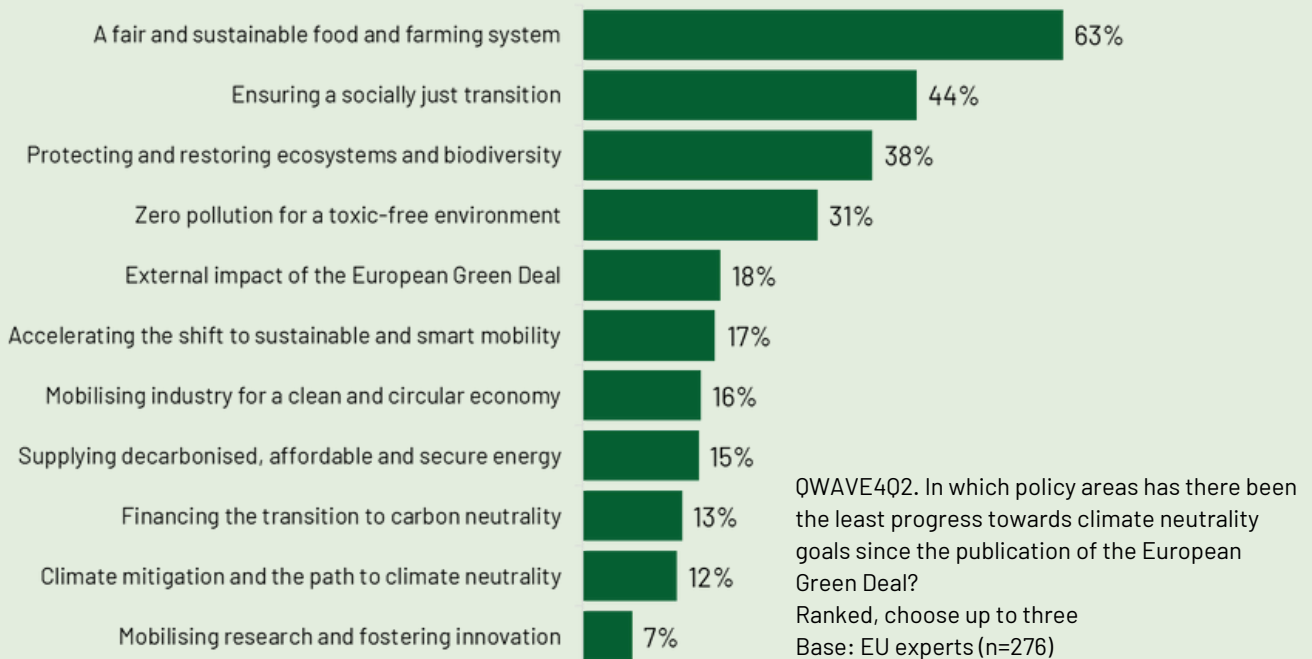
That said, ‘supplying decarbonised, affordable and secure energy’ is also one of the main priorities for the European Commission after 2024 (27%), demonstrating that the decarbonisation process still requires effort by the EU’s political leadership. However, other areas appear to be the experts’ choice for the top two priorities for the next Commission: four in ten (40%) believe the Commission should adopt more measures to ensure a socially just transition, while about one third (30%) selected ‘a fair and sustainable food and farming system’.

The perceived importance of these policy areas makes a great deal of sense given the mass protests by farmers across Europe, driven in part by concern for their livelihoods, that targeted some aspects of EU climate policy. Furthermore, these are also the policy areas where experts perceive the least progress having been made towards climate neutrality goals. The belief that the Commission should prioritise these areas likely stems from the perception that progress on them is lacking and needs to be accelerated.

**Chart 12: The perceived need for the European Commission to make each policy area one of their top two priorities after 2024**



**Chart 13: EGD policy area which has made the least progress towards climate neutrality goals**



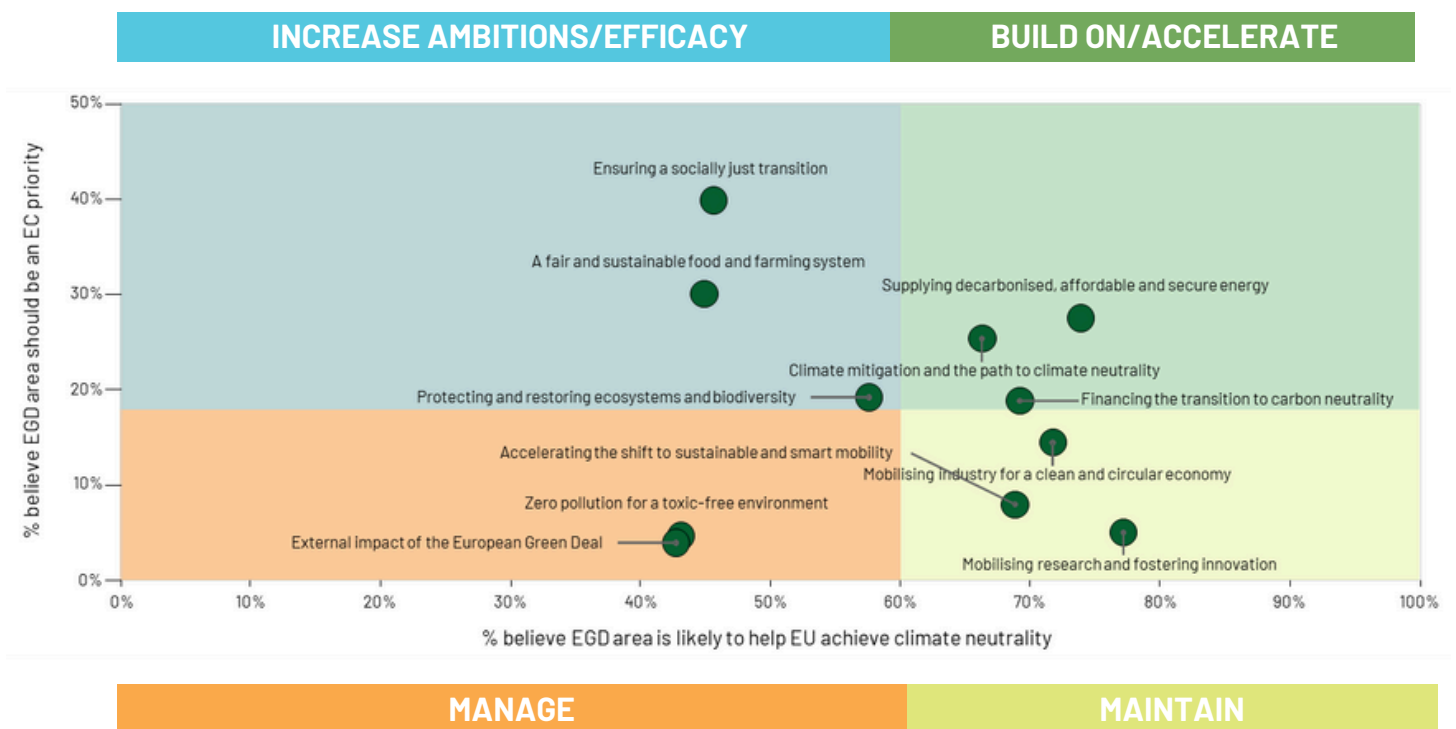
## 3.2. Priority and likelihood of success

In the previous chapter we outlined separately which policy areas EU experts think are likely to help the EU achieve climate neutrality, and which policy areas EU experts believe should be prioritised by the new EU Commission. In the matrix chart below (Chart 14) we combine this information, plotting the proportion of respondents that believe the policy area should be prioritised, and the percentage

that believe the policy area is likely to help the EU achieve climate neutrality.

Each point represents a policy area. The higher up on the chart each point is, the more experts think it should be prioritised. The further to the right on the chart each point is, the more experts think it is likely to help the EU achieve climate neutrality.

**Chart 14: The perceived priority of implementing each EGD thematic area, against their perceived likelihood of helping the EU achieve climate neutrality**



Q21. From a scientific perspective, how likely or unlikely is it that each of the following thematic areas' targets and objectives, as they currently stand, will help the EU achieve climate neutrality by 2050? / Q28. Which of the following thematic areas of the European Green Deal should be the top two priorities of the European Commission after 2024?

Q21. Single code, closed question, five point scale, respondent presented with list of statements one at a time. / Q28. Ranked, choose up to two

Base: EU experts (n=276)

What this chart (Chart 14) allows us to do is neatly identify those policy areas that are both above-average<sup>12</sup> in terms of how many experts think they should be prioritised, and also above average in terms of how many experts think they are likely to help the EU achieve climate neutrality. These policy areas fall in the top-right ‘Build On/Accelerate’ category, and include ‘supplying decarbonised, affordable and secure energy’, ‘climate mitigation’, and ‘financing the transition to carbon neutrality’. It appears that there are now many tools at the disposal of policymakers helping them to achieve the 2050 targets in these policy areas, and that from now on the challenge is to accelerate their implementation.

This chart also allows us to identify those

policy areas which, if they are prioritised by the European Commission as an above-average number of experts hope, require some reform, as currently a below-average proportion of experts believe they are likely to help the EU achieve its climate goals.

These policy areas fall in the ‘Increase Ambitions/Efficacy’ category. ‘Ensuring a socially just transition’ falls into this category, and indeed it being so high placed indicates that the perceived need to prioritise this policy area has come uncoupled from any environmental impact its targets or objectives may have. As such it may be necessary to reform this policy area to ensure that if prioritised, that prioritisation does not compromise on efficacy.

### 3.3. Progress made on specific policies/policy areas

In addition to assessing the relative progress made toward climate neutrality goals by different policy areas, this year EU experts were also asked to rate the absolute progress made towards various other goals.

At most only a third of experts on each policy area think that progress on any of the tested goals was good. However, for most of the goals, the majority of experts believe that

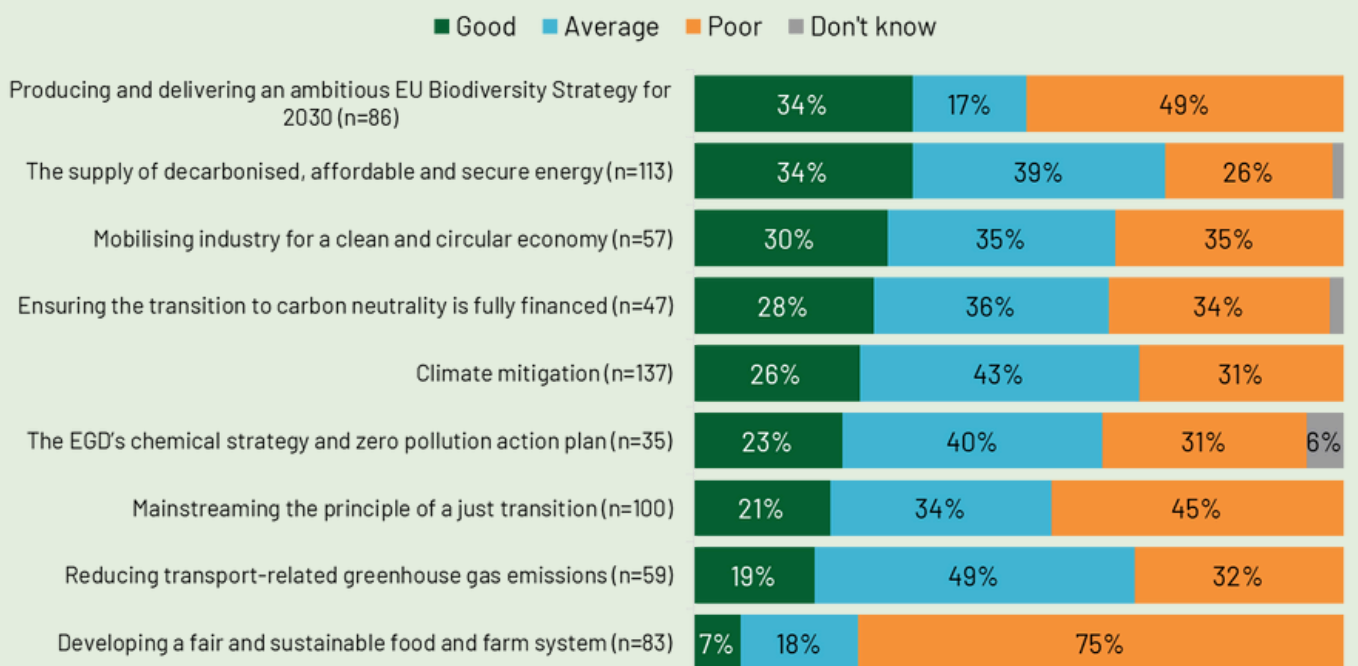
progress has been at least average. The only goals where experts are noticeably more pessimistic (i.e. close to or more than half think progress has been poor) are the same problem areas already discussed, namely those related to the just transition and farming (which includes ‘producing and delivering an ambitious EU Biodiversity Strategy’).<sup>13</sup>

<sup>12</sup> We say ‘above average’ as the left-to-right quadrant borders are set to fall at the mean value of Q28 (priority), and the top-to-bottom quadrant borders fall at the mean value of Q21 (likelihood).

<sup>13</sup> While this last goal has not been explicitly mentioned previously, two major pieces of law contributing to the EU Biodiversity Strategy were not finalised. The regulation on pesticide reduction was shelved by the Commission on 6th February, midway through our fieldwork, while the Council’s vote on Nature Restoration Law, initially scheduled on 25th March, was postponed due to the lack of support from Member States.



**Chart 15: Perceived progress made on each of the following policies/policy areas since 2019**



WAVE4Q4a - WAVE4Q4i. How would you rate the progress made towards [see chart label] from 2019 until now?  
 Single code, closed question, five point scale.  
 Base: Experts on each policy area

### 3.4. Other policy findings

#### ***Climate mitigation and the path to climate neutrality (n=137)***

Seven in ten (73%) EU experts familiar with this policy area believe that the approved proposals for the Fit for 55 package are positive. Experts are split regarding the sufficiency of the at least 90% emissions reduction target the Commission has committed to achieve by 2040, with 47% believing the target is sufficient, while 43% believe it is not.

The Communication on the 2040 climate target was published in early February, removing the part on emission reduction requirements for the agricultural sector, which might have contributed to such high scepticism.



## **Supplying decarbonised, affordable and secure energy (n=176)**

Echoing their cautiously positive stance on the progress made towards the goal of supplying decarbonised, affordable, and secure energy, most experts believe the REPowerEU Plan has contributed to the EU becoming less dependent on fossil fuels to at least a moderate extent (64%). Experts however are less positive about the current version of the Electricity Market Reform, in particular in relation to the protection measures from energy crises.

The revised law includes new social provisions to guarantee affordable energy bills for consumers and prevent disconnections for households in times of crises. However, just four in ten (43%) believe it will protect EU citizens from future crises or price spikes to at least a moderate extent, with slightly more (44%) saying it will do so only to a limited extent, or not at all.

## **Mobilising industry for a clean and circular economy (n=57)**

It is a longstanding goal of the Commission to advance the digital and ecological transition in parallel. In 2024 a third of experts familiar in this area (32%) feels that the EU has been successful in this, much more than believe it has been unsuccessful (21%). Opinion is more split regarding whether the EU has been successful in linking circular economy policies to climate and environmental targets. Four in ten experts (42%) believe it to have been successful, but a similar proportion (39%) believe the opposite. The scepticism might be linked to the fact that there are still considerable gaps to tackle on issues such

as excessive use and consumption of material resources, which has both circularity and climate related impacts, as well as impacts on biodiversity and water stress. In addition, climate and circular economy targets are still often dealt with separately, with more effort still needed to forge mutually beneficial links between these two areas of policy at the EU level.

On the other hand, a majority of experts (67%), believe that the revised EU ETS and new Net-Zero Industry Act will speed up decarbonisation of the EU's industry to at least a moderate extent.

## **Zero pollution for a toxic-free environment (n=35)**

As part of the Green Deal's Chemicals Strategy for Sustainability (CSS), one of the expected actions in this policy area was the revision of the Registration, Evaluation, Authorisation and Restriction of Chemicals (REACH), regulating the production and use of chemicals. It entered into force in 2007 and should be improved to ensure the necessary level of protection for the environment and human health. However, the European Commission did not come up with a revised proposal.

Two thirds (66%) of experts familiar with this area believe that this lack will have a negative impact on the stated goal. On a more positive side, other pieces of legislation contributing to the objective of zero pollution are close to adoption: The Packaging and Packaging Waste Regulation (PPWR), aimed at making packaging more sustainable and reducing waste, and the revised act on Classification, labelling and packaging of substances and mixtures (CLP).

## **Protecting and restoring ecosystems and biodiversity (n=86)**

With regard to nature restoration, two thirds (67%) of experts believe the revised Nature Restoration Law, even though less ambitious compared with the original proposition, would have at least a moderate impact on the restoration of biodiversity in the EU. However, only one expert feels the revised Law would have the exact impact needed, suggesting that more will need to be done. The Nature Restoration Law survived several challenges since its publication. It was formally adopted by the European Parliament on 27 February,<sup>14</sup> overcoming a last-minute amendment that called for the rejection of the entire dossier. At the time, most Member States supported the regulation, guaranteeing the qualified majority required for its adoption. However the spread of farmers' protest across the EU resulted in the postponement of the

Council's final vote planned on 25 March, making its future adoption uncertain.

Respondents were also asked about the topics that the next European Commission should prioritise to achieve this area's objectives. Experts reiterated the need to focus on nature restoration, a topic voted by almost half of respondents familiar with this policy area (48%). Almost one third of experts (29%) selected pesticide reduction, showing that even in the face of opposition, there remains significant support for this policy. Following the European Parliament's rejection, the Commission withdrew the proposal. We anticipate that the next College of Commissioners will relaunch a proposal addressing the excessive use of chemical pesticides in the European Union impacting human health and ecosystems.

---

<sup>14</sup> Please note that fieldwork was closed on 26 February



## ***Fair and sustainable food and farming system (n=83)***

EU experts familiar with this policy area are most likely to select 'increasing financial support for farmers to transition towards sustainable agricultural practices' (59%) as one of the three most important actions to focus on, same as in last wave. This suggests that current investment in sustainable agriculture, including via the CAP, continues to fall short of what is needed. The recent CAP simplifications proposed by EU legislators to address the

concerns raised by European farmers in recent protests constitute a step back in the EU's agenda to make food and farming sustainable and climate resilient. In fact, the elimination of requirements such as mandatory standards on habitat for nature and crop rotation are likely to increase challenges for farmers, as these practices strengthen resilience to increasingly frequent extreme weather phenomena.



## **Accelerating the shift to sustainable and smart mobility (n=59)**

Seven in ten (71%) experts familiar with this policy area expect the ETS 2 to have at least a moderate impact on the shift to sustainable and smart mobility. However, just one in ten (9%) believe it will have the exact impact needed, so while impressions

on current policy are broadly positive, there is still work to do. This is further indicated by the majority of experts believing that EU citizens are not currently incentivised to choose more sustainable and smart modes of mobility (61%).

## **Financing the transition to carbon neutrality (n=47)**

Well over half (57%) of experts familiar with this policy area are either not very or not at all confident that the EU's legislators will finish revising the Energy Taxation Directive (ETD) before the end of their mandate. This ETD is considered to be a key file to ensure that, among other targets, tax rates on fuels adequately reflect their energy content,

aligning taxation with environmental and climate objectives. Yet, little progress has been made since the Commission published its revised proposal for two main reasons: the breakout of the war in Ukraine and the following energy crisis, and the difficulty in achieving unanimity among Member States, which is necessary for tax matters.

## **Ensuring a socially just transition (n=100)**

Just one in six (16%) of experts familiar with this policy area believe the European Green Deal agenda ensures a just transition to a great extent or more. A third (33%) believe the EGD supports the just transition to a moderate extent, while just over four in ten (43%) believe the EGD supports this aim to a limited extent. Therefore, the majority of experts think the EGD contributes to the just transition to at least some degree, but the majority are also circumspect about the scale of that contribution.

Similar circumspection can also be found in the opposite direction, where over half of experts (55%) believe that the EGD is in

conflict with the objectives of the just transition, to a limited or medium extent. Just a quarter (26%) of experts believe the Deal does not conflict with just transition objectives at all. Making the ecological transition just would secure broader public support for climate action. Some remarkable steps were taken by the Belgian Presidency (in charge from January to July 2024) with the proposal for a European Common Policy Framework bringing together climate neutrality, sustainability, and a fully circular economy while leaving no one behind. In addition, the European Economic and Social Committee produced an opinion laying out a [Just Transition Policy Framework](#).



# 4

## Case studies: Leveraging the EU presidencies

**European Green Deal Barometer**  
Fourth edition (2024)

In order to develop a deeper understanding of the Green Deal's implementation at the national level, IEEP and partners focused on interviewing experts on the following five EU countries: France, Czechia, Sweden, Spain, and Poland.<sup>15</sup> These interviews have been used, as was done in the previous editions of

the Barometer, to produce five case studies examining the progress of the EGD agenda in each country. These countries were chosen for analysis as they have recently held, or will soon hold, the Presidency of the Council of the EU, which makes them important players in the advancement of Green Deal policies.

**Chart 16: Proportion of country experts that believe their government will commit to the continuation of the European Green Deal**



Q35. Do you believe the [nationality] government will commit to the continuation of the European Green Deal agenda at the EU level beyond the 2024 EU elections?

Single code, closed question, two point scale.

Base: Experts in each country (France, n=30; Czechia, n=24; Sweden, n=21; Spain, n=30; Poland, n=38)

<sup>15</sup> Q: If you feel comfortable commenting on the EGD's implementation in any of these countries, please select the one you feel the most comfortable commenting on.

## 4.1 Key country trends



### France

*Figures are based on sample of 30 France experts.*

France held the Presidency of the Council from January to June 2022. During this period its agenda heavily focused on emergency measures such as energy security in response to Russia's invasion of Ukraine. During the country's Presidency, member states reached agreement on a series of environmental plans, including the carbon border adjustment mechanism and green mobility.

Reflecting recent tensions within the country, France experts continue to say that the EU should focus on 'a fair and sustainable food and farming system'<sup>17</sup> and ensuring a socially just transition' to increase

support for the EGD. However, in response to recent farmers protests, the government rolled back environmental regulations and cut its green transition budget, including the country's flagship MaPrimeRénov' climate-friendly home renovation scheme and its Green Fund support. While a majority of France experts (67%) continue to believe that the national government will commit to the continuation of the EGD agenda in 2024, hopefulness has declined slightly since last year (77%). In fact, over half of France experts (57%) warn that upcoming elections will have negative impact on the implementation of the EGD.



### Czechia

*Figures are based on sample of 24 Czechia experts (small sample).*

Czechia held the Presidency of the Council from July to December 2022. While continuing its predecessor's focus on energy and security, the Presidency also achieved the approval of several parts of the Fit for 55 package, such as the Regulation setting emission targets for the land use sector

Biodiversity Framework, gathering international praise.

However, on a national level, Czechia experts warn that 'lack of consensus across the Czech political spectrum on the European Green Deal's priorities' (54%) and

<sup>17</sup> 45% vs 43% in Spain and 26% in Poland.

'inflation and the rising cost of living' (50%) are the most important barriers to implementing the EGD.

Czechia experts are also pessimistic of the impact of future national elections on the EGD agenda<sup>18</sup> and two in three (67%) describe the efforts of the national parliament in driving the EGD's progress as poor. Nonetheless, over half (54%) believe the

government will commit to the continuation of the EGD agenda after the elections. Greater focus on the social and financial dimensions could be key to maintaining this commitment, as Czechia experts most often select 'ensuring a socially just transition' (88%) and 'financing the transition to carbon neutrality' (38%) as the top areas the EU should focus on to increase national support for the EGD.



## Sweden

*Figures are based on sample of 21 Sweden experts (small sample).*

A greener and more secure EU was the goal when Sweden took over the Presidency of the Council from January to June 2023. In fact, the Fit for 55 package crossed the finishing line under the Presidency, a major success for climate action and key to the EU becoming the world's first climate-neutral continent by 2050.

While Sweden experts praise the good effort academia and universities (81%), national agencies (71%) and civil society organisations (71%) are making to drive progress on the European Green Deal, eight in ten (81%) Sweden experts rate the efforts of the national government as poor. They highlight 'short-term thinking in decision making at various levels' (76%), 'lack of consensus across the Swedish political

spectrum on the EGD's priorities (67%) and 'inconsistent political commitment to the EGD agenda from Swedish government' (62%) as the key barriers to implementing the agenda in Sweden.

Regarding the future of the Green Deal at national level, only a very slim majority of Sweden experts (57%) believe that their government will commit to the continuation of the EGD agenda, while the rest predicts that it won't commit – possibly a result of negative perceptions of the impact of the change of government in the September 2022 elections. Over six in ten (62%) Sweden experts say that the EU should focus on 'ensuring a socially just transition' to increase support for the European Green Deal in the country.

<sup>18</sup> 63% of Czechia experts say upcoming elections will have a negative impact on the EGD agenda.





## Spain

*Figures are based on sample of 30 Spain experts*

Spain held the Presidency of the Council from July to December 2023, the first of the current presidency trio with Belgium and Hungary. With green transition and environmental adaptation being one of its top priorities, the Presidency represented the EU's joint position at COP28 in Dubai and pushed for the restoration of Europe's degraded ecosystems (Law on Nature Restoration) and reducing the use of harmful substances in industry.

Spain experts continue to have a notably high opinion of the national government. They are more likely than France and Poland experts<sup>19</sup> to believe their national government has been good at driving progress forward on the EGD in their country.

Experts think 'the Spanish private sector believing that the Green Deal increases the

cost of doing business' (47%) and 'different socio-economic circumstances across Spanish regions' (40%) pose the biggest barriers to implementing the EGD in the country. Regional and local governments (30%) and large-scale businesses (27%) are the stakeholders most likely to be seen as making poor effort when it comes to progressing the EGD agenda.

Spain experts are positive regarding the impact of the European Elections. Nine in ten (90%) of Spain experts believe the government will commit to the continuation of the EGD agenda after the next European elections. Over four in ten experts believe that the EU should focus on ensuring a socially just transition (47%) and 'fair and sustainable food and farming system' (43%) to increase support for the EGD in Spain.



## Poland

*Figures are based on sample of 38 Poland experts*

Poland will hold the Presidency of the Council from January to June 2025, opening the 2025-26 presidency trio, composed of Poland, Denmark and Cyprus. Although the

recently-elected Government led by Donald Tusk has promised to accelerate the green transition, marking a new direction of climate policies for Poland, respondents

<sup>19</sup> 67% of Spain experts vs 20% of France and 18% of Poland experts

Government's efforts to advance the EGD implementation as poor. If compared with the other case-studies, Poland experts' perceptions on their own government's efforts are more negative than the others, with the exception of Sweden<sup>20</sup>This may be linked to the Government's support shown towards farmers protesting against Ukraine imports and the restrictions imposed by Green Deal. In fact, Tusk has started negotiations with the Commission to obtain some exemptions from some EGD provisions impacting agriculture. A majority of Poland experts consider 'short-term thinking in decision making (66%) and inconsistent political commitment (45%) to be the primary barriers to implementing the EGD in the country.

Nonetheless, over nine in ten (95%) of Poland experts believe the government will commit to the continuation of the EGD agenda after the elections, the highest of all case study countries. Poland experts are more likely than all other experts to select 'the supply of decarbonised, affordable and secure energy'<sup>21</sup> as the area the EU should most focus on to increase support for the EGD in their country. Some of the EGD's most ambitious goals, such as achieving climate neutrality by 2040 and decarbonisation by 2050, have become a sensitive issue for Central-Eastern Member States, and this coupled with increasing pressure from the agricultural sector, is likely why experts believe ensuring a socially just transition will also be crucial for the implementation of the Green Deal agenda in Poland.



<sup>20</sup> 71% of Poland experts vs 37% of France and 13% of Spain experts (with the exception of 81% of Sweden experts rating 'national government' poorly).

<sup>21</sup> 53% of Poland experts vs 28% of France and 30% of Spain experts

**Table 2: The areas experts in each country believe the EU should focus on**

	<b>France (n=30)</b>	<b>Czechia (n=24)</b>	<b>Sweden (n=21)</b>	<b>Spain (n=30)</b>	<b>Poland (n=38)</b>
<b>A fair and sustainable food and farming system</b>	43%	0%	10%	43%	26%
<b>Ensuring a socially just transition</b>	30%	88%	62%	47%	58%
<b>Supplying decarbonised, affordable and secure energy</b>	27%	33%	24%	30%	53%
<b>Protecting and restoring ecosystems and biodiversity</b>	27%	4%	14%	17%	3%
<b>Climate mitigation and the path to climate neutrality</b>	20%	0%	24%	7%	11%
<b>Mobilising industry for a clean and circular economy</b>	17%	25%	19%	13%	18%
<b>Mobilising research and fostering innovation</b>	10%	13%	5%	10%	0%
<b>Zero pollution for a toxic-free environment</b>	7%	0%	5%	7%	5%
<b>Accelerating the shift to sustainable and smart mobility</b>	7%	0%	24%	7%	8%
<b>Financing the transition to carbon neutrality</b>	7%	38%	14%	20%	18%
<b>The external impact of the European Green Deal</b>	0%	0%	0%	0%	0%

**Table 3: Country summary**

	<b>France (n=30)</b>	<b>Czechia (n=24)</b>	<b>Sweden (n=21)</b>	<b>Spain (n=30)</b>	<b>Poland (n=38)</b>
<b>Experts that believe the next national elections will have a positive impact on progress towards the EGD agenda.</b>	3%	0%	33%	3%	66%
<b>Experts that believe the impact of previous national elections has been positive.</b>	27%	33%	19%	50%	89%
<b>Factor experts most often select as the biggest barrier to implementing the EDG in each country.</b>	Inflation and the rising cost of living (53%)	Lack of consensus across the political spectrum on the EGD's priorities (54%)	Short-term thinking in decision making at various levels (76%)	The private sector believes that the Green Deal increases the cost of doing business (47%)	Short-term thinking in decision making at various levels (66%)
<b>Stakeholder experts most often identify as making a good effort to drive progress on the EGD in each country.</b>	Civil society organisations (63%)	Civil society organisations (83%)	Academia and universities (81%)	Academia and universities (87%)	Civil society organisations (82%)
<b>Stakeholder experts most often identify as making a poor effort to drive progress on the EGD in each country.</b>	Large-scale businesses (50%)	The national parliament (67%)	The national government (81%)	Regional and local governments (30%)	The national parliament (76%)



# 5

# External impacts of the EGD



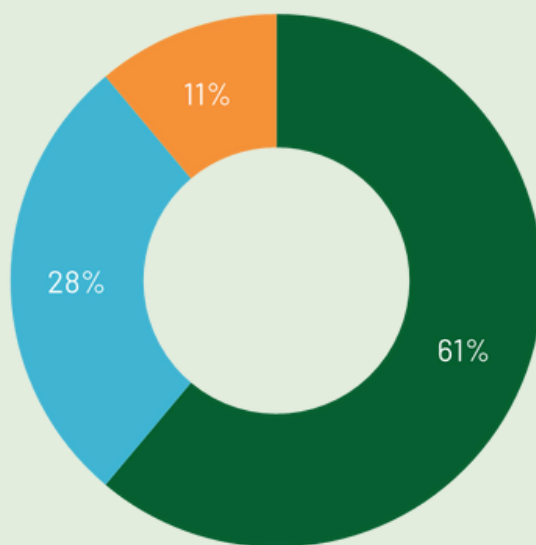


In this year's Barometer 36 experts on countries outside of the EU shared their international perspectives, allowing us to assess the impacts the Green Deal may have on third countries. With their contribution, we can better understand whether the Green Deal objectives will help the EU to achieve its international climate objectives. Of the 36 experts that completed this part of the survey, 17 live in Europe (but outside the EU), while 19 live outside of Europe.

Our first goal is to understand the familiarity of non-EU experts with the European Green Deal. Over six in ten non-EU experts (61%) report that they are familiar with the EGD (see Chart 17). Familiarity with the EGD outside the EU seem to have improved since last year when only half of the non-EU experts (51%) reported being familiar with the Deal.

**Chart 17: Familiarity with the European Green Deal**

■ Very/quite familiar   ■ Somewhat familiar   ■ Not at all/not very familiar



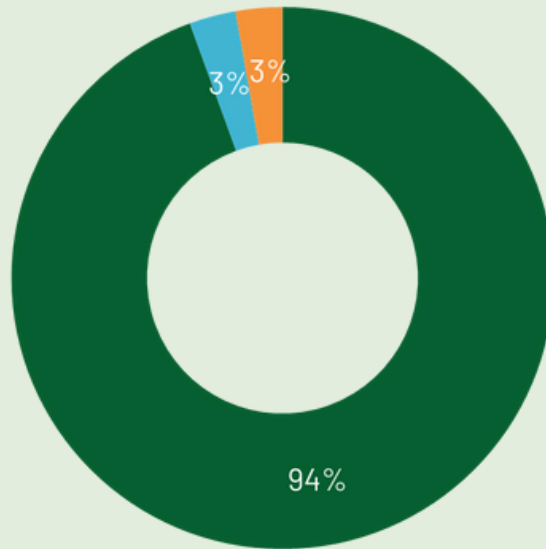
Q4. How familiar are you with the European Green Deal?  
Single code, closed question, five point scale.  
Base: Non-EU experts (n=36)

With familiarity improving, now over nine in ten (94%) non-EU experts agree that the EGD will have a global impact (see Chart 18). They also see the EGD as presenting the

country in which they have expertise with both problems and opportunities (83%, see Chart 19).

**Chart 18: Agreement and disagreement that the EGD will have a global impact**

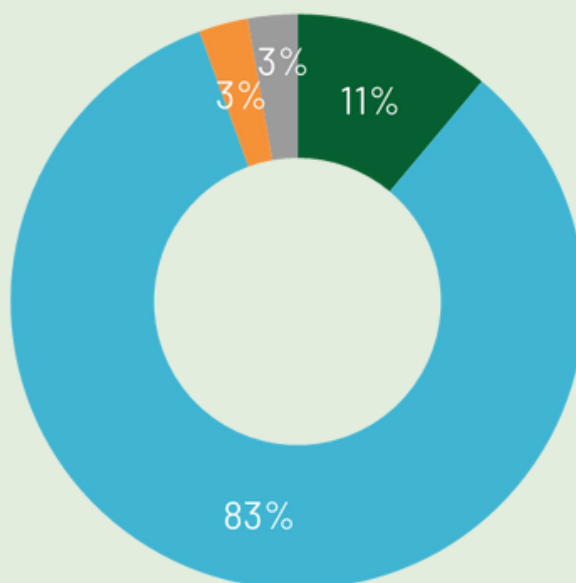
■ Agree ■ Neither agree nor disagree ■ Disagree ■ Don't know



Q5. Do you agree or disagree with the following statement: "If the EGD proposals are turned into legislation by the EU institutions, they will have an impact on a global scale"? Single code, closed question, five point scale.  
Base: Non-EU experts (n=36)

**Chart 19: Belief that the EGD presents the experts' country with opportunities, problems or both**

■ Only problems ■ Only opportunities  
■ Both problems and opportunities ■ Neither problems nor opportunities  
■ Don't know

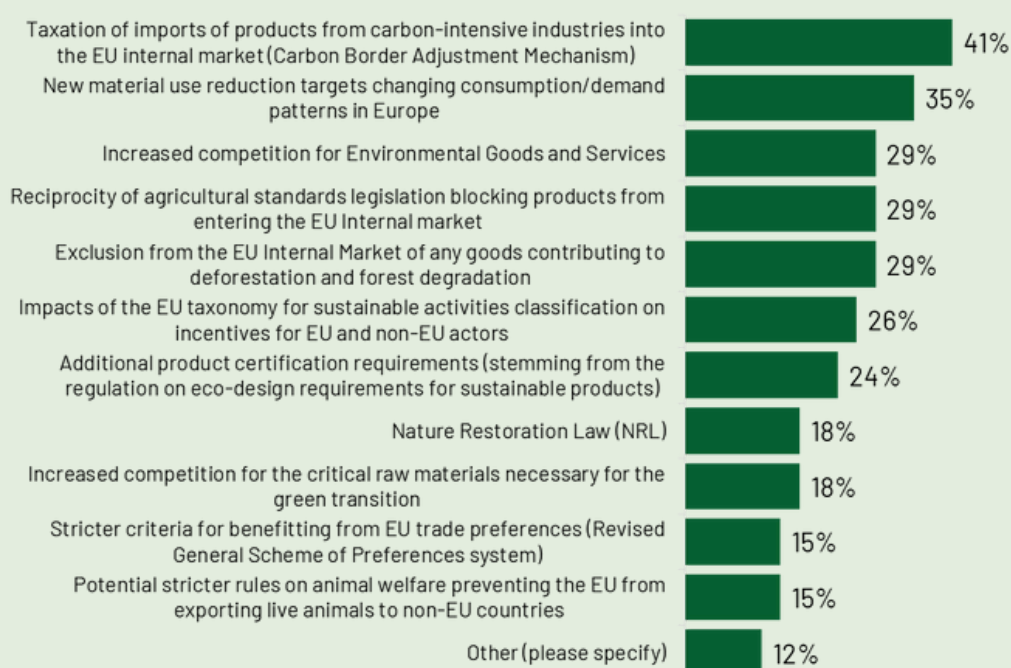


Q6. Would you say that the European Green Deal presents [expert's country] with opportunities, or problems? Single code, closed question, five point scale.  
Base: Non-EU experts (n=36)

The opportunities non-EU experts most associate with the EGD are the taxation of imports from carbon-intensive countries (45%) and new material use reduction targets (35%) as one of the three EU policies that pose the biggest opportunity for their country (see Chart 20).<sup>22</sup>

Meanwhile, the policies non-EU experts believe will most negatively impact their countries are the Revised General Scheme of Preferences system (40%), the reciprocity of agricultural standards legislation blocking products from entering the EU Internal market (37%), and additional product certification requirements (35%).<sup>23</sup>

**Chart 20: EGD policies perceived as opportunities by non-EU experts**



Q8. Which three European Green Deal policies offer the biggest opportunities for [expert's country]

Ranked, choose up to three

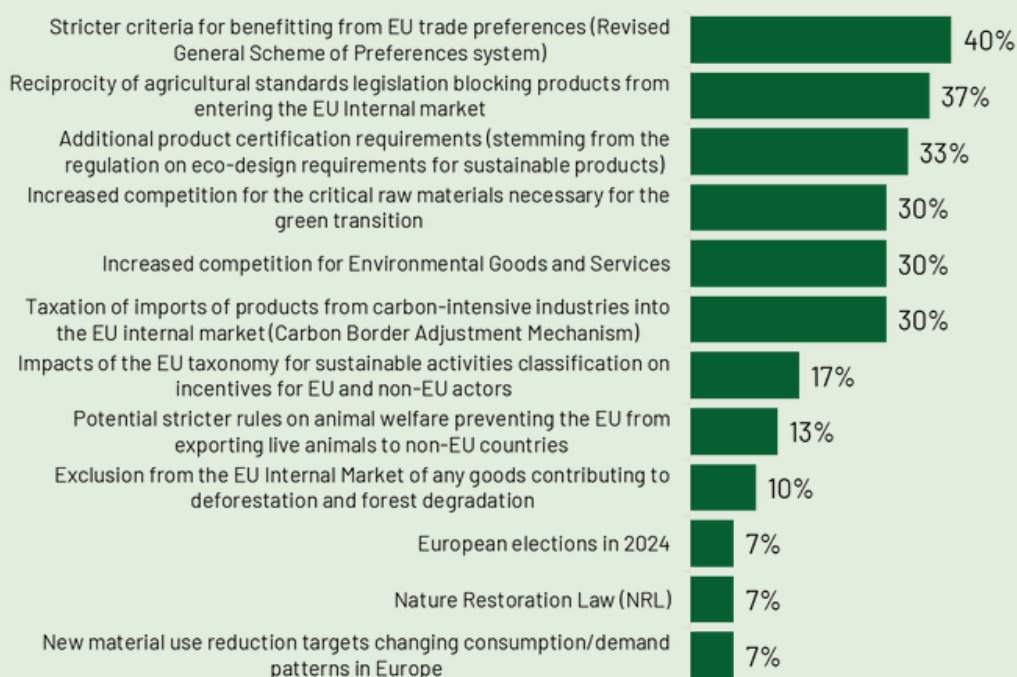
Base: Those non-EU experts that see the EGD as presenting the country they are expert on with opportunities, or with both problems and opportunities (n=34)

<sup>22</sup> The figures above are the proportion of non-EU experts that see the EGD as presenting the country they are expert on with opportunities, or with both problems and opportunities (n=34).

<sup>23</sup> The figures above are the proportion of non-EU experts that see the EGD as presenting the country they are expert on with problems, or with both problems and opportunities (n=30).



## Chart 21: EGD policies non-EU experts believe will impact their country most negatively



Q7. Which three of the following European Green Deal policies will most negatively impact [expert's country]

Ranked, choose up to three

Base: Those non-EU experts that see the EGD as presenting the country they are expert on with problems, or with both problems and opportunities (n=30)

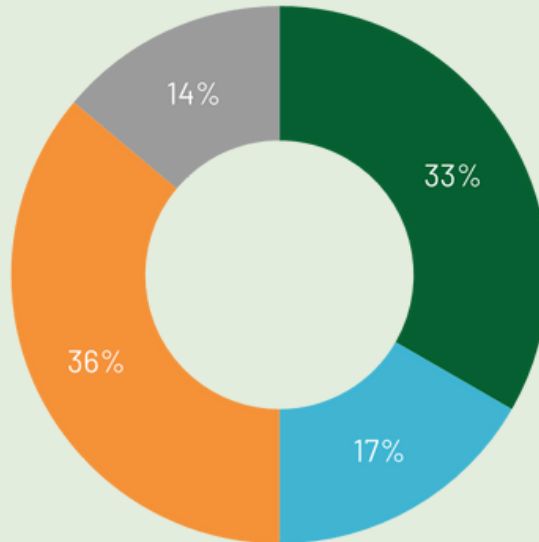
Non-EU experts are almost equally split on the EU's receptivity to external input, with around 1 in 3 non-EU experts saying the EU is open (33%) or closed (36%) to input from countries outside the EU on the design and implementation of the EGD (see Chart 22).

Non-EU experts express confidence (likely to agree) that the EDG will help the EU achieve the implementation and targets of different global frameworks (see Chart 23). Four in five (81%) agree that the ambitiousness of the EGD establishes the EU as a leader in addressing global environmental challenges, and 61% of

experts believe that, if successfully implemented, the EGD will inspire their countries to increase ambition in addressing global environmental challenges. Although with slightly different percentages, non-EU experts recognise multiple positive spillovers resulting from Green Deal policies. This should encourage EU policymakers to continue keeping the EU green agenda central, by setting ambitious and necessary actions to counter the effects of climate change.

**Chart 22: Agreement and disagreement that the EGD will have a global impact**

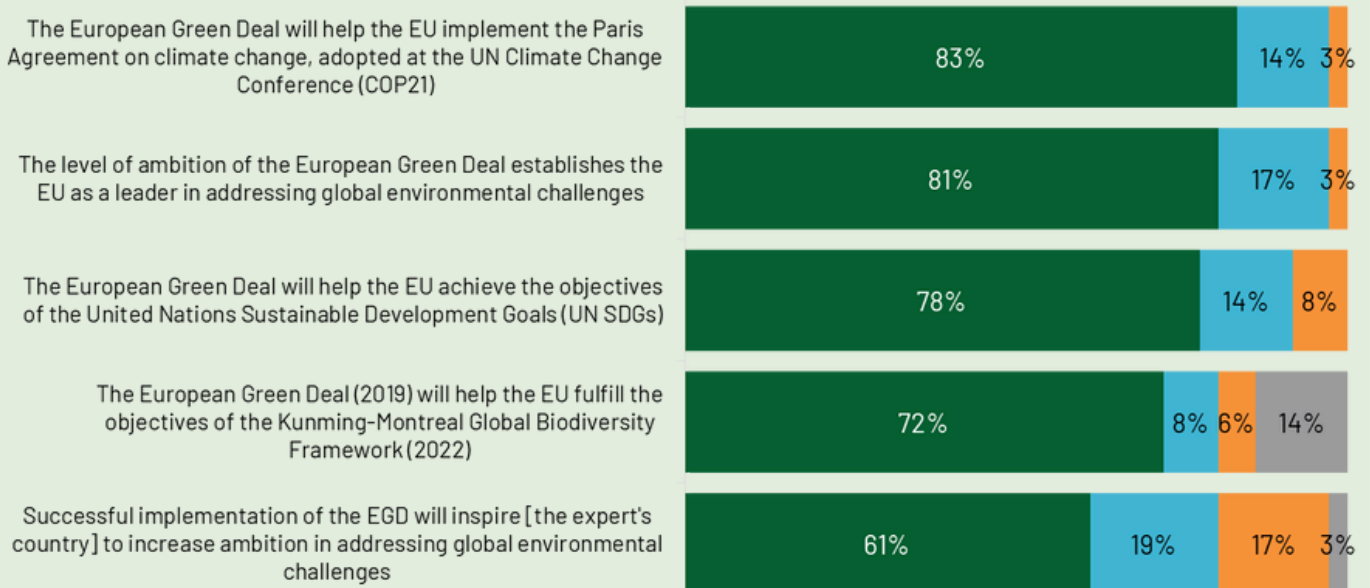
■ Open ■ Neither open nor closed ■ Closed ■ Don't know



Q9. Is the EU closed or open to input from countries outside of the EU on the design and implementation of the European Green Deal? Single code, closed question, five point scale.  
Base: Non-EU experts (n=36)

**Chart 23: Agreement with the tested statements**

■ Agree ■ Neither agree nor disagree ■ Disagree ■ Don't know



Q10. To what extent do you agree or disagree with the following:  
Single code, closed question, five point scale, respondent presented with list of statements one at a time.  
Base: Non-EU experts (n=36)

## Box 2. The views of EU experts

Seven in ten EU experts (70%) familiar with the external impact policy area (n=56), believe the external impact of the EGD will be positive, recognising perhaps that it could set an example for action for third country governments.

They are also more likely to agree that the EGD will help the EU fulfil the objectives of the Paris Agreement, a similar finding that raised in the last Barometer's edition. Six in ten (63%) believe that the Carbon Border Adjustment Mechanism (CBAM) will help reduce the carbon emissions of products entering into the EU to at least a moderate extent, and only one expert believes the Mechanism will have no effect. The CBAM will be fully applied from 2026, while a partial intro-

-duction started last year on the import of some products, to allow EU and non-EU industries and public authorities to adapt to the new regime. This gradual introduction of the CBAM fosters the decarbonisation of EU industry, while phasing-out of the allocation of free allowances under the EU Emissions Trading System (ETS) and avoiding the so-called "carbon leakage".

Nevertheless, experts mostly disagree (57%) that the EU external policies are sufficiently mainstreamed into the EGD agenda, highlighting an increased need to enhance the involvement of external actors in the design of the EGD policies.







# 6 Recommendations



The European Green Deal is probably experiencing the most difficult challenge, since its launch. The upcoming European elections are likely to shake the current political balance, with a new College of Commissioners and different alliances within the European Parliament's groups which might shift the priorities for the next mandate. Not to mention the incoming Hungarian Presidency of the Council (from July to December 2024) who is not expected to focus on green policies.

However, the objectives stated in the European Climate Law are legally binding. The triple crisis of climate change, pollution, and biodiversity loss is scientifically

recognised, and not addressing it now will worsen the situation at a faster pace. Choosing not to take action will result in higher costs than implementing any other policy enforcement. In addition, pressure coming from other actors, such as local authorities, the scientific community and civil society organisations, cannot be ignored.

The following recommendations to ensure a resilient future for the EGD are complemented with the outcome of discussions during the Think2030 Conference held in Brussels on 27 March 2024.



## 1. Ensuring effective implementation of the Green Deal policies

As shown in the previous chapters, the number of pieces of legislation produced and approved by EU legislators is significant. For the next phase of the Green Deal, it is necessary to focus on the effective implementation of such laws at national and local levels. In a mid-term review of the 8th EAP, drawing on the EEA's monitoring report, the European Commission acknowledges that the 2030 targets are "within reach if the Member States commit to implementing policies and laws".<sup>24</sup>

Establishing the 2040 targets to at least 90% reductions will facilitate the phasing out of fossil fuels and it is important the official adoption is not delayed throughout the appointment procedure of the new Commission.

Also, introducing climate neutrality into the National Energy and Climate Plans for the next of phase of revision, which at the moment lack of ambition for the achievement of the 2030 targets, is of utmost importance.

<sup>24</sup> See [here](#) the Commission's Report on the 8th Environment Action Programme Mid-Term Review



## 2. Aligning future priorities with climate objectives

Discussions on the action plan for the next legislative term have been ongoing for months, and industrial competitiveness is likely to play a central role. Under an initiative by the Belgian Presidency, hundreds of companies and organisations have signed the Antwerp Declaration, calling for a European Industrial Deal to complement the green policies.

Having the industry sector on board during the transition is undoubtedly a positive step, as it can boost innovation, improve infra-

-structure, and create new jobs. However, it is hoped that this will not undermine the path towards climate neutrality and a circular economy.

The European Green Deal has faced several challenges, from the pandemic to the war in Ukraine, and it has proved to be a dynamic strategy that can be adapted to circumstances and pursued in parallel with other emergencies. The EU institutions should continue to deliver it in this way, by integrating it to future priorities.



## 3. Increasing finances to accelerate a just transition in all sectors

The revision of the Multiannual Financial Framework (MFF) post-2027, starting already next year, will present opportunities to discuss how to channel funds more effectively towards sustainability priorities, providing a just transition across sectors.

As a matter of fact, there is certainly a need to review the current CAP, moving to a system that directly links funding to climate mitigation goals and supports farmers in the

transition to more environmentally friendly practices and the effective implementation of sustainable priorities, including biodiversity. Introducing a market mechanism, such as an ETS for the agri-food sector;<sup>26</sup> could be one source of revenue in addition to the CAP that could support farmers during such a transition, similar to the creation of the Social Climate Fund to accompany the ETS for road and transport.<sup>27</sup>

<sup>25</sup> See [here](#) the Antwerp Declaration for a European Industrial Deal

<sup>26</sup> See [Applying the polluter pays principle to agricultural emissions](#)

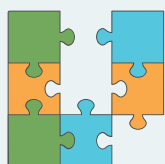
<sup>27</sup> See [IEEP's paper](#) on Transforming EU land use and the CAP: a post-2024 vision



## 4. Improving communication and strengthening citizens' ownership

To counter the current resistance and negative narrative, communication around the Green Deal needs to be improved, highlighting its emerging opportunities and multiple long-term benefits for the planet and future generations. As revealed by the survey responses, the role of citizens and

civil society organisations is considered crucial for the continuation of the EGD. In addition, in most of the case-study countries, they are regarded as the stakeholders who make the greatest efforts to promote Green Deal progress.



## 5. Filling in some gaps and integrating different policies

As shown by respondents, more in-depth reforms are required in certain areas that have been overlooked so far, particularly in relation to the areas of food, biodiversity and in ensuring a just transition. Also additional efforts should be made in shifting to sustainable production and consumption, which current levels are cause of high level of pollution and biodiversity loss, and was identified as an issue impacting the achievement of the climate targets. Therefore, we recommend filling the following gaps:

- Introducing a new overarching EU material resources law with consumption reduction targets;
- Working toward climate neutrality in agri-food, and reducing agriculture accounts;
- Upscale intervention in the preservation and restoration of nature to strengthen climate adaptation and resilience;
- Investing in the just transition to align climate and environmental action with social equity and well-being.

## ACKNOWLEDGEMENTS

IEEP would like to thank the European Green Deal Barometer 2024 survey partners who contributed to the creation of the survey and helped in the dissemination. In particular, the Think Sustainable Europe network members, AMO (CZ), EnergiaKlub (HU), IDDRI (FR), and The Green Tank (GR); the European

Environmental Agency, the European Environmental Bureau, the Green Economy Coalition, Reform Institute (PL), UNEP One Planet; our private sector partners Tetra Pak and IBMA and the Heinrich Böll Foundation that supported the Barometer work.

## ANNEX: STAKEHOLDER SAMPLE

This edition of the European Green Deal Barometer is based on a survey of 312 sustainability experts, defined as people who have worked with an organisation, or in a role, that focuses on environmental and sustainability issues for at least a year, or who have completed a Masters or Doctoral university course in a subject related to these issues, or who have helped design and/or implement EU environmental legislation.

In this edition of the Barometer nearly nine in ten (88%) sustainability experts live in EU countries. Of the non-EU experts 17 are from Europe, with the remaining 19 non-Europe experts living in Africa (4), the Americas (8), or Asia (7).

Of the EU experts, 26% live in Central and Eastern Europe, 10% Northern Europe, 21% Southern Europe and 33% Western Europe.

The stakeholder sample is very evenly split across the four main sector categories. 24% of experts sampled come from academia and think tanks, 24% from roles in government or policy, 24% from NGOs and foundations, and 22% from the private sector. Just over six in ten (61%) have worked in or studied environmental policy, sustainable development, or corporate responsibility for five years or more.



**THE INSTITUTE FOR EUROPEAN ENVIRONMENTAL POLICY (IEEP)**

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

European Green Deal Barometer 2024  
editors: Irene Chiocchetti and Elisa Decourcelle (IEEP)

For questions, please contact  
ichiocchetti@ieep.eu

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

**Savanta:**

For more information about IEEP, visit [www.ieep.eu](http://www.ieep.eu) and follow us on Twitter @IEEP\_eu and LinkedIn.

**SURVEY PARTNERS**

We gratefully acknowledge the role of the Think2030 and Think Sustainable Europe 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 report reflects only the views of its authors and not the donors.

This work was supported by

