Unify

BRINGING THE EU TOGETHER
ON CLIMATE ACTION

Before Survey

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UNIFY : Bringing the EU together on climate action
Project Before Survey

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The survey was conducted in the period January – March 2020 in EU Member States with specific emphasis on 10-Member States – Denmark, Germany, France, Estonia, Poland, Czech Republic, Slovenia, Portugal, Spain and Croatia.

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OBJECTIVE AND METHODOLOGY OF THE SURVEY

The main objective of the Survey is to determine the level of knowledge of European stakeholders and local actors on the following 3 key EU level policy processes: National energy and climate plans, Long Term Strategies to reach climate neutrality and the programming of the EU funds. The Survey also assesses stakeholders' beliefs and attitudes towards the EU and the Member States' climate action.

The Survey had 25 questions divided in the following 5 section:

- General Questions on Climate Change to assess beliefs and attitudes of respondents
- 3 sections to assess the level of knowledge and familiarity with the following policy processes :
    - National Energy and Climate Plans
    - National & the EU Long Term Strategies
    - Programming and use of EU funds for increased climate action
- Personal information section

The Survey is conducted through an online questionnaire that is shared with European NGOs, youth activists, academics and other professionals who work on climate and energy policies. Even though the survey is sent to over 1000 people, only 866 people responded.

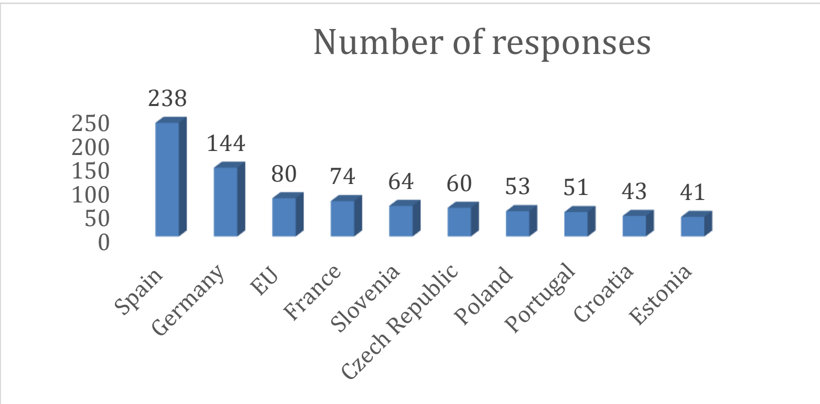


Figure 1: Number of responses per country

GENERAL FINDINGS

Almost 80% of the respondents are either concerned or very concerned about climate change. In particular: on EU level 77% of respondents are very concerned about climate change and the same percent of them feel that the EU is not doing enough in fighting against climate change.

The situation is similar for Germany where 73% of respondents are very concerned about climate change and 71% of them think that the EU is not doing enough in the fight against climate change. In France 64% of the respondents agree that the EU is not doing enough, while this number is 54% in Slovenia. In Croatia 42% of respondents are very concerned about climate change and they think that the EU is not doing enough in the fight against climate change. The situation is similar in Spain where 46% of respondents are very concerned and 87% feel that the EU is not doing enough in the fight against climate change. In Czech Republic 75% of respondents are very concerned and 60% of them feel that the EU is not doing enough. In Estonia 27% of respondents are very concerned and the same number thinks that the EU is not doing enough in the climate fight in Portugal 62% and Poland 50% are very concerned.

Respondents have ranked the EU's 2030 climate and energy targets based on their knowledge, where 1 meant that targets are not at all ambitious, and 5 that they are too ambitious. Majority of respondents assessed that the EU's current climate and energy targets of at least 40% reduction in greenhouse gas emissions; at least 32% share for renewable energy; at least 32.5% improvement in energy efficiency are not ambitious.

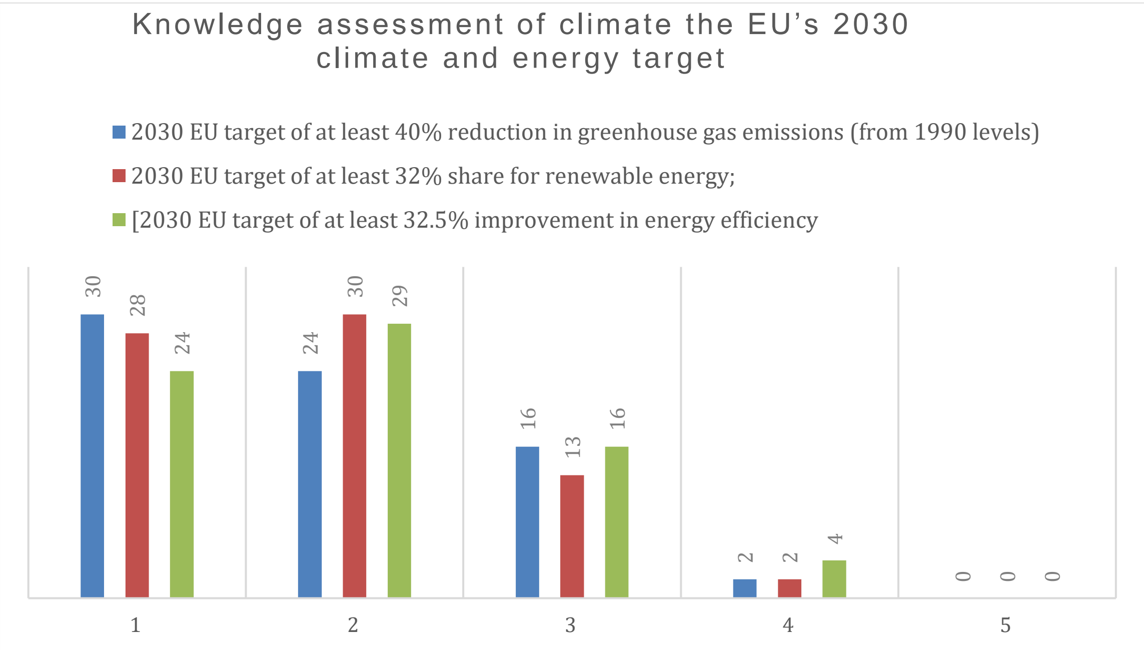


Figure 2: Respondents assessment of the EU's current climate and energy targets.

When asked to rank the statements covering different topics and approaches of the Unify Project on a scale from 1 to 5 according to how they feel about them, 82% of respondents believed that Member States should have better plans of the implementation of climate measures. This statement is followed by 78% of support to the statement " *Increasing climate target and taking additional measures may have a lot of co – benefits, such as better insulated homes, energy independence, lower cost of electricity, lower transport costs, and less air pollution."*

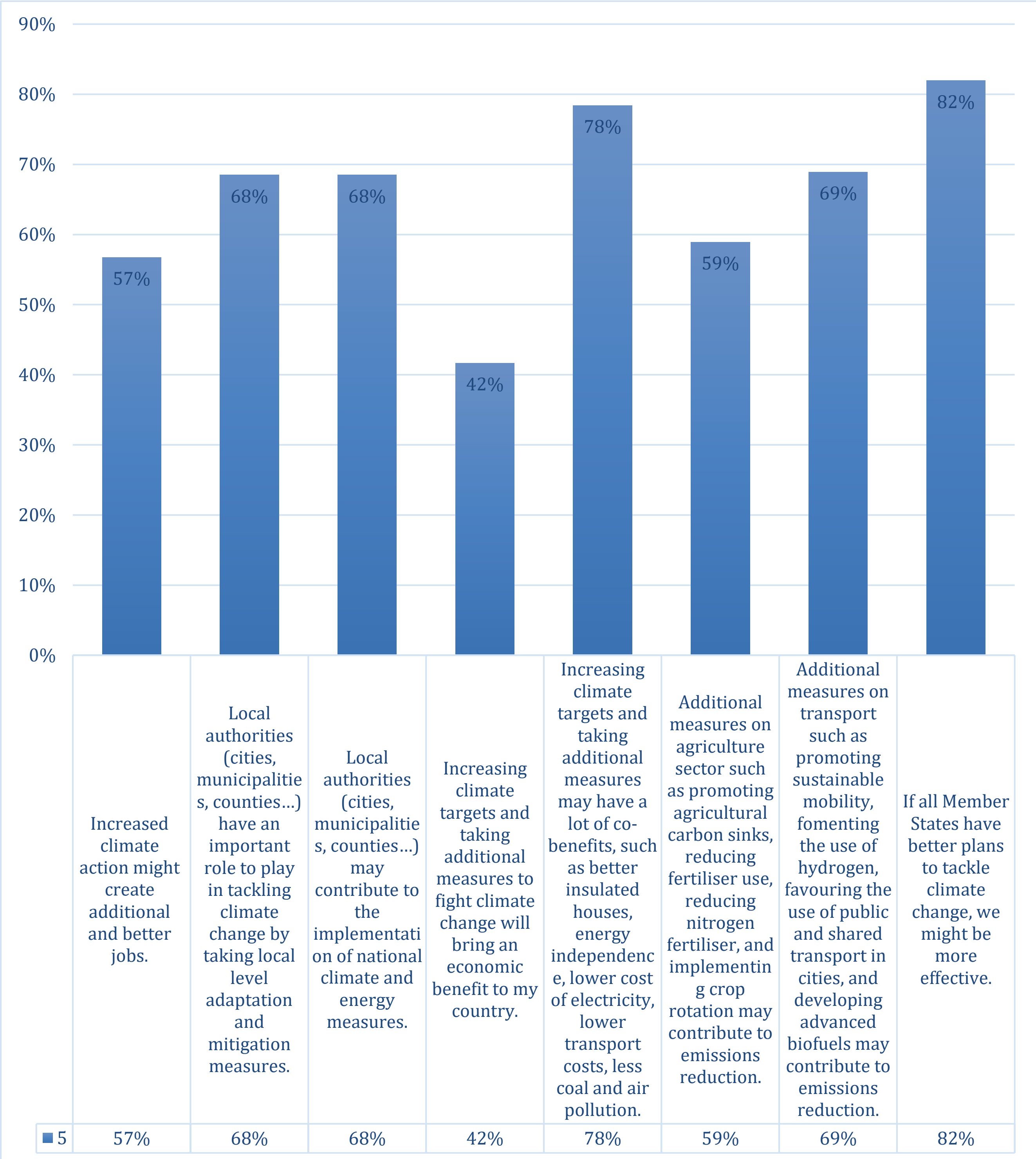


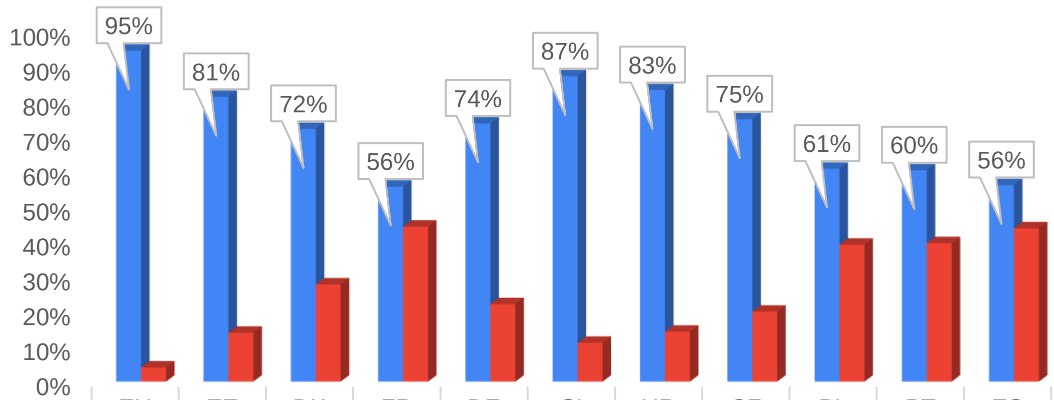
Figure 3: Respondents ranking of statements regarding different policy tools and processes to increase climate ambition.

NATIONAL ENERGY AND CLIMATE PLANS

In total 68% of respondents answered that they are familiar with the process of developing and adopting the National Energy and Climate Plans (NECPs). The highest percentage of the respondents in comparison to the overall number of responses per country was in Slovenia, Croatia and Estonia up to 87% (SI), 83% (HR) and 81%(EE) of respondents who were familiar with the process.

However, out of the number of those who were familiar with the process in some Member States only the small number of respondents actually participated either in the process of drafting or commenting on the document during the process of public consultations. In total only 25% of all respondents were involved in the process of drafting or commenting on the NECP.

As far as distribution per Member States goes, in comparison to the total number of respondents who were familiar with the process of the NECP in Spain only 5% of respondents participated in the process in some capacity while in Poland the number rises to 50%.



	EU	EE	DK	FR	DE	SI	HR	CZ	PL	PT	ES
YES	95%	81%	72%	56%	74%	87%	83%	75%	61%	60%	56%
NO	4%	14%	28%	44%	22%	11%	14%	20%	39%	40%	44%

Figure 4: Respondents' familiarity with the NECP process

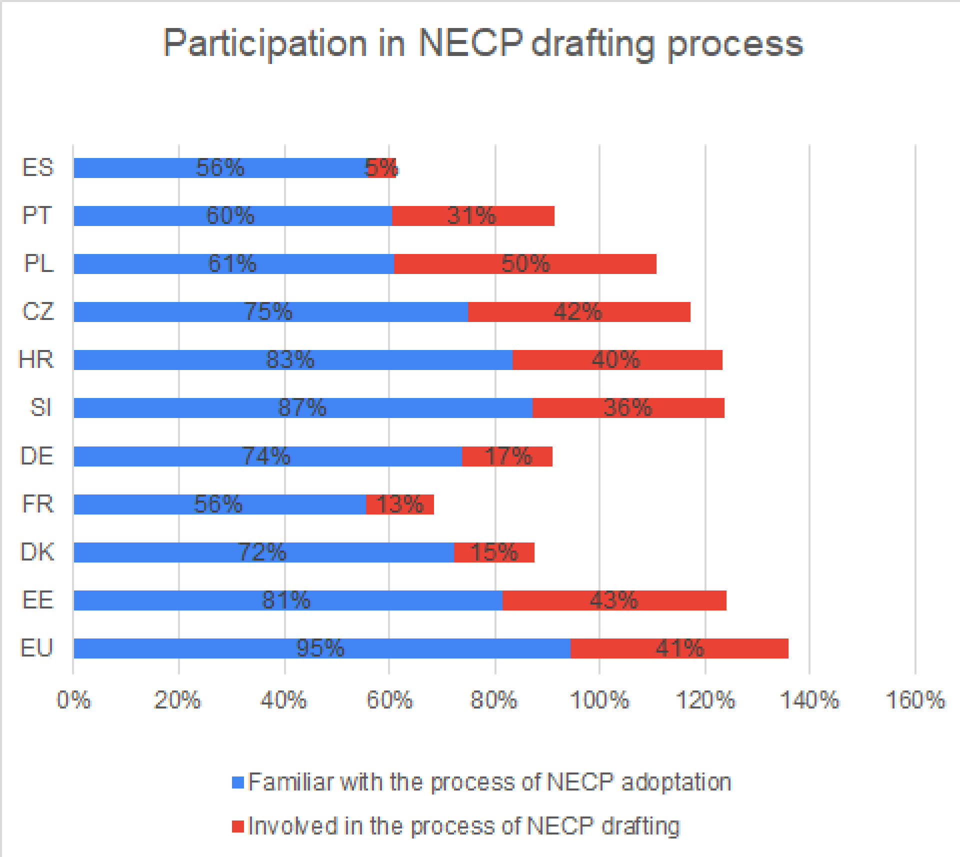


Figure 5: Respondents' participation in NECP drafting and consultation process

In total 54% of respondents who were involved with the NECP drafting process believe that national climate goals envisaged in their NECP are not aligned with the EU goals while 46% believe that national and EU targets are aligned. As for country distribution, respondents in Czechia, Poland, Germany and Slovenia mostly feel that their national climate targets are not aligned with EU targets, while in Estonia, Croatia and Spain respondents in average feel that their national goals are aligned with EU climate targets.

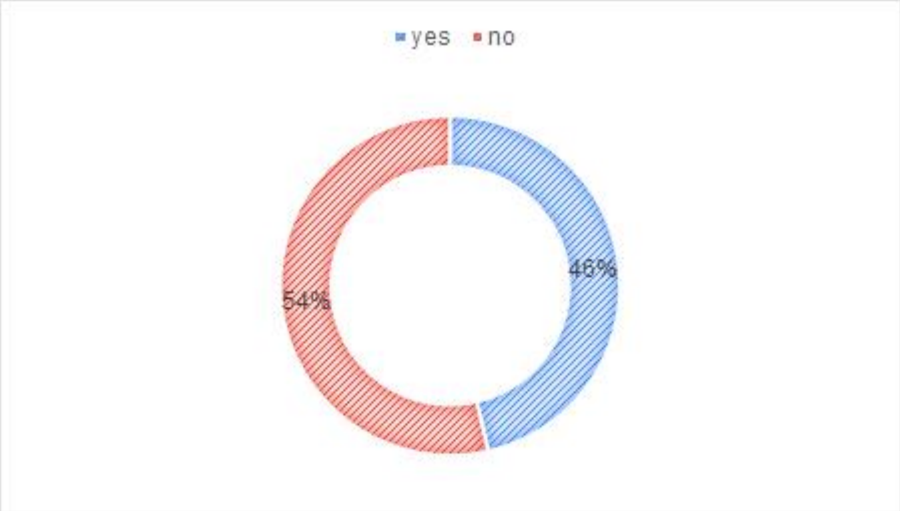


Figure 6: Respondents involved in the NECP drafting process beliefs regarding the alignment of national and the EU level targets.

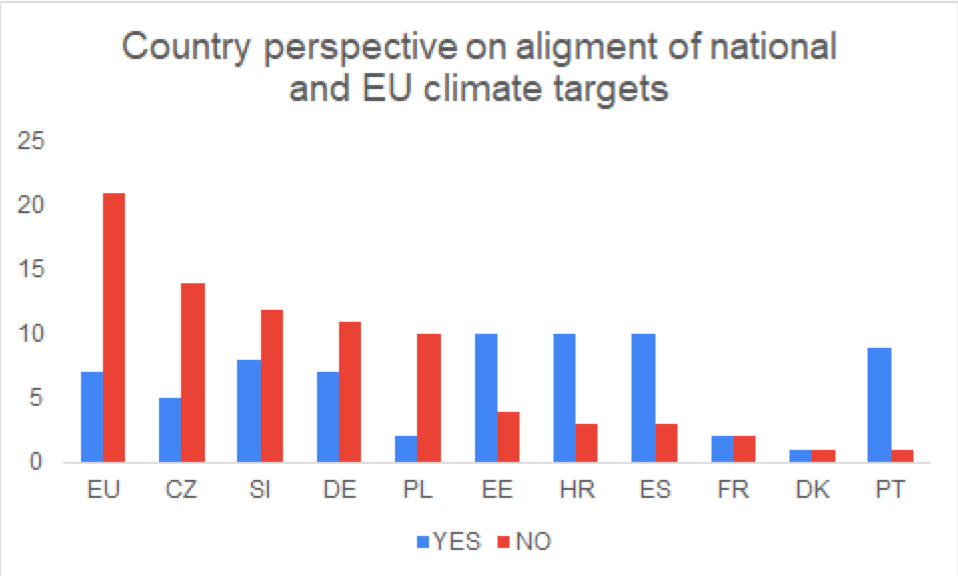


Figure 7: Country perspective on alignment of national and EU climate targets

When asked about their opinion regarding the readiness of their respective country's regulations to implement all measures envisaged by their National Energy and Climate Plans, 73% of respondents believe that their countries regulations are not ready to implement measures envisaged under the NECP, and additional 15% do not know or cannot answer to the question on readiness of the national regulations.

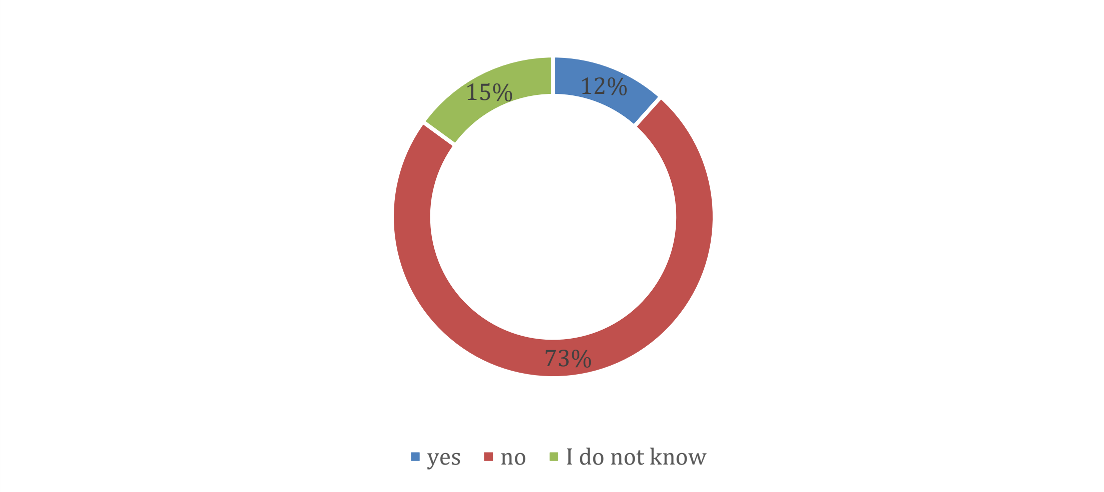


Figure 8: Opinion on readiness of national policies to implement climate measures envisaged in their NECPs

To the question "*In your opinion how likely is it that your country will implement measures envisaged in its National Energy and Climate Plan by 2030?. Please, assess the level of probability of reaching the National Energy and Climate Plans targets by 2030 on a scale of 1 to 5. Where 1 is "it is not likely at all", and 5 is "it is very likely"",* 26% of the respondents answered that it is not likely that their country will reach its climate goals and 33% answered that it is in equal measure probable as it is not probable that their countries will reach their planned target goals.

LONG TERM STRATEGIES

The third part of the questionnaire was aiming to understand respondents attitudes, beliefs and knowledge on the process of drafting and adopting National Long-term strategies, as well as their knowledge on the EU long term strategy.

In total 81% of the respondents are familiar with the EU's objective of reaching climate neutrality by 2050 through different initiatives under the European Green Deal.

When asked about their familiarity with national processes in terms of developing National Long Term Strategy documents, results are a bit different. In total 49% of respondents answered that they know that Member States must develop their National Long-term Strategies with a perspective of at least 30 years (2050) and 47% are not familiar with this obligation. Compared to respondents familiarity with the NECP process which was 71%, it is clear that National Long Term Strategies are much less known policy processes.

Looking at the country level the biggest differences between familiarity with NECP and nLTS process are in:

- Germany 74% knew about NECP in comparison to 54% who are familiar with nLTS
- Slovenia 87% (NECP) and 65% nLTS
- Croatia 83% (NECP) and 60% nLTS
- Poland 61% NECP) and 34% nLTS
- Spain 56% (NECP) and 27% nLTS

	Yes		No	
	NECP	nLTS	NECP	nLTS
EU	95%	81%	4%	16%
EE	81%	80%	11%	15%
DK	72%	56%	14%	33%
FR	56%	43%	14%	47%
DE	74%	54%	20%	38%
SI	87%	65%	22%	35%
HR	83%	60%	28%	38%
CZ	75%	55%	39%	42%
PL	61%	34%	40%	58%
PT	60%	50%	44%	48%
ES	56%	27%	44%	71%

Figure 9: Knowledge and familiarity with the NECP and national Long Term Strategy processes in different countries

When asked to assess what they think how likely is that their country will implement measures envisaged in its Long-term Strategy by 2050, the majority of responses was that it is not likely (number 2 on the scale) or that they are not able to assess (number 3).

PROGRAMMING AND USE OF EU FUNDS

Respondents are given a number of policies and measures and asked to select a maximum of 5 thematic areas which in their opinion should be funded in the next EU funds (for the period 2021- 2027) in order to accelerate the transition to net zero emissions.
According to the first collective assessment, all respondents prioritise the following three thematic areas : energy efficiency, clean local public transport and sustainable land use and agriculture.

At the national level top three priorities are almost identical to the overall selected priorities, there are just slight variations depending on the country.

For respondents who answer the Survey from the **EU** perspective, the first three priorities are: measures supporting energy efficiency, clean local public transport, phasing out polluting coal power plants. For respondents from **Denmark** priorities are the following: creating a financial instrument for sustainable land-use and agriculture, measures supporting energy efficiency, city planning for green infrastructure. For **German and Slovenian** respondents the most important priorities are clean local public transport, phasing out polluting coal power plants and financial incentives to support the roll-out of renewable energy generation and storage and related infrastructure. **Croatian and Spanish** respondents identify sustainable land use and agriculture, energy efficiency and clean local public transport as their first three priorities. **Portugues** respondents selected energy efficiency, financial incentives to support the roll-out of renewable energy generation and storage and related infrastructure, and clean local public transport as top three. **Czech** respondents vote for phasing out polluting coal power plants, financial instruments for sustainable land-use and agriculture and investment in low and zero emission vehicles and infrastructure as top three priorities. **French** respondents identify the following as the three most highly rated priorities: energy efficiency, financial instruments for sustainable land-use and agriculture, phasing out polluting coal power plants. For respondents from **Estonia** the three most highly rated priorities are financial incentives to support the roll out of renewable energy generations and storage, financial instruments to support RD&I and zero-carbon technologies and energy efficiency measures. In **Poland** respondents rated energy efficiency measures, phasing out polluting coal power plants and clean local transport as three most highly rated priorities.

Overall across all countries **the lowest rated priority** is a grant scheme to favour safe cycling and appropriate walking paths. The priority following in the lowest number of votes is the one promoting schemes for investment in low and zero emission vehicles and infrastructure. And the third lowest rated one is the one promoting incentives for behavioural changes among consumers. This is interesting since one of the three top rated priorities is clean local public transport.

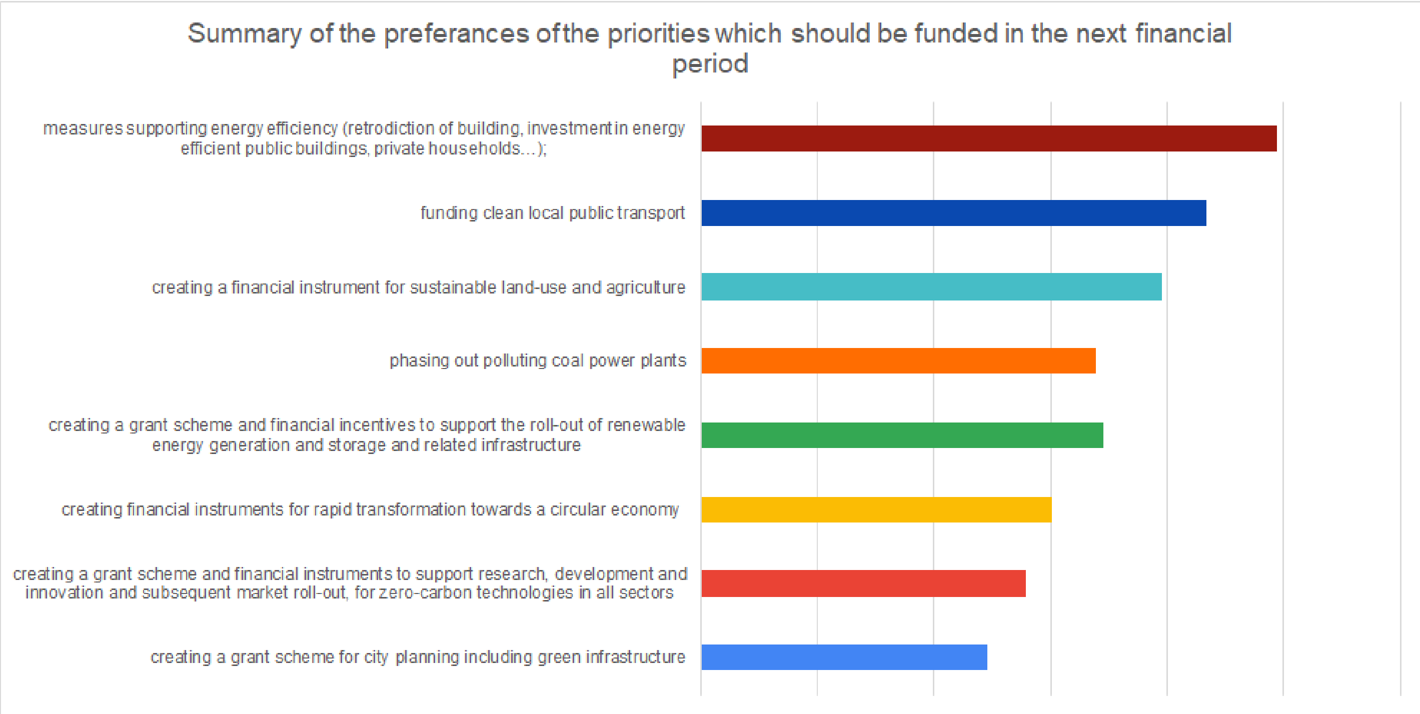


Figure 10: Summary of the preferences of the priorities which should be funded in the next financial period

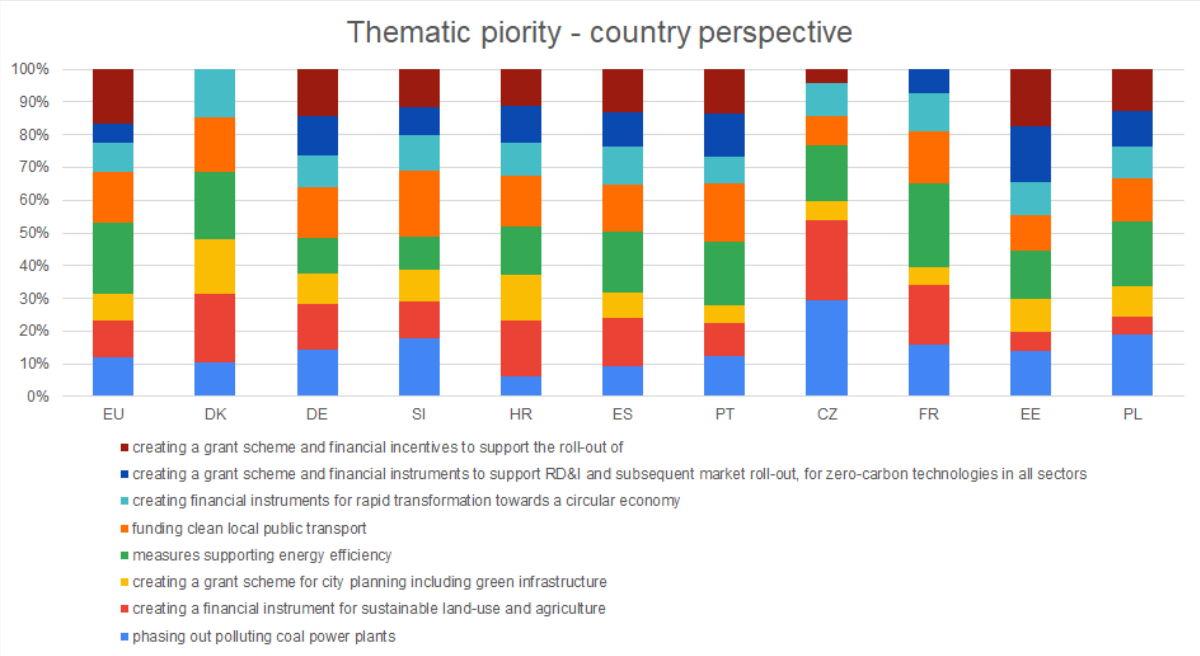


Figure 11: Priorities - country perspective

When asked to rate sectors at national level that should benefit the most from the new EU financial framework and the list included following sectors:

1. Small and Medium Enterprises and industry – to reduce GHG emissions;
2. Agriculture and fisheries sector – to reduce GHG emissions,
3. Just transition – supporting redevelopment of carbon intensive regions;
4. Transport sector – to incentivise sustainable and emission neutral vehicles,
5. Energy sector – to increase investment in renewable energy sources;
6. Building sector – to increase energy efficiency

Energy sector was rated as the first priority in all countries except, France where building sector is rated slightly higher, but energy sector is close second, Denmark where energy sector and agriculture sector have exactly the same number of votes for the top priority area, Slovenia and Portugal where transport sector is voted as the top priority sector for the next financial period. Overall three top rated sectors for the next financial period are Energy, transport and building sector. These results correspond with the results of the EU level questionnaire as well.

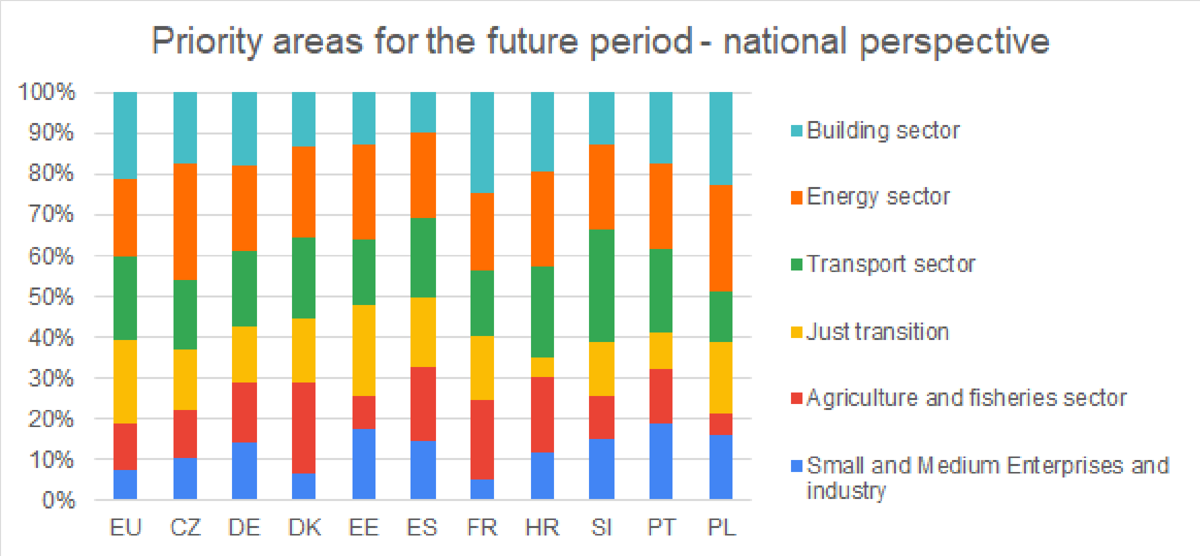


Figure 12: National perspective on the prioritization of the sectors for the next financial period

PROFILES OF SURVEY PARTICIPANTS

On gender distribution there was a slightly higher number of responses from man (57%) in comparison to women (40%). The exception is Poland – where the question was not asked, and the data is not available.

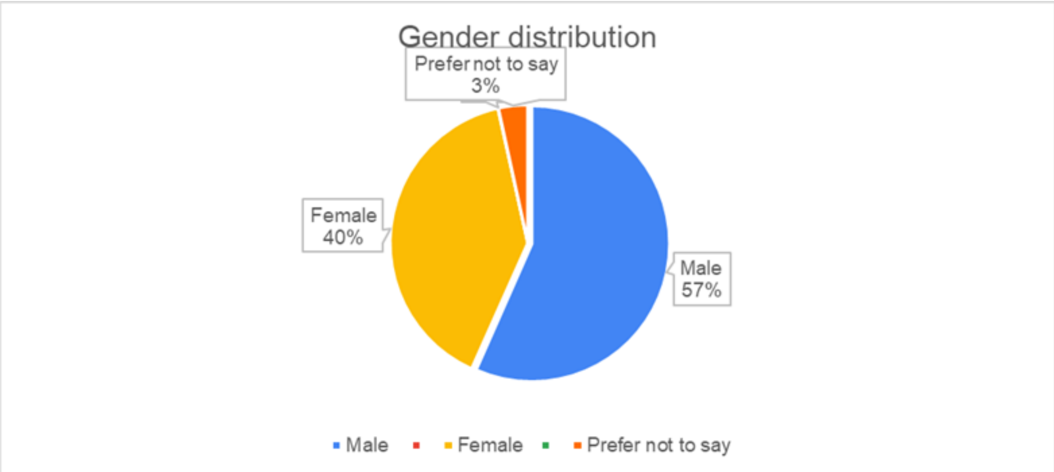


Figure 13: Gender distribution of respondents

As for age distribution, the majority of respondents are in the age group between 30 and 45 (44%) and between 46 and 65 (35%). Around 14% of respondents are between 18-29% years old, which can be assessed as a result of student strikes.

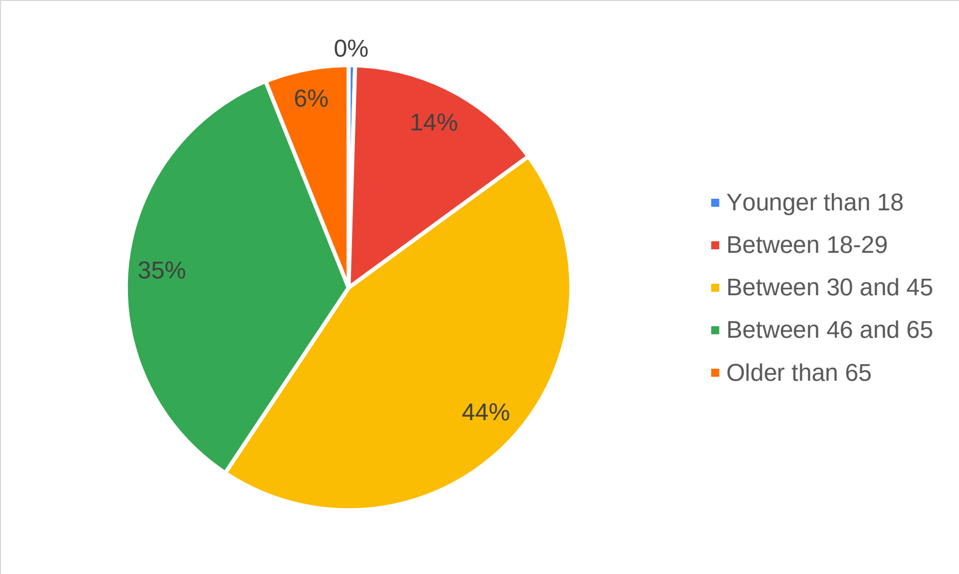


Figure 14: Age distribution of respondents

In terms of the labour market status, 86% of the respondents are employed, 3% are unemployed, 6% are students and 5% are retired.

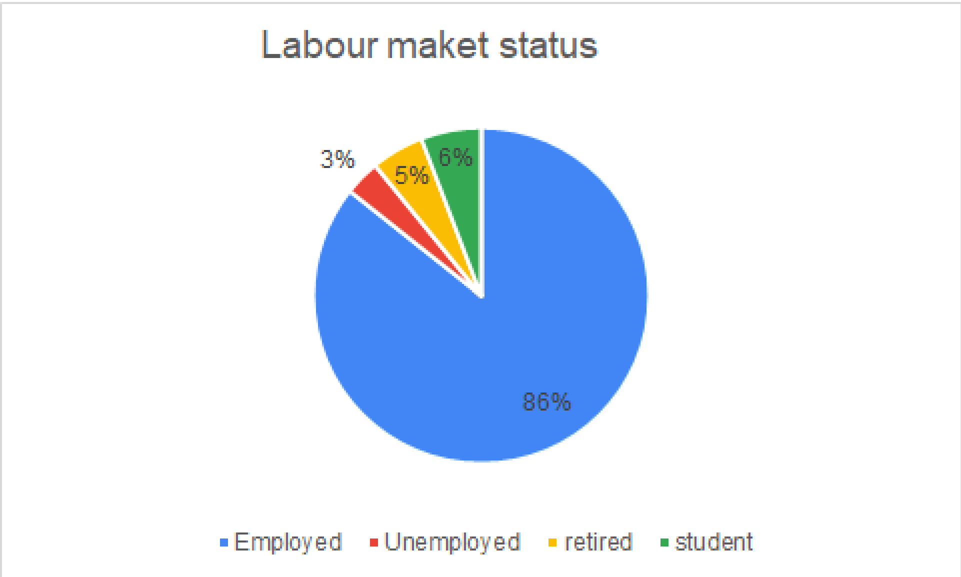


Figure 15: Labour market status

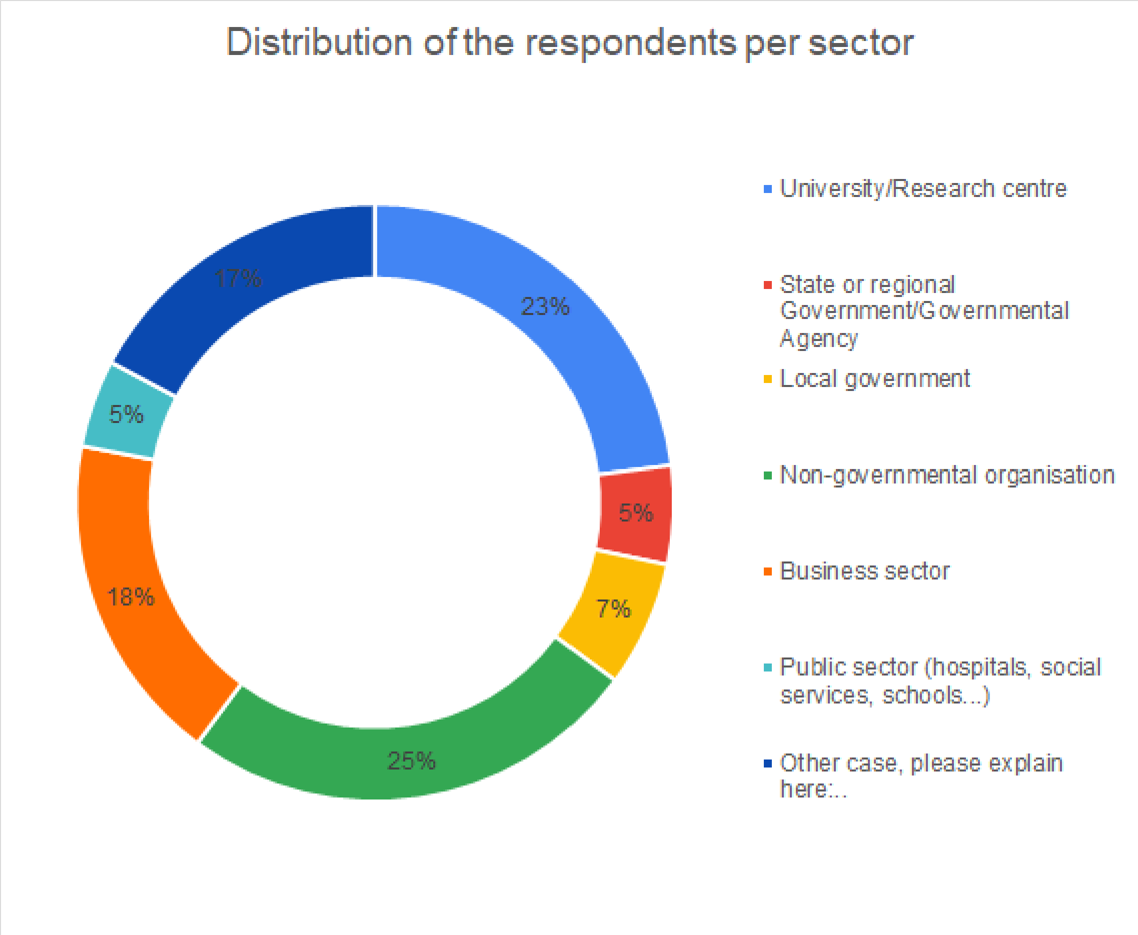


Figure 16: Distribution per sector

Further distribution per sector shows that overall 25% of respondents fill in the questionnaire from the perspective of non-governmental sector, 23% are involved with University and research institutions, 18% are from business sector, 17% are from other sector not mentioned in the survey, while the least number of respondents are involved with local authority (7%), governmental sector (5%) and public sector (5%).

Looking at the distribution on the national level, there are considerate differences per sector. For example, on the EU level majority of responses were from respondents involved with the non-governmental sector (74%) as well as in Denmark where 72% of all responses were from the respondents from the non-governmental sector. In comparison in Poland only 8% of responses were from respondents from the non-governmental sector while the biggest response was from the local government sector 52%. In other countries responses from local governments vary from 0 (Denmark), 1% (France, Germany, Spain), 3% (Slovenia, Czechia), 5% (Estonia), 9% Croatia, 18% (Portugal). State or Regional governments are also overall relatively underrepresented considering that on EU level, as well as in Denmark, Croatia and Poland there were no responses from this sector. Governments were covered in responses in Czechis 15% and Slovenia 13%, France and Germany 3% and Estonia 5%. The highest number of responses from the business sector are from Germany 38% and France 36%.

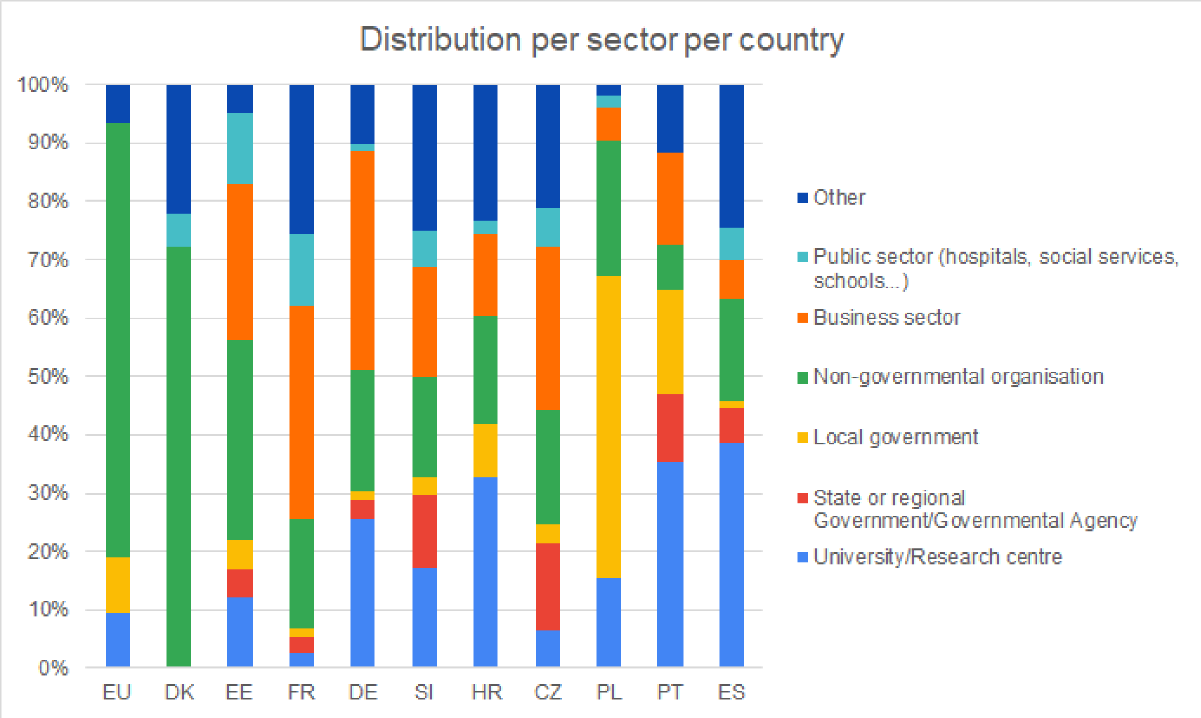


Figure 17: Distribution of respondents per sector - national perspective