

Summary of key survey results – climate policy expert opinions

- **Outlook: Paris up, EU down.** Compared to the previous month, expert responses in October suggest a more pessimistic view on long-term EU policy confidence and its economic impact. There was a slight positive increase in ratings of confidence in the international community, but this value remains low.
- **2030 renewables targets:** That EU Member States will no longer be legally binding national targets is seen to represent a significant change in EU climate policy; experts generally **do not approve**.
- **“What if?” there is a gap:** most experts agree that the European Commission should be empowered in some form to remedy any gap between EU targets and national contributions for renewables & efficiency.
- **Enshrined in law:** experts agree that the 2030 governance system **should be anchored in legislation**.
- **News out of Bonn:** experts perceived recent developments in the ongoing UN climate negotiations as favourable signals for a possible Paris outcome – mirroring the upswing in the long-term outlook.

This survey contains answers elicited from members of the POLIMP “Expert Response Group” (ERG), a select group of individual European climate and energy policy experts who provided their assessment anonymously (see page 3).

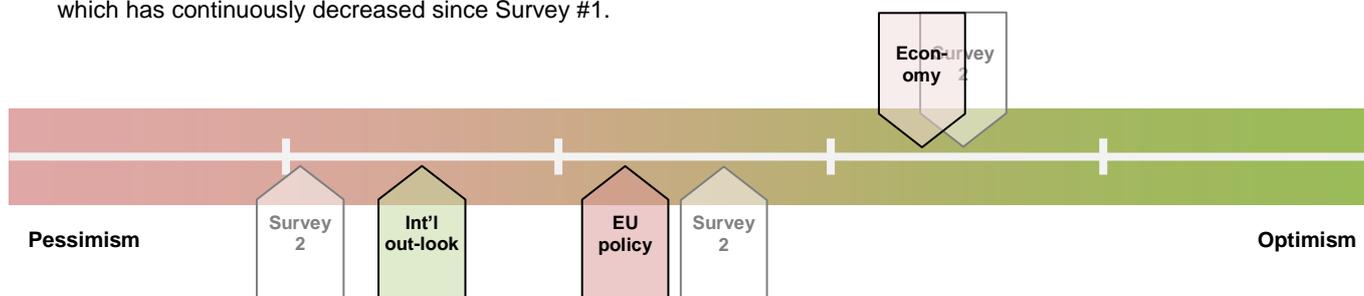
EU Climate Policy ‘Barometer’

- The POLIMP experts **were increasingly more pessimistic regarding the success of long-term climate policy in the EU** when it comes to meeting emissions goals.
- The impact of EU climate policy on the economy was rated slightly more negative. Present results reflected the expert opinion on Survey #1.
- There was a **slight increase in optimism concerning the capacity of the international community** to tackle climate change, albeit from a relatively low starting point. This may be in part due to recent developments in the lead up to COP21. Despite this change, 63% of experts still had a more pessimistic than optimistic view vis-à-vis the international community’s ability to meet the two degree target. **The overall international outlook remained negative.**
- As can be inferred from Figure 1, **the views of the ERG on the economic implications of EU climate policy and the overall international outlook have remained relatively stable** relative to the experts’ confidence in EU climate policy, which has continuously decreased since Survey #1.

Table 1 Mean rating and SD for barometer survey items

Issue addressed by the experts	Change*	Mean rating	SD
Long-term EU policy confidence	→	3.27	1.49
EU climate policy economic impact	→	4.31	1.20
International outlook	→	2.50	1.32

*since last survey



Response Rate for Survey No. 3 – 16 members of the ERG responded, representing a **37.2% response rate**. Germany (27%) and the United Kingdom (27%) were among the most represented countries. Most of the responses (16%) were from the NGO sector, followed by Business (13%) and Research (13%).

Main Topic: “A New Governance System for 2030”

- ERG members rated the move towards **non-binding national renewables targets for 2030 a significant change** from past policy ($M = 4.87$, $SD = 0.99$).
- Overall, experts disapproved of this development** ($M = 2.47$) and only two experts “strongly approved” of the change. However, there was a very high variance of opinion between experts, with opinion congregating on both ends of the spectrum ($SD = 1.77$).
- Experts seemed **undecided as to whether or not a gap** between EU targets and national progress **would develop** ($M = 3.07$, $SD = 1.33$).
- Nevertheless, members of the ERG felt that the **Commission should be empowered to impose remedies** in the event of a gap in ambition between MS contributions and the EU targets ($M = 4.53$).
- Responses indicate **indecision** as to whether the discussion of **new governance will weaken or strengthen EU climate policy** in the long run.
- The ERG was in agreement that measures to improve energy **market integration should be included** in a new governance system for 2030 ($M = 5.33$, $SD = 0.65$).
- Experts also largely agreed that **any new governance system should be enshrined in EU law** ($M = 4.83$).
- However, the ERG was **split** as to whether the indicative national RE contributions for 2030 would provide **sufficient long-term investment certainty** ($M = 3.31$, $SD = 1.11$).

Table 2 Mean ratings for survey items on governance

Issue addressed by the experts	Mean rating	SD
National RE targets no longer binding? (1 = not significant, 6 = highly significant)	4.87	0.99
National RE targets no longer binding? (1 = strongly disapprove, 6 = strongly approve)	2.47	1.77
Likelihood of gap between EU and national ambition? (1 = very unlikely, 6 = very likely)	3.07	1.33
EC impose remedies should a gap develop? (1 = refrain from imposing remedies, 6 = be empowered to impose remedies)	4.53	1.60
Discussion of new governance system, weaken or strengthen climate policy? (1 = more likely a chance for weakening, 6 = more likely a chance for improvement)	3.50	1.00
Need to include market integration? (1 = no need, 6 = absolutely necessary)	5.33	0.65
New governance system enshrined as law? (1 = no aspects enshrined as law, 6 = fully enshrined)	4.83	0.94
Investment certainty? (1 = no investment certainty, 6 = high investment certainty)	3.31	1.11

Figure 1: Changes in the climate policy ‘barometer’

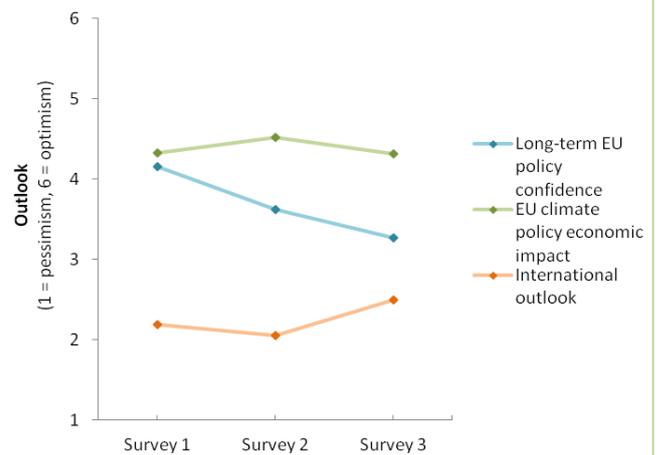
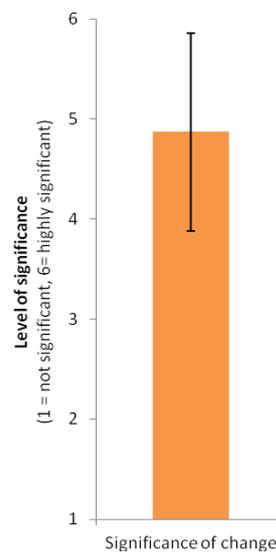
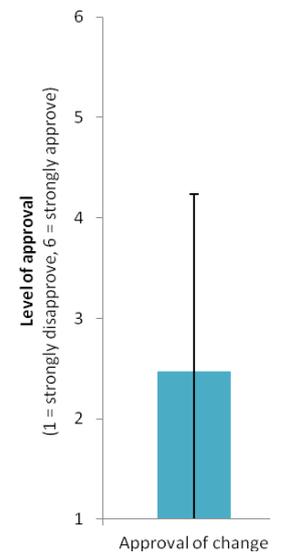


Figure 2: Mean significance of change to non-binding national RE targets*



*error bars indicate SD

Figure 2: Mean approval of change to non-binding national RE targets*



“Buzz of the Week”

- With less than a month before Paris, **experts tended to agree that recent developments in the ongoing UN climate negotiations are a positive signal** marking progress ($M = 4.20$, $SD = 1.26$).
- There was some disagreement ($SD = 1.49$) among experts concerning the credibility of recent climate commitments from the private sector.** Notably, those from NGOs ($M = 3.00$) were quicker to question the credibility of private sector climate statements than their fellow members of the ERG in the Business sector ($M = 4.75$). This difference was significant.

BACKGROUND: About the POLIMP Expert Response Group (ERG) Survey Series

The POLIMP Expert Response Survey Series aims at engaging a targeted group of stakeholders and experts on matters relating to climate policy and international climate governance. The series consists of eight “snap” (short) surveys distributed over the span of a year to an Expert Response Group (ERG) pre-selected by the POLIMP project. All eight surveys follow a similar structure. Correspondingly, each survey and matching report is organized into three parts:

- **EU Climate Barometer** – three recurring questions on a general assessment of the status quo: *long-term policy confidence*, *climate economy* (the effect of climate policy on the economy) and *international outlook*.
- **Main Topic** – questions linked to parallel Webinar with the same thematic focus
- **“Buzz of the Week”** – question(s) on a relevant climate policy topic currently in the news

The Expert Response Group (ERG) is composed of 43 stakeholders, policy-makers, industry representatives and researchers working in the field of climate policy. Each individual was handpicked and invited to participate by the POLIMP partners for their expertise, engagement with topics relevant to the project and tenure in the field. With a focus on the EU, ERG members represent different European countries and are active in a diverse array of sectors. Participation in each survey is voluntary and all responses remain anonymous. For a list of ERG members please visit: <http://www.polimp.eu/publications/survey-series>.

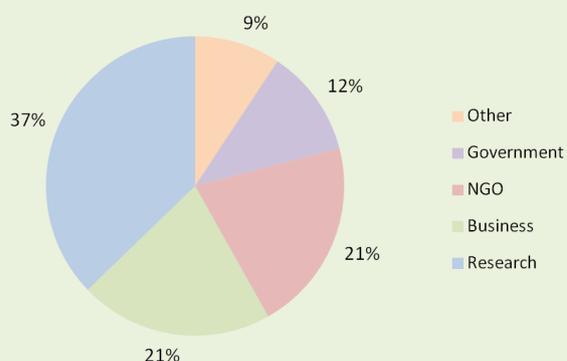


Figure: ERG by sector

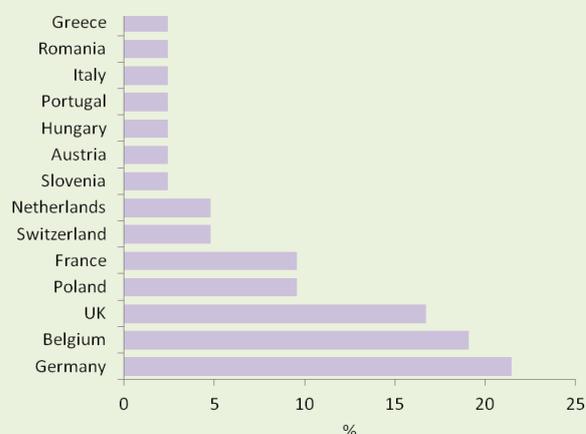


Figure: ERG by country of work

Note on Statistical Analysis – Differences and results significant with a p -value of 0.05 are described as *significant* in the text. All error bars indicate 95% confidence intervals. Time series results (i.e., the climate policy ‘barometer’) are conceptualized as an indication of overall ERG opinion. In other words, due to the voluntary nature of each survey and consequently the differences between samples, true within-subject comparisons are not reported. For information on methodology please contact the POLIMP Expert Response Survey Series Team by email: questions@polimp.eu.

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ANNEX – Survey Questions

BAROMETER

1. LONG-TERM POLICY CONFIDENCE: In the present moment, in your opinion, how likely is the EU to establish policies that can deliver a long-term emission reduction target of 80-90% by 2050 compared to 1990 levels? (1 = unlikely, 6 = very likely)
2. CLIMATE ECONOMY: Currently, in your opinion, the effect of existing EU climate policy on the EU's economy and its competitive position in the global economy is: (1 = overall negative, 6 = overall positive)
3. INTERNATIONAL OUTLOOK: What is your general outlook on the ability of the international community (or rather humankind) to keep global warming below two degrees? (1 = very pessimistic, 6 = very optimistic)

TOPIC

4. In October 2014, EU heads of state and government adopted conclusions on the 2030 climate and energy architecture. One of the changes made for 2030 compared to 2020 is that the **renewable energy target is binding only at EU level** and that there will not be legally binding national targets. What is your assessment of the **significance of this change** (regardless of whether you approve or disapprove of it)? (1 = not significant, 6 = highly significant)
5. To what extent do you **approve of the change** in the binding nature of the renewable energy target for 2030? (1 = strongly disapprove, 6 = strongly approve)
6. With national contributions left for Member States to set and enforce, it is conceivable that the overall **EU target may not be met** as a total sum of all national targets. In your assessment, based on what you know about current renewable energy trends and related policies, do you think that it is likely that a significant gap will emerge? (1 = very unlikely, 6 = very likely)
7. Should gaps between national contributions and the EU targets arise—which could happen for both the renewables and efficiency targets—to what extent do you think the **European Commission should be empowered** to propose specific remedies? (1 = refrain from imposing remedies, 6 = be empowered to impose remedies)
8. To support the achievement of the EU targets, there is currently discussion on **a new governance system** for EU climate and energy policy. The European Commission has proposed the establishment of new, inclusive **national climate and energy plans** as a means of bringing all 2030 target elements together in a coherent, nationally-determined concept. The October 2014 conclusions picked up on this element and ask for a streamlining of planning and reporting requirements. At this point in time, no decisions have been taken on what this new system could look like. Do you see this debate more as an opening for a weakening of the 2030 framework or as an opportunity for improving it? (1 = more likely a chance for weakening, 6 = more likely a chance for improvement)
9. The 2030 governance debate is also taking place in the wider framework of the Energy Union. To what extent do you think that the 2030 governance system should explicitly include considerations about EU energy market integration and greater collaboration among Member States? (1 = no need to include market integration, 6 = absolutely necessary to include market integration)
10. To what extent do you think that any new governance system (incl. the planning and reporting process) should be enshrined explicitly in legislation? (1 = no aspects enshrined as law, 6 = fully enshrined as law)
11. To what extent do you believe that indicative national renewable energy contributions for 2030, included in national climate and energy plans (which presumably would include indications on national support policies also), will **provide sufficient certainty to investors** about the long-term direction of policy? (1 = no investment certainty, 6 = high investment certainty)

BUZZ

12. This week negotiators convene in Bonn for the last time before Paris. To date over 120 INDCs have been submitted and just recently the co-chairs released a significantly shorter and streamlined version of the ADP Draft Agreement. Some would argue that these among other developments signify *substantial* progress and an increasingly positive signal for Paris. To what extent do you agree? (1 = strongly disagree, 6 = strongly agree)
13. Yesterday the White House announced that 81 major US companies have signed the American Business Act on Climate Change, pledging their support for a strong outcome in Paris. This past week ten of the world's largest oil companies released a separate statement to the same effect. In the months preceding Paris, there have been numerous other examples of non-state actors coming into play. In your view to what extent do these statements originating from the private sector represent real commitments to combat climate change? (1 = not real commitments, 6 = substantial change in the private sector actions)