



Shaping global green leadership: addressing the external spillovers of the European Green Deal

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Welcome and introduction

Antoine Oger

Executive Director,
IEEP – Institute for European Environmental Policy

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Shaping global green leadership: addressing the external spillovers of the European Green Deal

Joint presentation: the European Green Deal Barometer 2025 and the Global Attitudes Survey



Irene Chiocchetti
Institute for European
Environmental Policy (IEEP)



Chris Hopkins
Green Economy Coalition (GEC)

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Institute ^{for}
European
Environmental
Policy

European Green Deal Barometer 2025

External impact of EGD policies

Irene Chiocchetti, Policy Officer at IEEP

www.ieep.eu

 @IEEP_eu

European Green Deal Barometer

- Annual expert consultation assessing the **progress of the Green Deal implementation**
- 5th edition: assessing the **external impact** of Green Deal policies
- **Opportunities and challenges** for third countries
- Achievement of **international climate targets and commitments**
- **160+ experts** interviewed from the EU and outside the EU with different backgrounds: academia, public administration, NGOs and the private sector
- Highlighting insights of **32 non-EU experts**



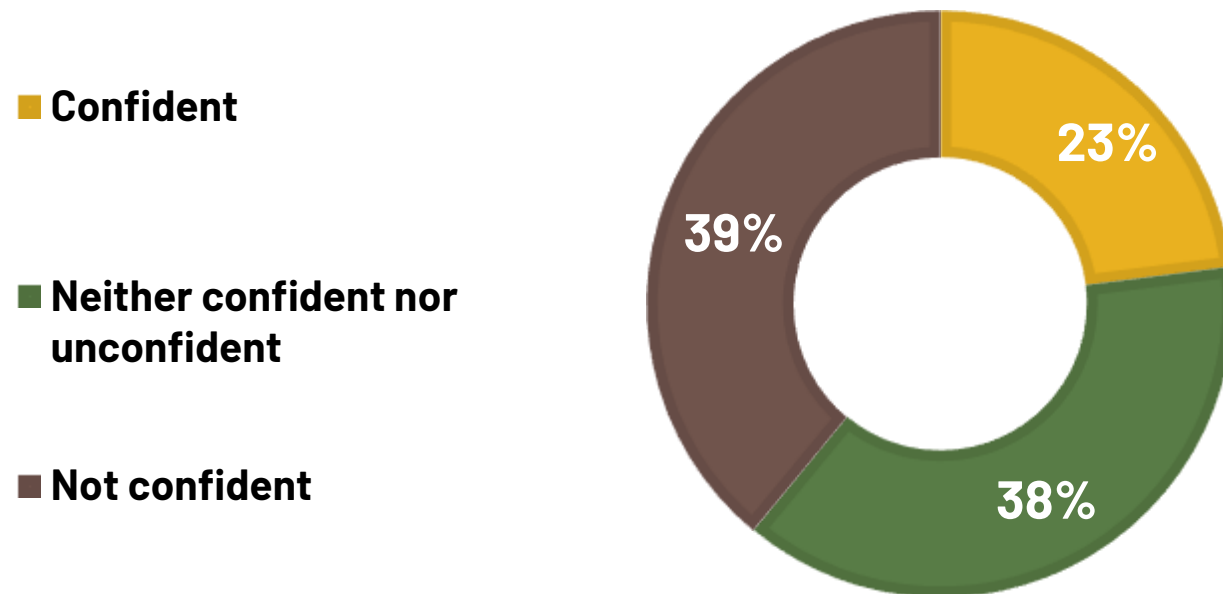
Gates Foundation

HEINRICH BÖLL STIFTUNG
BRUSSELS
European Union



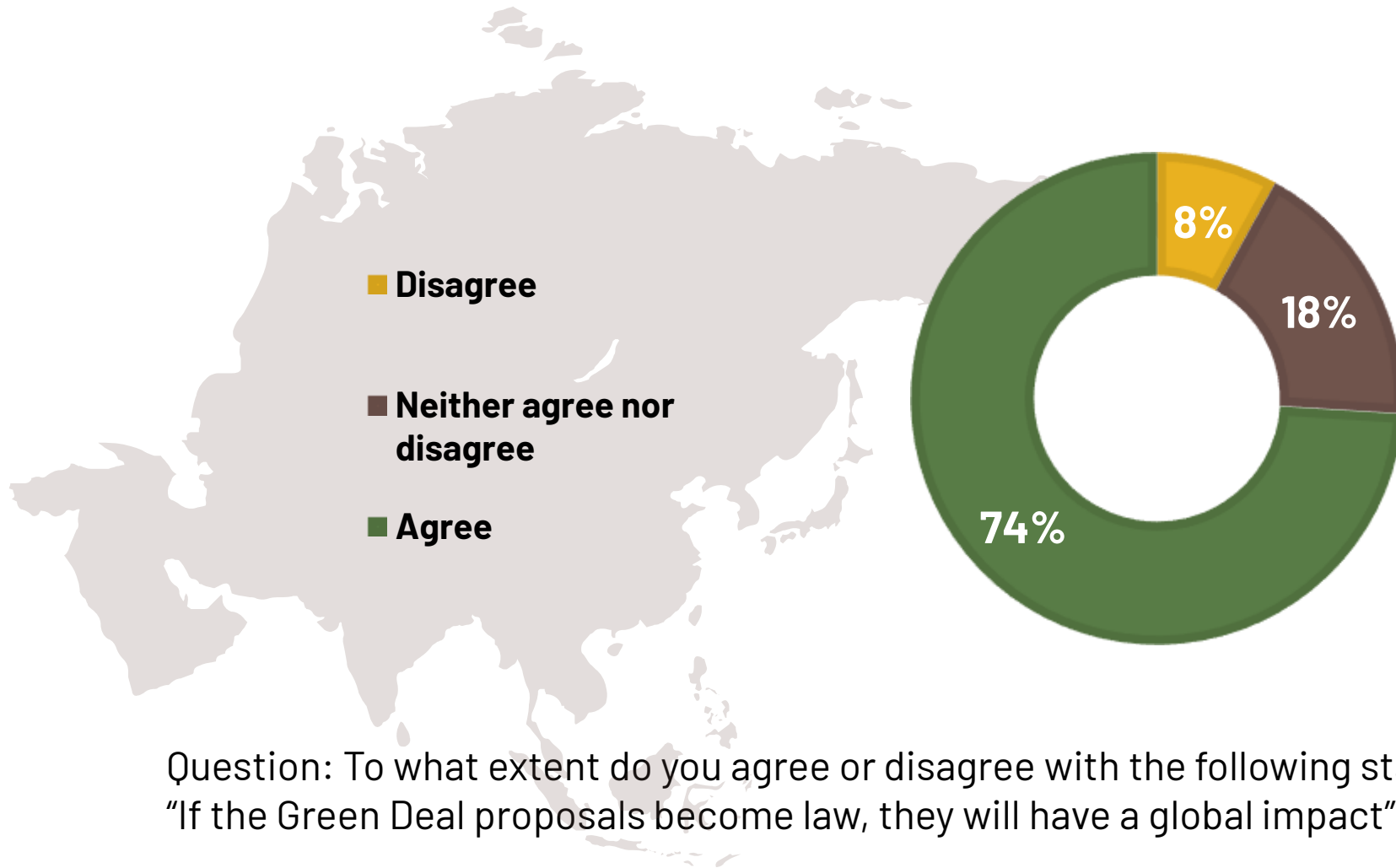
EUROGEO SURVEYS
European
Geoscience for
Society
The Geological Surveys of Europe

Experts' weak confidence in the Green Deal being turned into law

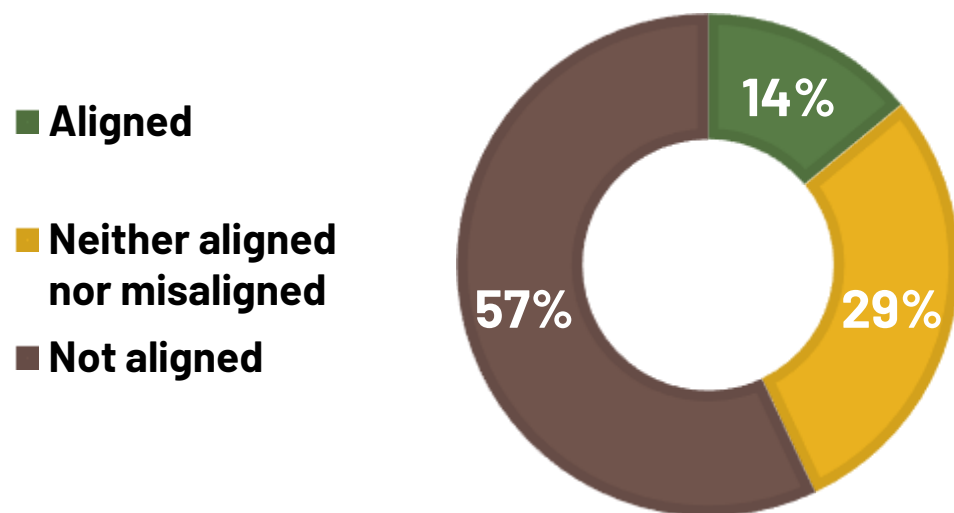


Question: The European Green Deal is a comprehensive agenda with specific environmental ambitions and targets, with the goal of making the EU climate-neutral by 2050. How confident are you that the EU institutions will turn these ambitions into approved legislation?

The European Green Deal is expected to have a global impact



EU external policies perceived as not fully aligned with the Green Deal



What do non-EU experts think?

25% think that the EU's external policies are sufficiently aligned and **44%** that they are not aligned

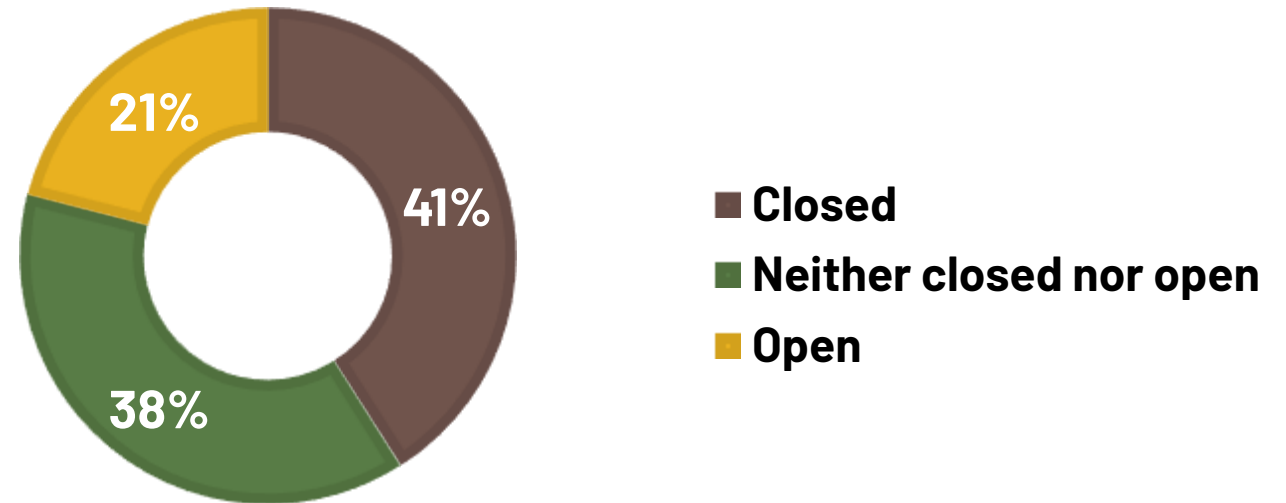
50% of African experts think that EU's external policies are sufficiently aligned

Question: Do you believe that the EU external policies (e.g., EU trade policy, Cooperation for development policy, Common Security and Defence Policy, Energy policy etc.) are sufficiently aligned with the European Green Deal Agenda?

EU perceived as closed to input from third countries the EU on EGD policies

What do non-EU experts think?

54% think that the EU is closed to input from externals



Question: In your opinion, is the EU closed or open to inputs from countries outside of the EU on the design and implementation of the European Green Deal policy proposals?

Opportunities and challenges arising from the Green Deal for third countries

Main opportunities	Main challenges
Environmental and sustainability incentives (68%)	Environmental and sustainability standards (61%)
Trade and market opportunities (41%)	Trade and market barriers (59%)
Agricultural standards (36%)	Exports restrictions due to agricultural standards (44%)

Experts generally agree that **EGD** presents both **opportunities and challenges** (89%)

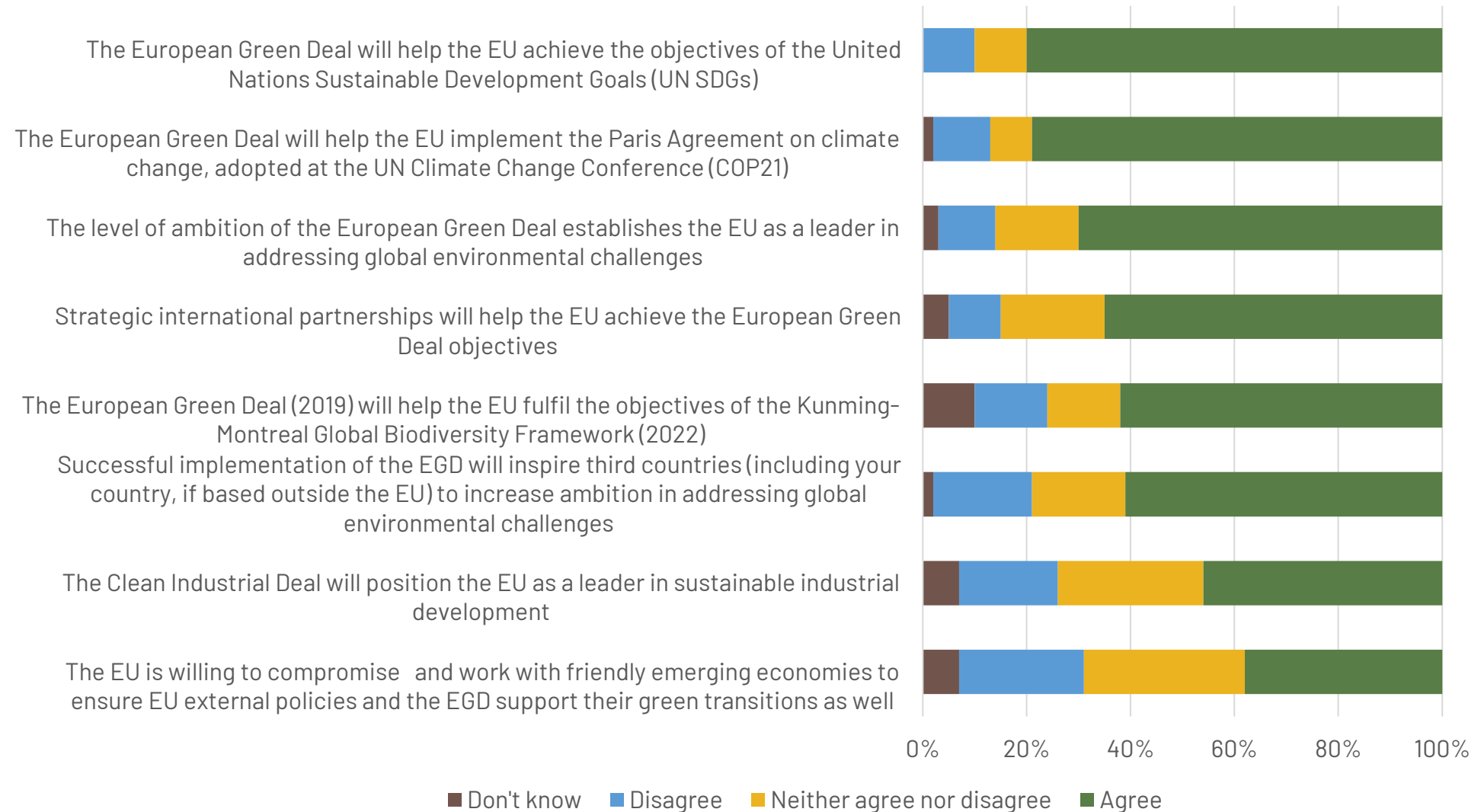
What do non-EU and African experts think?

- Main opportunity → **Environmental and sustainability standards**
- Main challenge → **Trade and market barriers**

The Green Deal contributing to achievement of international climate targets and inspiring other countries

What do non-EU experts think?

In general, reflecting the overall findings. However, more disagreement on whether **the EU is willing to compromise and work with emerging economies** to ensure the EU external policies and the EGD support their green transition



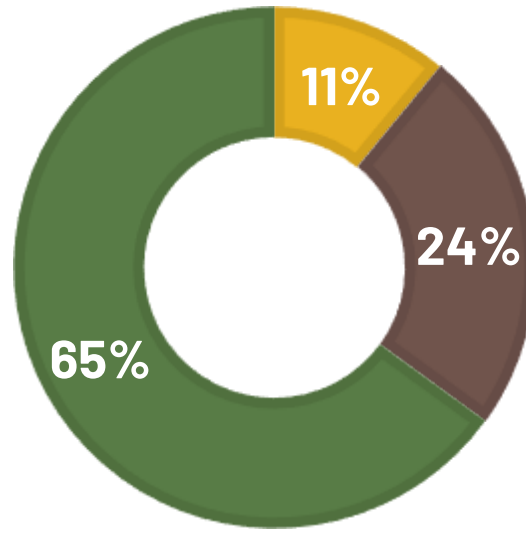
Question: To what extent do you agree with the following statements?

Spillovers from some Green Deal's files

EU POLICY	MAIN SPILLOVER OR LIMIT
CBAM (40 responses)	It makes Global Southern countries pay higher importing costs even if they are not responsible for climate change – 58%
EUDR (33 responses)	Risks disproportionately impacting smallholder farmers due to restricted resources to ensure compliance – 61%
CRMA (22 responses)	Environmental and social impacts are not adequately addressed – 73%
FTAs (23 responses)	They contribute to global climate and environmental degradation by importing goods produced in countries with less stringent climate and environmental regulations – 61%
CSDDD (35 responses)	Supply Chain Disruptions (e.g., if suppliers cannot meet the requirements) – 51%

The Green Deal overall external impact is considered positive

- Negative
- Neither negative nor positive
- Positive



What do non-EU experts think?

- **72%** see the overall external impact of the EU Green Deal as positive (either positive or very positive)
- **Only 12%** consider it to be negative or very negative

Question: In your opinion, is the overall external impact of the European Green Deal positive or negative?
(Consider aspects such as economic impacts, environmental benefits, and changes to trade relationships when evaluating the overall impact.)

Recommendations

1. **Don't give up on the Green Deal when boosting competitiveness**
2. **Addressing the external spillovers and improving alignment between the Green Deal and EU external policies**
3. **Remaining a leader in the transition, and building diversified strategic partnerships**





Institute for
European
Environmental
Policy

Thank you for your attention

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Global Attitudes to Green Economy – 2024 Survey

Implications for addressing spillovers of the EGD



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Chris Hopkins – Economic Policy Lead

greeneconomycoalition.org

@GECoalition

We are grateful to the European Union for providing funding support for this work (INTV-24634)



Overview



- Providing **a complimentary citizen perspective** to the 2025 European Green Deal Barometer, via an overview of the GEC's Global Attitudes to Green Economy (2024) survey.
- This data provides evidence of underappreciated (in Europe/G7?) **citizen support for green objectives across key global southern countries / emerging economies**.
- It also gives clues as to the **considerations that affect citizen views of EGD measures**, and spillover effects. Such as:
 - The need for national governments to lead their citizens in the green transition, and be enabled to do so.
 - The key role for targeted mitigations to reassure citizens on specific measures, and negative impacts.
 - The importance of local & international solidarity in framing green economy actions – no country, no citizen, going alone. Common but differentiated roles.

Global Attitudes to Green Economy survey - 2024

What:

GEC is running an annual 'Global Attitudes to Green Economy' survey – in partnership with Savanta – over 3 waves in 2024, 2025, and 2026.

We are sourcing citizens views on green and circular *economies, objectives, and trade-offs* in key countries.

Who:

Wave 1 (2024) targeted 10 countries – BRICS, emerging economies, GEC hubs, and Australia as a contrast/control.

When:

Data was collected in Oct/Nov 2024 – with approximately 1000 citizens surveyed per country.

This means we have usable sub-category data for different demographics/age groups. **Full data is freely available on the GEC website.**

- Australia – 1,012 completes
- Brazil – 1,011 completes
- China – 1,005
- India – 1,002
- Indonesia – 1,005
- Mexico – 1,001
- Nigeria – 1,002
- Peru – 1,019
- South Africa – 1,014
- Turkey – 1,013

The Savanta logo is located in the bottom right corner. It consists of the word "Savanta" in a white serif font, followed by a stylized pink and red dot graphic. The entire logo is set against a black rectangular background.

Savanta

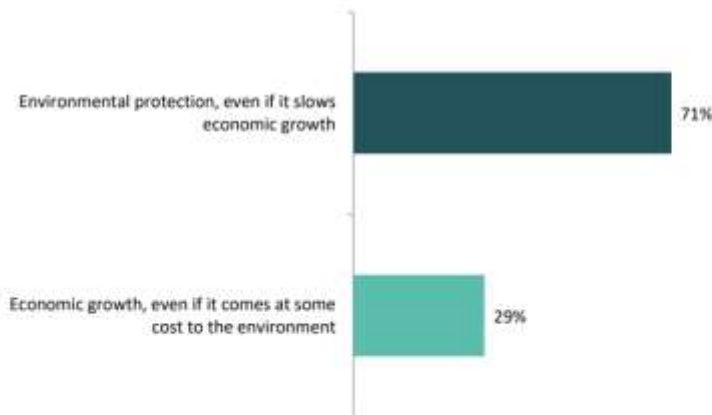
Key finding 1 – Underappreciated southern support for green

Citizens in emerging economies support the high-level EGD objective of greening / balanced economic development.

Seven in ten would prioritise environmental protection over economic growth, with strong backing across all age groups

7/10

If you had to choose, which of the following would you prioritise?



Countries

71% globally choose environmental protection over economic growth, with standout support in:

- Indonesia: 82%
- Turkey: 80%
- Brazil: 75%

Age

- Strongest backing from ages 55-64 (76%)
- 70%+ support across age groups

9/10 back core green goals – education, balanced econ/env

Nine in ten globally back environmental education in schools, with emerging economies leading the charge

A remarkable 93% agree that schools should teach children about environmental protection

This support peaks in:

- Indonesia and South Africa (both at 97%), showing strong backing from emerging economies

91% want their government to prioritise policies that benefit both the economy and the environment.

Notably high in:

- Indonesia (97%)
- Nigeria, Turkey and South Africa (94%) each

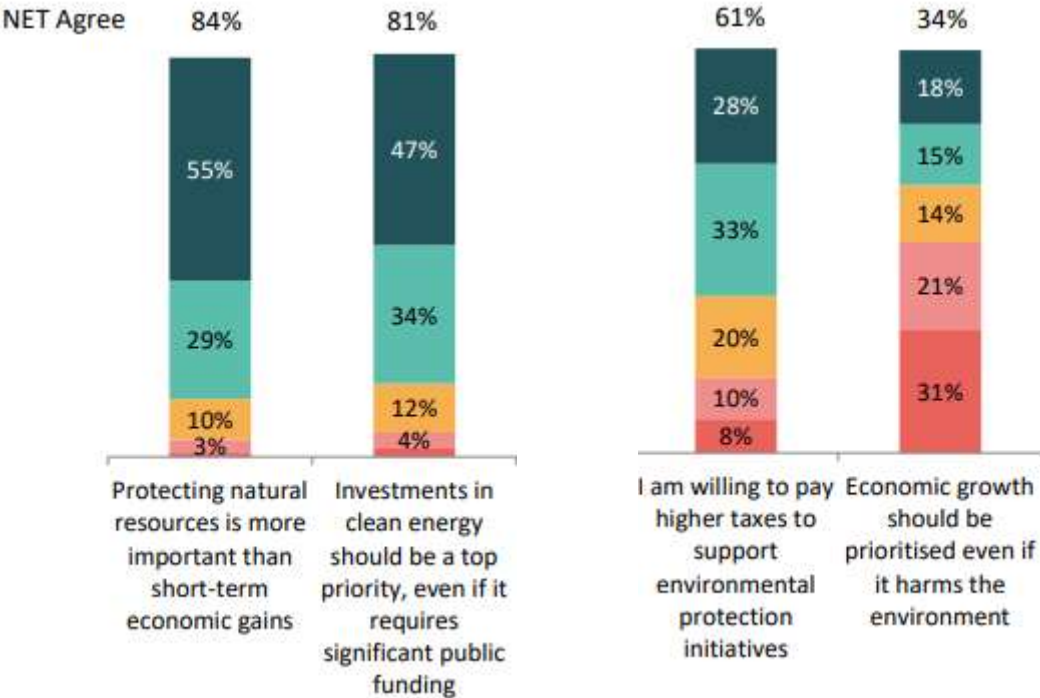
Young and middle-aged adults show strongest support for renewable energy laws (90% of 18–44-year-olds vs 83% of 65+)



Key finding 1 – Underappreciated southern support for green

Citizens in emerging economies support the high-level EGD objective of greening / balanced economic development.

Countries in the Global South are taking the lead in recognising the critical balance between economic progress and environmental stewardship. Turkey (48%), Peru (43%), Brazil (42%), and Nigeria (41%) show the strongest commitment to creating laws that support both economic growth and environmental protection.



“Protecting natural resources is more important than short-term economic gains” 84% NET agree

“Economic growth should be prioritised even if it harms the environment” 34% NET agree

Strongly disagree Somewhat disagree Neither agree nor disagree Somewhat agree Strongly agree

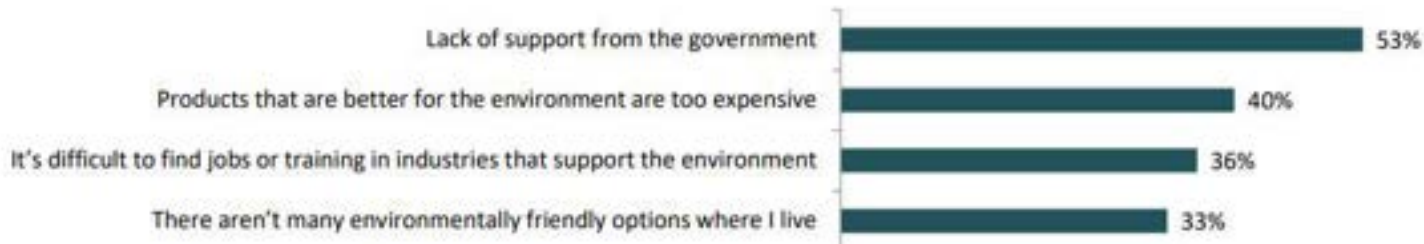
Sample size: n = 10,084 | Base = All respondents | Q = "How much do you agree or disagree with the following statements?" (Single choice)

Most supported ----- Least supported

Key finding 2 - Caveats on green objectives – more leadership

Citizens in the global south want to see more leadership from their governments
– governments must be empowered to lead / regulate industry etc.

What do you think makes it hard for you to make more choices that are better for the environment?



“Lack of support from the government”

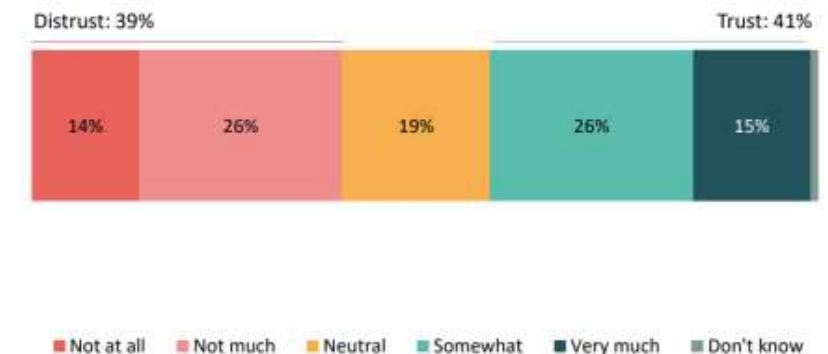
54%, top barrier to making green choices

- Lack of support from the government highest in Nigeria (66%) and Peru (61%)
- Only 34% in Australia cite this as a barrier, suggesting different challenges in different contexts



“Trust in leaders’ decision making on a sustainable future”
mixed↑
41%, 39%

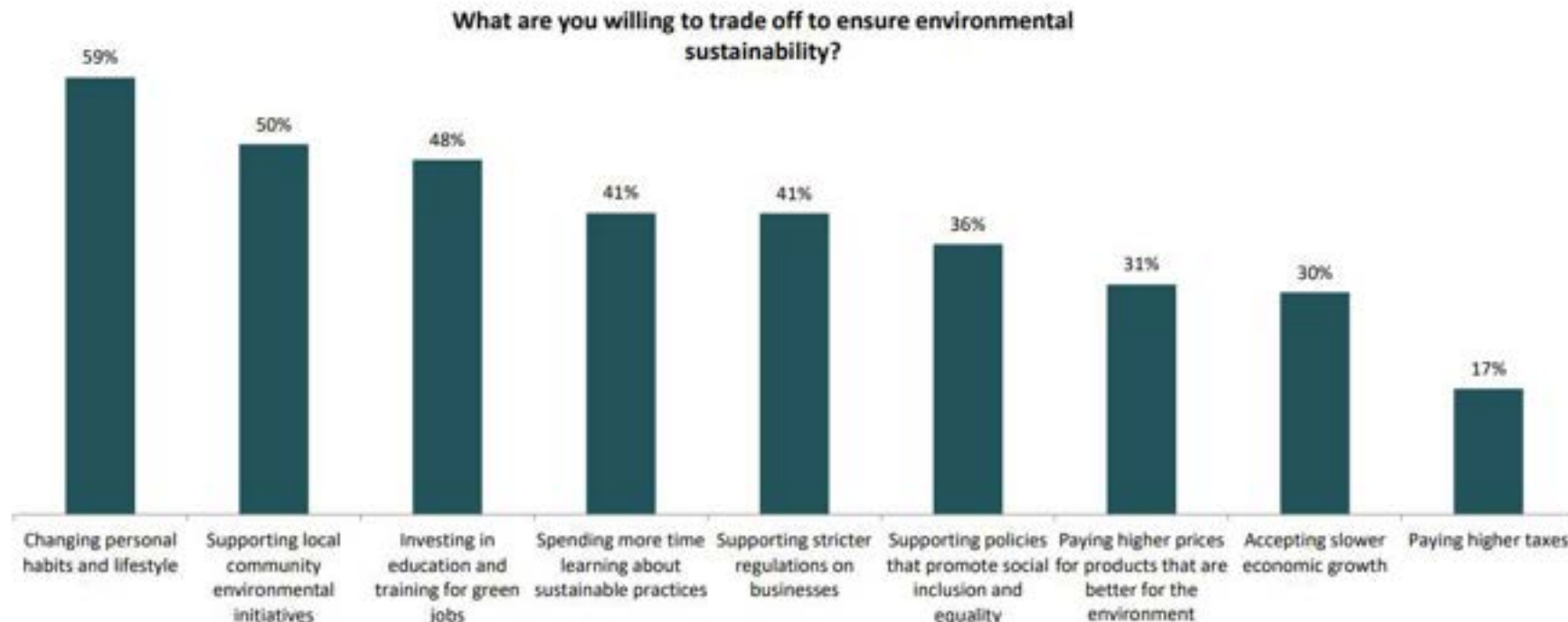
Trust that political leaders will make the right decisions for a sustainable future



Key finding 3 - Caveats on green objectives – wary of policies with personal trade-offs

There's willingness to make personal and communal trade-offs for the sake of environmental sustainability, however financial trade-offs like higher prices and taxes are less favoured

“Willing to (personally) trade off for environment”



3 lowest - Higher taxes (17%), slower growth (30%), higher prices (31%)

2 highest – habits/lifestyle (59%), local community initiatives (50%)

Implications for EGD and Barometer findings

Southern citizens:

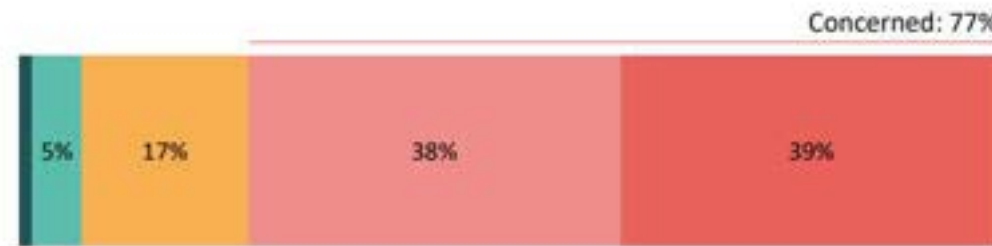
Strongly agree with green objectives → worry on specific measures and concentrated personal/national costs.

Green experts (inc. global south):

[EGD Baro says..] Worry on green objectives being legislated, implemented → optimistic about positive EGD spillovers.

Concern / need to act on green is clear, especially to support future generations.
77% concerned.

Concern about the impact of current environmental policies on future generations



Small, individual actions are accepted, but solidarity and leadership needed **first** to access sacrifices on prices/taxes...

■ Not concerned at all ■ Slightly concerned ■ Moderately concerned
■ Very concerned ■ Extremely concerned

Sample size: n = 10,084 | Base = All respondents | Q = "How concerned or not are you about the impact of current environmental policies on future generations?" (Single choice)

Implications for EGD and Barometer findings

Southern citizens:

Strongly agree with green objectives → worry on specific measures and concentrated personal/national costs.

Green experts (inc. global south):

[EGD Baro says..] Worry on green objectives being legislated, implemented → optimistic about positive EGD spillovers.

Policy conclusions:

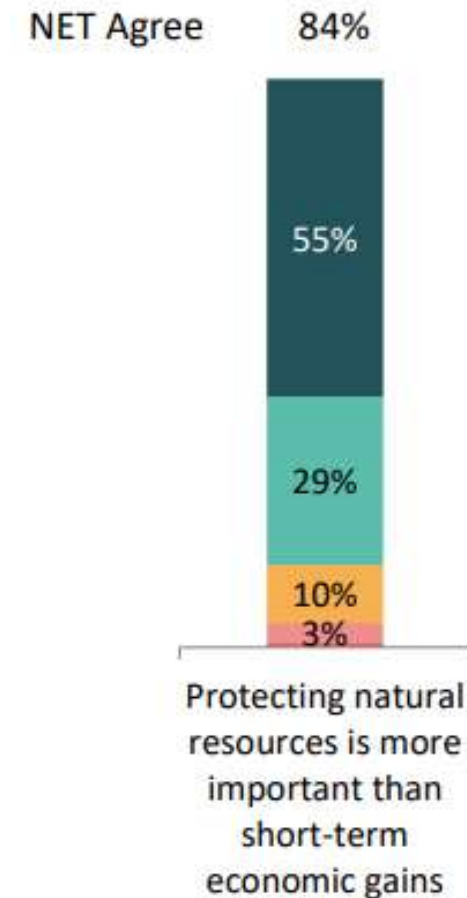
- Do focus on targeted mitigations for policies with negative spillovers and household cost/price impacts. Essential.
- Work out how EU/EGD action can empower southern national governments to set high ambition green agendas, lead their own citizens, and build on existing enthusiasms – concessionary finance, CBAM € proceeds, debt-swaps, tech transfer/partnerships. Flexibility.
- Genuine simplification (non-dilution) to help legislation through – access the positive spillovers all want.
- Avoid *any sense of* unilateralist measures, where possible – embrace enabling international processes & multilateral frameworks. *Even in* this tough moment for them.
E.g. More flexible ‘country platforms’ for just transition investment, Global Gateway projects.

Closing framing/messaging findings



/Not new, but still interesting/

1. Big framing benefits from positioning the environment, nature, and natural capital as continuous with **'protecting natural resources'** – strong instincts not to waste resources, invest in nature, avoid short-termism.
2. Emphasising **future generations'** right to inherit a healthy environment has strong cross-cultural appeal and activates inter-generational concerns.
3. **Managing pollution, industrial waste and clean water** are instinctual green policy touch-stones that citizens expect as a minimum from governments – what ever the perceived costs.
4. Policy messaging that can credibly demonstrate **solidarity in green action across scales** (individual → community, country → international, high income → low income) has a much higher chance of acceptance.



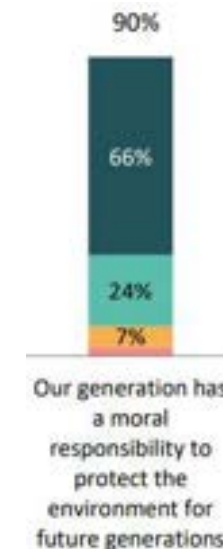
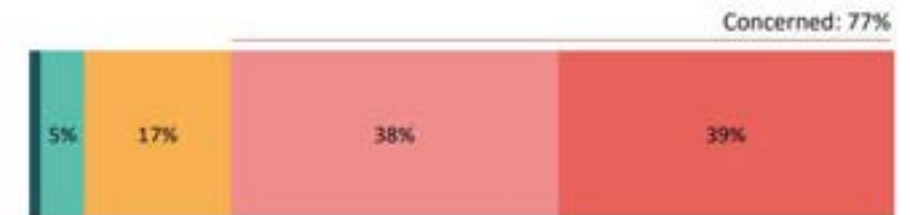
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Concern about the impact of current environmental policies on future generations

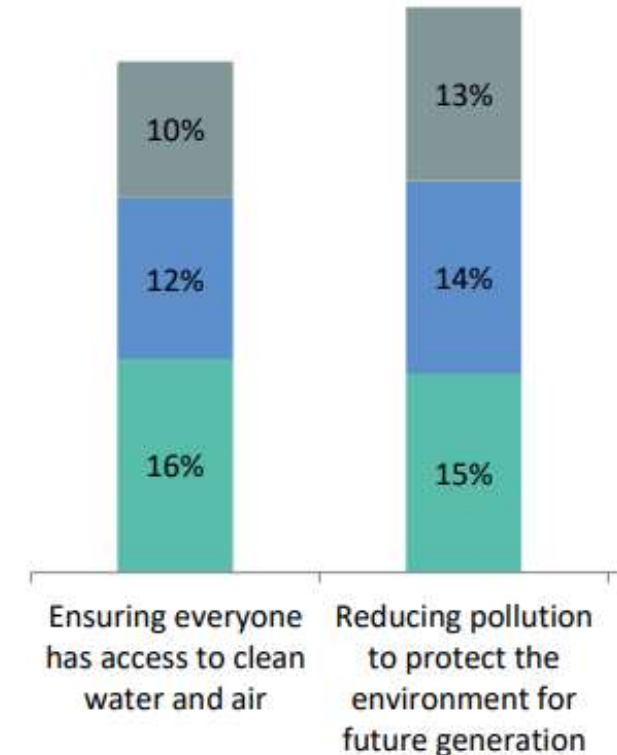


Closing framing/messaging findings

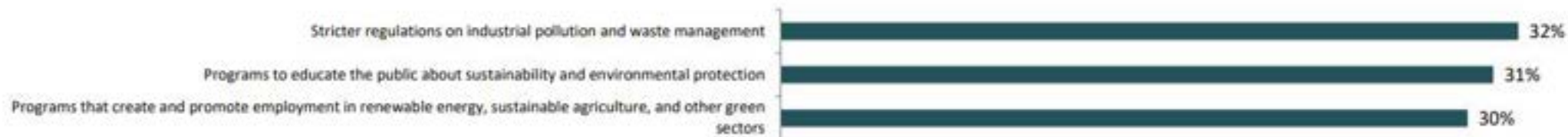


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Effective actions for protecting the environment and promoting sustainability right now



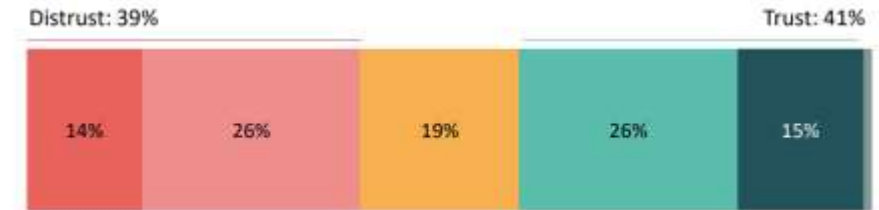
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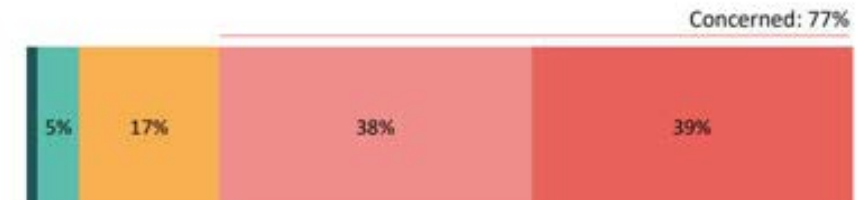
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4. Policy messaging that can credibly demonstrate **solidarity in green action across scales** (individual → community, country → international, high income → low income) has a much higher chance of acceptance. Citizens do want national and international leadership.

Trust that political leaders will make the right decisions for a sustainable future



Not at all Not much Neutral Somewhat Very much Don't know

Concern about the impact of current environmental policies on future generations



Not concerned at all Slightly concerned Moderately concerned Very concerned Extremely concerned

Thank you.

- **Contact**
chris.hopkins@greeneconomycoalition.org
- **Next for the GEA Survey**
2025 focus on green backlash, accountability, rule of law; adjusted countries.
- **The GEC Network**
A multistakeholder alliance – 75 members,
9 national hubs, 6 continents
Unions, businesses, NGOs, UN agencies and citizen groups.



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Panel discussion – Shaping global green leadership: addressing the external spillovers of the European Green Deal



Moderated by Pierre Leturcq

Head of Global Challenges and SDGs Programme, IEEP

VIDEOMESSAGE BY

Rim Berahab

Senior Economist
Policy Center for the New South



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Panel discussion – Shaping global green leadership: addressing the external spillovers of the European Green Deal



Perrine Fournier

Trade campaigner
FERN



Antoine Oger

Executive Director,
IEEP – Institute for European
Environmental Policy



Bruno Capuzzi

Policy Leader Fellow – School
of Transnational Governance



Seutame Maimele

Economist: Sustainable Growth at
Trade and Industrial Policy
Strategies (TIPS)

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Panel discussion – Shaping global green leadership: addressing the external spillovers of the European Green Deal



Closing remarks

Matt Eldridge

Senior Programme Officer, Development Policy and Finance
Gates Foundation

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Panel discussion – Shaping global green leadership: addressing the external spillovers of the European Green Deal



Conclusions

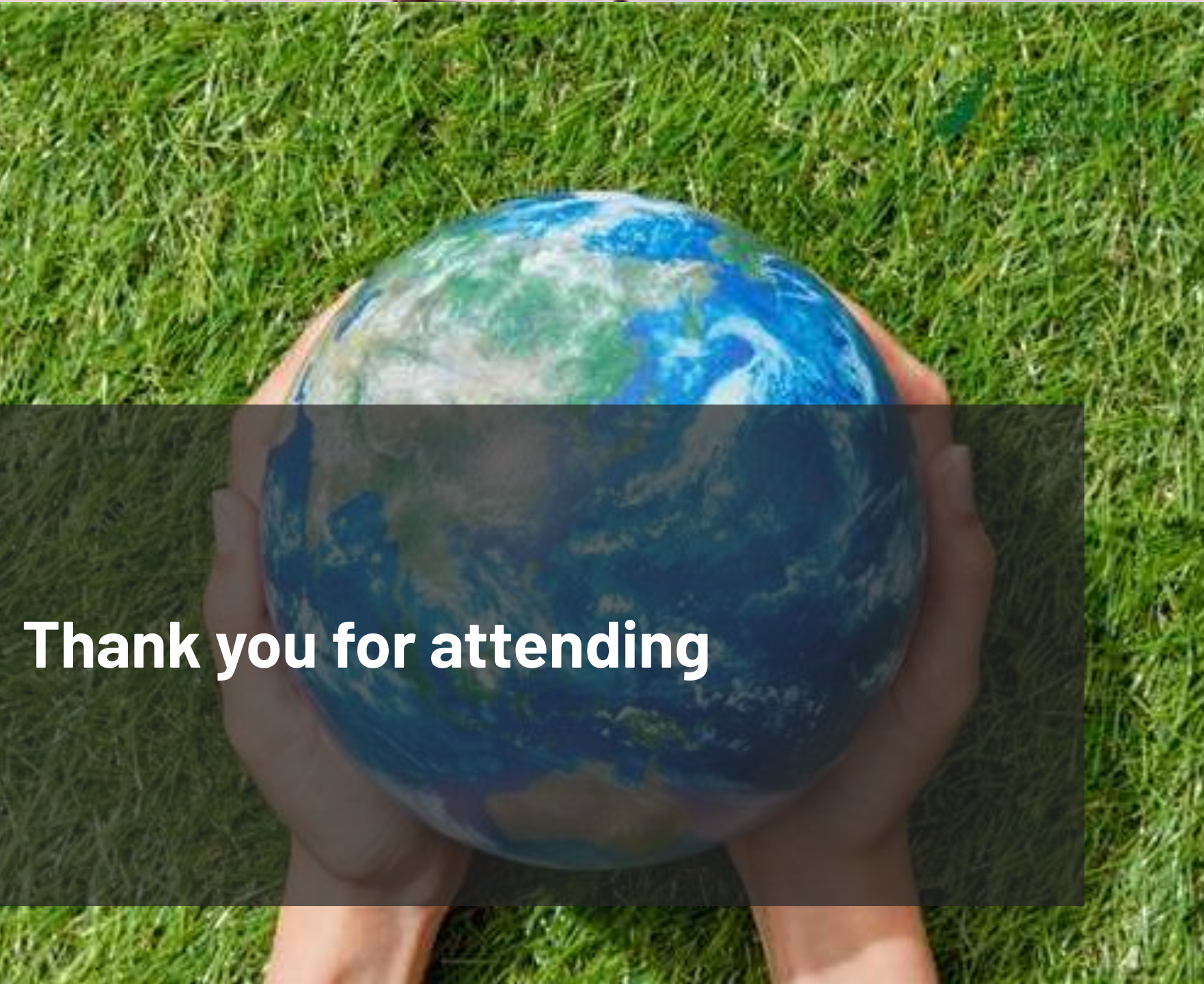
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