REPORT APRIL 2025

5 LESSONS FROM IMPLEMENTING THE EU'S CLIMATE TRANSITION ON THE GROUND

AN ANALYSIS OF POLITICAL DEVELOPMENTS ACROSS MEMBER STATES IN 2024

PEPE ESCRIG

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About E3G

E3G is an independent think tank working to deliver a safe climate for all.

We drive systemic action on climate by identifying barriers and constructing coalitions to advance the solutions needed. We create spaces for honest dialogue, and help guide governments, businesses and the public on how to deliver change at the pace the planet demands.

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Cover image
A technician explains heat pump features.
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SUMMARY

2024 marked a decisive shift in Europe's green transition. As the EU entered a new political cycle, the European Green Deal moved from high-level policymaking to tangible rollout in the real economy. E3G's analysis finds that there is definite progress, with governments, businesses and people making significant strides towards a cleaner future. However, to ensure a resilient transition, Europe needs better coordination, greater investment, stronger social foundations and more political stability.

Last year, Europe's green transition intertwined with political developments at national and regional levels that echoed all the way back to Brussels. Polarisation in elections, economic competitiveness concerns, high energy prices, and investment shortfalls shaped EU discussions, feeding into the EU's new Strategic Agenda and the 2025 work programme of the European Commission. The dominant narratives often focussed on crises and setbacks, fostering a false perception of stagnation and failure. Yet reality was often more complex, and certainly less daunting. Recognising both achievements and difficulties is crucial for building confidence in the transition and addressing real barriers effectively.

Five political lessons

1. **Europe's climate transition is underway**, proving both resilient and instrumental in the face of challenges.
2. **National approaches are often strategically risky and misaligned**, emphasising the value of having EU goals and coordination.
3. **Investments are a critical transition bottleneck** and need upscaling along with stable policy frameworks.
4. **People broadly endorse climate action**, but support is fragile without adequate socio-economic backing.
5. **Increasing polarisation** erodes public trust in the transition, whereas involving diverse stakeholders fosters shared ownership of decisions.

Implications for governments, businesses and citizens

> **Governments** across Europe can learn a lot from each other, since they are navigating similar barriers and solutions as they implement the green transition. They will need to simultaneously respond to overlapping crises, while avoiding ineffective solutions or siloed approaches. At the EU level, upcoming policies face the challenge of responding to on-the-ground realities. From securing sufficient financing through the next multiannual financial framework to shaping a joint EU industrial strategy with the Clean Industrial Deal. From maintaining public buy-in with adequate social support, to ensuring policy stability and certainty with an ambitious 2040 climate target, careful simplification efforts, and limited far-right influence.

> **Businesses** must face a new reality: the world has embarked on a clean transition and the EU is betting on decarbonisation as the backbone of its economic strategy. While those lagging behind confront increasing pressure to adapt to a shifting landscape, those that have already started adapting to and investing in a cleaner future are well positioned to advance confidently. Collaboration with governments, transparency about their efforts, and proactive community engagement can help businesses attract funding, build public trust, and create stable conditions for long-term success. However, if frontrunners do not engage more actively in public debates, their stances risk being overshadowed by incumbent interests resistant to change.

> **Citizens** consistently support climate action, yet they have additional worries, such as the cost-of-living crisis and security. Europeans want political leaders to tackle these issues together – such as by lowering bills through cheaper renewables and house renovations – but they will need to remain mobilised and make their voices heard. People are more likely to support the transition when policies are socially just and when they feel included in decisions that impact their lives. Meanwhile, they need to be vigilant about far-right disinformation and exploitation of socio-economic issues and cultural shifts.

In this report, we present key findings from analysis of the political realities of implementing the EU's green transition. Rather than a sectoral or EU-law transposition review, we examine key political trends, fractures, and challenges shaping the transition on the ground. We show how governments, businesses, and citizens are reacting to the evolving landscape and explore the most contentious debates of 2024. Additionally, we delve deeper into several real-world stories, and provide a comprehensive set of over 400 references to support climate advocates in advancing climate action.

5 lessons from implementing the EU's climate transition on the ground in 2024

The transition is underway, proving both resilient and instrumental in the face of challenges.

Europe's climate transition marked new records as governments and businesses made strides.

Europe's transition proved resilient to challenges and instrumental to overcoming them.

National approaches are often risky and misaligned, needing EU coordination.

Member states' risky bets and unaligned strategies threatened to slow down progress and waste resources.

Joint EU strategic planning and frameworks were revealed as crucial yet still insufficient to meet the EU's transition goals.

Investments are a critical transition bottleneck and need upscaling along with stable policy frameworks.

Insufficient public and private investments were behind most transition challenges.

Deregulation agendas upset private investors seeking regulatory certainty.

People endorse climate action, but support is fragile without adequate socio-economic backing.

Opinion surveys, consumer behaviour and activism signalled people's continued support for climate action.

The cost of living and insufficient socio-economic support threatened the transition's social acceptability.

Increasing polarisation erodes public trust; involving stakeholders fosters shared ownership of decisions.

Far-right and vested interests tried to fuel climate backlash using disinformation and tapping into societal and cultural concerns.

Lack of trust and consensus challenged progress and certainty, while dialogue fostered societal buy-in and stability.

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LESSON 1

EUROPE'S CLIMATE TRANSITION IS UNDERWAY, PROVING BOTH RESILIENT AND INSTRUMENTAL IN THE FACE OF CHALLENGES

2024 showed Europe's climate transition slowly but surely unfolding on the ground, with governments and businesses progressing on green transition goals. They had to navigate challenges such as heightened international competition, persistently high energy prices, political gains by far-right parties opposed to climate action, and mounting climate impacts. Yet, the climate transition proved both resilient to these issues and instrumental to addressing them. These real-world developments made it clear that the EU is decisively headed towards climate neutrality, the remaining questions being how fast and how fair the transition will be.

Europe's climate transition marked new records as governments and businesses made strides

Europe's climate transition is advancing with lagging – yet promising – progress towards its targets.[1] By mid-2024, only 15 out of 154 quantifiable EU policy targets across key sectors such as climate, energy, circularity, transport and agriculture were not progressing. 32 were on track and 64 progressing despite needing acceleration.[2] As a result, greenhouse gas emissions in the EU continued decreasing in the first half of 2024,[3] and early data for the second half confirmed the pattern. For instance, emissions in the power sector last year dropped by 13% compared to 2023, thanks to renewables producing an unprecedented 48% of the EU's electricity, while fossil fuel power dropped to only 28%,[4] the lowest percentage ever. Progress made by both governments and businesses – often under the radar – in advancing climate transition contributed to these achievements.

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Member states are making progress

National governments are dedicating significant time and effort to transpose and implement the European Green Deal, often through dedicated national climate laws. Almost all of them have also submitted their final National Energy and Climate Plans (NECPs),[5] which outline their respective transition strategies for the rest of this decade. Early analyses of the plans show that, while national ambition remains insufficient,[6] it has significantly accelerated over the past five years.[7] For instance, the solar power targets for 2030 almost doubled.[8] This demonstrates how governance structures and processes – such as the NECPs – can provide stability to the climate agenda and help sustain action despite shifting political and economic contexts.

The pathways to climate neutrality differ across countries and evolve alongside domestic politics and the party affiliation of governments in power. For instance, on the one hand, Poland's new government turned away from its predecessor's adversarial stance towards climate policy.[9] For their part, the conservative leaders of both the Netherlands[10] and Italy[11] moved focus to climate adaptation, easing permits for renewables and building gas and nuclear infrastructure. Amid national shifts, many local leaders tended to show an unwavering support for the transition, with 3,500 of them signing a declaration that backed the European Green Deal[12] and 23 cities receiving awards for their plans to become climate-neutral by 2030.[13]

Central and Eastern Europe leads in solar power growth

Solar farm electricity generation is growing faster in Central and Eastern Europe (CEE) than in any other region of the continent,[14] despite CEE historically being one of Europe's heaviest coal-burning regions. This development underscores how affordable solar installations have become relative to other forms of electricity generation, as well as the impact of some under-the-radar supportive policies such as Poland and Hungary's target of net zero carbon emissions in power generation by 2050 and their plans to further expand clean energy.

Businesses and industries are making progress

European businesses are transitioning too. 96 out of the EU's top 100 firms already have a net zero target, and the number of companies with a transition plan is rapidly growing.[15] While these plans are not guaranteed to be robust enough or substantiated in practice – particularly if EU policies mandating them, such as the CSRD and CSDDD, are watered down as planned[16] – they signal a growing recognition of sustainability as a business imperative.

It also means that companies have already committed significant investments to the transition and cannot afford to go back. According to the European Investment Bank (EIB), more than 60% had invested in climate action in 2024, compared to 56% in 2023 and 53% in 2022.[17]

Concretely, these plans and investments mean companies are shifting to electric vehicles[18] and renewables,[19] driving a record in corporate clean energy buying and saving them money.[20]

Despite decarbonisation being inherently more challenging for heavy industries and the urgent need for it to accelerate,[21] new initiatives in the cement,[22] [23] chemicals,[24] and steel[25] [26] [27] sectors in 2024 showed progress in these sectors' transition to carbon neutrality as well. For instance, if all current projects for iron and steel materialise, emissions in these sectors could be halved by 2030.[28]

Europe's transition proved both resilient to challenges and instrumental to overcoming them

Progress is happening despite significant economic and political challenges, such as high energy prices following Russia's war on Ukraine, sluggish competitiveness (particularly for the cleantech sector), political instability and climate impacts. The clean economy transition is already proving instrumental to addressing those same challenges but has not yet harnessed its full potential.

War in Ukraine and energy dependence

Russia's war on Ukraine pushed Europe to speed up its energy transition,[29] as energy security was top of politicians' minds, especially in the Baltic[30] and Nordic[31] states. While diversification of fossil gas remained part of the EU's strategy, Europe mainly improved its energy security through sector-specific climate action, the expansion of renewables and energy efficiency gains,[32] and measures to reduce gas demand.[33] In fact, fossil gas demand steadily declined across European member states in recent years,[34] now reaching a 10-year low.[35] Remarkably, in 2024, Bulgaria finally closed its Russian oil import loophole[36] and Austria, long dependent on Russian gas, started turning this around with decisive action.[37]

Unfortunately, Europe's ties with Moscow continued filling up Putin's war chest,[38] which Russia in turn spent on attacking European gas storage sites in Ukraine.[39] This is because a "refining loophole"[40] in the EU's bans continued to allow purchases of fuels made from Russian crude via third countries. In fact, the volume of Russian LNG imports into the EU has remained unaffected.[41]

High energy prices

Continued reliance on fossil fuels[42] remains a key driver for high energy prices, which remain well above pre-pandemic levels despite a slight decrease in 2024 (Figure 1).[43] Fossil fuel dependence, particularly fossil gas, is also keeping consumers vulnerable to energy price spikes, such as that provoked by a Norwegian gas outage.[44] Nuclear supply outages have also contributed to this.[45] Meanwhile, schemes to shield households during the energy crisis have started to be phased out,[46] keeping high energy prices a pressing issue for Europeans.[47]

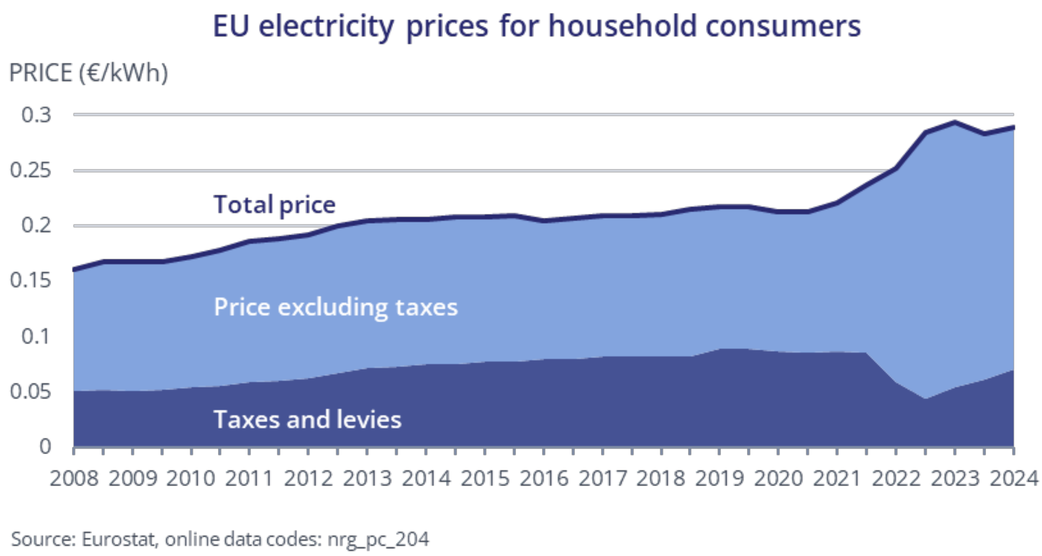

Figure 1: While average electricity prices slightly decreased in 2024, continued volatility of global fossil fuel markets and the phase-out of compensation measures meant final prices for consumers remained around 2023 levels.

EU industry's competitiveness

Energy costs being higher for European industries than for their US and China counterparts also aggravated Europe's economic competitiveness.[48] This has become a big concern for businesses and even forced some to consider downscaling or relocating their operations.[49] Therefore, companies[50] and investors[51] are increasingly betting on the clean energy transition as a competitiveness asset.

The climate transition supports companies' competitiveness

Reducing energy costs through decarbonisation is crucial to Europe's industrial competitiveness.[52] That's one of the reasons why, in 2024, over 500 companies[53] urged the EU to confirm the Green Deal as essential for a competitive Europe. Similarly, other businesses publicly supported[54] an EU emissions reduction target of "at least 90%" by 2040 to improve the EU's resilience to shocks, energy security and competitiveness. Moreover, Germany's 50 leading companies stressed the importance of climate neutrality for the country's economic success.[55]

While many business leaders agree that doubling down on the climate transition is crucial for their future competitiveness and resilience,[56] competitiveness in the short term remains a great concern for some cleantech sectors that are key for the transition to succeed in the first place. Take the electric vehicle (EV)[57] and solar photovoltaic[58] industries' struggle to keep up with Chinese competition – the former seeing their sales drop[59] and the latter witnessing even more production leave the EU.[60] Heat pumps have also been struggling to reach their potential due to governments' inconsistent support schemes, the cost-of-living crisis and the comparatively low price of subsidised gas:[61] sales plummeted in 2024[62] after an initial boom during the worst years of the energy crisis.

Car crisis? Not so fast.

2024 saw a drop in EV sales,[63] battery maker Northvolt's bankruptcy[64] and Volkswagen's persistent struggles[65] come on top of long-standing concerns about heightened Chinese competition.[66] Yet, claims by some of a "crisis" in the European automotive sector[67] were strongly contested:[68] Northvolt and Volkswagen's situations were not representative in a sector that made big profits on EVs in 2024 despite exceptionally lower demand. The drop in sales and bump to profits came from manufacturers' bet on a value-over-volume[69] strategy of making e-cars fancier, and cuts to public subsidies[70] for consumers. The EU's decision to impose duties of up to 35.3% on top of the 10% tariffs on Chinese car imports[71] resulted in retaliation,[72] which might hamper the increase in EVs' affordability for Europeans.[73] Yet, EVs remain the automotive industry's safest bet, and sales are expected to rebound[74] as EU manufacturers shift focus to affordable models[75] and new public incentives come to light.[76] Early 2025 trends are already confirming this.[77]

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Far-right parties on the rise

In 2024, Europe's climate transition also proved resilient to further far-right growth. In recent EU, national and regional elections, far-right parties made significant gains in countries such as Germany,[78] France[79] and Austria,[80] mostly at the expense of both centre-left and centre-right parties in governments dealing with the cost-of-living crisis.[81] Yet, they underperformed during the 2024 EU parliamentary elections in countries such as Poland,[82] Hungary,[83] and Finland,[84] and in regional elections in Italy[85] – all places where they are or have recently been in power. And while the far-right grew in France's parliamentary elections, they fell short of expectations, with a leftist coalition making it to first place instead.[86] Progressives in Spain[87] and Lithuania,[88] as well as centrists in eastern member states,[89] have also grown or remained strong, and while green parties have lost ground in Germany, Austria and France, they were on the rise in Denmark, Sweden, Italy and Slovenia.[90] These mixed results show that while far-right growth and normalisation is a consolidated trend[91] and more than a simple protest vote,[92] voting behaviour is complex and popular discontent can easily turn against them after they have touched power.

Post-election agreements were equally relevant: aided by some centre-right and liberal parties, the far-right has already entered government in seven EU countries,[93] and also now holds a strong sway in France.[94] Yet, climate policies for the most part survived[95] populists entering or influencing government coalitions. This was possible due to the checks and balances within existing national and EU legislation, the tendency of extreme proposals to be unviable in practice, and the buffer of coalition dynamics. For instance, Germany's far-right AfD party has systematically been excluded from power by moderate parties,[96] and the same has applied to Austria's FPÖ.[97] The new right-wing Dutch government, despite rolling back some climate measures[98] and stalling sustainability reforms in the agricultural sector,[99] promised to largely keep the transition's direction of travel and continues to support an EU emissions reduction target of 90% by 2040.[100]

However, centrist forces have yet to develop effective strategies to fully prevent the real risk of the far-right materialising a significant deterioration of climate policies. For instance, stemming the rising threat of political extremism involves tackling the roots of the socio-economic problems it exploits, and according to experts, a socially fair transition would be able to do just that.[101]

Climate impacts

Lastly, people, businesses and governments in Europe had to grapple with severe climate impacts throughout 2024 – the warmest year on record.[102] Climate change fuelled catastrophic floods in Spain in October,[103] where over 36,000 people had to be rescued, 232 died, over 1,800 businesses were destroyed, and damages amounted to €11bn.[104] Just a few weeks earlier, climate change had also supercharged the strongest ever recorded rainfall event in Central Europe,[105] leaving at least 26 dead,[106] expensive damages[107] and record insurance losses.[108] These events came on top of heat waves sweeping across Italy,[109] Greece[110] and Spain[111] – which are estimated to cause as many as 40,000 annual deaths in Europe – as well as unprecedented droughts,[112] wildfires,[113] and mass die-offs of trees[114] threatening the livelihoods of rural communities.

Beyond specific events, climate change was reported to be impacting various economic activities, from tourism in Spain[115] and European cultural heritage sites[116] to Greek agriculture[117] and coastal economies[118] – to name a few. These runaway climate impacts evidenced that the EU and national governments[119] are poorly equipped[120] to deal with an already changing climate. Yet, in 2024, governments across Europe appeared to be starting to pay more attention to the need for climate adaptation efforts.

Governments started taking climate adaptation seriously

In 2024, Spain boosted its water reuse systems[121] and the Netherlands invested in dealing with floods.[122] While Belgium planned works against a rising sea,[123] France planned to overhaul insurance models[124] so that they cover increasingly costly climate disasters.[125] For its part, Poland planned to require all cities and towns with more than 20,000 inhabitants to put in place climate adaptation strategies.[126] These examples show a growing awareness of the need for climate adaptation action.

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LESSON 2

NATIONAL APPROACHES ARE OFTEN STRATEGICALLY RISKY AND MISALIGNED, EMPHASISING THE VALUE OF EU COORDINATION

Europe's transition is unfolding unevenly, with national governments often prioritising short-term interests over a coordinated EU approach. In 2024, several member states made strategically risky, unaligned choices – extending reliance on Russian fuels, pushing ahead with hydrogen mega-projects without a clear strategy, or doubling down on nuclear at the expense of renewables. Without strategic planning and EU coordination, decisions by governments and businesses on the ground risk creating new dependencies, driving up costs, and delaying key aspects of the transition – such as industrial electrification, gas phase-out, or greening finance.

Member states' risky bets and unaligned strategies threatened to slow down progress and waste resources

In 2024, several EU countries opted for prioritising short-term national interests, hampering the greater potential of joint EU strategies.

Buying Russian fossil fuels

This is particularly the case in the context of sanctions against Russia, as countries kept spending money on Russian fuels.[127] This was further complicated by the EU's 2022 exemption for Slovakia and Hungary from Russian oil import bans, which was meant to give them some extra time, but Hungary spent it ramping up imports even further.[128] Then, when Ukraine blocked Russian oil transit in June last year,[129] Budapest[130] and Bratislava[131] accused Kyiv and Brussels of threatening their energy security. It would later become clear that they had alternatives,[132] but simply preferred to retain their discounted Russian oil,[133] which kept their energy bills comparatively low while fattening their national coffers at the expense of the rest of Europe.

EU countries' efforts to substitute Russia with the US as a gas supplier also raised concerns about creating a new overdependence, while new investments in fossil gas infrastructure risk wasting additional billions[134] on stranded assets[135] – especially with LNG demand considered to have already peaked[136] and the EU's overall gas demand having declined for five consecutive years now.[137]

The money spent on new Russian gas and new LNG infrastructure could be better spent on financing the repair of Ukraine's wrecked energy system.[138] For instance, the Netherlands allocated €200 million to help Ukraine fix its energy system,[139] marking a U-turn for the far-right PVV party regarding its support for Kyiv. However, individual member-state-led initiatives like this will not be effective without coordination.

Hydrogen infrastructure

Lack of coordination and risks of creating stranded assets also surfaced around hydrogen infrastructure. EU countries and industries are in a fast-paced race to develop a titanic green hydrogen market, but the rush might come with drawbacks. The European Court of Auditors deemed Europe's hydrogen plans unrealistic and highlighted a lack of a cohesive strategy among member states.[140] For instance, France's labelling of hydrogen produced with methane as "low-carbon" created confusion in the industry.[141] While member states' own renewable hydrogen demand projections for 2030 are five times lower than the assumptions in the EU-wide RePowerEU plan, countries such as Germany,[142] the Netherlands[143] and Spain[144] are nevertheless already pouring billions into hydrogen mega-projects, with the risk that the funding will be ineffective in supporting decarbonisation if not supported by a coherent, strategic approach.[145]

One of those massive hydrogen projects is a 3,300-kilometre pipeline connecting the EU to North Africa, which is raising concerns over its implications for local populations in Tunisia and Morocco.[146] This mirrors the controversy surrounding Germany's deal with Serbia to build one of Europe's largest lithium mines,[147] which sparked mass protests[148] against the prospects of pollution and land degradation in this non-EU country despite lithium reserves existing in EU countries like Austria or Portugal. These reactions underscored the risks these projects could pose to the EU's diplomacy and clean energy partnerships if not sufficiently thought through as part of a solid EU joint strategy.

Italy's Mattei Plan holds potential but comes with risks

Italy's Mattei Plan,[149] which seeks to enhance energy security through partnerships in Africa, offers an intention of mutually beneficial cooperation – though it is so far empty of content.[150] It risks being detached from joint EU-wide diplomatic efforts and ending up co-opted into Italian PM Giorgia Meloni's anti-immigration narratives.[151]

Nuclear push and backtracking

France emerged as one of the clearest examples of a national government departing from the EU's joint efforts and making its own risky choices. The country's ambivalence[152] in implementing EU green legislation, its delays[153] and backtracking on previous green commitments – such as on housing efficiency,[154] agriculture,[155] oil extraction[156] and green funds for local authorities[157] – and its self-driven push for nuclear energy[158] at the expense of renewables,[159] risked the effectiveness of its environmental planning, cost the country billions,[160] brought it penalties for missed targets,[161] and took people to the streets.[162]

While backtracking on green commitments was limited elsewhere, France also led a cross-EU push for nuclear power[163] that was supported by changing national strategies in other countries, such as Romania,[164] Italy[165] and the Netherlands.[166] This push deeply divided EU countries,[167] as some worried it could hamper the EU's joint renewables targets, position in the global cleantech race, and energy independence from Russia, as well as inflate the price tag of the transition.[168] [169]

Joint EU strategic planning and frameworks proved crucial yet still insufficient

Proactive planning at the EU level could improve coordination and align member states' efforts, which as seen, can sometimes be inconsistent or even contradictory. However, crucial aspects of the transition remain under-planned, and the current policy framework is not sufficiently equipped to ensure a smooth process. As a result, much is being left to unfold on its own, increasing the risk of insufficient, expensive and inequitable action.

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Gas phase-out

A clear example of this is Europe's accelerating shift away from fossil gas, driven by the energy crisis and clean technology advances. While the EU introduced some measures to manage the reduction of gas demand, holistic planning across sectors – power, industry, households, workers and regions – is still lacking, and investment into gas infrastructure continues, increasing the risk of stranded assets.[170] Critical gaps in the legal framework left cities and regions to handle the transition on their own, risking a more expensive, fragmented and inequitable outcome.[171] Moreover, an unmanaged decline in the EU's oil and gas demand threatens far-reaching consequences for Europe's key fossil fuel supplier countries – creating new security risks for the bloc.[172]

Electrification

Similarly, the EU has made significant strides in electrification, including record additions of renewables capacity in recent years. Yet, member states have been facing challenges to accelerating the electrification of the EU's economy, struggling to overcome issues of grid constraints, high costs, and changing demand patterns that risk slowing investment. Notably, the electricity share of industrial energy use has been flatlining over the past 20 years[173] and even declining since 2022.[174] Instead, proper EU-level planning – via the upcoming Electrification Action Plan – has the potential to unlock the decarbonisation of up to 90% of industrial energy use, all while enhancing the EU's economic competitiveness, technological leadership and energy resilience.[175]

Transition planning to mobilise sustainable finance

To ensure a well-managed transition, effective planning must align efforts across all governance levels, including corporate strategies. A holistic transition planning framework would help bridge policy gaps, ensuring coherence between national, regional, and sectoral plans while integrating international developments.[176] At the same time, capital markets must be aligned with Europe's transition needs, directing financial flows towards sustainable investments and discouraging unsustainable practices. Strengthening – rather than weakening as recently done[177] [178] – the EU's sustainable finance framework by providing clear incentives and embedding sustainability risks into financial strategies is crucial to mobilising the necessary capital on the ground.[179]

Without these systemic changes, the transition risks being fragmented, underfunded, and misaligned with Europe's climate and economic objectives.

LESSON 3

INVESTMENTS ARE A CRITICAL TRANSITION BOTTLENECK AND NEED UPSCALING ALONG WITH STABLE POLICY FRAMEWORKS

The EU's green transition faces a major bottleneck: insufficient investment. Key projects, from grid expansion to industrial decarbonisation, lag due to funding shortfalls. While private capital offers high returns in some cases, all estimates show it falls short of the investment boost the EU needs. Yet, public investment so far remains limited and fragmented. Policy uncertainty and regulatory shifts further impact investor confidence, risking slowing down progress.

Insufficient investments were behind most transition challenges

In 2024, the climate transition faced obstacles such as grids that were unfit to keep up with renewable capacity[180] and shortages of skilled labour for growing sectors.[181] Behind most such challenges was insufficient financing. For instance, the rate of investments in electricity grids was only half of what is needed to make them fit for a renewable future.[182]

Zooming out, the transition's cumulative investment needs are estimated at 8.3% of the EU's GDP annually.[183] Assessments like the latest French pluriannual financial framework defining the public financing needs for the transition,[184] European Central Bank (ECB) estimates,[185] and the influential "Draghi report",[186] indicate a growing acknowledgement of the need for massive public and private investments. Moreover, the "Antwerp Declaration" of over 1,200 industry organisations across 25 sectors highlighted the need for significant additional funding for the green transition in the EU's upcoming industrial strategy.[187]

Private investments in the sustainable transition promise high returns in some cases,[188] but even under optimistic assumptions capital markets fall far short of

Europe's investment needs.[189] Despite this, the EU and its member states are not unlocking private and public investments at scale,[190] and often struggle to ensure effective access to and absorption of existing funds – as illustrated by local authorities, which call for support and capacity building.[191]

Public banks are crucial for spurring green spending

Public banks such as the EIB have a critical role to play in mobilising capital towards the green transition.[192] Last year, they enabled European cleantech debt investment to reach €17 billion[193] – the narrowest-ever investment gap with the US – and helped make the EU the second best place for net zero investments.[194] Yet the EU is still lagging in overall cleantech investments,[195] which is why nearly 40 clean energy firms asked the EIB to provide public guarantees to foster their competitiveness[196] – a demand that has now been included in the EU's Clean Industrial Deal.[197]

Public investments in the transition are seen by some industrial players as a key solution to boost their competitiveness.[198] Some state-led green investments in 2024 – such as in Belgium,[199] Czechia,[200] Spain,[201] Sweden[202] and the CEE region[203] – showed the power of public investments in realising large-scale infrastructure projects for decarbonisation. For instance, Germany approved a €4bn subsidy scheme to help industries decarbonise,[204] and France put forward €1.5bn to support ArcelorMittal's transition.[205] In some cases, these investments were possible thanks to loans from the EU's temporary Recovery and Resilience Facility (RRF), which is ending in 2026 and will have to start being paid back.

These funds remained sporadic though, while also raising concerns among EU countries about the risk of a subsidy race and discoordination,[206] as well as sometimes being less green than claimed.[207] IMF research showed that if the EU were to instead pool its resources and coordinate green investments, it would slash CO_2 faster and more efficiently.[208]

Beyond sporadic projects, national governments generally struggled to fill transition investment needs last year due to increasingly restrained budgets,[209] fiscal orthodoxy,[210] and public revenue losses due to falling carbon prices.[211] In some cases, they even cut back on green spending.[212] That was particularly the case for Germany, a major advocate for fiscal restraint, due to its EU- and self-imposed legal spending limits[213] – something the country is now reforming.[214]

Deregulation agendas upset private investors seeking regulatory guidance and certainty

The need for regulatory simplification was the subject of hot debate in 2024,[215] reaching its peak when Germany's economy minister expressed a desire to "fire up the chainsaw and cut the whole thing down" in a reference to corporate sustainability reporting requirements.[216] Intentional or not, his hyperbolic statements supported a dishonest push for deregulation[217] that takes aim at sustainability standards and key elements of the European Green Deal – from the internal combustion engine ban[218] to renewable targets.[219]

While some SMEs might have been worried that new EU reporting requirements for big companies would spill over to them indirectly,[220] most EU companies are prepared for the new regulations[221] and the EU has already approved measures to provide technical assistance for SMEs.[222] Investors and corporate bodies for their part have warned against watering down ESG regulations and demanded more detailed regulatory guidance to funnel money into the right net zero projects.[223] Moreover, fraudulent emissions reduction projects[224] and exaggerated green investments[225] [226] highlighted the need for full corporate accountability. This became even clearer after the STBi – a global framework guiding businesses' climate targets – relaxed the rules on carbon offsets,[227] sparking concerns among the body's employees and civil society organisations that the move could enable big polluters to avoid real emission cuts through fake climate efforts.[228]

Corporate honesty

A European Commission analysis showed that companies aligned with the EU Taxonomy for sustainable activities have outperformed the overall market.[229] One reason is investors increasingly see strong ESG performance as a sign of resilience and reduced risk. But reporting is equally crucial: companies following clear reporting standards perform better in actual corporate responsibility[230] and increase their financial returns.[231]

Beyond corporate reporting, the reality is that the private sector has already committed billions to Europe's green transition and regulatory certainty is crucial for the viability of their investments.[232] This is why, for instance, 50 companies in the automotive sector asked to maintain the target of ending the internal combustion engine by 2035.[233]

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LESSON 4

PEOPLE BROADLY ENDORSE CLIMATE ACTION, BUT SUPPORT IS FRAGILE WITHOUT ADEQUATE SOCIO-ECONOMIC BACKING

Public support for climate action remained strong in 2024, as seen through opinion polls, consumer choices, and vibrant activism. However, it became clear that this endorsement could fade if transition policies, such as those to make homes greener, are perceived as unfair – especially during times of inflated cost of living. Without stronger and well-funded social protections, public discontent and political resistance threaten to stall progress.

Opinion surveys, consumer behaviour and activism signalled people's continued support for climate action

Opinion surveys

Through 2024, the broad majority of Europeans continued to show support for the green transition, contradicting the perception of generalised green backlash.[234] [235] [236] While elections at different levels saw a trend of far-right growth, attitudes towards climate policies are not the main driver of voting behaviour. Instead, recent elections have mostly been driven by other topics[237] such as security,[238] migration[239] and economic recovery,[240] while climate action remains a top concern for European voters.[241] For instance, voters in Germany, France and Poland across almost all political affiliations wanted more ambitious climate action.[242] In both France and Denmark, people saw climate change as the most important among the recent overlapping crises.[243]

Consumer behaviour

Consumer behaviour tended to support this fact. Not surprisingly, policies that provided direct financial incentives proved particularly successful. For instance, the French government had to stop its electric car uptake programme just a month after launching it due to unexpected demand.[244] Nevertheless, a new study showed that over 60% of European consumers opt for environmentally friendly items even if they are more expensive as long as they are aware of them.[245] In fact, consumers were often one step ahead of their governments' plans. For instance, while politicians struggled to introduce new building decarbonisation measures,[246] renewable energy communities kept multiplying across France,[247] the sales of so-called "balcony power plants" boomed,[248] and one in five Spaniards put solar panels on their rooftops.[249]

Climate activism

Moreover, and contrary to common perceptions, climate activism in support of climate action did not go away.[250] Instead, it continued to evolve into new forms,[251] from mass protests calling for ambition in 2019 to more diverse, spread-out groups acting as permanent watchdogs of sustained[252] and sound delivery.[253] In 2024 we found activists calling out green projects that disregard environmental heritage and local populations, such as Tesla's gigafactory in Grünheide (Germany)[254] and a hydrogen facility in Kretinga (Lithuania),[255] as well as more disruptive actions like causing the cancellation of 60 flights at Munich Airport.[256] Litigation was a also a common tactic,[257] with citizens bringing fossil giants – such as Shell[258] and TotalEnergies[259] – to court over the impacts of their emissions, as well as countries – such as Germany[260] – over their insufficient climate mitigation efforts. Across Europe, activists joined forces with other social actors – such as labour unions[261] and public transport workers[262] – and scientists became involved, as seen in Brussels[263] and France.[264] However, European countries increasingly repressed protests,[265] criminalised activists,[266] and even arrested scientists,[267] aggravating a "repressive tide"[268] that made the UN urge EU governments to reinstate democratic protections for protest.[269]

Eco-workers in Italy

Workers at a car factory in Campi Bisenzio, Italy, have been occupying the facilities since they were laid off overnight when production was moved out of Europe. They demand a shift from producing car parts to renewable technology, such as solar panels and cargo bikes.[270] Partnering with climate activists and academics, they have developed a plan for this transition and organised large demonstrations and even literature festivals, becoming a symbol of popular engagement to advance a green and just transition.[271]

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The cost of living and insufficient socio-economic support threatened the transition's social acceptability

While Europeans continued to show support for climate action in 2024, it became increasingly clear that this support could fade if the transition is not fair and citizens are left to shoulder the costs on their own.

Households' energy bills

This became particularly clear in the case of buildings' fossil fuel reliance. Europeans might want to live in energy-efficient homes but they also worry about the cost of living, as persistently high energy bills come on top of high mortgages and rents[272] – which is taking people to the streets.[273]

In order to buffer the high energy prices of vulnerable households, countries such as Greece approved subsidies financed by new levies on the gas power producers that had set the high prices in the first place.[274] However, those were just band aids, and countries such as Germany even planned the opposite: levies for electricity consumers to fund the construction of new gas-fired power plants.[275]

In this context, decarbonising buildings and homes emerged not only as essential to reaching Europe's climate targets and creating millions of new jobs,[276] but also as a root solution to protect Europeans against fossil fuel-driven energy price hikes and to help them save money.[277] Public investments such as public grant schemes and subsidies for home renovations and energy upgrades – instead of compensating high energy bills driven by volatile fossil fuels – could both support public budgets and structurally lower energy costs. Despite the upfront costs, improvements in energy efficiency for homes could increase households' disposable income in the long run via lower energy bills, reduced exposure to energy price shocks, and higher property value.[278]

Some progress was made in this direction in 2024: Bulgaria,[279] Croatia,[280] Italy,[281] Denmark[282] and Poland,[283] to name a few, ramped up incentives and regulations for energy efficiency renovations. However, despite these measures, progress was sparse: renovation rates remained far too slow[284] and the funding gap for decarbonising buildings – at €150 billion per year[285] – risked growing even further after some national budget cuts.[286]

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Empowering citizens

Italy[287] [288] and Poland[289] approved incentives for people to buy solar panels and small-scale wind turbines, respectively, and bet on renewable energy communities – which allow people to produce their own clean electricity and break free from volatile fossil fuel prices and big energy producers.

ETS2 anxieties

With progress lagging when it comes to freeing households from fossil fuel dependence, no EU country except Austria[290] dared to start implementing the elephant in the room: ETS2 – Europe's carbon pricing scheme for buildings and transport, which extends carbon pricing to sectors impacting households more directly. Poland pushed for the whole EU to delay its 2027 launch[291] and Slovakia's environment minister refused to implement it altogether.[292]

Political indecisiveness was rooted in worries that the measure could aggravate low-income households' cost-of-living despite safeguards to protect the most vulnerable,[293] which in turn could fuel green backlash. For instance, Germany's own carbon price for buildings is highly unpopular[294] after being the target of a far-right-led disinformation campaign,[295] which is not helped by the fact that initial plans for redistributing the scheme's revenues to low-income households vanished due to severe budget restrictions last year.[296] To break this vicious circle, researchers have been urging EU countries to move quickly to ensure ETS2 is tied to social support mechanisms from the get-go,[297] such as through a lending facility that allows countries to start spending the revenues from future ETS2 allowances now.[298]

Beyond buildings decarbonisation, 2024 has reinforced the need for a broader just transition strategy that ensures workers and communities see clear benefits from climate policies. For instance, unions came together in support of an EU Just Transition Directive to ensure their workers' continued support for climate action. In their spotlight: securing enough financing for just transition policies – including from their own countries' budgets via looser EU fiscal rules. The EU's Just Transition Fund has so far been insufficient for this purpose and poorly absorbed, yet cases such as its implementation in Germany's lignite regions – lauded by applicants and administrators last year – could serve as a blueprint for its expansion across sectors and countries.[299]

With industries, workers, and communities increasingly vocal about the need for a well-managed transition, 2024 has underscored that fairness is not just a moral imperative but also a political necessity for Europe's green future.

LESSON 5

INCREASING POLARISATION ERODES PUBLIC TRUST, WHEREAS INVOLVING DIVERSE STAKEHOLDERS FOSTERS SHARED OWNERSHIP OF DECISIONS

In 2024, far-right and incumbent interests continued to make use of societal tensions, resistance to cultural shifts, and pre-existing socioeconomic issues – often through disinformation – to undermine the green transition and feed perceptions of failure and backlash. Growing polarisation made consensus-building increasingly hard and threatened to erode public trust. Experience showed that engaging diverse stakeholders – such as farmers and civil society – can strengthen shared ownership of decisions, smooth contentious reforms and, potentially, ensure longer-term stability of transition policies.

Far-right parties and vested interests tried to fuel climate backlash using disinformation and tapping into societal and cultural concerns

The latest election campaigns in Europe showed that the green transition is an increasingly politically charged issue, even if it was not the main driver of voting behaviour. Everywhere you looked, be it Italy[300] or France,[301] green policies had become a highly divisive topic.[302]

Fuelling backlash

Far-right parties across the continent challenged climate measures[303] and renewable projects,[304] portraying them as “ideological” threats to national identity,[305] individual freedoms[306] and economic growth.[307] They tapped into urban–rural divides[308] and exploited local resistance to unappealing renewable projects[309] to turn NIMBYism into state policy.[310] Aided by vested interests or even COVID conspiracy groups turned into climate denialism networks,[311] they spread fake news and fuelled a trend of growing climate scepticism.[312]

While, in contrast, some progressive parties – such as in Italy[313] and Spain[314] – made gains making climate ambition a central theme of their campaigns, some centre-right parties such as the German CDU picked up on populist narratives,[315] which sometimes backfired.[316] The far-right's impact on climate policy might have been limited[317] and climate action remained a top concern for European voters,[318] but centrists adopting far-right narratives and forming coalitions with them risked normalising anti-green rhetoric and making polarisation structural.

Farmers' protests

The case of Europe-wide farmers' protests[319] last year was particularly eye-opening in terms of the origin and impact of this anti-green polarisation. As demonstrations unfolded, far-right[320] and big agri[321] narratives against the European Green Deal – fuelled with misinformation[322] and Russian propaganda[323] – permeated national political debates and raised questions about Europeans' so-called "climate fatigue". The far-right tried to ride the wave to make political gains[324] and most governments rushed to make concessions,[325] notably tax exemptions for agricultural fuel. The European Commission[326] and a few national governments also opted to roll back green decisions, such as France stopping its pesticide phase-out plans.[327]

However, a closer look at the sources of discontent revealed a gap between farmers and agri giants,[328] [329] with distrust in climate policies mainly stemming from a deeper urban–rural divide.[330] In reality, farmers' troubles related mainly to cheap imports, price pressures from retailers, the cost of living, and red tape.[331] These issues were hardly blameable on the European Green Deal,[332] and rather stressed the urgency of a fair socio-ecological transition in the sector.[333] In fact environmentalists agreed with this and even joined farmers' rallies in solidarity.[334] Environmentalists and farmers started collaborating to align ecological goals with systemic reforms. Aware of this, the far-right's strategy doubled down on gastro-nativism to keep farmers embroiled in the culture wars,[335] aided by a meat and dairy industry that is starting to copy the fossil fuel industry's tactics.[336]

The actual voice of European farmers

Farmers are concerned about worsening climate impacts.[337] For instance, a recent study found that 62% of French farmers considered the ecological transition necessary and only 15% rejected it.[338] This is why many of those protesting also loudly supported the green transition,[339] demanding help to face climate impacts,[340] denouncing misinformation about their demands,[341] and calling out far-right instrumentalisation.[342]

Farmers' protests were not the only highly polarising topic last year. A concerted nuclear push monopolised energy and climate debates in several countries. Italy, which phased out nuclear power in the 1980's following a referendum, became highly polarised[343] about the government's plan to build 8 GW of new nuclear power capacity.[344] The divisive topic also fuelled political controversies in countries such as Belgium,[345] Germany,[346] Sweden[347] and the Netherlands.[348]

Internal combustion engine ban

The phase-out of internal combustion engines for new cars by 2035 was also highly politicised, with conservative parties in countries like Germany[349] and Czechia[350] staunchly opposing it in election campaigns. But even car makers themselves had conflicting positions about it. The European Automobile Manufacturers Association[351] and firms in the slow lane like BMW, Volkswagen and Renault indeed wanted to buy more time.[352] But others like Volvo,[353] Ford and Stellantis[354] felt ready to take on the challenge,[355] and 49 other companies highlighted the current target's importance for regulatory certainty, the viability of their investments and technological leadership.[356]

All these examples highlighted the need to shield implementation from far-right attempts to undermine climate efforts or fuel backlash, but also the need to acknowledge the importance of culture and identity. For instance, exploiting the nostalgia for an idealised past can serve to foster resistance to inevitable changes, unless transition narratives manage to connect to shared values and inspire people to imagine a better future.

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Lack of trust and consensus challenged progress and certainty, while dialogue fostered societal buy-in and stability

Successful climate action relies on long-term policy stability, and therefore consensus building and sustained public trust. However, growing polarisation was already complicating decision making in 2024. Opposing views often led to infighting within government coalitions[357] or different institutions,[358] causing delays[359 360] and uneasy compromises.[361] The struggle of governments to build broad consensus around climate plans also meant they were often contested by opposition parties,[362] different segments of civil society[363] and industry.[364] A good example of this was the repeated blockages of key EU environmental regulations by the FDP, the former German government coalition partner and pro-business party, which created both tensions within the government and discontent among their core constituency, businesses.[365]

The combination of public distrust and arduous decision making was particularly clear in the case of approving renewables permits. Lengthy permitting procedures[366] became a political minefield as politicians tried to square the circle between accelerating the transition, ensuring local acceptance and protecting the environment.[367] Member states' governments passed legislation to expedite permitting,[368] but that made local acceptance a growing challenge, from NIMBY opposition against high-voltage lines in southern France[369] to pushback against "industrial-scale renewables" across Italy.[370] The Spanish government tried to clamp down on land speculation to appease citizens' concerns in a way that could further slow down the rollout of renewables,[371] whereas Sardinian authorities directly signed a moratorium on new onshore wind and solar[372] – a decision Giorgia Meloni's central government is challenging.[373] The rollout of solar panels on farmlands emerged as one of the potential solutions to the trilemma,[374] as it would minimise environmental impacts and local opposition while boosting food security[375] and topping up farmers' profits. However, Meloni's government has instead tightened restrictions on agri-PV,[376] a decision farming companies welcomed[377] but that the solar industry bashed as "ideological".[378]

Building trust by rising above the noise

While governments navigated the complex interlinks between the rapid rollout of renewable energy, nature preservation and social acceptance, initiatives like Iberdrola's Biodiversity Plan[379] – aiming for a net positive impact on ecosystems by 2030 – offered a proactive path forward for companies to ensure the long-term resilience of their projects and enhance community buy-in. The company says it has carried out 1,800 actions from that plan in the past two years.

Farmers' protests and NIMBY opposition against renewable projects had something in common: people felt left out of decisions that affected their lives – a sentiment that populists then exploited. But 2024 also showed that dialogue and participation can give people ownership of transition decisions and prevent backlash. Empowering diverse social groups can "vaccinate" them against narratives that depict green policies as an elitist agenda against ordinary citizens.

For instance, farmer protests, initially portrayed as a form of green backlash, faded as they shifted to a constructive dialogue where all stakeholders agreed on the need to ensure the ecological transition of the sector while providing farmers with financial support and tackling structural issues.[380] Farming unions now have the task of getting their members on board, with the promotion of plant-based diets being the most sensitive topic, but their sentiment has radically changed.

Equally, resentment among communities lacking support[381] for the transition acts as tinder for these anti-green strategies, but as the agriculture example shows, people may also be more receptive to change – and less susceptible to populist rhetoric – if they can have a say.

Constructive dialogue leads to joint ambition

Denmark was able to avoid farmer protests earlier this year through continuous dialogue with diverse agricultural stakeholders,[382] which resulted in a pioneering carbon tax on livestock[383] and plans for an emissions trading system (ETS) for agriculture.[384] Both the measure and the constructive stakeholder engagement might now serve as a blueprint for the EU as it rethinks the future of its Common Agricultural Policy and the necessary transformations for a new 2040 climate target.

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