

DECEMBER 2020 | **NDC UPDATE REPORT**

COME TOGETHER

Raising climate ambition
in the first NDC update cycle
amidst a global health crisis



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Come together: Raising climate ambition in the first NDC update cycle amidst a global health crisis

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EXECUTIVE SUMMARY

The 2020 NDC Update report discusses countries' preparedness to ratchet up ambition in the first NDC update cycle amidst a global health crisis. Based on our survey of 98 policy makers and experts involved in NDC planning and implementation from 83 countries, we discuss the progress of NDC implementation since 2015, expectations for the NDC update cycle, and progress on the development of Long-term Low Greenhouse Gas Emission Development Strategies (LTSS). We analyse the potential impact of COVID-19 on climate planning and climate action with regards to the future of clean technologies, the national climate agenda and mitigation pathways.

2020 has been an unexpected year. The climate crisis was overshadowed by the global health crisis and addressing it is more urgent than ever. On the other hand we also see reasons for optimism. Fundamental transition drivers remain intact, there has been a build-up of civil society pressure gaining traction, and several of the world's leaders have committed to taking serious action. To keep the momentum, and guide it in the direction of higher climate ambition, 2021 is the year we have to come together and act decisively.

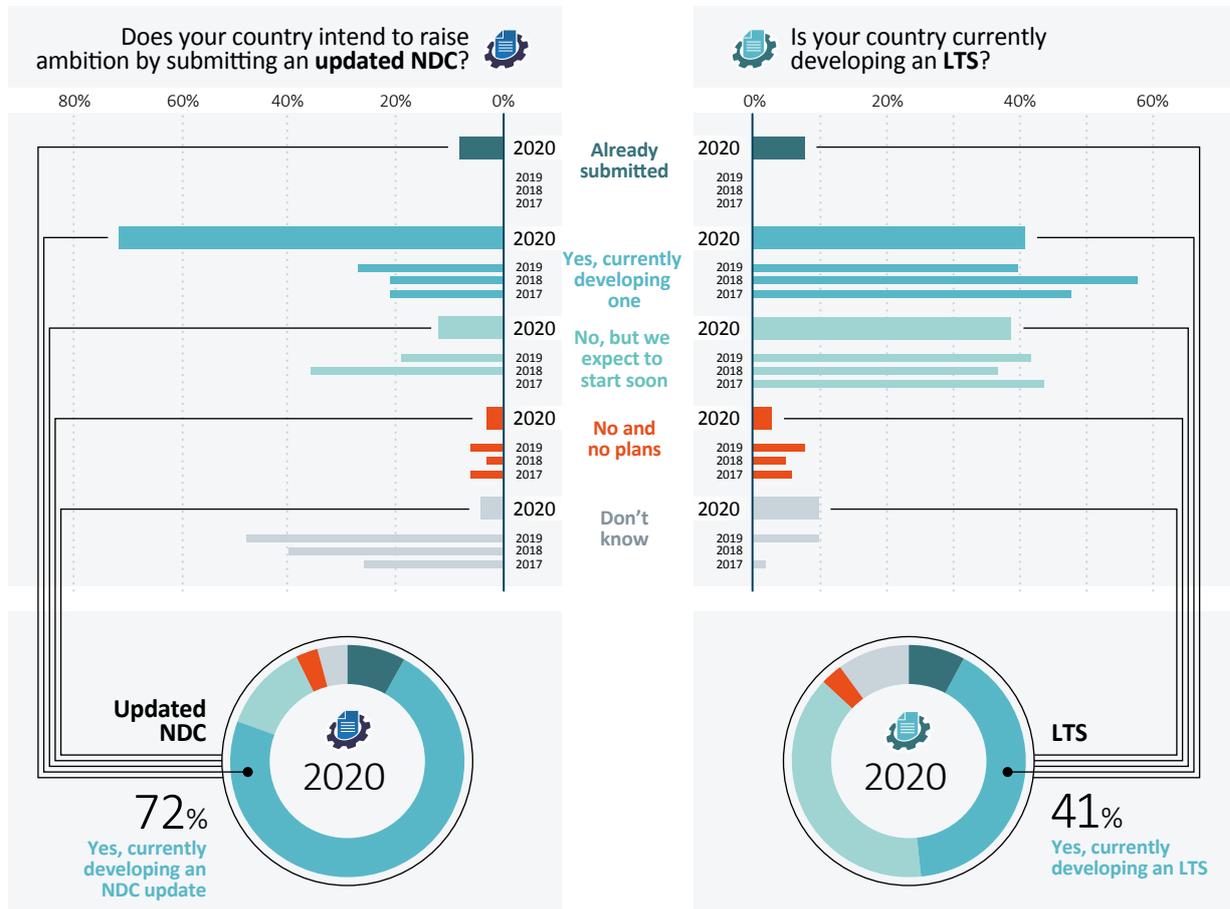
FIVE YEARS SINCE THE PARIS AGREEMENT TIME FOR SERIOUS COMMITMENT

2020 marks five years since the Paris Agreement, and the NDC update cycle provides the opportunity to register a turning point in raising ambition for climate change mitigation. Several serious and consolidated strategies for climate change action are emerging, but processes are delayed and

it is unlikely that climate commitments in 2020 will match the required urgency for climate action. The window of opportunity for re-orienting the global economy toward net-zero emissions, in line with the goal of the Paris Agreement, is closing. It remains unclear whether the current NDC update cycle will deliver a significant increase in ambition, but we find that too many countries do not currently plan to do so.



Figure ES1



Based on the NDC survey undertaken during August – September 2020

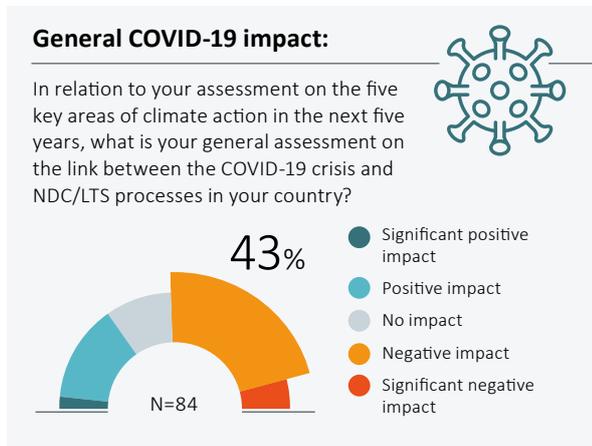
While there are several positive examples of countries that have been able to credibly inform the ambition level of their updated NDCs through the consolidation of the NDC and LTS processes, many countries have faced severe delays with the preparation of their LTSs and have missed this opportunity; the process of LTS development appears to have been broadly underestimated.

It is not too late – enhanced climate ambition by COP26 is crucial. Amidst the global COVID-19 crisis, delays to the processes of NDC and LTS finalisation are inevitable and the dash for submission should not come at the expense of quality with regards to ambition.

AMBITION AND ACTION IN TIMES OF COVID-19

The majority of respondents remains optimistic about the drivers behind climate action, but less so about the impact of the COVID-19 crisis on their countries' climate policy and ambitions. Some see this moment as an ideal opportunity to give the low-carbon transition a push, for example with strong green stimulus, while others are severely constrained in their policy options and require support.

Figure ES2



Based on the NDC survey undertaken during August – September 2020

Climate is in the spotlight, but short-term relief goes first. Green stimulus measures are being discussed and decided on, investments in fossil fuel industries are becoming increasingly risky, and the restrictive measures followed by citizens in countries around the world to mitigate the pandemic show that quite radical behavioural change is possible. However, the current crisis reorients the political compass towards short term spending, leads to less available public budget in the medium term and puts at risk much needed structural change through the bailing out of polluting businesses (such as aviation or mining) most often without climate related conditions.

A number of countries, especially in the developed world, will be able to buffer the economic shocks caused by the current crisis, accelerate the clean transformation, and even become strong players in the new clean technology markets. Despite attractive calls to ‘build back better’, for many developing countries the reality will be one of fragile supply chains, reduced liquidity, and increased debt. Depending on what the ‘new normal’ is going to look like, some countries will need to face significant economic restructuring, none of which is currently reflected in the projections of NDCs.

PERSPECTIVES ON THE IMPACT OF COVID-19 ON CLIMATE ACTION

Meeting the global temperature goal of the Paris Agreement will require efforts by all stakeholders and from all countries. We asked guest contributors to share their perspective on the impact of COVID-19 on climate action and reaching the goal of the Paris Agreement.

Guest contributions in section 4 cover NDC processes (NDC Partnership), the vulnerability of small islands developing states (Climate Analytics), challenges for ambition in developing countries (SouthSouthNorth), disruptions to agri-food systems (FAO), the role of civil society and stakeholder engagement (BUND) and the importance of transparency in recovery measures (World Resources Institute).

COME TOGETHER

The sense of optimism from our respondents could be an indication that positive developments are around the corner but it could also be a sign that there may be a mismatch of expectations. There is still time to act but the window of opportunity for adequate ambition raising does not allow to wait until the next NDC update cycle in 2025, at which point the scale of the task may be beyond reasonable reach.

We urge Parties not to wait until the next NDC update cycle in 2025 to correct the lack of ambition. The global COVID-19 pandemic has brought disruptions to the quality of climate planning processes and NDCs in 2020, but countries are likely to find themselves in a position of more clarity and confidence as they emerge from the crisis in the next years. The revival of active multilateralism should be seized by ambitious countries to act now, even if outside of the formal NDC update cycles, to communicate new commitments that reflect their highest possible ambition, and to rally and support others to follow their lead.

ABBREVIATIONS

A2A	Ambition to Action
AFOLU	Agriculture, Forestry and Other Land Use
CO₂	Carbon dioxide
COP	Conference of the Parties
COVID-19	Coronavirus disease 2019
FAO	Food and Agriculture Organization of the United Nations I
G20	Group of Twenty
GHG	Greenhouse gas
IEA	International Energy Agency
INDC	Intended Nationally Determined Contributions
IPCC	The Intergovernmental Panel on Climate Change
LTS	Long-term Low GHG Emissions Development Strategies
LULUCF	Land Use, Land Use Change and Forestry
NDC	Nationally Determined Contributions
SDGs	Sustainable Development Goals
UN	United Nations
UNFCCC	United Nations Framework Convention on Climate Change
WRI	World Resource Institute
WHO	World Health Organisation

ABOUT THIS REPORT

This report is part of a series of (bi-)annual NDC Update Reports, published ahead of international climate change negotiations, presenting recent developments, analysis, opinion, and discussion pieces. Drawing on the Ambition to Action (A2A) project and insights from a wide range of climate change experts and practitioners, the reports aim to be a platform for learning, sharing insights, and discussing topics around the implementation of the Paris Agreement. The NDC Update Reports focus on mitigation ambition and action in developing countries and emerging economies (with an occasional look at industrialised countries for contrast or comparison). The reports offer a podium for external contributors, including the working groups under the NDC Cluster to reflect on the topics covered in it from their perspective.

ABOUT THE AMBITION TO ACTION PROJECT

This report is an output of the Ambition to Action project, which supports NDC implementation through technical assistance and thought leadership. The second phase of the project is implemented collaboratively by NewClimate Institute and Xander van Tilburg, over a two-year period until the end of 2022. Project funding is provided by the International Climate Initiative (IKI) of the German Federal Ministry for the Environment, Nature Conservation, and Nuclear Safety (BMU). Ambition to Action’s technical assistance aims to support the mainstreaming of climate and development goals at the sector level, through the development of evidence on social, economic and environmental benefits of mitigation actions and pathways. This benefits evidence, for example detailing employment, energy security, and air pollution impacts, will show how sector planning decisions can support NDC implementation as well as national development priorities and can help reduce policy costs, identify trade-offs, and build stakeholder support for ambitious mitigation approaches at the sector level. Through a series of biannual reports (of which this is the seventh edition) and additional research papers, the project provides a platform for discussion, analysis, and sharing of lessons learned about NDC implementation in developing countries and emerging economies.

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1. INTRODUCTION

THE PARIS AGREEMENT REACHES ITS FIVE-YEAR ANNIVERSARY WITH REASONS TO BE OPTIMISTIC

2020 marks five years since the Paris Agreement and the first round of Nationally Determined Contributions (NDCs) in 2015. Climate change as domestic policy topic has come a long way in the past decades, especially since the 2015 Paris Agreement and the IPCC special report on *Global Warming of 1.5°C* (UNFCCC, 2015; IPCC, 2018). There is a growing awareness that the current economic pathway will lead to unacceptable global warming and new forms of activism are emerging, with a large following and carried predominantly by young people (e.g., Extinction Rebellion, Fridays for Future). We have recently seen some very strong signals towards increased domestic political prominence: The European Union discusses a more ambitious target of a 55% to 60% reduction of greenhouse gas (GHG) emissions in 2030 compared to 1990 levels with legal anchoring pending (European Commission, 2020a; European Parliament, 2020), China has expressed commitment towards carbon neutrality by 2060 and expects to be able to reach the peak in emissions earlier than communicated previously (UN News, 2020), and the newly elected US president has committed to re-joining the Paris Agreement on his first day in office (Biden and Harris, 2020).

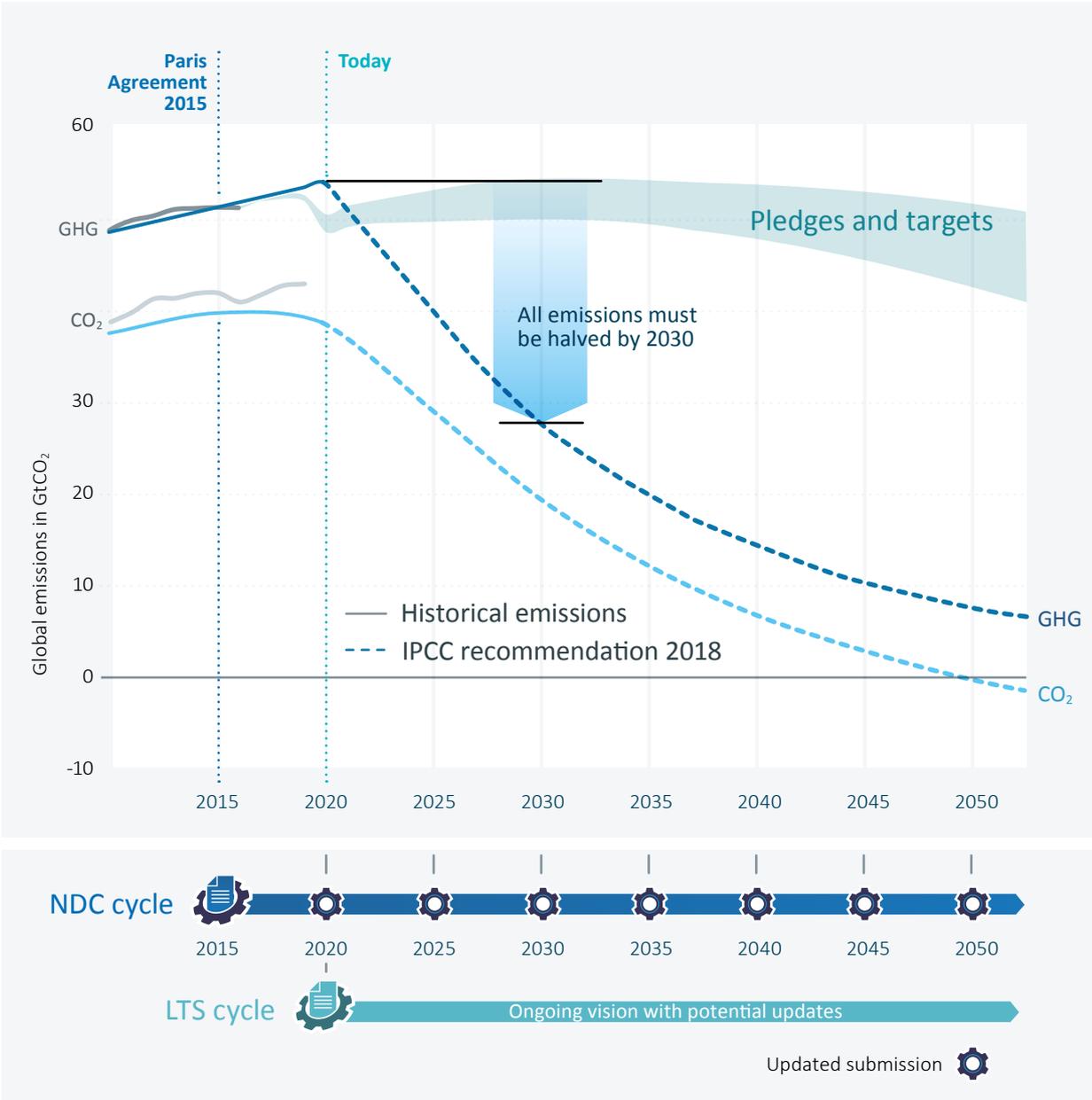
HOWEVER, PROGRESS ON CLIMATE ACTION IS SLOW AND AMBITION NEEDS TO INCREASE

It was clear early on that the first round of mitigation pledges, NDCs representing 186 Parties, is insufficient to meet the goal of the Paris Agreement to keep global temperature rise this century well below 2°C and to pursue efforts to limit the temperature increase to 1.5°C (UNFCCC, 2015; Climate Action Tracker, 2020d). Without sufficient ambition increases in the NDC update cycle to significantly scale up climate action over the next five years, the Paris Agreement 1.5°C temperature goal will no longer be achievable. The IPCC shows the need to peak global greenhouse gas emissions around 2020 followed by a steep emission reduction trajectory to halve emissions by 2030 and towards net-negative emissions in the second half of the century.

Yet, countries' climate pledges and targets lead to a stagnation rather than a decrease of greenhouse gas emissions (Figure 1). If we fail to reduce current emission levels, we will have used our entire carbon budget to stay within the 1.5°C limit within the next five years, ultimately requiring a full stop of carbon dioxide (CO₂) emissions in 2025 (Andrew, 2020).



Figure 1 The path to net-zero emissions in the context of the Paris Agreement, NDC update cycles and the development of LTS.
Emissions data from: (IPCC, 2018; Climate Action Tracker, 2020b)



THE COVID-19 PANDEMIC MAKES CLIMATE ACTION MORE URGENT AND ALSO MORE DIFFICULT

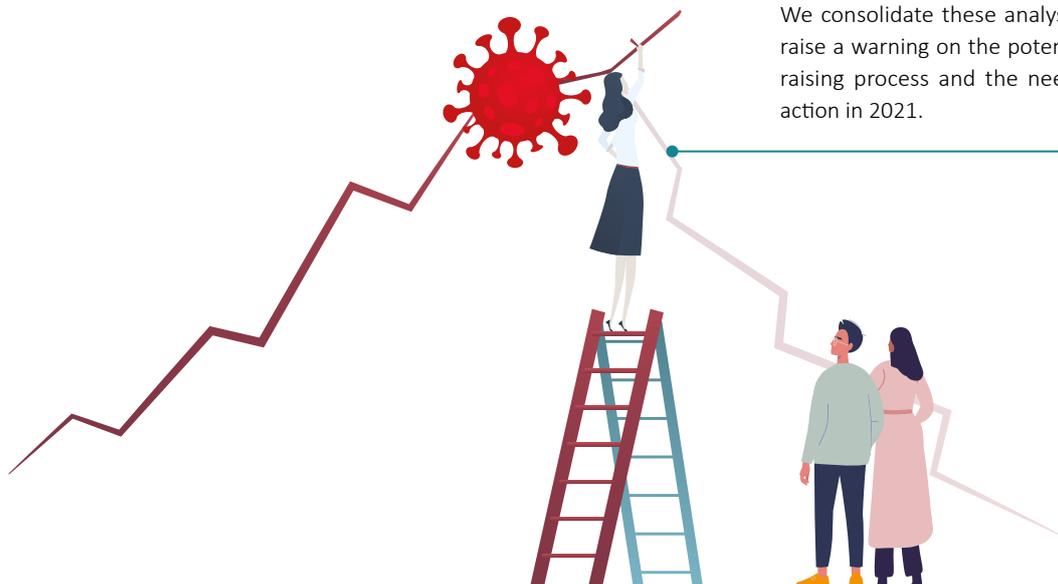
2020 took an unexpected and unfortunate turn: the severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) quickly spread around the world, leading to what is now known as the pandemic of the coronavirus disease 2019, COVID-19. Every country is affected by the pandemic, some significantly more severely than others (WHO, 2020). Largely, countries enforced strict lockdowns and shut borders so to avoid the further spread of the virus. As of December 2020, countries still struggle to keep infection rates down. Although first vaccines are in sight, it will take time before we overcome the pandemic. The health crisis emerges in the midst of a climate crisis, particularly affecting those countries already vulnerable to climate change.

The global COVID-19 health crisis comes at a crucial point in time for climate action. 2020 is the year that Parties had agreed to update and enhance the ambition of their NDCs, alongside the submission of long-term low greenhouse gas emission development strategies (LTS). Although the impact of COVID-19 and related recovery measures on climate action is still unclear, decisions taken in 2020 and 2021 will have defining consequences for emissions trajectories and our ability to eventually achieve the objectives of the Paris Agreement.

In this report we gauge progress and confidence on climate action, and discuss how the COVID-19 pandemic affects NDC development and implementation

As in previous years, we surveyed government representatives and experts close to national level NDC and LTS processes to gain a better understanding about the current state of climate planning, NDC implementation and NDC ambition raising. We explore this against the backdrop of the global COVID-19 pandemic, to gain insights on how the climate process is affected by the health crisis, where countries perceive challenges but also see opportunities for more decisive and ambitious climate action.

Chapter 2 discusses the results of the annual survey on perceived progress of NDC implementation, expectations for the NDC update cycle and the development of LTSs. In chapter 3, we discuss survey responses with regards to the impact of COVID-19 on climate change planning processes and the ability for enhanced action in the coming years. In chapter 4, we invite experts from a variety of fields to reflect on the impact that COVID-19 has or could have to reach the goal of the Paris Agreement from different perspectives. We consolidate these analyses and insights in chapter 5 to raise a warning on the potential inadequacy of the ambition raising process and the need for concerted and collective action in 2021.



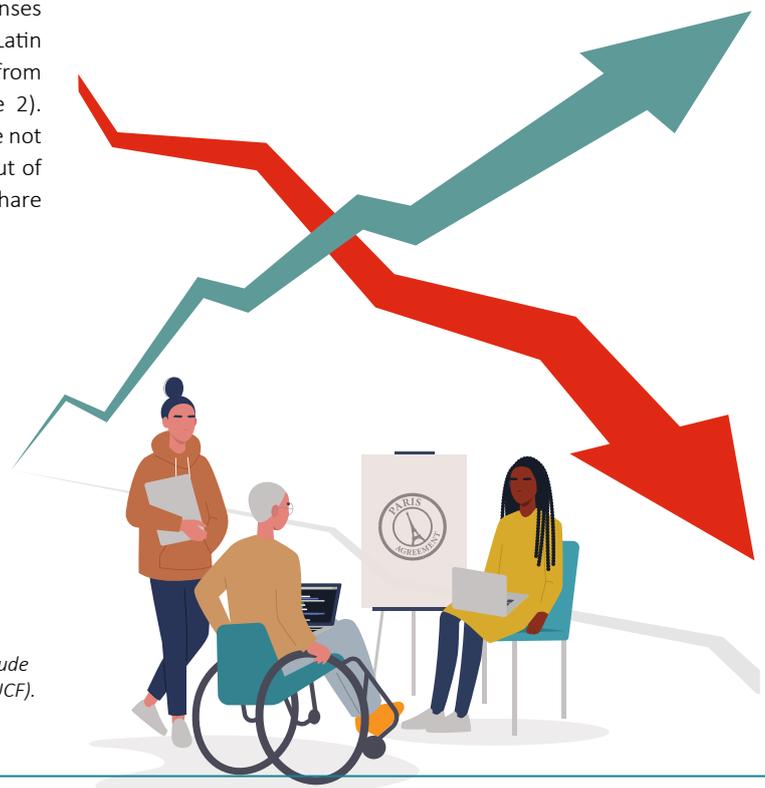
2. FIVE YEARS SINCE THE PARIS AGREEMENT: TIME TO SHOW SERIOUS COMMITMENT

With five years since the Paris Agreement, we surveyed government representatives and experts close to national climate change planning processes to obtain insights on the progress of implementation of countries' current NDCs, as well as expectations and challenges related to ambition raising in the current NDC update cycle. We also asked respondents about the status of their country's LTS and the alignment of these LTSs with countries' NDCs and the temperature goal of the Paris Agreement. In light of the current COVID-19 pandemic we asked respondents to reflect on how this has affected NDC and LTS planning and implementation processes, and how the pandemic may affect climate action over the next five years (see Chapter 3: An uncertain predicament: ambition and action in times of COVID-19).

We collected 98 responses representing 83 of the 189 Parties to the Paris Agreement, whereby most respondents (91%) are national government representatives. Responses cover all regions, with 35% from Africa, 26% from the Latin American and Caribbean (LAC) region followed by 19% from Asia, 15% from Europe and 5% from Oceania (Figure 2). Northern America (excluding Mexico) and Central Asia are not represented in this survey. The EU-27 accounts for 11 out of 15 responses from the European continent, which all share the same NDC.

The surveyed countries represent 43% of the Parties to the Paris Agreement but only 16% of global emissions,¹ meaning the survey majorly reflects the perspective of low-emitting countries and under-represents more emission-intensive economies. The majority of respondents (87%) represent non-OECD countries.

Note that all survey responses need to be considered with some care as they may be reflective of personal opinions, insights and experiences. In this sense, they provide a snapshot and perspective on the current situation in the respective country which complements the prominent analyses of the state of countries' climate policies and actions, such as the Climate Change Performance Index (CCPI), Climate Action Tracker, Climate Transparency Brown to Green Reports or the UNEP GAP Report.



¹ Greenhouse gas emissions data is from 2017 and does not include emissions from Land Use, Land-Use Change and Forestry (LULUCF). Source: (Gütschow, Jeffery and Gieseke, 2019)

Figure 2 Overview of survey respondents to the NDC Survey September 2020.



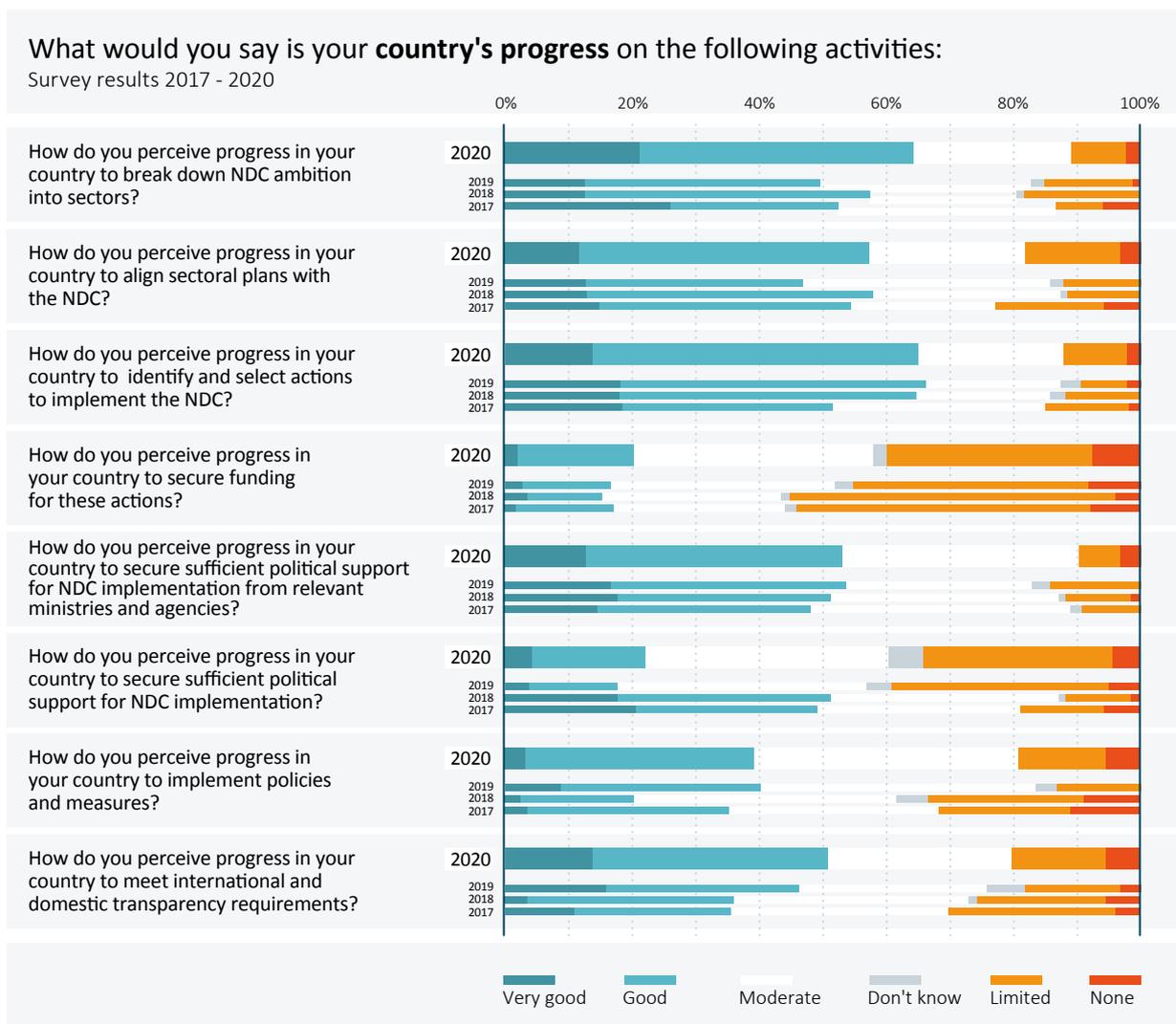
Source: NDC Survey 2020.



2.1. PROGRESS ON THE IMPLEMENTATION OF NDCS

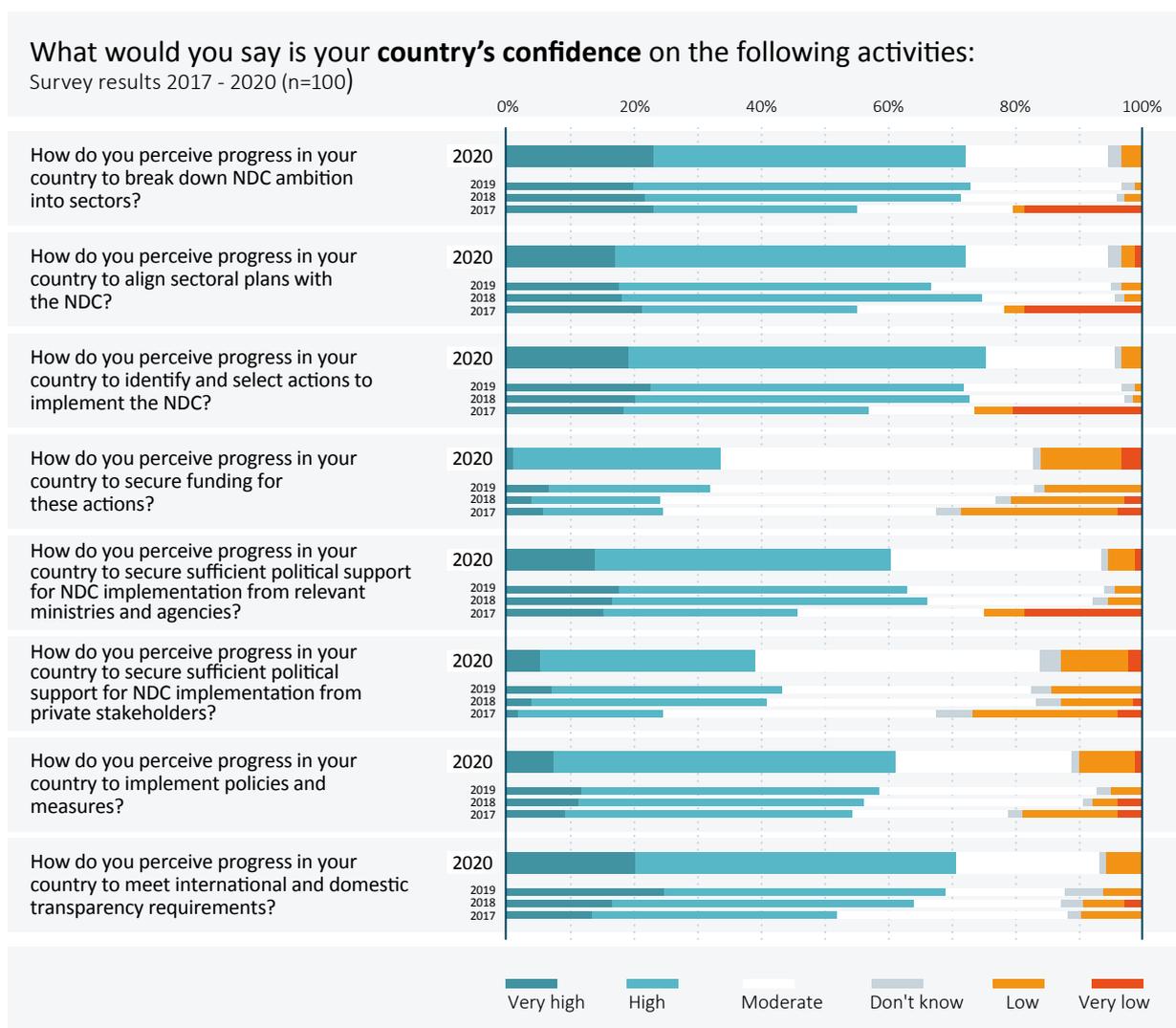
To get a better understanding of the status quo for the implementation of NDCs, we asked respondents to reflect on their actual progress and future expectations for a number of NDC implementation aspects (Figure 3 and Figure 4).

Figure 3 Respondents' perceived progress in implementing the NDC



Source: NDC Survey 2017, 2018, 2019 and 2020.

Figure 4 Respondents' confidence of future progress to implement the NDC



Source: NDC Survey 2017, 2018, 2019 and 2020.

COUNTRIES REPORT MOST PROGRESS IN OBTAINING CLARITY ON HOW THEIR NDCS WILL BE IMPLEMENTED

Each sector’s transition to net-zero emissions takes a different path and requires different targets and measures. **Breaking down economy-wide NDC targets to targets at the sector level is a key step for the identification and selection of actions to implement the NDC** and the **alignment of sectoral plans with the NDC**. Nearly two thirds of the countries we surveyed reported to have made good or very good progress on these aspects (Figure 3).

The strong progress with regards to obtaining clarity on how NDCs will be implemented at the sector level corresponds with the progress reported on **securing sufficient political support from ministries and governmental agencies**. The identification of sector-level targets and measures is usually an iterative process that requires the participation and extensive consultation with the key governing bodies of those sectors to result in co-ownership of those targets. More than half of respondents reported good or very good progress in securing this political support.

Progress on grounding national-level climate targets in sector-level plans is a key step for embarking on the **implementation of policies and measures** to achieve NDCs. Accordingly, the proportion of respondents that report high confidence for future progress on implementing policies and measures (nearly two thirds; see Figure 4) is significantly higher than the proportion that have perceived good progress to date (approximately one third; see Figure 3). Indeed, the rate at which countries are adopting specific policies and measures to implement climate objectives at the sector level appears to be accelerating in 2019 and 2020 compared to previous years (IEA, no date). However, there remains significant room for the broader replication and scale up of best practice policies. Only around two thirds of the 30 highest emitting countries have developed specific policies and measures related to renewable energy and energy efficiency, while the uptake of best practice policies is far lower in other sectors (NewClimate Institute, 2019; Roelfsema *et al.*, 2020).

Respondents show significantly less confidence in securing finance, and support from private sector actors

Although countries are obtaining more clarity on how their NDCs should be implemented, there still remains a high degree of uncertainty with regards to how those plans will be financed. Only around 20% of respondents reported positive progress **in securing funding for actions** (Figure 3), and confidence for future progress on these aspects remains bleak (Figure 4).

The continued lack of progress on financing planned actions may be in some part caused by a lack in certainty regarding the role of private sector actors. While leveraging private sector finance is frequently discussed as an important source of the capital required to implement more serious climate change mitigation measures, respondents’ confidence in **obtaining the support of private sector actors** has dropped considerably in recent years: while approximately 50% of respondents thought in 2017 and 2018 that they had achieved good progress in securing the support of private sector actors, only 20% reported the same level of confidence in 2019 and 2020 (Figure 3).

Respondents have a consistently optimistic outlook for NDC implementation

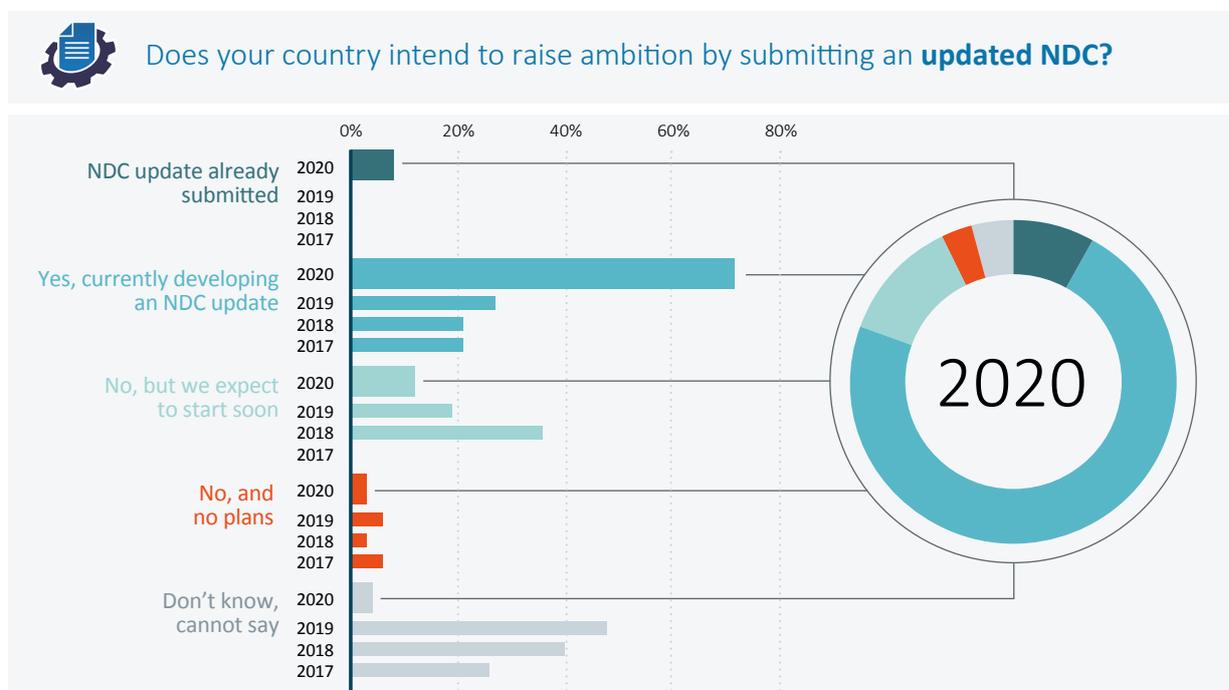
Aside from a perceived lack of support from the private sector, confidence across other aspects remains high. Respondents' confidence on their expected future progress for NDC implementation has been consistently optimistic each year, for most the NDC implementation aspects that we assess. However, comparing the level of reported progress from one year to another, there is little actual progress perceived by respondents between 2017 and 2020 on many of these aspects. Rather, we see a relatively static and consistent perception of progress among these issues. This could be an indication that countries' progress is repeatedly falling short of expectations. It is also likely that the respondents' baselines on what constitute's progress shifts over time, such that what is reported to be moderate progress in 2020 may be significantly better than what was considered moderate progress in 2017.

2.2. RAISING AMBITION IN THE FIRST NDC UPDATE CYCLE

Countries may have made progress with regards to grounding their NDCs in plans that can be implemented, but the ambition level of the sum of most of those current NDCs remains inadequate, and the NDC update cycle is a critical moment to realign ambition and keep the goal of the Paris Agreement within reach.

Many countries intend to adhere to the NDC update cycle, albeit with delays

Figure 5 Intention to raise ambition in the next NDC



The NDC update cycle in 2020 is an agreed milestone of the Paris Agreement which Parties have been able to plan for since 2015. By early December 2020 only 17 Parties had submitted an updated NDC – 12 of which had raised the ambition of their climate targets – while several Parties had indicated that they have no intention to submit strengthened targets (Climate Action Tracker, 2020a; UNFCCC, 2020b).

To determine whether countries are on track to prepare updated NDC submissions, we asked respondents whether their country intended to raise climate ambition by submitting an updated NDC (Figure 5).

Around half of respondents to the survey between 2017 and 2019 still did not know whether their countries would be raising climate ambition in their next NDC. As we approach the deadline in 2020, countries now report much more clarity: despite the disruption caused by the COVID-19 pandemic and the postponement of COP26, **a large majority of respondents (80%) state their country has already submitted or is currently developing an NDC update.** At the time of our survey in August/September 2020, the majority of those respondents still expected to submit their NDC updates within 2020. Given the continuation of the disruption from the global pandemic, and the fact that only 17 Parties have submitted an NDC update² by December 2020, it may be unlikely that such a high number of Parties will still achieve NDC submissions in 2020 in line with their original plans; a shift in the timeline of many submissions to 2021 appears likely.

Only a small number of respondents indicated that their countries have no plans to adhere to the NDC update cycle, although the influence of this group for dampening global momentum should not be underestimated; several major economies – including Russia, Australia, New Zealand and Japan – have stated publicly that they do not currently plan to submit an updated NDC (Climate Action Tracker, 2020a).

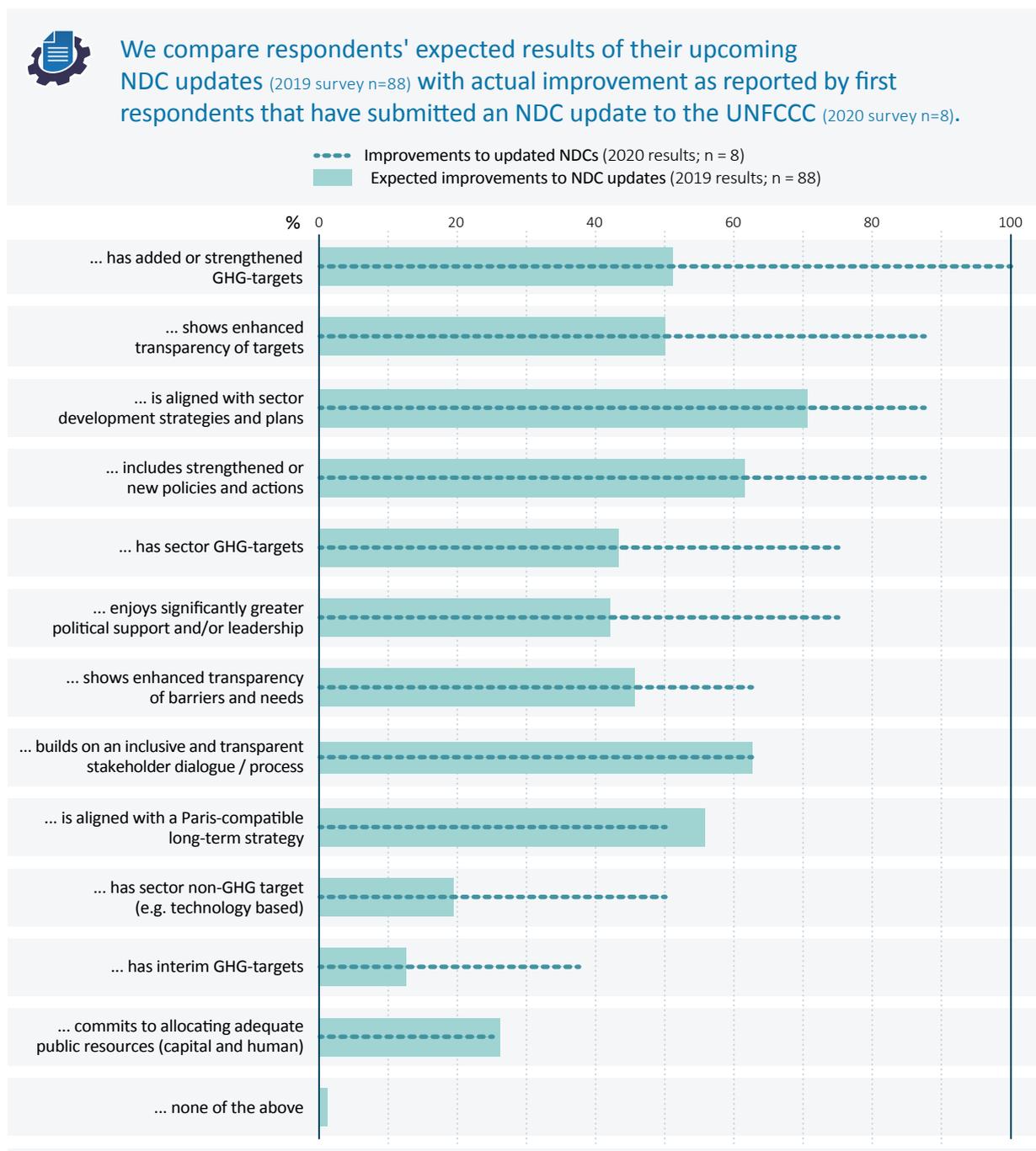
All respondents report to be strengthening their NDCs, but the substance for ambition remains to be seen

Parties agreed in the Paris Agreement that each NDC iteration should represent a progression of ambition, but demonstrate nuanced understandings of what constitutes progression with regards to ambition. To gain clarity on the ways in which countries consider their NDCs to be a progression, we asked respondents to ‘specify how the new NDC is an improvement from the previous one’ (Figure 6).



² The UNFCCC reports two Second NDCs on the NDC Registry (UNFCCC, 2020b). There are discrepancies in the definition of a Second NDC and NDC update. Suriname and The Marshall Islands have submitted a Second NDC, while others have submitted an updated version of their First NDC. For the purpose of the iterative cycle and improving NDCs with each submission, we do not differentiate between updated First NDCs and Second NDCs.

Figure 6 Expected improvements to upcoming NDCs and actual improvements in first NDC updates.



Of the countries surveyed that have already submitted a new NDC, **all respondents report progress on adding and/or strengthening GHG emission targets.** As of December 2020, twelve countries have raised the climate ambition of their climate pledges through updated NDCs: Chile, Norway, Viet Nam, Andorra, Jamaica, Moldova, Rwanda, Thailand, Cuba, Marshall Islands, Mongolia and Suriname. However, this handful of first-movers may not necessarily represent the trend for all Parties, and six countries did not raise the ambition of their climate pledges in their updated NDC (Climate Action Tracker, 2020a; UNFCCC, 2020b). Singapore strengthened its NDC target by translating its emission reduction target from a relative (compared to a business as usual development scenario) to an absolute emission target (65 MtCO_{2e} around 2030), thus it strengthened its climate targets but did not per se increase its climate ambition (Government of Singapore, 2020). Only around half of the countries we surveyed in 2019 stated that they expect to make improvements to their GHG emission targets as part of their NDC updates. Independent analyses of countries’ commitments and public statements in 2020 also shows that some countries do not intend to change their GHG emission targets (Climate Action Tracker, 2020a).

Similarly, the high proportion of first-mover countries that report to have strengthened their NDCs with regards to the **transparency of targets** and the **identification of sector-level targets in 2020**, does not necessarily match the generally lower expectations across all of the Parties surveyed in 2019. Thus, the handful of existing NDC update submissions in 2020 only provide limited insights with regards to what to expect from the bulk of the submissions that remain under development. Across all survey respondents in 2019, the most commonly reported ways in which countries expected to raise ambition were through enhanced alignment of the NDC with sector-level strategies, and through development of updated NDCs in a more inclusive and transparent stakeholder dialogue process. For example, Cuba has defined more precise sectoral GHG targets, supported by sectoral plans and non-GHG targets: both the NDC and the “Policy for the Perspective Development of Renewable Sources and the Efficient Use of Energy 2014 – 2030” aim for a 24% share of electricity generation from renewables by 2030, which is also anchored in the national decree law number 345 ‘From The Development Of Renewable Sources And The Efficient Use Of Energy’ (Cuba, no date; Ministry of Justice of Cuba, 2019; Government of Cuba, 2020).

Georgia’s NDC update is undergoing a final public consultation at the time of writing, following several interim events and consultation processes at the sector- and national level to update the NDC with stakeholder involvement (Climate Action Tracker, 2020a; Green Movement of Georgia, 2020). Those expected improvements with regards to the grounding of updated NDCs aligns with the aspects where the respondents reported good progress with the implementation of their existing NDCs (see section 2.2. Progress on the implementation of NDCs).

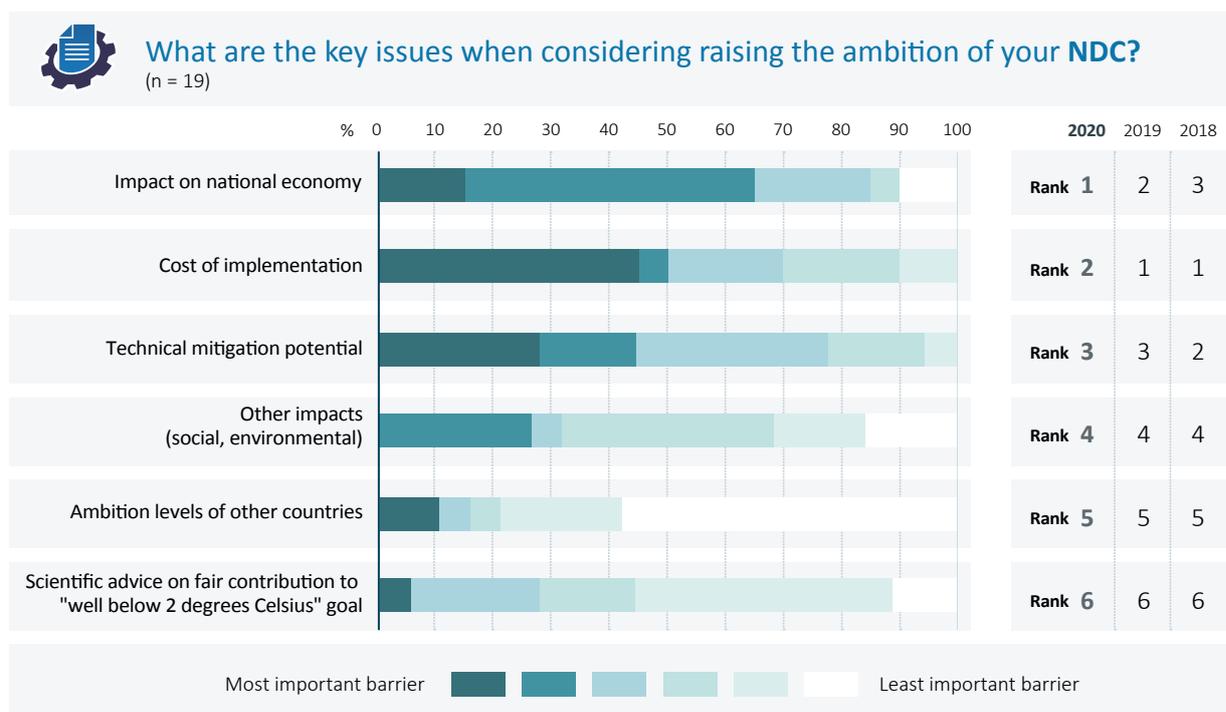
In the first NDC update cycle, we may expect significantly improved NDCs with regards to how “grounded” and “likely to be implemented” they are when compared to the initial round of NDCs. However, it remains to be seen whether the NDCs still under development will also feature any significant progression in the currently inadequate level of target ambition, as is critically necessary in this update cycle.

Economic short-sightedness remains a key barrier for ambition, in the absence of multilateralism

Five years on from the first round of NDCs, we could be faced with the prospect that the NDC update cycle may not deliver a sufficient progression with regards to the collective ambition of emission reduction targets. To understand what is behind countries’ decisions for updating (or not) the level of ambition of their NDCs we asked what key barriers countries face when considering raising the ambition (Figure 7).



Figure 7 Barriers to raising ambition in NDCs



In 2020, as in previous years, most respondents to the survey quote the **costs of climate action** and the **economic impacts** as the major barriers for enhanced ambition. This is an intuitive explanation; the need for enhanced flows of climate finance, particularly to developing countries, is clear. However, this oft-mentioned barrier is not so simple. While deep decarbonisation trajectories will require that vast sums of capital expenditure are shifted between industries – the “shifting of the trillions” – the current level of ambition at the global level is still at a point where significant improvements can be achieved with mature technologies that are now relatively low cost or even net-negative cost when considering those investment costs over a reasonable time horizon. Meanwhile, the increasing evidence on the co-benefits of climate action for economic development and health, among other factors, means that the broader socioeconomic impact associated with many mitigation strategies can be overwhelmingly positive, considering a longer-term perspective (Ürge-Vorsatz, Novikova and Sharmina, 2009; Day, Höhne and Gonzales, 2015; Day *et al.*, 2018; Gao *et al.*, 2018).

Respondents indicated that the **broader co-benefits** was not an especially relevant consideration for the determination of their ambition level (Figure 7), indicating that there may remain some potential to re-balance the narrative on the short-term costs and the longer-term gains, at the political level. Perhaps in a period where short-term economic losses are inevitable as a result of the COVID-19 crisis, a longer-term perspective on public investments might be possible and might reduce the relevance of these barriers for enhanced ambition.

The survey results also indicate that multilateralism is not having the desired effect for supporting ambition. Multilateralism – in particular, the re-enforcing of positive pressure between Parties to build on each other’s momentum and leadership to achieve a collective goal – is a cornerstone of the design concept for the Paris Agreement’s ambition mechanism. Since 2017, our survey respondents repeatedly note **the ambition level of other countries** is the second least relevant consideration for raising their own ambition (Figure 7), showing that the desired dynamic of this collective ratcheting mechanism has not kicked in.

2.3. DEVELOPING LONG-TERM STRATEGIES (LTS)

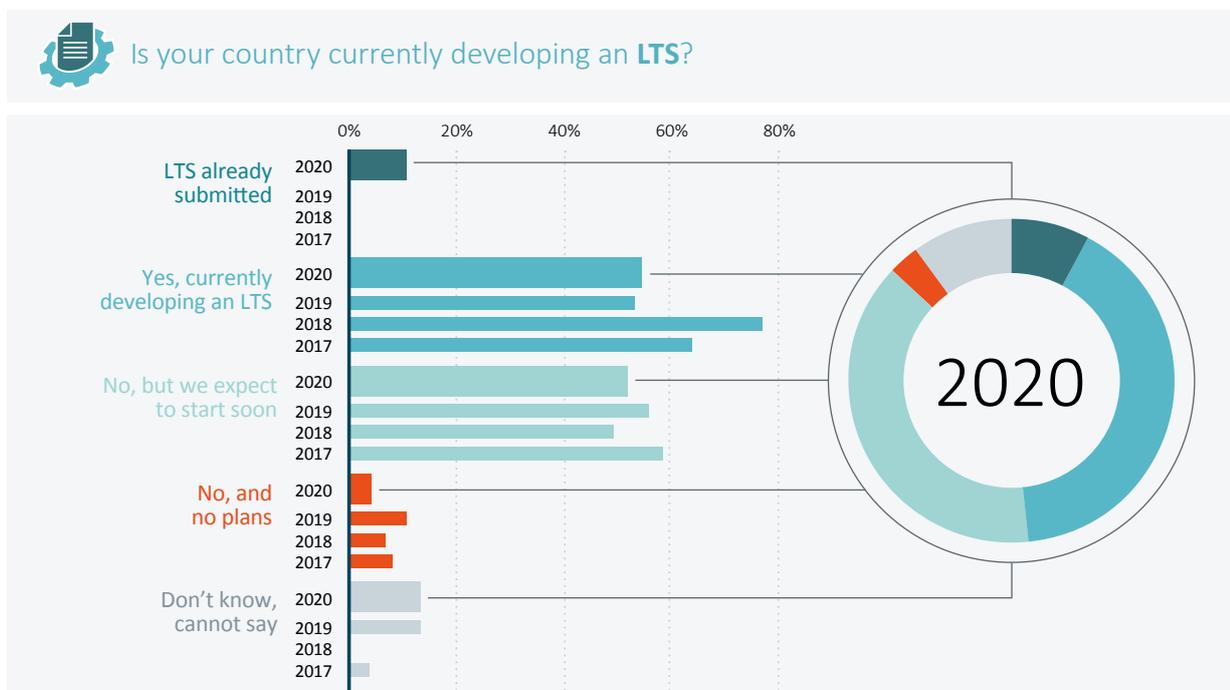
Many countries are delayed in the preparation of their LTSs and may have missed the opportunity to consolidate the LTS and NDC processes

Long-term low greenhouse gas emission development strategies (LTS) and the elaboration of a clear roadmap enable the credible and predictable progression of NDCs towards net-zero emissions. As such, LTSs provide an important framing for the NDC ambition mechanism.

To understand countries' progress in the development of their LTSs, we asked respondents whether their country is developing a long-term low GHG emission development strategy (LTS) and when they expect their country to submit it (Figure 8).

It is unlikely that the majority of countries will submit an LTS by the end of 2020. As of December 2020, 19 countries had submitted an LTS to the UNFCCC, of which 14 had already been submitted between 2016 and 2019 (UNFCCC, no date a). Fewer than half of the survey respondents indicated that their countries are currently in the process of developing an LTS (Figure 8), despite the approaching deadline. The low level of submissions contrasts with the expectations of survey respondents in previous years. Since 2017, a large majority of respondents (80–95%) stated that they are either developing an LTS or about to start developing one. This indicates that countries have faced severe delays in the development of these strategies.

Figure 8 Status of LTS development



Source: NDC Survey results 2017, 2018, 2019 and 2020.

The limited progress in the development and submission of LTSs, despite so many countries claiming to be engaged in LTS development for several years, indicates that the process for the development of a comprehensive LTS has been broadly underestimated by countries and the broader international support community alike. There are also indications that many countries may have deprioritised and pushed back the development of LTSs to after the NDC update, given limited resources available to complete both processes in 2020, representing a missed opportunity for the consolidation of these into one single process (Hans *et al.*, 2020).

The 2020 window for NDC updates and LTS submission provided an opportunity for aligning short- and long-term target setting, potentially facilitating the increased ambition of NDCs to be aligned with the generally higher ambition expressed to date in LTSs. The consolidation of these processes not only leads to greater efficiency in responding to international climate change reporting processes, but also is a tool in its own right to increase short-term ambition. Countries which have consolidated those processes – such as Fiji, the Republic of the Marshall Islands and more – have made use of long-term scenarios to back-cast short term targets that they consider to be adequate to meet those longer-term goals (Roeser *et al.*, 2019). Towards the end of 2020, the EU is discussing the ratcheting of its 2030 emissions reduction target in line with the long-term strategy for net-zero emissions by 2050 (Croatia and the European Commission, 2020).

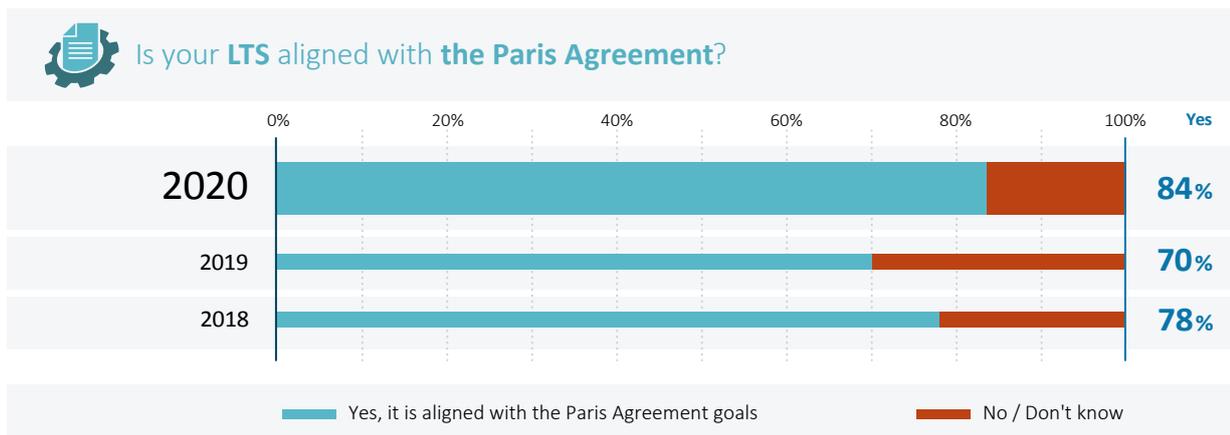
Despite the apparent delays in the preparation of LTSs in many countries, the large majority of survey respondents indicated that they still have intentions to develop and submit an LTS. Only 2% of survey respondents in 2020 indicated that they have no plans at all for LTS development (Figure 8).

There is a lack of consensus and constructive realism on what constitutes the alignment of LTSs to the Paris Agreement

To understand how countries' perceive the role of their LTSs for aligning national ambition, we asked the respondents of countries that are currently developing an LTS whether it is aligned with the Paris Agreement goal of maintaining global average temperature increase to well below 2 degrees (Figure 9).



Figure 9 Alignment of LTS to the goal of the Paris Agreement.



Source: NDC Survey results 2018, 2019 and 2020.

A large majority of respondents state that their country’s LTS is in line with the Paris Agreement. Comparing this to the generally highly insufficient level of ambition across the current NDCs (Climate Action Tracker, 2020d), this might indicate that there is a large discrepancy between the short-term ambition level of countries in their NDCs and the long-term ambition to reach net-zero emissions as envisioned in LTSs. For political reasons, it may indeed be easier to set ambitious long-term targets than ambitious short-term targets. However, there are also discrepancies between the latest scientific evidence on 1.5°C emission reduction trajectories and the targets put forward in some countries’ LTSs, which might also indicate a lack of clarity over the meaning of Paris alignment.

In 2020, only a handful of respondents state that they either do not know whether their country’s LTS is aligned with the goal of the Paris Agreement, or that it is not aligned. This realism is constructive. Uncertainties related to mitigation potentials from some hard-to-abate emission sources, as well as difficulties to obtain political consensus for a long-term decarbonisation pathway, present major challenges for all countries to clearly define Paris-aligned decarbonisation pathways. Acknowledging misalignment of the current LTS and transparently exposing the issues that cause misalignment can be an entry point both for international cooperation and to build the necessary foundation and evidence for constructive dialogue and collective ambition raising.

Table 1 Overview of submitted LTSs. Source: (UNFCCC, no date a).

Country	Document name	Date of submission	Target
Finland	Finland's long-term low greenhouse gas emission development strategy	05/10/2020	Net zero GHG emissions by 2050 and net zero CO ₂ by 2035
South Africa	South Africa's Low Emission Development Strategy	23/09/2020	Net zero GHG emissions by 2050
Singapore	Charting Singapore's Low Carbon and Climate Resilient Future	31/03/2020	Net zero GHG emissions as soon as viable in the second half of the century Halve emissions from its peak by 2050 (33 MtCO _{2e})
Slovakia	Low-Carbon Development Strategy of the Slovak Republic until 2030 with a View to 2050	30/03/2020	Net zero GHG emissions by 2050
European Union	Long-term low greenhouse gas emission development strategy of the European Union and its Member States	06/03/2020	Net zero GHG emissions by 2050
Costa Rica	Costa Rica's National Decarbonization Plan	12/12/2019	Net zero GHG emissions by 2050
Portugal	Portugal's National Long Term GHG Development Strategy	20/09/2019	Net zero GHG emissions by 2050
Japan	The Long-term Strategy under the Paris Agreement	26/06/2019	80% below 1990 levels by 2050
Fiji	Fiji's Low Emission Development Strategy 2018-2050	25/02/2019	Net zero GHG emissions by 2050, conditional target by 2041
Republic of the Marshall Islands	Tile Til Eo- 2050 Climate Strategy "Lighting the way"	25/09/2018	Net zero GHG emissions by 2050
Ukraine	Ukraine 2050- Low Emission Development Strategy	30/07/2018	31-34% GHG emissions below 1990 levels by 2050
United Kingdom	The Clean Growth Strategy	17/04/2018	Net zero GHG emissions by 2050 ³
Czech Republic	Climate Protection Policy Summary	15/01/2018	39 Mt CO ₂ -eq (80% reduction compared to 1990 levels)
France	French national low-carbon strategy	28/12/2016 (resubmission 18/04/2017)	Net zero GHG emissions by 2050 ⁴
Benin	Stratégie de développement à faible intensité de carbone et résilient aux changements climatiques 2016- 2025	12/12/2016	-3.62% compared to a business-as-usual scenario by 2025 (-16.17% with carbon sequestration)
United States	Mid-Century Strategy for Deep Decarbonization	16/11/2016	-80% below 2005 levels by 2050
Mexico	Mexico's Climate Change Mid-Term Strategy	16/11/2016	50% below 2000 levels by 2050
Germany	Climate Action Plan 2050	17/11/2016 (last update 04/05/2017)	Net zero GHG emissions by 2050
Canada	Canada's Mid-Century Long-Term Strategy	17/11/2016	-80% below 2005 levels by 2050, excl. LULUCF

3 The LTS aims for at least 80% emissions decrease by 2050 compared to 1990 levels. In June 2019, the UK amended its Climate Change Act to reach net zero GHG emissions by 2050.

4 The LTS aims for a 75% reduction of emissions by 2050 compared to 1990 levels. In June 2019, France passed a climate and energy law to reach net zero CO₂ emissions by 2050.

2.4. ACCELERATING SERIOUS ACTION

Several serious and consolidated strategies for climate change action are emerging, but processes are delayed and it is unlikely that climate commitments in 2020 will match the urgency for climate action

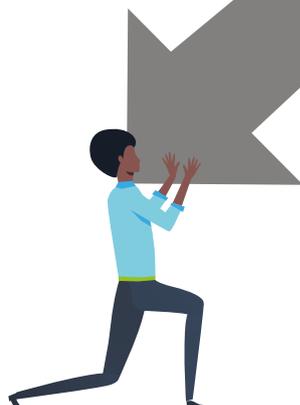
Countries report considerable progress in establishing clearer national frameworks for the implementation of their NDCs. Updated NDCs – currently being prepared by most countries for submission in 2020 or 2021 – are likely to demonstrate similar improvements with regards to their grounding in national and sector-level plans, and the broad level of cross-sector political support that they represent.

The window of opportunity for re-orienting the global economy is closing, and the current NDC update cycle requires more than improved conditions for the implementation of inadequate targets, if the objectives of the Paris Agreement are to stay within reach. It remains unclear whether the current NDC update cycle will deliver a significant increase in ambition, but there are indications that many countries do not currently plan to do so.

While there are several positive examples of countries that have been able to credibly inform the ambition level of their updated NDCs through the consolidation of the NDC and LTS processes, many countries have faced severe delays with the

preparation of their LTSs and have missed this opportunity; the process of LTS development appears to have been broadly underestimated.

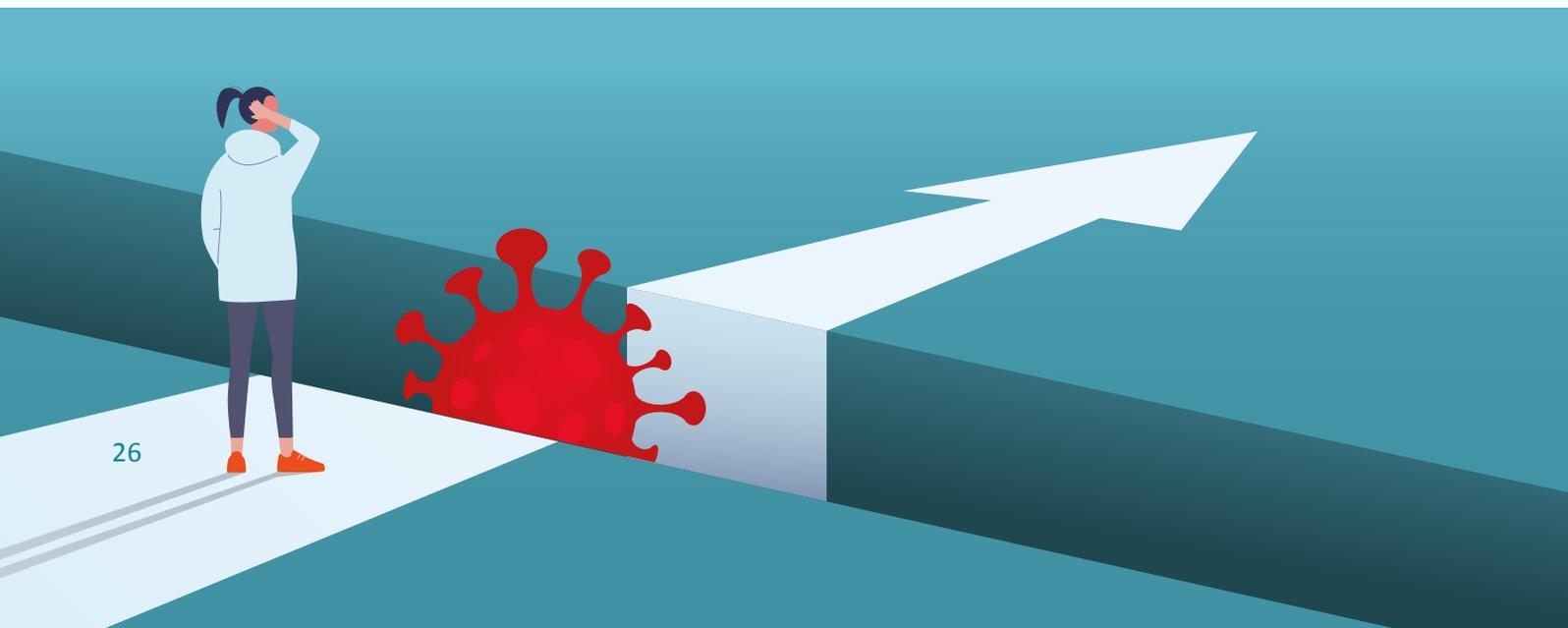
It is not too late – enhanced climate ambition by COP26 is crucial. Although Parties were encouraged to adhere to the originally planned timeline for the NDC update cycle in 2020, many countries will make use of the additional months afforded by the postponement of COP26 to finalise their NDC updates in 2021. Amidst the global COVID-19 crisis, the delayed submission of NDCs and LTSs is understandable and a dash for finalisation should not come at the expense of quality with regards to ambition.



3. AN UNCERTAIN PREDICAMENT: AMBITION AND ACTION IN TIMES OF COVID-19

In early spring 2020, economies around the world started to (temporarily) close down in response to the COVID-19 pandemic, triggering the economic crisis that is currently unfolding. Since then, governments have been scrambling to support businesses and individuals through the crisis, often making available large amounts of public resources to avoid foreclosures and job losses. In the first half of 2020, as the first wave of infections spread, many countries imposed a temporary national lockdown; over time they have started to re-open public life with a combination of social distancing measures and local responses to increased risks (e.g., cities and regions going into forms of lockdown). However, the pandemic is not under control and at the time of writing, several countries have reinstated nation-wide restrictions. Health experts indicate that the most realistic way out of the pandemic comes in the form of mass vaccination, as ultimate bulwark, and despite uncertainties, the current expectation is that this could be achievable in the second half of 2021 earliest for developed countries but is likely to take years globally (Craven *et al.*, 2020). Until then, governments will find themselves in an uncertain predicament.

What makes the current COVID-19 health and economic crisis stand out is that it affects sectors more or less harshly depending on how much they are (in)directly affected by social distancing restrictions. Hospitality and tourism, transport, and exporters of energy and goods (and services) are disproportionately affected, and countries' dependency on these sectors is a likely indicator for the depth of the crisis and length of the aftermath (as well as the intensity and longevity of the health crisis itself). It also shows that no country in a globally interconnected world is protected, however powerful their economy. We observe even the wealthiest countries forced to balance cooperation with isolationist tendencies, for example when acquiring personal protective equipment and in preparation for mass vaccination. All this happens against the backdrop of a global climate emergency: as was clear before the pandemic started in early 2020, mitigation ambition and action in the current five-year window (i.e., 2020-2024) will crucially determine whether the Paris Agreement goal of limiting global warming remains within reach.



At the time of issuing our survey the world was still in the middle of the COVID-19 pandemic with no signs of it slowing down (WHO, 2020): both health and economic crises are unfolding as we conduct this research, and we acknowledge it is impossible to know the (full) extent of its impacts. Nevertheless, we invited our respondents to look ahead and reflect on the challenges, and perhaps opportunities, the COVID-19 crisis brings to climate action (including long-term strategies and NDC ambition raising). For each of the survey questions discussed in this chapter, respondents could add comments in a field to clarify their multiple-choice answer; where possible, our analysis here builds on the survey results as well as that feedback.

We asked respondents to reflect on five important drivers of the climate transition (scaling up clean energy, phasing out fossil fuels, securing domestic political traction, redirecting public spending, and reconsidering emission reduction pathways) and on the overall outlook. We find that the majority of respondents is optimistic about the drivers behind climate action, but they have divergent views on whether the COVID-19 crisis is accelerating or slowing down their countries' climate policy and ambitions. Some see this moment as an ideal opportunity to give the low-carbon transition a push, for example with strong green stimulus measures, while for others the impact may be so large that they are severely constrained in their policy options (for example due to debt constraints). For some sectors, and indeed countries, 'straightforward' policy support to get back on track is insufficient and they will have to rethink their business models and trade positions in order to recover from the crisis and thrive in the future.

3.1. CLEAN TECHNOLOGY (AND FOSSIL PHASE-OUT)

Global energy investments are expected to drop by USD 400 billion (20%) in 2020 compared to plan, mainly due to postponement or cancellation of investments in coal power generation.⁵ Wind and solar PV are the only energy investments that are still picking up, moving the share of clean energy investments in the total from 33% in previous years to 40% in 2020. But while renewable energy investments grow in absolute terms, at around 4% from last year, this is a much slower rate than necessary to accelerate the clean energy transition so as to reach the Paris Agreement goal (IEA, 2020b).

The effect of the crisis on clean investments depends on the country context. Several counteracting forces are involved: clean energy investments are ideally positioned for economic recovery support, especially when they are 'shovel ready', deliver instant employment, and contribute to structural economic improvements (e.g., energy efficiency in buildings and industry). Another factor that may channel financing flows towards clean energy and away from fossil industries are the growing uncertainty and risks surrounding oil and gas investments. There are also negative aspects at play: global supply chain disruptions are expected to cause delays in renewable energy development across the world, which is putting stress on (nascent and often still fragile) clean industries and supply chains (IEA, 2020a). Moreover, developing countries and emerging economies are already facing massive capital outflows and the risk of credit-downgrades, reducing overall project financing options (IRENA, 2020 section 3.2).

⁵ For example, a number of high-profile Chinese funded coal power plants in developing countries, as part of the Belt and Road Initiative, have been canceled or postponed (The Economist, 2020).

On the other side of the transition, the fossil *phase-out* has as prominent a place as clean technology *phase-ins* and needs careful consideration to ensure a fair and inclusive energy transition. The phase-out of fossil fuels involves changing technologies and business models for carbon intensive activities, dealing with asset stranding, and finding a solution for shifts in existing and new employment opportunities (OECD, 2017). This has been recognised in the Paris Agreement, and addressing social and economic impacts is regarded as an essential ingredient for managing low-carbon transitions.⁶ In addition, countries that depend on export of coal and other fossil fuels, many of which located in the Global South, will need to find alternative income sources. The COVID-19 crisis adds an additional layer of complexity to this fossil phase-out: businesses and people in high carbon industry are hit by the short-term effects of the crisis, and calls for immediate relief may be understandable and legitimate. However, unconditional support for fossil industry could spell bad news when it locks users and producers into high-carbon activities and high-carbon assets that will need to be abandoned early in order to curb and reduce emissions.⁷

CLEAN TECHNOLOGIES

We first ask respondents whether investments in clean technologies such as renewable energy, electric vehicles, and efficiency improvements will increase or decrease. The responses are overwhelmingly positive: only two respondents fear that investments will decrease, while everyone else expects a (significant) increase (Figure 10). The arguments given in the feedback fall into two related categories: competitiveness and commitment. First, in many situations clean technologies are competitive and a sensible investment, even if the emission reduction potential is not considered. Second, commitment to climate action and the energy transition is firm and mainstreamed into policy and governance; as a topic, clean technologies are able to stay on the political agenda in times of crisis.

A note of caution is in order in this chapter: we ask about ‘increase’ without specifying whether this is from a low level or not, and whether the ‘increase’ is sufficient to set the countries on a Paris-compatible development course.

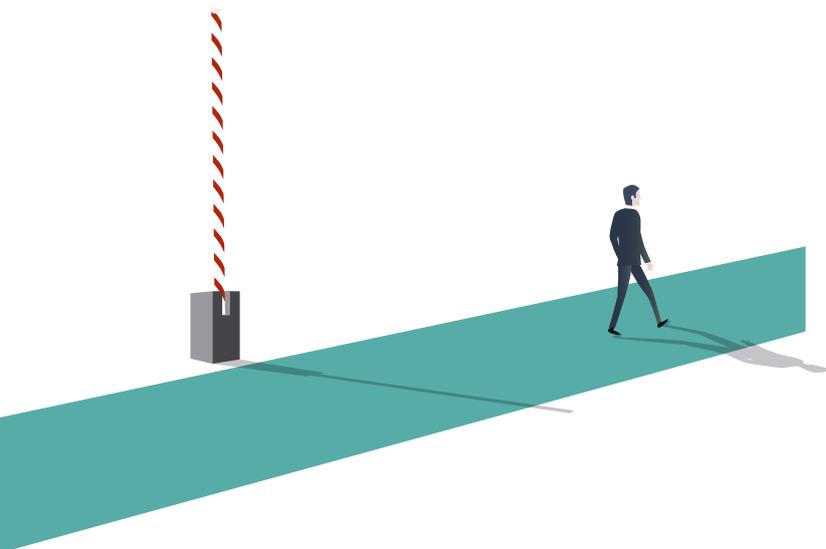
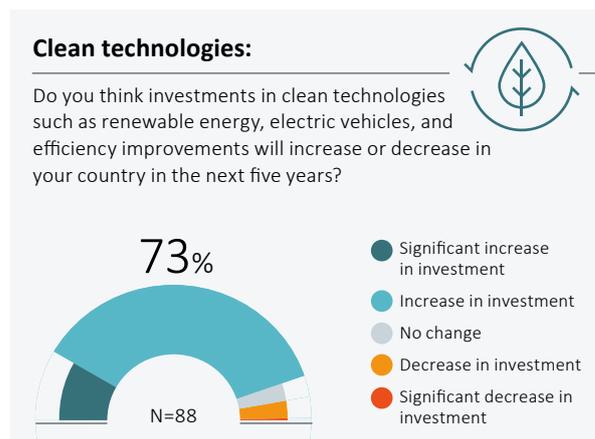


Figure 10 Development of clean technologies.



⁶ The EU has proposed a Just Transition Mechanism for that purpose, as one of the pillars of its European Green Deal (European Commission, 2020b).

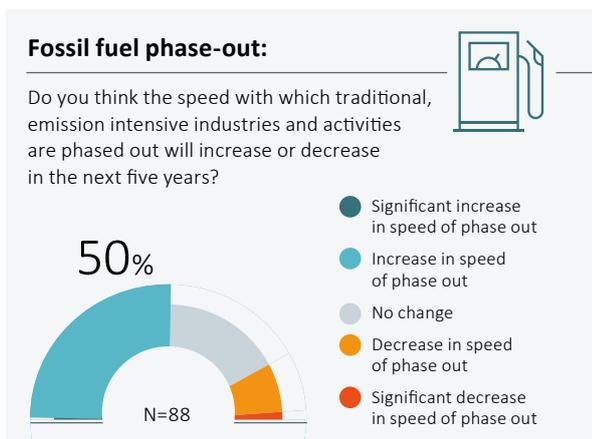
⁷ Analysis by VividEconomics for The Guardian newspaper finds that (per November 2020) in at least 18 of the world’s biggest economies pandemic rescue packages are dominated by environmentally harmful spending, and only four countries France, Spain, UK, and Germany) and the EU have interventions that will produce a net environmental benefit (The Guardian, 2020). This is in line with the picture emerging from IISD’s G20 Scorecard of Fossil Fuel funding (IISD, 2020).

FOSSIL PHASE-OUT

Next, we asked whether the speed with which traditional, emission intensive industries and activities are phased out will increase or decrease and find that more than half the respondents think the speed will increase, while only 15% suppose the phase-out will slow down. About one third of the respondents think that the current crisis will not affect the speed of the phase-out (Figure 11).

Here too we find arguments along the same lines as for expectations for clean energy technologies: it makes economic sense to invest in clean energy, and phasing out fossil fuel is part (implicitly or explicitly) of a transition strategy with sufficient political backing. Several respondents note that in their countries, support for the energy transition is weak, and they see a risk that the crisis is used as a pretext to strengthen the position of incumbent fossil players (state-owned or private) and effectively slow down the transition. For example, the low gas price we see now makes it seemingly attractive to replace diesel power generation with gas power instead of solar PV.

Figure 11 *Expectations to phase out fossil fuel*



One respondent indicated that the tourism sector was so badly hit that one of the relief measures was lifting the green levy. A few fossil resource-exporting countries experience a strong pull from existing players, private and public, who protect their vested interests and fortify their position – at the expense of a clean transition. As in the previous question, even though the phase-out speed is expected to increase by many, this may still not be adequate (i.e., incompatible with net-zero CO₂ emissions around 2050).

3.2. NATIONAL CLIMATE AGENDA AND PUBLIC SPENDING

Preliminary OECD estimates indicate that governments have included around 312 billion USD in ‘green measures’ in their crisis recovery packages, and that “so far the balance between green and non-green spending is not favourable in terms of the support towards positive environmental outcomes” (OECD, 2020).⁸ We should however acknowledge that the picture is hardly ever black-and-white: Some countries may have the opportunity to bring clean investments forward, but all governments will be under pressure to focus on immediate economic relief even if that means supporting high-emissions industries. In these situations, some form of conditionality could be considered: the business will receive support, but it will need to reform and reduce emissions in the future. However, making climate conditionalities too specific may not be possible given the uncertainty ahead, and there are alternatives such as securing a say in the future strategy of bailed-out corporations (e.g., by taking equity stakes (Steffen *et al.*, 2020).



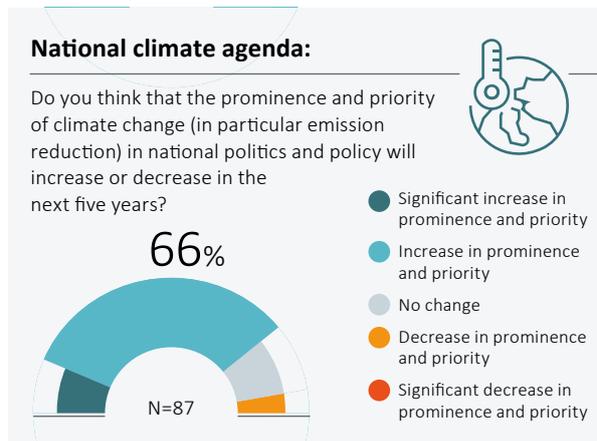
⁸ This is consistent with the picture that different response tracking efforts paint; for more information, see for example the Energy Policy Tracker, <https://www.energypolicytracker.org/>, CarbonBrief Tracking ‘green recovery’, <https://www.carbonbrief.org/coronavirus-tracking-how-the-worlds-green-recovery-plans-aim-to-cut-emissions>, and Vivid Economics’ Greenness of Stimulus Index, <https://www.vivideconomics.com/casestudy/greenness-for-stimulus-index/>.

NATIONAL CLIMATE AGENDA

We continued by asking respondents whether the prominence and priority of climate change (in particular emission reduction) in national politics and policy will increase or decrease. Three quarters of respondents expect increased prominence while only few respondents expect that political prominence and priority of climate will not increase (Figure 12).

Interestingly, all the feedback on this question points to political commitments established before the pandemic. None of the respondents identify the COVID-19 crisis as an extra boost for climate awareness and/or public support. Although COVID-19 shows how destructive global systemic crises can be, and that it makes sense for governments to prepare and avoid a climate crisis (IMF, 2020b), none of the respondents explicitly make that connection, instead referring to established agreements such as current NDCs and sector strategies. In any case, we observe a strong optimistic signal, either despite COVID-19 or enforced by it.

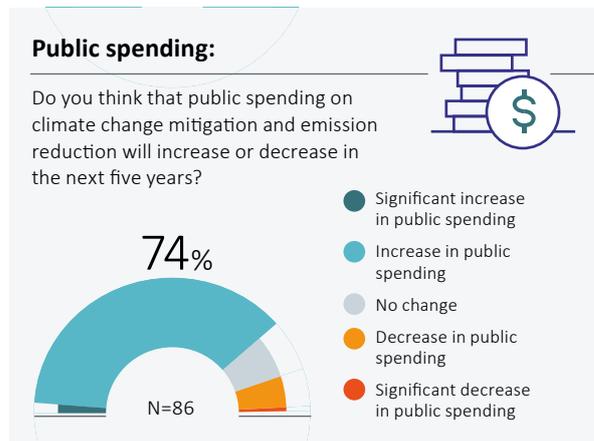
Figure 12 Prominence and priority of climate change.



PUBLIC SPENDING

Figure 13 shows that in spite of the unfolding economic crisis, 80% of respondents expect that public spending on climate change mitigation and emission reduction will increase in the coming five years. Notwithstanding several countries announcing strong green stimulus measures, this still seems very optimistic. Many countries already head into the pandemic with very low fiscal space due to high (public) indebtedness and other pre-existing vulnerabilities. It's not entirely clear what warrants the positive response to this question: Are governments slow to realise the trouble they might be in? Is climate action independent of available public resources? It is likely that public spending on mitigation action comes from a relatively low level so that even small advancements are reflected in the expected increase.

Figure 13 Expected public spending on climate change.



3.3. MITIGATION PATHWAYS AND THE NDC PROCESS

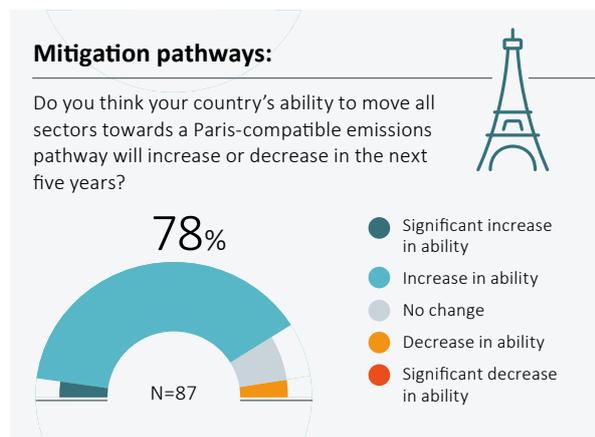
In order to keep global warming in check, emission pathways need to show fast decline (see Figure 1 in Chapter 1 Introduction). During the lockdowns, energy demand fell as much as 20%⁹ and greenhouse gas and particulate emissions dropped significantly. However, the effect of the lockdowns on global warming is very small and although they show that a behavioural change is possible, at least for a limited time, this is only sufficient in tandem with clean investments on a massive scale (Forster *et al.*, 2020). The shape and speed of the recovery will vary by sector and country, and currently the short- and medium-term outlooks are unusually uncertain. This makes it very difficult to meaningfully update mitigation pathways at the moment. Some modelers have introduced a ‘two-year blip’ to represent the partially stifled economy while the pandemic is on, after which they continue their projections (Forster *et al.*, 2020). The Paris Agreement temperature goal may still be within reach (Climate Action Tracker, 2020c), but if countries let the recovery lean too much towards high-emitting fossil-based support, that window closes fast. Now is the time to think about recovery on a sector-by-sector basis, keeping in mind that the Paris Agreement requires net zero CO₂-emissions in 2050 or shortly after; national and sectoral mitigation pathways underlying the NDCs and LTSs should reflect that.

The 26th UNFCCC Conference of Parties (COP) is postponed until 2021, but countries are urged to stick to the timeline of the Paris ratcheting mechanism and submit their updated NDCs, as well as long-term strategies.¹⁰ At least on the surface, the process seems to commence (see Chapter 2) and there have been strong signals in support of enhanced ambition as mentioned above. Nevertheless, we can expect that NDC implementation, ambition raising, and long-term sector planning will take a while to settle in and reflect the new post-COVID-19 reality. In the meantime, transparency and information exchange will be very valuable and the frequency needs to be increased (see 4.6 A transparency and data perspective).

MITIGATION PATHWAYS

A solid majority (83%) of respondents expects that in the next five years their countries will be better able to move towards a Paris-compatible emissions pathway (Figure 14). The feedback reveals that there are two forces at play: determination and ability. Leadership, commitment to climate action, and sectoral plans are important ingredients for developing transition (mitigation) pathways, but without a healthy economy, support for the transition may fade fast. Especially in this time of crisis, keeping the economy running is essential. Countries that were already economically fragile, and those that have been hardest hit by the collapse of tourism and trade, will have to focus their attention to healthcare and basic services provision, potentially limiting their ability to take action on climate. In light of this, over 80% seems undeniably optimistic.

Figure 14 Ability to move sectors towards net-zero emissions.



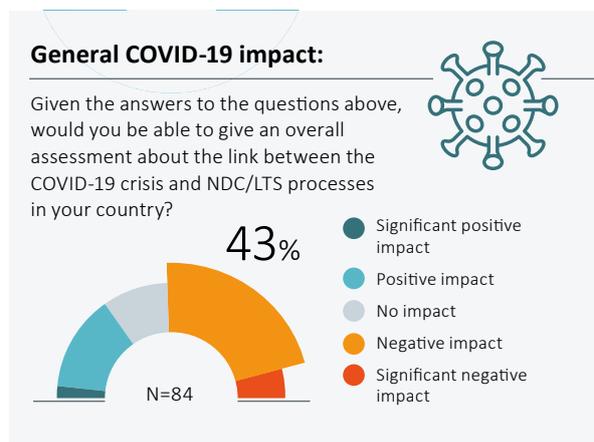
9 This concerns electricity demand: “every month of full lockdown reduced demand by 20% on average, or over 1.5% on an annual basis”. Coal demand is expected to fall by about 8% in 2020, global natural gas demand could decrease by 5% in 2020, and global oil demand is expected to be a record 9% lower in 2020 than in 2019 (IEA, 2020b).

10 The ‘Climate Ambition Summit 2020’, announced on short notice and to be held virtually on 12 December 2020, calls for leaders to come forward and announce new, more ambitious NDCs, LTSs setting out pathways to net-zero emissions, climate finance commitments to support the most vulnerable, and ambitious adaptation plans and underlying policies (BEIS, 2019).

OVERALL IMPACT ON THE NDC PROCESS

As a last question in the survey, we ask our respondents to share an overall assessment about the link between the COVID-19 crisis and NDC/LTS processes in their country. While the five factors mentioned earlier in this chapter all paint an optimistic picture, the overall picture is more diffuse: a large group (51%) expecting a (significant) negative impact and a substantial group (31%) expecting positive or significant positive impact (Figure 15). There are the practical issues around NDC and LTS the processes that cause delay: in several countries the international experts delivering technical assistance and developing projects have left or visit less frequently, national staff and political decision makers may also be affected by lockdown closures or reallocation to other pressing demands. While in general this leaves a gap in capacity, one respondent optimistically sees this as a good moment for stepping up to the challenge and increase national capacity and ownership.

Figure 15 COVID-19 impact on NDC and LTS processes



3.4. BETWEEN RESOLVE AND ABILITY

It is clear that climate change *should stay* high on the agenda, especially now: the crisis response can be used to give climate action an extra impetus (IEA, 2020c). More importantly, without taking climate into account in the responses to the current crisis, the window for reaching the Paris Agreement goal becomes even smaller. It is not clear whether climate change really is able to stay high on the agenda; whether the momentum for ambitious national climate policies will pick up during and after the COVID-19 crisis, or whether it takes a hit and faces setbacks. What do our respondents see when they look ahead and reflect on the challenges and perhaps opportunities the COVID-19 crisis brings to climate action, long-term strategic planning, and NDC ambition raising? The many responses show a complex interplay of factors and uncertainties.

Climate is in the spotlight... but short-term relief goes first

The COVID-19 crisis puts climate change in the spotlight: strong green stimulus measures are being discussed and decided in some countries, fossil investments are becoming increasingly risky, and the restrictive measures show that quite radical behavioural change is possible (i.e., less travel, remote work). On the other hand, the current crisis reorients the political compass towards short term spending and for many countries this inevitably leads to higher indebtedness and less available budget in the medium term. Also, a certain level of pragmatism is displayed by governments when bailing out polluting businesses: sectors that need to transform radically to become carbon neutral (e.g., aviation, mining, automotive) are receiving public money in order to avoid layoffs and foreclosures – sometimes with climate conditionality, but more often without such requirements. Some respondents fear that this will lock their countries into high-carbon pathways, that without additional policy measures the economics of fossil-based ‘business as usual’ growth are still favourable, and that clean energy investments will not accelerate at the rate needed.

There is resolve on the importance of climate action and ambition, across most countries, but also a risk that for some the impacts are so severe that they cannot take adequate action and risk being left behind. With only few exceptions, we see growing support for climate ambition and action. A number of countries, especially in the developed world, will have the opportunity to buffer the economic shocks caused by the current crisis, accelerate the clean transformation, and even become strong players in the new clean technology markets. Despite attractive calls to ‘build back better’, for many developing countries the reality will be one of fragile supply chains, reduced liquidity, and increased debt; a reality in which they are more than ever dependent on international investments and support to come out of the crisis. Depending on what the ‘new normal’ is going to look like, some countries will need to face significant economic restructuring, none of which is currently reflected in the projections of NDCs (or LTSs for that matter).

4. PERSPECTIVES: HOW DOES COVID-19 IMPACT CLIMATE ACTION?

Meeting the global temperature goal of the Paris Agreement will require efforts by all stakeholders and from all countries. At the same time, the COVID-19 pandemic likewise affects all stakeholders in all economies. Now is the time to come together and collectively pursue ambitious climate action to reach net-zero emissions globally and build resilient and sustainable societies. We ask institutions to share their views from different perspectives on the same question: “Looking at climate action and ambition planning, in what respect has the COVID-19 crisis and response made it easier or more difficult to meet the temperature goal of the Paris Agreement?”.

4.1 Thinking of climate and recovery together: Insights from the NDC Partnership: The NDC Partnership shares their insights on NDC processes and the impact of COVID-19 on their member countries. There is a general willingness among countries to include climate in recovery, and to learn from each other. As the COVID-19 pandemic puts the NDC process at risk, the Partnership taps into their international networks of knowledge and focuses on economic advice.

4.3 SIDS in a squeeze: Climate Analytics reflects on the particular vulnerability of Small island states (SIDS) to both climate change and the pandemic. Several SIDS have been hit disproportionately hard because of their reliance on tourism and because of existing debt. International support needs to support them to stay on track for climate and sustainable development goals.

4.3 Raising debt or raising ambition: are there trade-offs to be made?: SouthSouthNorth discusses the ability of developing countries to raise climate ambition and how to help those countries most affected by the pandemic. Least-developed countries will come out of the crisis with even less access to capital. Perhaps the time and circumstances are right to consider NDC conditionality in relation to debt relief such as debt-for-climate swaps.

4.4 Building back a better global agri-food system The FAO discusses how building back better is of particular relevance in currently disrupted agri-food systems in light of the current climate crisis. The COVID-19 crisis has revealed the fragility of global agri-food supply chains and the vulnerability of many businesses and households involved. For FAO, build back better is about transforming the agri-food sector to be more resilient. Only then can countries play their part in the mitigation challenge.

4.5 Civil society must be involved when solving a global crisis: BUND argues that to meet the goals of the Paris Agreement stakeholder engagement is as crucial as ever and digital processes can be key. Civil society engagement is at risk from COVID-19 and social distancing measures: governments need to act fast on topics with long-term impact, and activists can’t meet and exchange or protest. We need to catch up and find a way to involve civil society again.

4.6 A transparency and data perspective: WRI shares their insights on the importance of transparency in climate processes and recovery measures. Transparency becomes more important as things are moving faster (and they are moving fast). Unless co-benefits of clean technologies are clear, crisis urgency may push the scale towards fast dirty solutions.

4.1. THINKING OF CLIMATE AND RECOVERY TOGETHER: INSIGHTS FROM THE NDC PARTNERSHIP

Authors: Romeo Bertolini and Namitha Vivek (NDC Partnership Support Unit)

This year should have been a pivotal year for climate action. Under the Paris Agreement, countries are expected to submit revised NDCs relative to their 2015 commitments by the end of 2020. However, our present reality is an unprecedented global pandemic and consequent global economic meltdown, which compounds the challenges faced by countries to raise and deliver on climate ambition.

Countries face dual health and economic crises, as the Stern Review shows “the costs of stabilizing the climate are significant but manageable; delay would be dangerous and much more costly” (Stern, 2007). With “building back better” now the international community’s mantra for climate-smart recovery measures, the reality for most countries’ growth and prosperity are particularly challenged by the pandemic. The NDC Partnership’s early assessment of COVID-19’s impact on NDC progress and enhancement revealed five key messages (NDC Partnership, 2020a):

- Reallocation of funds as a result of the pandemic leads to reduced climate spending in developing countries;
- The NDC quality and revision timelines are at risk;
- There is urgent need for technical assistance in evaluating COVID-19’s impact on a national scale;
- Countries are eager to learn from each other on deploying strategies for economic recovery;
- Governments are considering climate action when developing their economic stimulus packages.

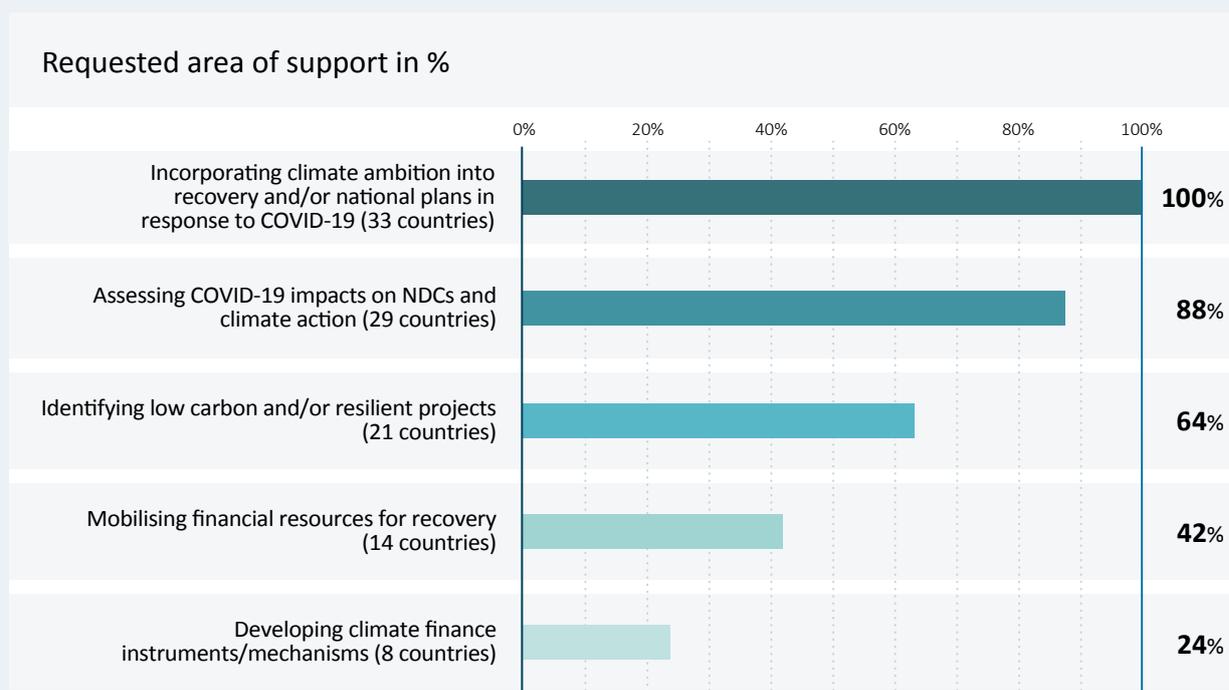
To support developing countries in preparing green recovery responses to COVID-19, the NDC Partnership has established an Economic Advisory Support Initiative and commenced embedding economic advisors in the planning and finance ministries of 33 members (NDC Partnership, 2020c). This is supported by 14 development partners who are members of the Partnership.

This economic advisory support focuses on preparing climate compatible recovery packages and incorporating climate ambition into COVID-19 recovery plans (Figure 16). It is anticipated that 29 of the 33 countries receiving advisory support will conduct assessments of COVID-19’s impact on NDCs and climate action, and 21 will identify specific low-carbon and climate resilient projects.

Ethiopia, for instance, will assess COVID-19’s macro impact on the ambition of its revised NDC, its Climate Resilience and Green Economy (CRGE) strategy, and the potential for green jobs creation. The country-driven green recovery support varies across countries: 14 countries will mobilize financial resources to support projects and eight will identify or develop financing instruments, such as tax credits and de-risking mechanisms.

Uganda, for example, aims to scale-up existing project idea notes and concepts into national flagship fundable projects to support green recovery. Similarly, Grenada is set to design fiscal instruments to stimulate green growth, including guarantees, venture capital, tax credits, green bonds, and refinancing facilities.

Figure 16 Overview topics requested by countries related to COVID-19 Economic Recovery.



Source: NDC Partnership Support Unit, 2020.

To enhance this support and facilitate ongoing learning, the advisors, as well as countries from across the Partnership, will also have access to a virtual Thematic Expert Group and a Green Recovery Network.

- The **Thematic Expert Group** provides on-demand technical advice, research, and guidance on specific sectors or themes related to climate adaptation and mitigation incorporated in recovery responses. This support helps align integration of economic recovery with a country’s NDC and other national climate change planning documents, including low-emission development strategies (LEDS) or long-term strategies (LTS).

- The **Green Recovery Network** facilitates learning between economic advisors and countries on their recovery path. It creates opportunities for learning between regions, countries, and partners via stakeholder consultations, roundtables, and information sessions.

The responsibility of course-correction and pushing for enhanced climate action, as expressed in the Paris Agreement, requires collaborative and adaptive approaches. The NDC Partnership’s country-driven, decidedly coordinated and collaborative approach involving its over 180 members is well-equipped to help countries tackle this crisis. Countries, implementing partners and non-governmental members of the NDC Partnership are committed to putting climate action at the heart of recovery (NDC Partnership, 2020b).

4.2. SIDS IN A SQUEEZE

Authors: Frances Fuller, Adelle Thomas, Jan Sindt, and Patrick Pringle (Climate Analytics)

COVID-19 underscores vulnerabilities of SIDS and difficulties in achieving long-term low-emission development as envisioned in the SAMOA Pathway, 2030 Agenda and the Paris Agreement.

The COVID-19 pandemic has quickly evolved from a health crisis to a development crisis and will have catastrophic impacts for the sustainable development and viability of the economies of small island developing states (SIDS). While the long-term economic impacts of the pandemic are not yet known, the crisis has highlighted the fragility of economies and development gains in tourism-based import-dependent SIDS that are already facing severe recession. In the face of existing impacts of climate change, the pandemic makes it ever more difficult for SIDS to realise their long-term low-emission development as envisioned in the SAMOA Pathway (UN General Assembly, 2014), the 2030 Agenda, and the three pillars of the Paris Agreement: mitigation, adaptation, and loss and damage.

COVID-19 has overwhelmed healthcare capacities and led to strict measures to prevent the virus spreading, including closing borders, resulting in significant economic implications for island nations that are highly tourism-dependent (Alexandre Dayant and Jonathan Pryke, 2020). International tourist numbers were already down by 65% in the first half of 2020 (World Tourism Organization, 2020). Tourism accounts for 30% to 66% of GDP in most SIDS, and as a result of the pandemic, SIDS' economies have faced devastating impacts on tax revenue, foreign exchange earnings, employment, debt servicing, human capacity, and therefore, priority setting (UNCTAD, 2020).

While updating NDCs, SIDS have been faced with difficult decisions in the economic fallout from COVID-19. Limited resources, compounded by projections of slow economic recovery, make it very difficult to prioritise capital intensive investment in decarbonisation, even though it is understood that transforming the energy sector would be cheaper than current systems. This is particularly relevant for the many SIDS that allocate up to 70% of GDP on importing fossil fuels and servicing debt (Charles Feinstein, 2014).

COVID-19 also has significant impacts on debt to GDP ratios for SIDS that have already been affected by climate impacts. In The Bahamas, Hurricane Dorian displaced thousands of people and resulted in damages over US\$3.4 billion, with the government anticipating it would take at least five budget

cycles to return to pre-Dorian levels of debt (IDB, 2020; The Nassau Guardian, 2029). Still reeling from Dorian, The Bahamas applied for an IMF loan to address the pandemic's economic impacts, further increasing the debt to GDP ratio, where it was already near 200% (IMF, 2020a). SIDS-specific targeted support for implementation is critical, particularly for those with higher levels of debt as a result of the pandemic.

While responding to COVID-19, climate change risks are exacerbated: natural disasters hit harder, become threat multipliers, and overwhelm capacities to respond. Recovery from destructive tropical cyclones takes many years to decades, which has implications for the efficacy of COVID-19 measures as well as the economic resources that are available to respond to the pandemic (Hsiang and Jina, 2014). Relying on limited resources to protect vulnerable populations from COVID-19 risks resources being diverted from longer-term strategic climate action.

The widespread implications of the pandemic on mitigation and adaptation action mean that SIDS may face higher levels of loss and damage. Countries struggling to keep up with rising tides of COVID-19 risk losing further ground in curbing the negative impacts of climate change. SIDS already face challenges in identifying and assessing existing and potential loss and damage due in part to lack of capacity, data and financial resources. The shift of attention and resources to respond to COVID-19 may place the pressing issue of loss and damage on the back burner both nationally and internationally, resulting in negative impacts that continue to go unaccounted.

The climate and COVID-19 crises have underscored the extreme vulnerability of SIDS which are clearly facing constraints that, compounded with the impacts of the pandemic, could become insurmountable without a collective response from the international community. SIDS have and will be putting forward ambitious NDCs, it is now for partners to support implementation and ensure international climate action that limits global average warming in line with the long-term temperature goal of the Paris Agreement, 1.5°C.

4.3. RAISING DEBT OR RAISING AMBITION: ARE THERE TRADE-OFFS TO BE MADE?

Authors: Charlotte Ellis and Michael Gerhard (SouthSouthNorth)

Prior to the COVID-19 pandemic outbreak, developing countries were already struggling to access the finance required to shift development pathways towards a low-emissions, climate resilient future. As the primary operating entity of the UNFCCC financial mechanism, the Green Climate Fund (GCF) presents a useful barometer to measure availability and accessibility of climate finance for developing countries, in line with the USD 100bn goal set out in the Paris Agreement.

As of June 2020, only USD 3.4 billion of the USD 9.78 billion pledged in the GCFs first replenishment process had been confirmed, an early indicator that developed countries could be prioritising managing the impacts of the COVID-19 crisis. Of great concern, is that access to climate finance will be increasingly difficult as countries refocus their public resources on domestic challenges. Shifting priorities of contributors to the Fund presents a real risk to the ability of developing countries, whose fulfilment of Nationally Determined Contributions (NDCs) commitments are largely conditional upon receiving finance and does nothing to encourage the ramping up of ambition. It is equally concerning that the GCF approval pipeline amounts to only around USD 2bn (as of June 2020), highlighting the challenges developing countries experience in developing projects for fund approval.

On the one hand, this presents a challenge for climate action in that developing countries may be prioritising post-COVID recovery measures in the short term, risking inaction on longer-term climate ambitions. Indeed, the need to service mounting debt may see countries pursue export revenues at any cost, including ramping up extractive industries, fossil-fuel usage, and attempting cost saving measures by not paying the premium for investing in climate resilient infrastructure (Akhtar *et al.*, 2020). On the other hand, this may create the opportunity for countries to think holistically, and design GCF projects that align with broader long-term development strategy, putting climate change in the centre of recovery planning, and the opportunity to refresh the pipeline of climate-related investments globally.

However, doing so in the context of limited fiscal resources, rising debt and already high unemployment and poverty rates, whilst simultaneously addressing COVID-19 recovery, will be a

massive undertaking requiring tremendous levels of financial resources that are simply not available nationally. According to African Finance Ministers, Africa alone needs immediate emergency financing, providing fiscal space and much needed liquidity, to the tune of USD 100 billion. Many developing countries are unable to borrow more; 40% are at serious risk of defaulting on their existing debt obligations in the next year (Akhtar *et al.*, 2020). G20 leaders announced their “Debt Service Suspension Initiative for Poorest Countries”, (applying to 73 primarily low-income developing countries). The IMF has also cancelled debt repayments by the 25 poorest developing economies for the next six months (estimated at around USD 215 million). Initiatives like these are welcome since they provide urgently needed fiscal “breathing space” to crisis-ridden developing countries, but they do not constitute debt relief of any kind. Quite the contrary, by linking eligibility to new or on-going borrowing, even if on concessional terms, the initiative prioritises lending (and therefore new debt) over debt relief. Taking on further debt is completely untenable, but is it avoidable?

It appears that the time, and political mood, may be right for considering NDC conditionality in relation to debt relief or expansion. One such tool that presents a potential way out of the climate finance deadlock is “debt-for-climate swap” initiatives, taking lessons from the “debt-for-nature swaps” of the 1980s and 1990s (Akhtar *et al.*, 2020). However, the hidden costs, implications and potential effects on national autonomy emanating from such an approach are unclear at this point. What is clear is that developing countries face significant challenges in accessing climate finance, and limited fiscal resources are exacerbated by COVID-19. However, opportunities that support raising ambition are present. Firstly, the opportunity to approach GCF funding with a strategic eye on sustainable recovery and holistic long-term development, secondly, a new framing of debt that could support enhanced climate ambition. This is potential new ground for negotiations, and conversations concerning “green debt” that could emerge as part of the build-up to, and at COP 26 in November 2021, will be of keen interest.

4.4. BUILDING BACK A BETTER GLOBAL AGRI-FOOD SYSTEM

Authors: *Krystal Crumpler, Shanali Pethiyagoda and Julia Wolf (Office of Climate Change, Biodiversity and Environment of the Food and Agriculture Organization (FAO) of the United Nations)*

The COVID-19 health crisis quickly revealed weaknesses and chokepoints in our global agri-food system. Measures to contain the spread of the virus, such as border restrictions and physical distancing, caused disruptions in food supply chains (FAO, 2020c), often leading to reduced labour income, higher food costs, and lower food availability (David Laborde, Rob Vos and Will John Martin, 2020). An estimated 100 million additional people are pushed into extreme poverty, and 130 million more people face chronic hunger by the end of the year (Daniel Gerszon Mahler et al., 2020; FAO IFAD UNICEF WFP WHO, 2020).

While the effects are felt the world over, the socioeconomic impacts are disproportionately affecting rural populations, migrant workers and indigenous peoples who depend on agricultural production, fishing, pastoralism or forestry for their food security, nutrition and livelihoods (IFO ILO FAO IFAD WHO, 2020). These communities are already grappling with vulnerabilities to climate change, and to them the impacts of climate change are likely to be more protracted and more severe than those of the current pandemic.

The similarities between the health and climate crises run deep: globally, food systems contribute significantly to extensive ecosystem degradation, biodiversity loss and land use changes that enable the spread of zoonotic diseases and drive greenhouse gas emissions (FAO, 2019). Industrial agriculture in particular is aggravating risks: driving habitat loss and creating the underlying conditions for viruses to emerge and spread (IPBES, 2019). Agri-food systems are not only vulnerable to climate change, they also contribute: Up to 30 percent of global emissions are attributed to the food system, especially livestock value chains (IPCC, 2019). An amount of food that could feed over 1.25 billion people a year, with a greenhouse gas footprint equivalent to 1.5 billion tons of CO₂e emissions, is wasted each year (Torero, 2020).

This calls for a change, and the current crisis is the right moment to rethink agri-food production and build back better. Meeting the goals of the Paris Agreement, and indeed preventing another global pandemic, requires us to transform the sector and its dependent communities towards greater resilience. Governments may have to face trade-offs between crisis response, fast economic recovery, and longer-term

sustainability objectives. For example, reverse migration from cities to rural areas due to lack of employment is expected to put increasing pressure on forest resources, resulting in deforestation and hence fewer carbon sinks (FAO, 2020d), and a (temporary) dip in oil- and gas-prices is impacting the competitiveness of biobased products (FAO, 2020d). Moreover, producers and agri-businesses delay or cancel investments in low-emission and resilient technologies, due to losses in production capacity, reduced market access, and stagnation of remittances.

In light of this, FAO is taking on its strategic role to promote a way out of this pandemic that is inclusive, climate-resilient, and compatible with a sustainable, low-emission development pathway. With countries rolling out large stimulus packages, there is an unprecedented opportunity to take on agri-food systems transformation as a key element of “building back better” (FAO, 2020a). In practice, this means putting in place response and recovery policies and programs that mitigate the immediate impacts of the pandemic on incomes and food security, while simultaneously contributing to building longer-term resilience and adaptive capacity. Without such transformation, the food system will not be able to buffer future climatic shocks and stresses.

One of FAO’s Flagship programmes implemented in partnership with UNDP, Scaling up Climate Ambition on Land Use and Agriculture through NDCs and NAPs (SCALA) is integrating COVID-19 response and resilience-building measures into its logical framework to ensure a programmatic approach to addressing the climate change-COVID-19 nexus (FAO, 2020b). In particular, SCALA will use the NDCs and NAPs as entry-points for “building back better” through a multi-stakeholder approach to evidence generation, policy integration and private-sector finance mobilization.

Fixing the fragilities of our agri-food systems was a challenge before, and the socioeconomic fallout of the pandemic is threatening to impede and even reverse progress on SDGs 1 (“No Poverty”) and 2 (“Zero Hunger”). Nonetheless, innovation, cooperation, and determination have characterized our fight against COVID-19 – it is certainly within our grasps to adopt the same approach in our fight against climate change.

4.5. CIVIL SOCIETY MUST BE INVOLVED WHEN SOLVING A GLOBAL CRISIS

Author: *Martin Baumann (BUND)*

Our expectations for 2020 as the year that would define a clear trajectory towards achieving the goals of the Paris Agreement could not have been higher. There was growing pressure from youth movements, scientists and civil society organisations calling for more ambitious climate policies, fired by the disappointment of COP 25, which failed to satisfy these demands. But then COVID-19 entered the scene.

While we are still coming to terms with the wide-ranging political, social, economic and environmental impact of this pandemic, it is safe to say that it has severely disrupted the timetables and motivation of most countries to review their Nationally Determined Contributions (NDCs) towards the Paris Agreement. At the time of writing this, only 13 countries have submitted a new NDC, representing a mere 3.6% of global emissions (WRI, 2020b). It remains to be seen how many of the remaining 137 countries that promised revised NDCs in 2020 will actually deliver on that promise- and if not, how long the delay will be. This uncertainty points to the lack of transparency in many current NDC revision processes.

Even more worrisome is the lack of ambition in the emission targets of most countries. The risk that the ambition mechanism of the Paris Agreement continues to be considered an option rather than an obligation has even increased in recent months. Despite the initial massive drop in global emissions that resulted from COVID-19, the gap between the well-known IPCC scenario of 1.5°C and real-world emission trajectories is widening. In the midst of the pandemic, many countries are now trying to jump-start their economies with financial help for sectors that rely heavily on fossil fuels. As a result, vast amounts of emissions are locked in for years to come- at a time when investments are urgently needed to reduce these emissions as quickly as possible. Despite the many different options to align economic recovery programmes with sensible and ambitious climate policies to keep us on track to achieve the goals of the Paris Agreement, these are not being considered sufficiently.

There are many reasons for this situation, but two stand out: Firstly, the sheer extent and speed of the spread of COVID-19 took most people by surprise. Decision makers were expected to do something, and to do it fast. In most cases, they have chosen short-sighted measures to re-establish the status quo rather than long-term investments to transform emission-heavy sectors like energy, transport and agriculture. Secondly, the movements and alliances that were leading the climate debate before the pandemic found themselves in a situation where they were no longer able to travel, meet and protest. The participatory processes that enabled civil society groups and other stakeholders to contribute to more ambitious climate policies were put on hold, reduced or stopped altogether.

These participatory processes must resume immediately so that all relevant stakeholders, above all the people that are most affected by the consequences of climate change, can have a say in setting their country's NDC and other climate policies. The past few months have shown that a significant amount of our everyday work can be carried out online with digital tools. The same applies to participatory processes, and there is a range of good practice examples from various countries where digital tools have helped to continue and enrich traditional forms of participation (BUND, 2020). COVID-19 remains a major disruption, but there are no more excuses for delaying ambitious climate policies, or for not including the whole of society in developing them. In times where we face a global health, biodiversity and climate crisis, it is now more important than ever that all stakeholders work together and finally address the causes at the heart of these problems, kick-start the socio-ecological transformations that are needed, and pave the way to healthy livelihoods for all, on one healthy planet.

4.6. A TRANSPARENCY AND DATA PERSPECTIVE

Authors: Cynthia Elliott and Nathan Cogswell (WRI)

The global commitment to climate change remains insufficient as countries face growing urgency for action and new threats posed by the COVID-19 pandemic. With the postponement of in-person UNFCCC activities, questions arise regarding whether transparency has been impacted. It stands to reason that many countries will likely experience delays in reporting to the UNFCCC, particularly for countries that were already experiencing capacity and staffing shortages.¹¹ Such delays can compound further and inhibit a timely understanding of the state of global effort, for example, with delays in preparing a synthesis report of NDCs.¹² On the other hand, technical review of the 4th Biennial Reports, technical analysis of countries' 3rd Biennial Update Reports, the Multilateral Assessment, and Facilitative Sharing of Views were still held this year through virtual means (UNFCCC, 2020c, 2020a, no date b and c).

A May 2020 article in *Nature Climate Change* suggested that 2020 CO₂ emissions may decline 7% as a result of COVID-19 (Le Quéré *et al.*, 2020). But the actual impact of COVID-19 on global greenhouse gas (GHG) emissions may not be known for several years and until national inventories have been completed. In fact, some countries may not report their GHG inventories for 2020 until their first transparency reports under the Paris Agreement are submitted in 2024. While the full extent of immediate and long-term impacts may not be known for some time, countries can still transparently communicate their commitment, for example, through revised and updated NDCs.

A related aspect of transparency that COVID-19 has underscored is the need for timely and quality data to inform decision-making, including climate-related data. Rapid analysis of the social, development, and economic impacts of the pandemic and the development of recovery strategies depends on data availability. Rather than rebuild the old economy fuelled by GHG-emitting energy sources, a prosperous future demands governments build back better and requires a holistic assessment of a variety of indicators and accurate, up-to-date data (WRI, 2020a). Many countries still lack comprehensive climate change data collection, validation and management systems, and require support to build capacity for developing transformative strategies to accelerate the recovery process and move into a new era of economic and environmental prosperity.

Beyond data and reporting, COVID-19 has also had an impact on the strength of accounting rules related to emissions offsetting. In 2016, the International Civil Aviation Organization (ICAO) created a market-based scheme to reduce emissions from international aviation called the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA). Due to the impacts of the pandemic on the aviation industry, in June 2020, ICAO decided to change the baseline from which airlines would offset emissions, meaning that airlines will not have to offset as many emissions (ICAO, 2020). This example illustrates how the lack of strict international accounting and transparency rules can significantly affect market-based policies and the role of the political environment in shaping accounting and transparency rules.

Transparency remains critical to understanding progress toward the Paris Agreement goals and the implications of COVID-19 on that progress. Continuing to place a strong emphasis on transparency and accountability will only serve to further advance climate action and ambition in the context of COVID-19.

11 It may be too early to say definitively as reports and submissions are more often made closer to the end of the year coinciding with reporting deadlines for biennial update reports and biennial reports.

12 The synthesis report originally intended to be prepared ahead of COP26 previously scheduled for November 2020, will now have an initial report published in February 2021 with a final version published closer to COP26 as stated in UNFCCC Notification: Publication of nationally determined contribution synthesis report dated August 13, 2020. https://unfccc.int/sites/default/files/resource/notification_on_ndc_synthesis_2020_ec_2020_306.pdf

5. COME TOGETHER

THE CURRENT NDC UPDATE CYCLE COULD FALL SHORT OF EXPECTATIONS

Optimism and confidence on progress are high among national government representatives. More so than one might expect, when considered alongside independent expert analyses on current emissions trajectories and the general inadequacy of countries' pledges. This could be an indication that positive developments are around the corner, but it could also signal a lack of serious commitment. Indeed, countries do appear to be making tangible improvements with regards to grounding their NDCs in national and sector-level planning processes, increasing the prospects for their implementation, but it is not yet clear whether raising the ambition level of NDCs is sufficiently prioritised in this NDC update cycle.

There is still time to act, but the window of opportunity for adequate ambition raising does not allow to wait until the next NDC update cycle in 2025, at which point the scale of the task may be beyond reasonable reach. Countries need to prioritise ambition raising in this NDC cycle and should use the time ahead of COP26 to encourage and support each other to do so.

Respondents indicated that the drivers for accelerating the necessary transitions to a sustainable, decarbonised society remain in relatively good shape, despite the disruptions caused by the global pandemic in 2020. Nevertheless, it is clear that the crisis represents a major set-back for all actors, and that those transitions very much depend on how countries can and will respond to it. In this regard, the crisis affects countries differently: for some countries, the necessity for economic recovery stimuli might present an opportunity and a push to build back better; many other countries will lack the resources to grasp this opportunity without support. In spite of the domestic priorities that arise during a crisis, able countries must consider providing such support generously and in a timely manner, recognising that it is in our common interest to ensure that no country is left behind.

Countries are caught between ability and resolve to accelerate transitions amidst a global health crisis



THE FORCES FROM WITHIN ARE ALIGNING

Against a troubling backdrop, several forces continue to support the necessary transitions at the domestic level. Civil society is mobilising positive energy and political urgency in countries around the world. Its role is crucial and must be protected, even in times where lockdown measures make it more difficult to have voices heard. Citizen engagement has been a key driving factor in the rapid acceleration of commitments from subnational governments and companies over the past year (NewClimate Institute and Data-Driven EnviroLab, 2020), which can in turn offer confidence and encouragement for enhanced ambition at the national level. Conditional bailouts and green recovery efforts in some countries build on this momentum by further pushing the domestic private sector to embrace new pathways. On these levels, the forces of collective action and collaboration are alive and driving change.

A revival of multilateralism in 2021 must be embraced to address the looming lack of ambition

The ambition mechanism of the Paris Agreement was designed in a way that it is driven by, and relies upon, collaboration, positive peer pressure, and leadership towards a collective goal. In contrast to trends at the subnational level, our insights indicate that the relative absence of global multilateralism in recent years could prove a factor for the potential insufficiency of ambition in this NDC update cycle.

The conditions exist for a potential revival of multilateralism in 2021. The incoming administration of the US has pledged its commitment to re-enter the Paris Agreement in early 2021; other global powers – including the EU and China – have announced significant new climate targets that will raise the attention of others.

The platform for global climate leadership remains vacant and holds more potential for impact and influence than ever before. Bold demonstrations of leadership in the next months could lead to the manifestation of a high ambition coalition, and commitments to higher ambition in turn should be recognised and rewarded. For example, the NAMA Facility,¹³ with a new funding window of EUR 168 million in 2021, has made its preference for ambitious leaders explicitly clear.

We urge Parties not to wait until the next NDC update cycle in 2025 to correct the looming lack of ambition. The global COVID-19 pandemic has brought disruptions to the quality of climate planning processes and NDCs in 2020, but countries are likely to find themselves in a position of enhanced clarity and confidence regarding potential emission trajectories and ambition as they emerge from the crisis in the next years. The revival of active multilateralism will be a prerequisite for ambitious countries to act at this moment, even if outside of the formal NDC update cycles, to communicate new commitments that reflect their highest possible ambition, and to rally and support others to follow their lead.

¹³ The NAMA Facility provides tailor-made support for the implementation of highly ambitious and transformational Nationally Appropriate Mitigation Actions (NAMA) in developing countries. More information at: <https://www.nama-facility.org/>

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