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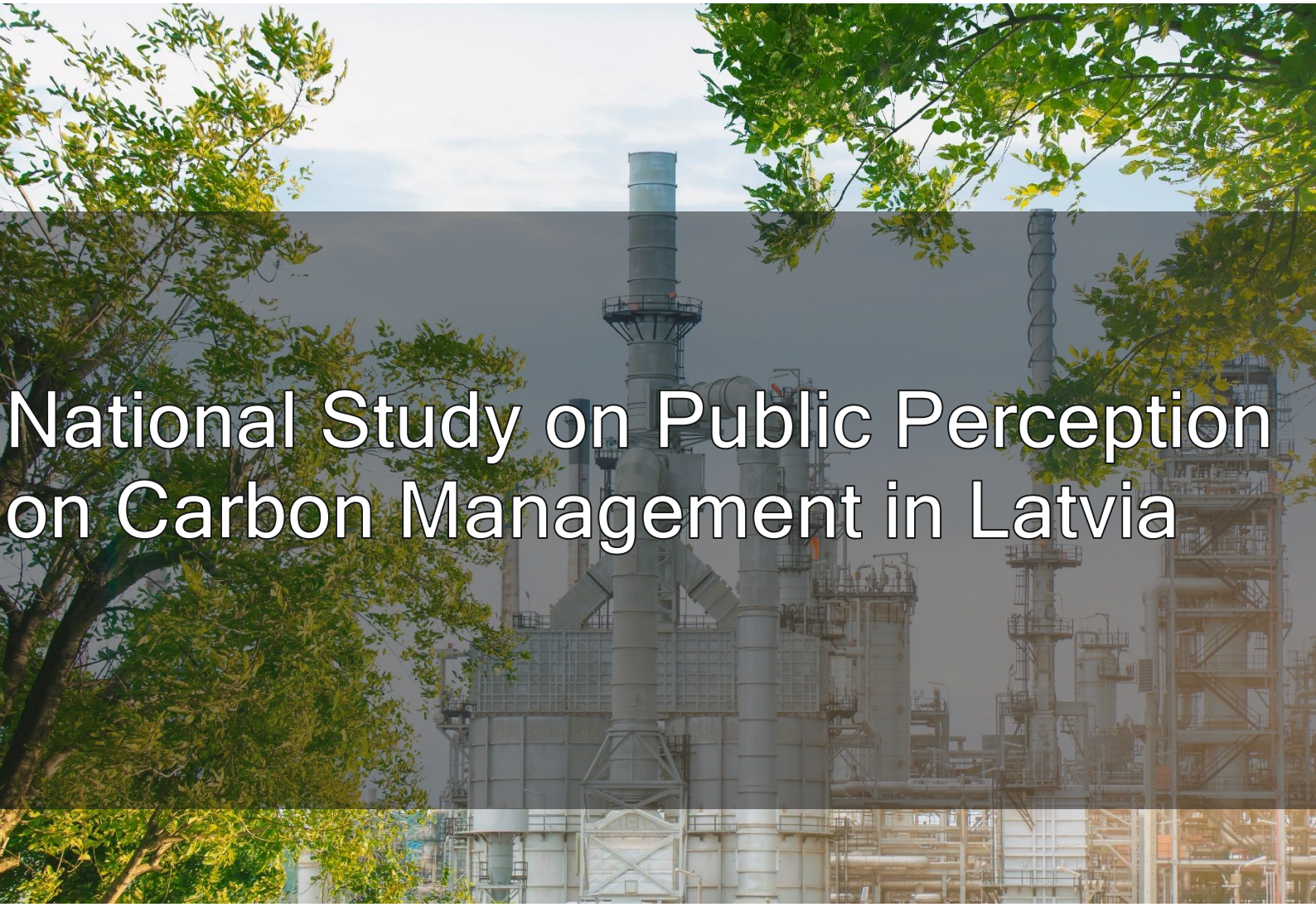

National Study on Public Perception on Carbon Management in Latvia

February 2026

This paper was written as part of the GreenHorizon CEE Project: Industrial Carbon Management for a Sustainable Future in CEE. The project is funded by the European Climate Initiative (EUKI) of the German Federal Ministry of Economic Affairs and Climate Action (BMWK).

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List of abbreviations

CM	Carbon Management
CCS	Carbon Capture and Storage
CCU	Carbon Capture and Usage
CEE	Central and Eastern Europe
NGO	Non-governmental Organisation
CO_2	Carbon Dioxide
EU ETS	The EU Emissions Trading System
CAPEX	Capital Expenditure
OPEX	Operating Expenditure

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1. Executive Summary

This study examines how citizens, local communities, industry representatives, civil society actors, academia and regional public authorities in Latvia perceive and assess CM solutions, with particular emphasis on CCS. CCS is considered a relevant mitigation option for reducing emissions in hard-to-abate industrial sectors—most notably cement production. In the Latvian context, Schwenk Latvia plays a significant socio-economic role at the local, regional, and national levels, making its decarbonisation pathway particularly salient for public debate.

The findings indicate that overall public awareness of CM remains limited. However, this appears to reflect an information gap rather than active opposition. Focus group participants demonstrated interest in the topic and a willingness to engage constructively in discussion. The results suggest that improved understanding of technical aspects—particularly risk management and safety measures—can positively influence public perception and help prevent the kind of strong opposition observed in relation to certain wind energy projects in Latvia.

The feasibility of CM deployment and the level of public acceptance are closely linked to the clarity of institutional roles, the coherence of regulatory procedures, and effective coordination among stakeholders. Clear communication of technical matters, such as leakage prevention and contingency measures, is also essential. Local authorities, in particular, highlighted limitations in technical expertise and stressed the need for practical guidance, capacity-building, and clearer allocation of responsibilities at the national level.

Public acceptance is strongly influenced by how benefits are communicated, perceived, and distributed. For citizens and local authorities, the relevance of CM technologies is assessed primarily in terms of tangible local impacts—such as income generation, employment preservation, industrial competitiveness, knowledge development, and regional economic growth—rather than solely through broader climate mitigation arguments. Correspondingly, perceived risks are associated mainly with cost distribution, the integrity and long-term safety of storage sites, potential increases in energy prices, and the institutional capacity to supervise and monitor storage projects over time.

The study further demonstrates that both civil society and academic stakeholders generally acknowledge the necessity of CM technologies for hard-to-abate sectors. However, differences emerge regarding preferred implementation pathways—particularly the relative prioritisation of CCS versus CCU over different time horizons—and the appropriate financing model, including the balance between public and private funding.

2. Introduction

This study was developed as part of the GreenHorizon CEE Project: Industrial Carbon Management for a Sustainable Future in CEE. While the recently published National Study on Capacity Gaps in Carbon Management in Latvia established the technical and regulatory baseline for CCS in Latvia, this report focuses mainly on the "human factor" - the awareness, acceptance, and concerns of the Latvian public.

This study aims to:

- Quantify Awareness: Measure the baseline understanding of CCS among the general public and specific local communities in regions close to potential CO_2 storage projects, like Saldus and Dobele.
- Identify Drivers of Acceptance: Explore factors (e.g., industrial job preservation, climate compliance) potentially influencing positive perception.
- Uncover Risk Perceptions: List concerns regarding environmental safety, sub-surface integrity, and long-term liability.
- Inform Communication Strategy: Provide evidence-based recommendations for national authorities and industry actors to move beyond the current "undeveloped" state of public discourse.

The analysis is based on a national survey, focus groups, and interviews with relevant stakeholders. These methods provide an integrated picture of public awareness. They also show how different citizens perceive the risks and benefits, and under what conditions these CM could gain social acceptance.

3. Contextual Understanding

In Latvia, the political landscape regarding carbon management reached a major milestone in October 2025, when the national ban on permanent CO_2 storage was officially lifted. That makes particularly relevant time now to understanding public sentiment is this is a prerequisite for successful carbon management project implementation.

Initial analysis indicates that the path to public acceptance faces several documented hurdles:

- Information Vacuum: Public discourse is currently limited and almost exclusively driven by private industry actors rather than neutral state institutions.
- Polarized Political Climate: General climate action in Latvia remains a sensitive topic, often overshadowed by urgent defense spending and heated debates over onshore/offshore wind energy.

- Institutional Silence: There is currently a lack of a designated lead state institution to champion a national CM communication strategy, leaving the public with fragmented information.
- Cautious Optimism: While no significant organized opposition has been observed to date, the general sentiment is "cautiously positive" but highly susceptible to misinformation due to low technical literacy regarding sub-surface resource management.

So far just one local NGO has made a public statement on their view towards carbon management. A prominent Latvian climate NGO Green Liberty published their position on carbon management at the end of October 2025[i], expressing a cautious and critical initial position regarding the development of CCS in Latvia. While the organization acknowledges that CCS may be necessary for specific "hard-to-abate" industrial sectors (like cement production), they strongly advocate for a "hierarchy of climate actions" where CCS is a last resort. They argue that the primary focus of climate policy must remain on reducing emissions at the source through energy efficiency, the transition to renewable energy, and circular economy practices. The NGO emphasize that CCS should only be considered for industries where no other technological alternatives exist to reach zero emissions. It should not be used as an excuse to prolong the use of fossil fuels or delay systemic changes. They raise concerns about the long-term safety of storing CO_2 underground, including potential leakage risks and the impact on groundwater or local ecosystems. They also argue that focusing heavily on CCS might create a false sense of security, distracting from the urgent need to overhaul consumption and production patterns. Green Liberty insists on a transparent decision-making process. Since the Latvian Parliament recently lifted the ban on CO_2 storage (October 2025), they argue that local communities and civil society must be involved in every step of project planning. They advocate for strict legal frameworks to ensure that industrial operators—not the state or taxpayers—carry the long-term financial and environmental liability for storage sites.

4. Methods

In terms of methodological scope, this study applies a mixed-methods approach, combining quantitative and qualitative research techniques. The quantitative component consists of a nationally representative survey, while the qualitative component includes focus group discussions and semi-structured stakeholder interviews.

The proposed methodological framework ensures the inclusion of diverse actors within the CM ecosystem, including civil society representatives, academia, regional policymakers, and industrial stakeholders. This approach enables a comprehensive assessment of public awareness, perceptions, and stakeholder positions, while also capturing contextual nuances and sector-specific perspectives relevant to CM development in Latvia.

To capture a nuanced view of Latvian society, this study employed a mixed-methods approach:

- National Surveys: Representative polling to capture general awareness and sentiment toward carbon management, emphasising carbon capture and storage deployment.
- Focus Groups: Conducting localized sessions in areas (Saldus, Dobele municipalities) designated as potential CO_2 storage sites to understand "Not in My Backyard" dynamics and general view of local stakeholders.
- Targeted Stakeholder Interviews: Engaging with industrial companies (such as Schwenk Latvia, NORSAF), environmental NGOs (Green Liberty), academic institutions (Riga Technical University) and other relevant stakeholders.

All focus groups and interviews were recorded as audio files to support subsequent analysis conducted for this report.

4.1. National Representative Survey

The survey was done from August to September 2025 examining how Latvian citizens understand and evaluate CM technologies. It was conducted by specialised survey company "Latvias Fakti" using 50% online survey (CAWI) with "Latvijas Fakti" web panel and 50% computer assisted telephone interviews (CATI), in total reaching 773 respondents. For the survey questionnaire developed within the project consortium was used to align with the study's analytical objectives. The questionnaire combined socio-demographic items with questions assessing attitudes toward CM technologies and included quality-control measures to ensure data reliability. Computer assisted telephone interviews were done by 10 "Latvijas Fakti" interviewers. The quality of the interviews was checked by 2 "Latvijas Fakti" researchers.

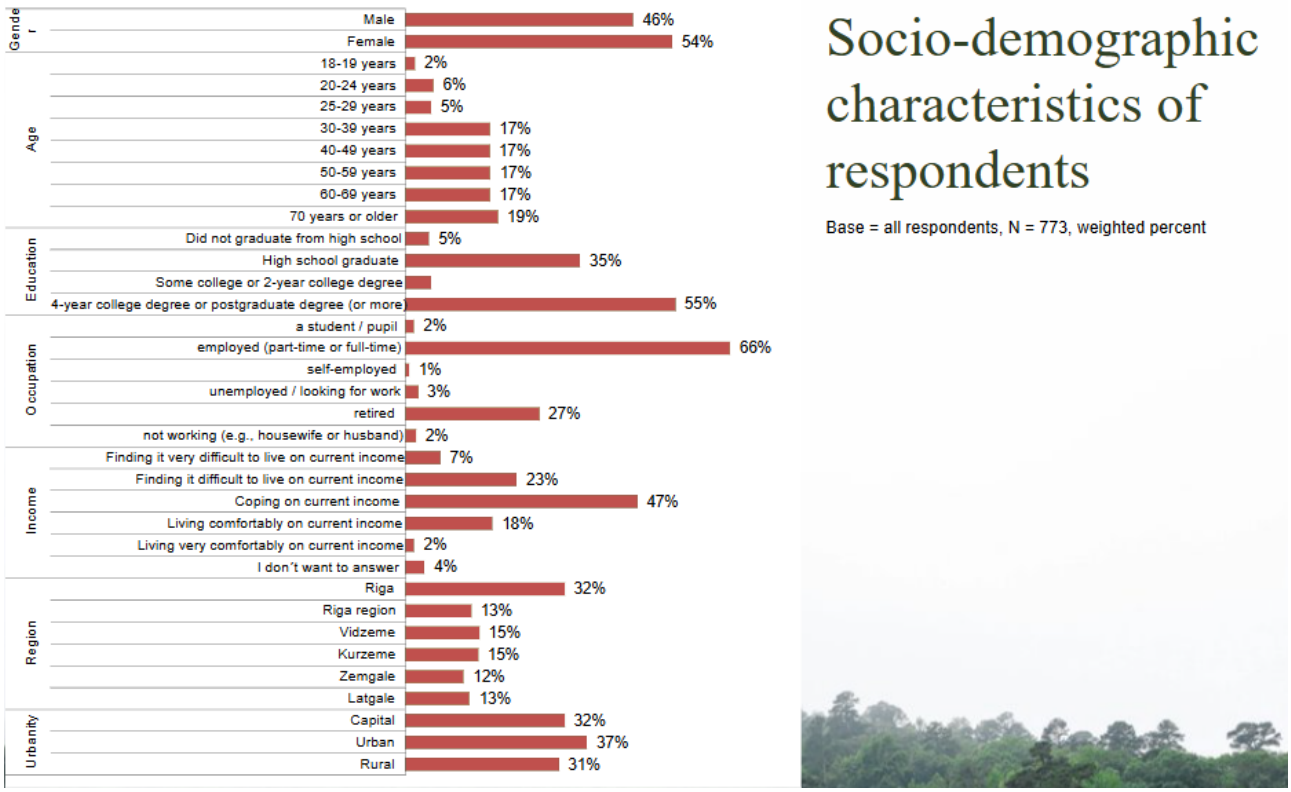

Figure 1: Socio-demographic Characteristics *of Respondents, Latvijas Fakti*

4.2. Focus Groups

Two focus groups were organized in Saldus municipality (on 29 October 2025) and Dobele municipality (on 3 December 2025). Both municipalities are relevant for industrial carbon management project deployment because of the main "hard-to-abate" industrial stakeholder Schwenk Latvia is located in Saldus municipality, and both municipalities has good prospects for establishing CO2 storage locations.

4.3. Individual Interviews

Semi-structured interviews were conducted to capture national nuances in stakeholder perceptions of CM. The interview sample included key actors representing both the supply and demand sides of CM technologies, as well as members of national civil society coalitions.

The interview guide was developed in coordination with other project partners to ensure cross-country comparability, while also being tailored to each interviewee's specific role within the CM value chain. The questions covered several thematic areas, including: (1) the stakeholder's professional background and involvement in CM; (2) general perceptions of CM technologies; (3) views on justice considerations, cost implications, and the distribution

of benefits and burdens; (4) governance and regulatory challenges; and (5) expectations regarding public awareness and social acceptance.

At the conclusion of each interview, participants were invited to raise additional issues they considered relevant or to highlight aspects they believed warranted greater attention. This open-ended component allowed for the identification of context-specific concerns and emerging themes beyond the predefined interview structure.

In this report, the views expressed by the interviewees shall not be considered as the views of Bellona Europa or of the report author who conducted the interviews.

5. Results

This section presents the main findings of the national research on public perceptions of CM in Latvia. The analysis integrates evidence from the national survey, the focus group discussions and the stakeholder interviews, each of which captures a different aspect of how CM technologies are understood and evaluated. These components collectively address public awareness and attitudes, community-level perspectives, and institutional viewpoints.

5.1. Results of National Representative Survey

A nationally representative public opinion survey was conducted in Latvia in August–September 2025 (with 773 respondents to reflect the general population). The survey examined public awareness of carbon management, perceptions of climate change, justice considerations, trust in decision-making actors, acceptance of different carbon management technologies, and preferences for alternative climate change mitigation options.

Overall, public awareness of carbon management is still quite low. Forty percent of respondents reported that they had never heard of carbon management, while a further 36% indicated that they had heard of it but did not know what it was. Only 24% of respondents stated that they knew what carbon management is. Awareness varies by age, with respondents aged 20–24 being substantially more informed: 43% of this group reported knowing what carbon management is. These findings indicate that knowledge about carbon management among the Latvian population is generally insufficient and unevenly distributed across age groups.

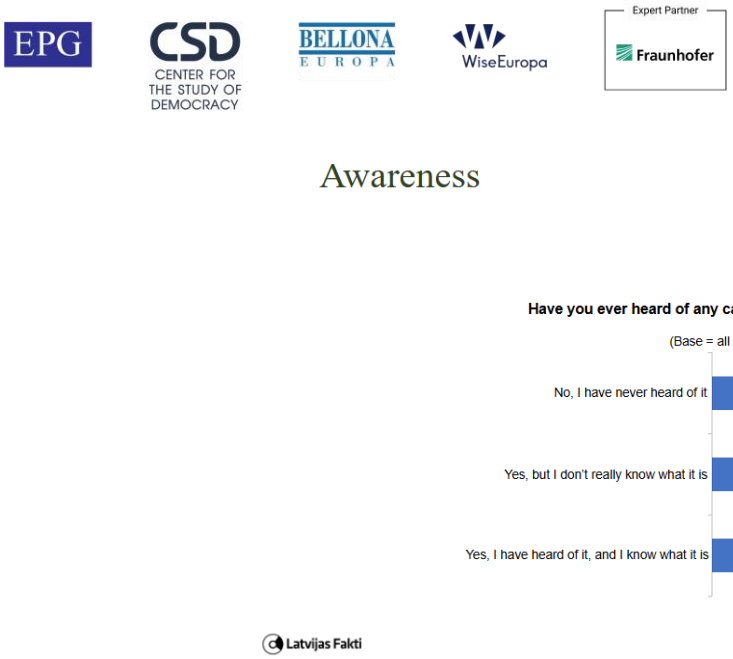

Figure 2: Awareness About Carbon Management Technologies, Latvijas Fakti

Despite limited knowledge of carbon management, concern about climate change is relatively high. Almost half of respondents (45%) consider climate change to be a very severe or severe problem, and only 9% do not regard climate change as a problem at all. Younger adults aged 25–29 are more likely to perceive climate change as severe, while respondents living comfortably on their current income more often describe climate change as (only) a moderate problem. However, this concern does not translate into active engagement, as 90% of respondents reported that they are not actively involved in environmental or sustainability-related activities. This gap between concern and engagement suggests a pronounced attitude–behavior discrepancy.

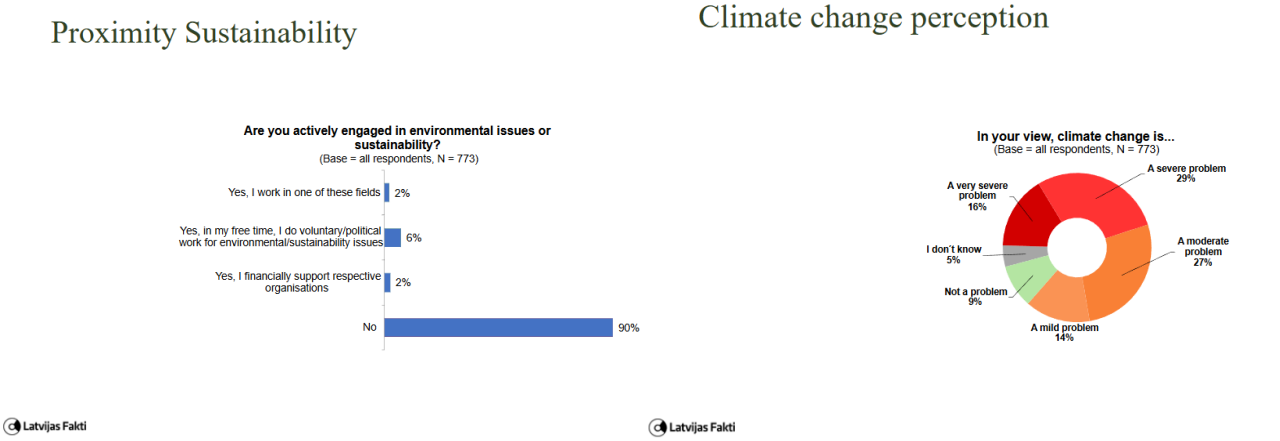

Figure 3: Climate Change Perception and Engagement in Environmental Issues or Sustainability, Latvijas Fakti

Respondents reported strong attachment to their living environment. Three quarters of respondents feel attached to the area where they live, while 69% feel attached to the natural heritage and 63% to the cultural heritage of their area. Respondents who feel strongly

attached to the natural heritage of their area evaluated carbon management slightly more positively than those who do not feel attached, although differences remain modest. This suggests that place attachment does not necessarily lead to outright opposition, but rather to a more reserved or ambivalent assessment.

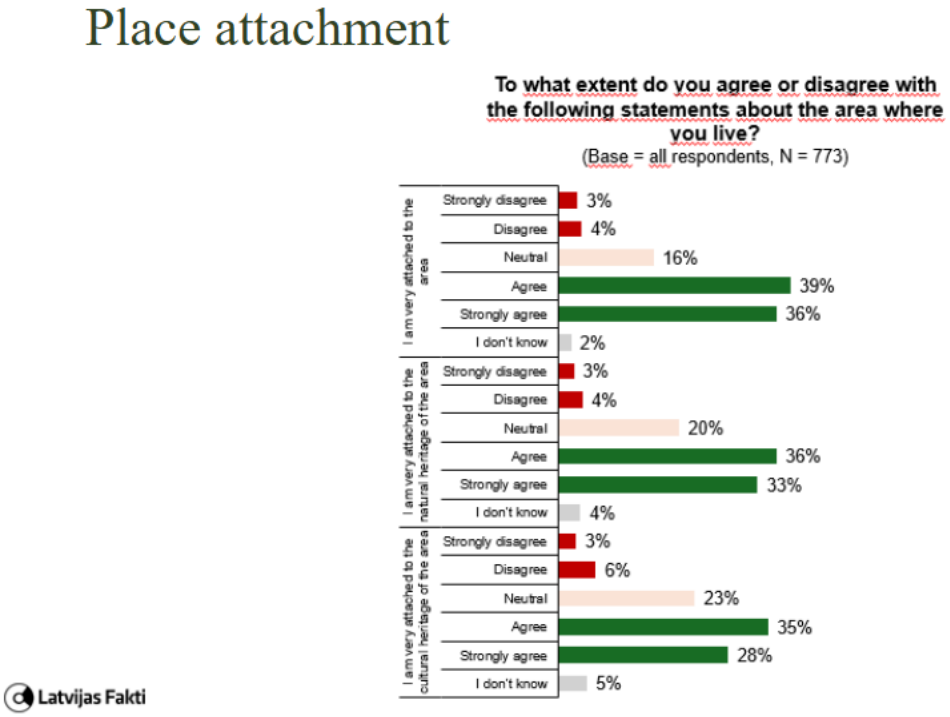

Figure 4: Place Based Attachment, Latvijas Fakti

Perceptions of justice related to potential carbon management projects are characterized by both skepticism and uncertainty. Across all justice dimensions—distributional justice, procedural justice, and recognition of justice - more than 40% of respondents selected neutral response options. At the same time, 40% believe that the distribution of burdens and benefits would not be just, 44% believe decision-making procedures would not be just, and 46% believe that affected groups would not be adequately recognised. These results indicate low confidence in the fairness of potential carbon management implementation, likely compounded by limited information and trust.

Trust in actors involved in carbon management decision-making is uneven and generally limited. Scientists are the most trusted group, receiving an average trust score of 3.6 out of 5, followed by civil society with a moderate trust level of 3.0. All other actors, including national and regional government, industries, NGOs, energy companies, and the European Commission, receive average trust scores below 3. Trust in NGOs is particularly low, with only 20% of respondents indicating trust (4) or complete trust (5). Students and pupils exhibit comparatively higher trust in NGOs, while respondents experiencing financial difficulties and those from the Zemgale region exhibit lower trust.

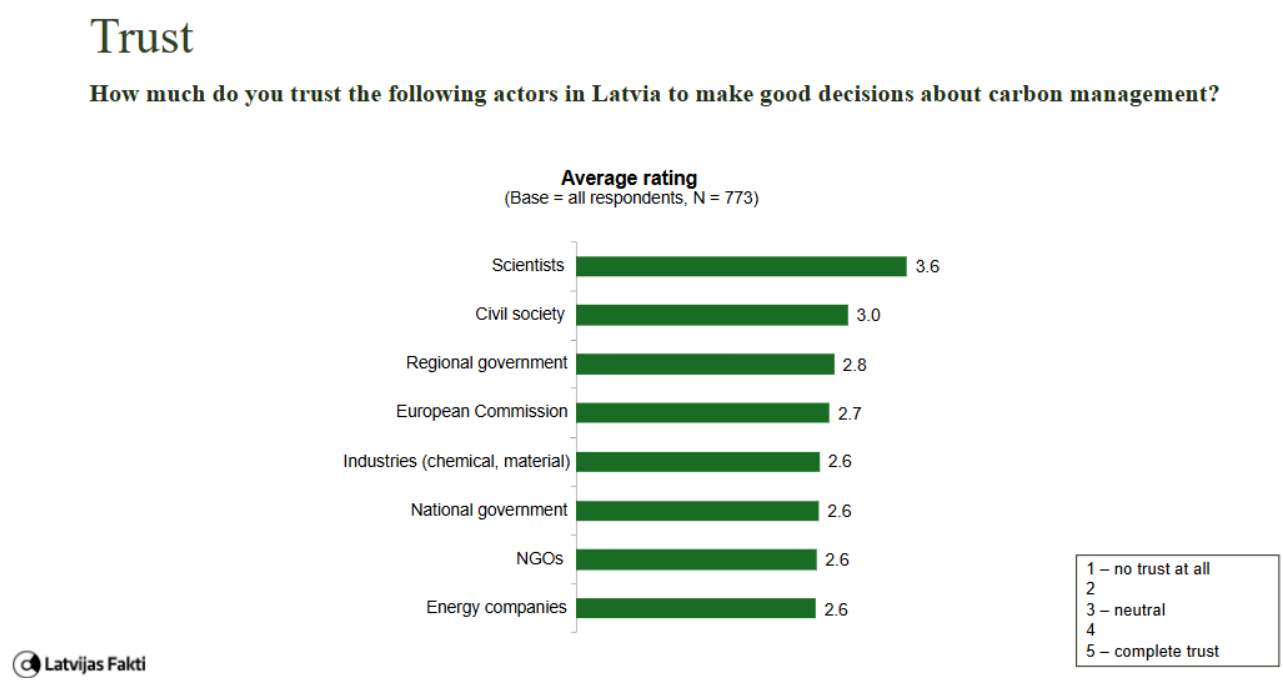

Figure 5: Trust in Different Carbon Management Actors in Latvia, Latvijas Fakti

Expectations regarding the impacts of carbon management are mixed. Respondents anticipate potential benefits such as climate improvements, economic development, and improved governance, but they also expect negative outcomes, particularly increased financial burdens on citizens. Attitudinal statements further reflect ambivalence: while 39% agree that carbon management helps to mitigate climate change and 46% view it as innovative, 41% believe it tampers with nature and 57% remain neutral regarding its safety. Differences across age groups and regions are evident, with younger respondents and those from Zemgale expressing more positive views, while respondents from Kurzeme are more likely to perceive carbon management as interfering with nature.

Acceptance

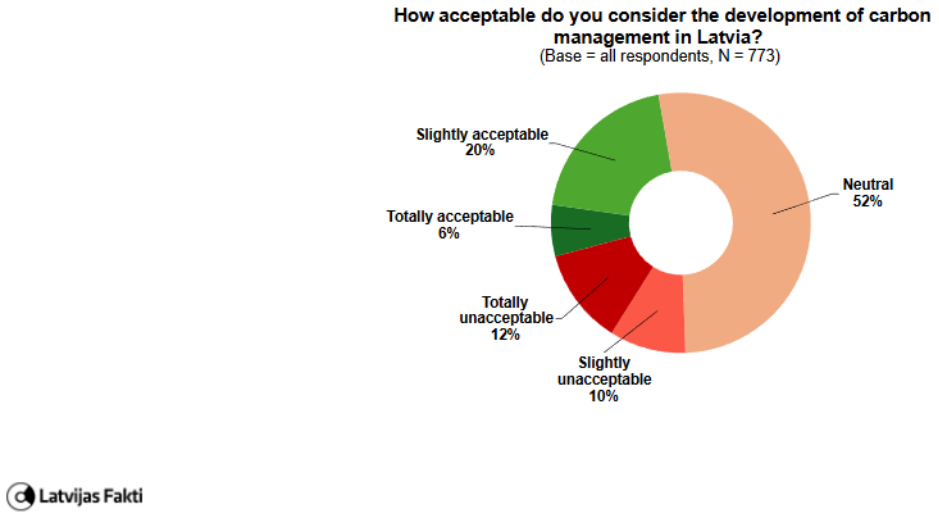

Figure 6: Carbon Management Development Acceptance in Latvia, Latvijas Fakti

Acceptance of carbon management in Latvia is moderate to low. Only 26% of respondents consider its development acceptable, while 22% consider it unacceptable and a majority of 52% express neutral attitudes. Acceptance varies significantly across different carbon management technologies. Notably, respondents who report weak attachment to local natural heritage, as well as those who are uncertain about their attachment, express relatively higher support for carbon storage, suggesting that opposition is partly rooted in place-based environmental concerns.

Respondents indicated that the most acceptable carbon management option would be the development of CO_2 capture at an existing industrial or power plant in their neighbourhood (local acceptance), whereas carbon storage in the neighborhood is the least acceptable. A total of 28% considered CO_2 capture at an existing industrial or power plant in their neighbourhood totally or slightly acceptable, representing the highest level of acceptance among all carbon management technologies presented. The lowest level of support was observed for carbon storage in respondents' neighbourhoods, with 42% of surveyed participants stating that this option would be totally or slightly unacceptable.

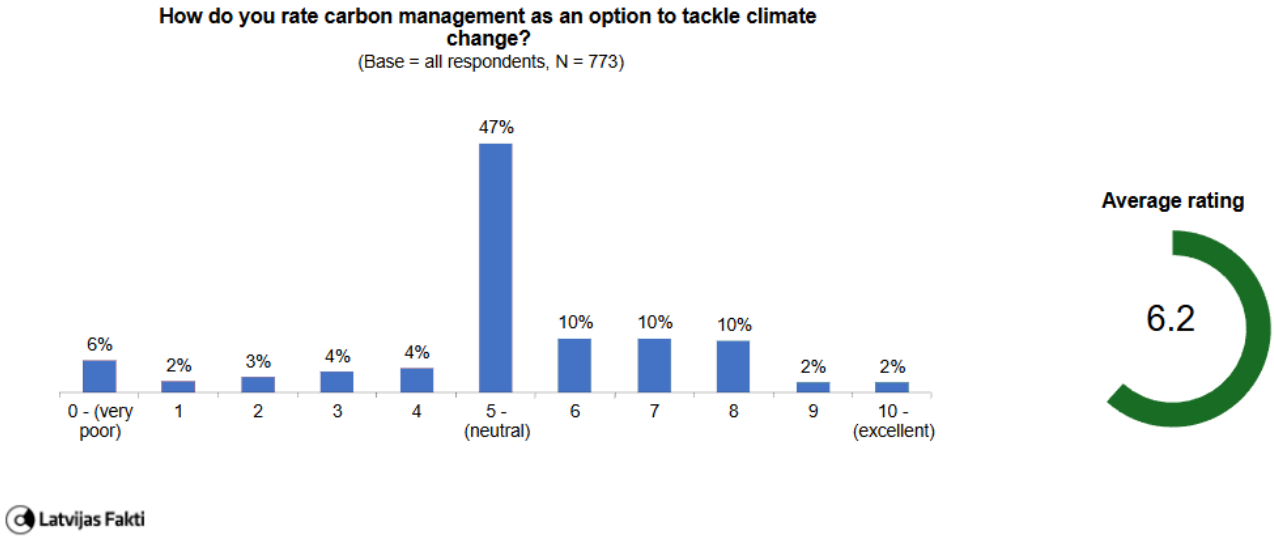

Figure 7: Carbon Management as Climate Change Solving Technology, Latvijas Fakti

When compared to alternative climate change mitigation measures, carbon management is generally viewed as less suitable. Nearly half of respondents (52%) rated carbon management as a neutral option for tackling climate change. Reforestation and afforestation are considered the most appropriate options, receiving the highest average rating among all alternatives. Preferences for alternatives vary by socio-demographic characteristics, with younger respondents favoring wind energy, older and non-working respondents favoring lifestyle changes. Overall, nature-based and renewable energy solutions are preferred over carbon management technologies.

5.2. Results of Focus Groups

An important criterion in the selection of focus group locations was to conduct discussions in regions where key elements of the CM value chain in Latvia could potentially be implemented. The selected regions were chosen based on two main factors: the potential for geological CO_2 storage and their proximity to Schwenk Latvia, which in August 2025 launched a CO_2 capture pilot project at its cement plant. This marked a significant step towards establishing a fully operational CM value chain by 2030, with the stated ambition to capture up to 800,000 tonnes of CO_2 annually at its facility in Brocēni municipality.

Both focus group sessions began with a presentation by Jānis Volberts, Baltics Manager at Bellona Europa, who provided an overview of carbon management developments, a locally tailored explanation of relevant technologies and policy frameworks, and an introduction to

the rationale, planned activities, and timeline of the GreenHorizon CEE project. The presentation served to establish a common baseline of understanding and to frame the subsequent discussions.

The first focus group was held on 29 October 2025 in Saldus municipality (that includes the Brocēni and Blīdene areas). The session was conducted in person at the municipal premises and included seven participants aged between 41 and 64. The group comprised municipal officials, local entrepreneurs, an NGO representative, and locally active citizens. All participants engaged actively in the discussion, raising questions and highlighting areas of uncertainty. While participants were initially reserved, their attitudes became more positive as the discussion progressed. By the end of the session, participants expressed support for potential local CCS projects, particularly in light of perceived benefits such as knowledge development, additional municipal revenues, economic spill-over effects, and the continued operation of a key regional employer with an improved climate footprint.

The second focus group took place on 3 December 2025 in Dobele municipality. This location was selected due to its geographical relevance and the presence of the most extensively studied potential geological storage sites. The session included 11 participants aged between 31 and 70, among them the mayor, senior municipal management representatives, entrepreneurs, municipal department experts, and locally active citizens. Although some participants were initially less engaged, participation increased as the discussion developed and the topic became clearer. Similar to the first session, participants were initially reserved; however, unlike in Saldus municipality, concerns remained more prominent throughout the discussion. Participants expressed particular apprehension regarding potential impacts on agricultural land and households located above prospective storage sites. Key concerns included possible effects on groundwater, private wells, property values, and other long-term implications associated with CO_2 storage activities.

5.3. Results of Interviews with Key Stakeholders

As part of the in-depth research on public perceptions regarding the implementation of the CM in Latvia, seven individual semi-structured interviews were conducted with key stakeholders between October and December 2025. The majority of participants represented the energy industry, including Schwenk Latvia, Latvenergo, and NORSAF. The sample also included one potential storage operator, one consultancy firm previously engaged in CM-related work in Latvia, one climate-focused non-governmental organisation, and one university with significant involvement in CM-related research and policy discussions.

Of the seven participants, three were female and four were male. All interviews were conducted online and lasted approximately 45–60 minutes.

During the interviews, industry stakeholders frequently emphasised practical implementation constraints and competitiveness considerations. The representative of the non-governmental organisation highlighted issues related to climate integrity and socio-economic fairness. The academic participant generally contributed longer-term, technical, and system-level perspectives on the potential development and implications of the CM in Latvia.

5.3.1. Results of Interviews with Industry

Among the three industrial stakeholders interviewed, there was a consistently high level of familiarity with CM-related technologies. All indicated that they have considered the application of such technologies within their respective operations. For some stakeholders, CM constitutes the primary decarbonisation pathway, and they are proactively pursuing its deployment in a manner aligned with their corporate strategies. These actors are actively engaged in pilot projects and stakeholder communication activities, including public events aimed at demonstrating technological feasibility and explaining the need for coordinated action across the entire value chain. For others, CM represents one of several possible decarbonisation or production pathways, with its implementation contingent upon technical feasibility and broader strategic considerations.

Industry representatives generally view CM as essential not only for environmental protection but also for maintaining economic activity and long-term competitiveness. Most respondents consider both CO_2 storage and utilisation to be viable options, depending on market development and the availability of demand for CO_2-based products, such as synthetic fuels. Investment decisions related to CM deployment are strongly influenced by capital and operational expenditure (CAPEX and OPEX), as well as projected EU ETS prices. Stakeholders expect that CM implementation would generate direct cost savings over time and ensure compliance with evolving regulatory requirements. Several interviewees emphasised that CM is perceived not merely as an emissions reduction measure but as a strategic instrument to safeguard competitiveness beyond 2030, particularly in local and Baltic Sea Region export markets.

Some actors expressed a clear readiness to advance CCS-related activities, noting that pilot installations for CO_2 capture have already been integrated into their production processes. However, even these comparatively advanced stakeholders highlighted that administrative burdens and slow legislative processes constrain progress, particularly in relation to preparatory activities required for full-scale CM deployment. All respondents acknowledged the presence of implementation risks, describing CM as a complex undertaking involving regulatory, financial, and social uncertainties. Limited institutional capacity was identified as one of the most significant risks, particularly with regard to the ability of public authorities to provide timely regulatory frameworks and coordinated support for project development.

Industry representatives underscored the substantial environmental value of reducing emissions directly at the source. At the same time, they stressed the broader socio-

economic and industrial benefits of enabling the continued operation of hard-to-abate sectors, which are considered essential for regional and national employment, economic output, and income generation.

5.3.2. Results of Interviews with Academia

Although the interviewee emphasised that carbon management is essential for Latvia's transition towards climate neutrality, the interviewee's position regarding the relative roles of CCS and CCU was nuanced. In the longer term, the interviewee expressed a preference for expanding carbon utilisation pathways, however stressing that there still is place for CCS considering the large volumes to be captured from industries, such as cement production.

With respect to CCS, the interviewee noted that many of the available studies on storage potential in Latvia are largely theoretical and, in some cases, outdated. As such, they were considered insufficient to provide reliable assessments of geological storage capacity and the most promising locations for long-term CO_2 storage. This uncertainty was seen as a limiting factor for strategic decision-making.

While CCS has important place for midterm industrial decabonisation, greater emphasis, in the interviewee's view, should be placed on the utilisation of captured CO_2, with the aim of fostering a broader and more diversified market for CO_2-based products. The development of CCU pathways was described as an opportunity to create added value by transforming CO_2 into new commercial products, thereby strengthening economic incentives for carbon capture.

The interviewee also highlighted the potential risk of a "storage lock-in" effect, whereby prioritising CCS could slow down or crowd out the development of CCU solutions. Furthermore, transport infrastructure costs were identified as a potential bottleneck, particularly if domestic storage capacity is not available when industrial demand for CO_2 management emerges. In this context, the interviewee stressed the importance of avoiding delays in expanding the market for CO_2-derived products, arguing that time is a critical factor in ensuring a balanced and forward-looking carbon management strategy.

5.3.3. Results of Interviews with Civil Society

The civil society interviewee demonstrated a moderate level of familiarity with CM technologies. The interviewee's knowledge was sufficient to follow public debates; however, it was largely shaped by, and aligned with, the position of an EU-level umbrella organisation that more closely monitors and develops policy positions on CM.

The interviewee consistently emphasised that CM technologies should be applied only where strictly necessary, particularly in hard-to-abate sectors where no viable alternatives currently exist. The interviewee cautioned against the potential misuse of such technologies to prolong fossil fuel-based activities. From this perspective, public funding should prioritise renewable energy, reforestation, energy efficiency, and circular economy measures, while

CM projects should, in principle, be financed exclusively through private sources. The interviewee also highlighted the need for clearly defined evaluation criteria and strict conditions under which CM projects would be permitted to proceed.

Overall, the civil society perspective was characterised by a precautionary approach, with a strong focus on governance frameworks and potential risks. Although the representative acknowledged that CM technologies can support decarbonisation in sectors with limited alternatives—offering a transitional pathway to reduce emissions without immediately discontinuing essential industrial activities—the emphasis was predominantly placed on associated risks. These risks were described as environmental, economic, and institutional in nature, as well as systemic, particularly in relation to the possibility that CM deployment could delay or weaken the broader energy transition.

6. Conclusion

The study results indicate that public opinion on CM in Latvia is characterised by relatively low to moderate levels of knowledge, widespread neutrality, and moderate concern about climate change, combined with comparatively low levels of institutional trust. Rather than strong polarisation, public attitudes appear to be shaped by uncertainty and limited access to clear and accessible information for both specialised and general audiences. These findings suggest that future public acceptance of CM may be highly sensitive to improvements in public information, transparent and equitable governance arrangements, and sustained efforts to strengthen trust in decision-making institutions.

Key stakeholder groups broadly agree that CM has the potential to support industrial competitiveness, preserve employment, and attract new investment. At the community level, perceptions of CM are primarily shaped by its tangible local impacts, including job creation, economic revitalisation, and regional development. Public acceptance tends to increase when benefits are visible, concrete, and equitably distributed.

While industry representatives view CM as essential for maintaining competitiveness and ensuring regulatory compliance, civil society actors emphasise fairness and climate integrity. Academic stakeholders consider CM to be an indispensable component of achieving climate neutrality. Despite these differing priorities, there is broad consensus that successful CM deployment will require strengthened governance frameworks, long-term strategic planning, and coordinated, transparent communication.

This report provides the most up-to-date overview of public awareness and social acceptance of CM technologies in Latvia. It may therefore serve as a benchmark for all stakeholders involved in CM deployment, including local, regional, and national authorities, business actors, non-governmental organisations, and academic institutions. Its purpose has been to equip stakeholders with evidence-based insights into current public perceptions of CM in Latvia, thereby supporting more informed decision-making and fostering

constructive social dialogue—an essential precondition for the successful implementation of CM projects.

The findings will also inform the planning of subsequent activities under the EUKI GreenHorizon CEE project. By 2027, the project foresees a series of meetings and workshops with representatives of public authorities and local communities. The results presented in this report will provide a foundation for developing context-specific materials tailored to regions with high CM deployment potential and for supporting public authorities in addressing the social acceptance dimensions and context-specific nuances identified in Latvia.

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