

# Morning Opinion Survey Results

Jacqueline Sharp

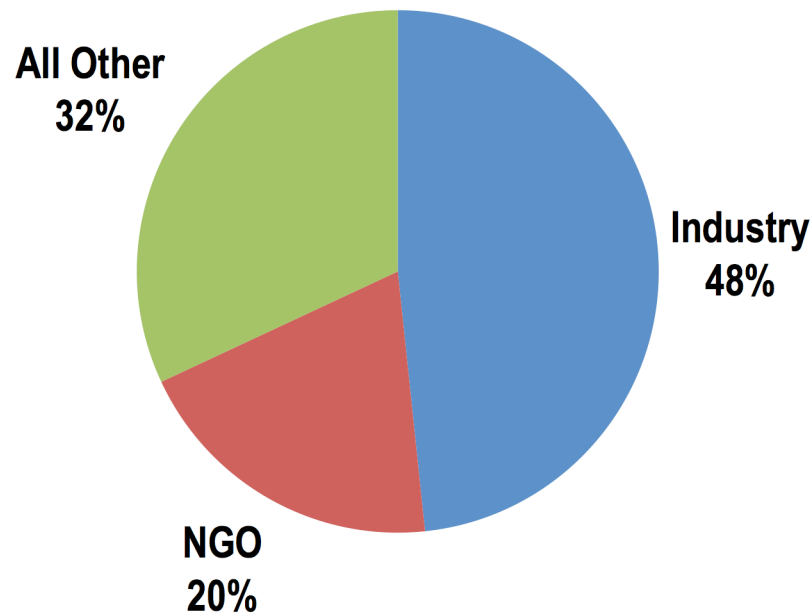


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November 10, 2008

# Participant Profile



We received 91 surveys  
this morning

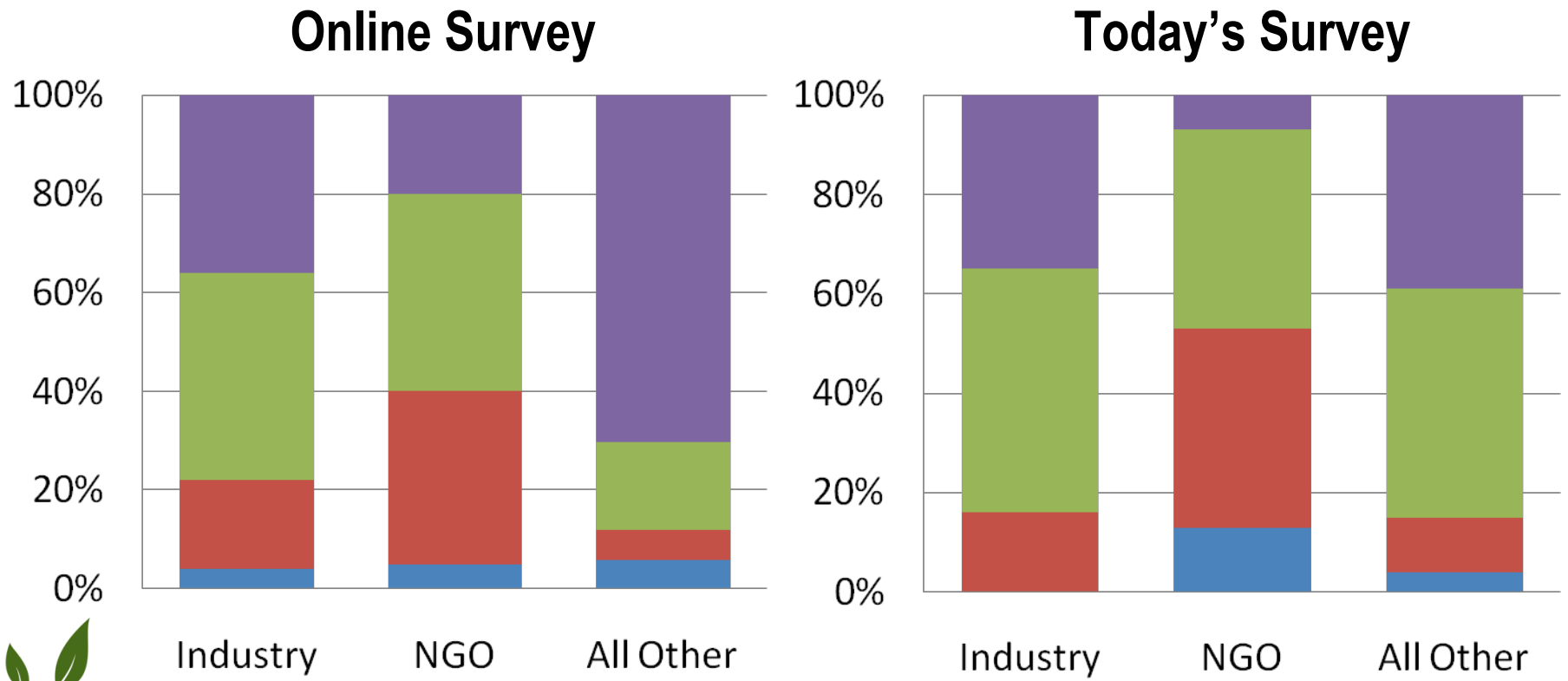
Government, Academia, and  
Other respondents are  
combined in the analysis



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# What Share of Canada's GHG Emission Reductions will be Met with CCS?



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- Less than 5 %
- 15 – 29 %
- 5 – 14 %
- More than 30 %

# Relative Concern About CCS Development Issues

	<b>Industry</b>	<b>NGO</b>	<b>All Other</b>
Highest Concern	Gov't policy certainty Cost Effectiveness	Gov't policy certainty Cost Effectiveness	Gov't policy certainty Cost Effectiveness
Lowest Concern	Effectiveness Availability of infrastructure	Effectiveness Availability of infrastructure	Effectiveness Availability of infrastructure



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# Relative Importance of Policy Evaluation Criteria

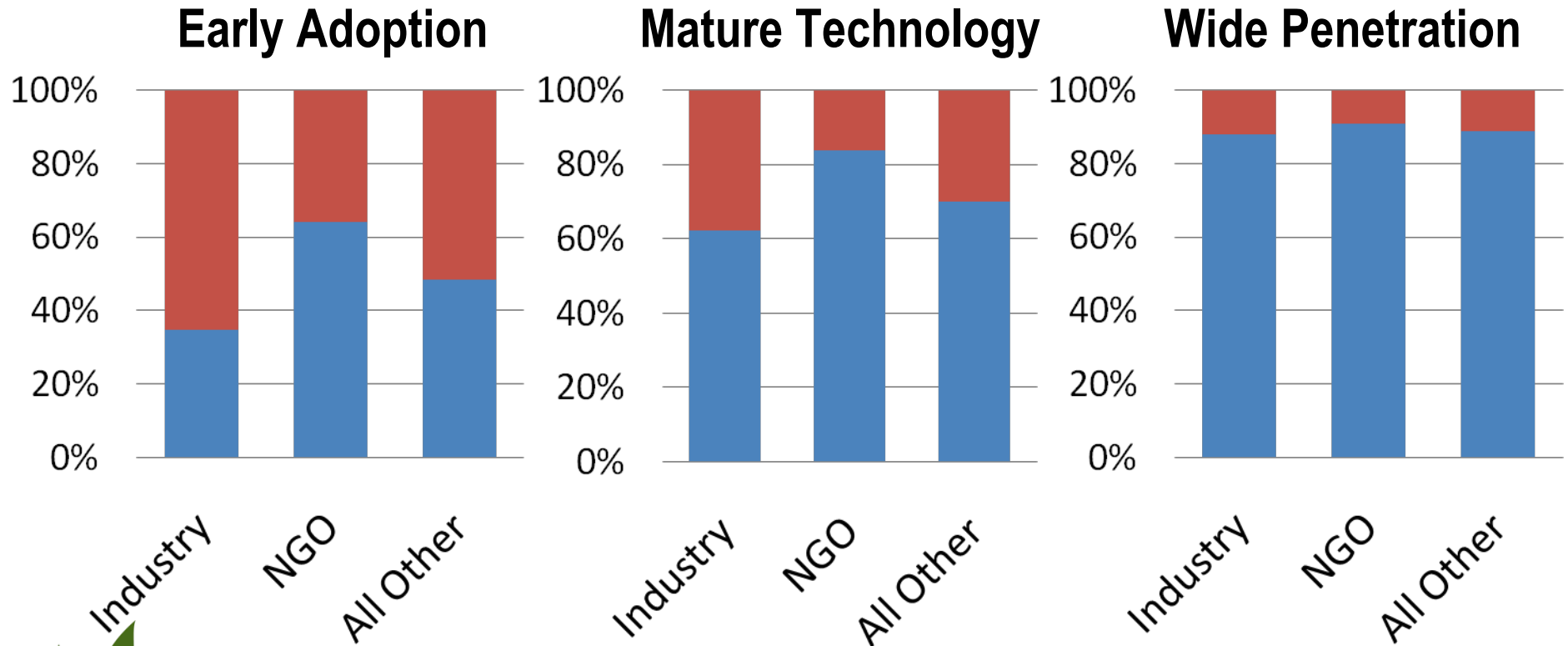
	<b>Industry</b>	<b>NGO</b>	<b>All Other</b>
Most Important	<ul style="list-style-type: none"> <li>Policy predictability</li> <li>Rapid deployment of CCS</li> </ul>	<ul style="list-style-type: none"> <li>Rapid deployment of CCS</li> <li>Protect the environment</li> </ul>	<ul style="list-style-type: none"> <li>Policy predictability</li> <li>Rapid deployment of CCS</li> </ul>
Least Important	<ul style="list-style-type: none"> <li>Stimulate low-carbon tech</li> <li>Stimulate innovation</li> </ul>	<ul style="list-style-type: none"> <li>Stimulate innovation</li> <li>Administrative simplicity</li> </ul>	<ul style="list-style-type: none"> <li>Stimulate low-carbon tech</li> <li>Administrative simplicity</li> </ul>



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# How to Close the Cost Gap for CCS Implementation



 **GHG Price Signal**  
 **Public Support**



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# Preferences among Policy Options for Pricing GHG Emissions

	<b>Industry</b>	<b>NGO</b>	<b>All Other</b>
Most Preferred	Carbon tax w/ reinvestment	Carbon tax w/ reinvestment	Carbon tax w/ reinvestment
	Intensity-based regulations	Absolute cap and trade	Absolute cap and trade
Least Preferred	Absolute cap and trade	Intensity-based regulations	Intensity-based regulations
	Regulated requirement	Regulated requirement	Regulated requirement



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# Preferences among Policy Options to Provide Public Funding for CCS

	<b>Industry</b>	<b>NGO</b>	<b>All Other</b>
Most Preferred	Direct public subsidy	Public infrastructure invest.	Direct public subsidy
	Guaranteed credit value	Guaranteed credit value	Public infrastructure invest.
Least Preferred	Public infrastructure invest.	Royalty reductions	Gov't purchase of credits
	Royalty reductions	Direct public subsidy	Guaranteed credit value



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8 respondents, mostly from the NGO sector, selected “No Public Funding”



# Relative Importance of Long-term Liability Issues

	<b>Industry</b>	<b>NGO</b>	<b>All Other</b>
Most Important	Clear definition Point of liability transfer	How costs are covered Clear definition	Clear definition Party responsible
Least Important	How costs are covered	Point of liability transfer Party responsible	How costs are covered Point of liability transfer



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# Areas of Agreement

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- **CCS Issues:** All agree that gov`t policy certainty / stability and cost effectiveness are very important, effectiveness and infrastructure are less important
- **Evaluation criteria:** All agree that ability to promote deployment of CCS is important
- **GHG price signal:** Carbon tax with reinvestment is favoured, regulated CCS requirement is disliked by all
- **Liability issues:** All sectors agree that a clear definition is the most important outstanding issue



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# Areas of Disagreement

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- **GHG Price Signal:** Intensity based regulations favoured by industry, not by other sectors. Absolute cap and trade favoured by all sectors but industry
- **Liability issues:** The point at which liability transfers to government is very important to industry, but low importance to other sectors.
- **Liability issues:** How liability costs are covered is a top issue for NGOs, low for other sectors.



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# For more information

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