

The War in Ukraine and EU Climate Leadership

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ABSTRACT

Prior to Russia's full-scale invasion of Ukraine in late February 2022, EU deliberations on the 'Fit-for-55' climate/energy package embedded in the European Green Deal were already well underway. The energy transition had also begun to gain traction towards more renewables, energy saving and emissions reduction. The invasion caused an energy-political earthquake that threatened to split the EU, slowing down or weakening these ongoing processes. This study finds that the invasion 1) strengthened rather than weakened the 'Fit for 55' package; 2) accelerated rather than slowed the ongoing energy transition; and 3) may have strengthened the EU's potential for climate leadership-by-example. However, the further consequences are highly uncertain as the EU shifts from crisis response to long-term governance of climate and energy policy implementation.

KEYWORDS

European Union, climate, leadership, Ukraine war, Fit for 55, Paris Agreement

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INTRODUCTION

Since the 1990s, the EU has aimed to play a leadership-by-example role in international climate cooperation, with increasingly ambitious targets and policy instruments. From 2009, this has involved packages of policies aimed at reducing greenhouse gas (GHG) emissions, improving energy efficiency and increasing the production of renewable energy to replace fossil fuels and promote net-zero industries. By 2020, helped by the lockdowns due to COVID-19, the EU had met its 20-20-20 targets by a good margin: GHG emissions were 31% lower than in 1990, energy consumption had been reduced by 20% and the share of renewable energy consumption had increased to 21% ^(EEA 2021).

In 2021, the European Commission proposed a comprehensive new climate/energy policy package for achieving the objective of a 55% net emissions reduction by 2030 (compared to 1990). This target also served as the EU's updated Nationally Determined Contribution (NDC) to the Paris Agreement. The 'Fit-for-55' package formed part of the European Green Deal (EGD) on wider sustainability, with industrial and societal ambitions of serving as a steppingstone towards the net-zero by 2050 target included in the EU Climate Law. When Russia – the largest energy supplier to the EU – invaded Ukraine on 24 February 2022, EU policymaking on the 14 legislative acts included in the 'Fit-for-55' package was underway but had not yet led to any results. In addition to causing deep suffering and destruction in Ukraine, the Russia invasion unleashed an energy-political earthquake that threatened to divide the EU, as it could possibly place energy security and affordability before sustainability concerns.

Externally, EU division could also further harm the Union's capacity to speak with 'one voice' in international climate cooperation. Internal political tensions among the member-states had represented a real risk of EU division during the 2015 Paris Conference. Poland, which had initially threatened to torpedo the 21st Conference of the Parties (COP 21), changed its stance, which was conditional on an outcome that would allow for a continuation of coal as a key energy source ^(ANDRESEN ET AL. 2016). In the end, the EU managed to maintain considerable political unity throughout the Paris Conference, helping to build a 'high-ambition' coalition. However,

EU-internal divisions were also evident at COP 26 in Glasgow in November 2021 – three months before the Russian invasion (VOGLER 2023).

Drawing on public reports, research papers and media articles, this paper explores the consequences of the Russian invasion of Ukraine for deliberations on key 'Fit-for-55' files, COP 27 in Sharm-El-Sheikh and the European energy transition. If the EU were to lose its climate/energy policy momentum, its potential for external climate leadership might be significantly reduced. EU climate leadership has received significant scholarly attention, but with only a limited focus on the exogenous conditions for change (SEE, E.G., SCHREURS – TIBERGHIEU 2007; PARKER – KARLSSON 2010; DUPONT – OBERTHÜR 2015; TORNEY 2015; WURZEL ET AL. 2017). Drawing on the literatures on leadership and exogenous shocks and crises, this paper explores changes in the EU climate policy, energy transition and leadership aspirations.

LEADERSHIP AND EXOGENOUS SHOCKS

Leadership in international cooperation can be defined as an asymmetrical relationship of influence, where one actor guides or directs the behaviour of others towards a certain goal over a certain time-period (UNDERDAL 1991: 140). In international climate policy, the EU stands as an identifiable and purposive actor with the necessary capabilities to act as a leader (VOGLER 2017). Also its component parts – the EU institutions, member-states and societal actors – may play a leadership role (WURZEL ET AL. 2017; SKJÆRSETH 2017).

Much of the literature on leadership has been concerned with categorizing different types and styles of leadership (E.G. YOUNG 1991; UNDERDAL 1991; BARNES 2010; WURZEL ET AL. 2017). In addition to leadership by example, whereby actors can show the way for others, the EU may exercise other types of leadership. For one thing, it can act as an entrepreneurial leader by using its resources to formulate and frame new policy ideas, mobilize support, and craft consensus. Entrepreneurial leadership entails identifying the appropriate means, and guiding others toward a common goal. This requires diplomatic, negotiation and bargaining skills – and such skills were enhanced since 2011 through the diplomatic service of the EU: the European External Action Service (BIEDENKOPF – PETRI 2021). Second, the EU may act as an intellectual or cognitive leader by shaping and influencing the interests and preferences needed for changing the status quo through ideas. Policies can

be accelerated by intellectual leadership particularly in issue-areas where scientists and technical experts play a central role, as with climate policy (DREGER 2014). Third, structural leadership requires some type of power or force based on material resources, such as economic or military strength. The world's largest internal market – the Single European Market – gives the EU economic power to restrict access to or tax products that fail to meet minimum climate or other environmental standards, as exemplified by the recently adopted Carbon Border Adjustment Mechanism (CBAM, see below). These types of leadership are not mutually exclusive: indeed, they may prove particularly effective in combination. However, they all require sufficient internal and external unity.

Theories of exogenous shocks build largely on the insight that established institutions and policies are inherently hard to change (POWELL – DIMAGGIO 1991; SKOCPOL – PIERSON 2002). Path dependency, and its self-reinforcing mechanisms like increasing returns and policy feedback, are expected to cause a bias towards reproduction and stability (NORTH 1990; PIERSON 2004). Changing an institutionalized cooperation is difficult, especially when collective norms, behavioural regularities and convergent expectations have evolved over time. However, exogenous shocks can be potentially powerful disrupters of such stability, providing moments of openness through 'critical junctures' and windows of opportunity for rapid policy innovation – which may lead to major changes in the status quo (CAPOCCIA 2015; RIXEN ET AL. 2016). 'Critical junctures' can be understood as situations of uncertainty in which decisions of pivotal actors are decisive for selecting one path of institutional development over other possible paths. However, the direction of change is essentially an empirical question. EU decision-making powers are dispersed among the 27 member-states and the EU institutions: the resultant wide range of pivotal actors may lead to 'joint decision traps' (SCHARPF 1988), or push EU agreements toward the lowest common denominator (SKJÆRSETH ET AL. 2016). This often results in lengthy and difficult negotiations, complex compromises, and sub-optimal policy solutions (WURZEL ET AL. 2017).

Lower ambition may ensue if the external shocks that establish collective EU norms for dealing with climate change through, e.g., effort-sharing lead to fewer behavioural regularities through greater flexibility, in turn resulting in more divergent expectations toward alternative long-term

low-carbon pathways. This could lead to a ‘push-back correction’ – the dismantling and erosion of previous policies (BURNS ET AL. 2020). Conversely, higher ambitions may result if the shock induces reinforcement of norms for effort sharing, more behavioural regularities through less flexibility, and more convergent expectations concerning alternative low-carbon pathways for 2030 and beyond. The shock may also pass more swiftly than expected, with limited effect on political dynamics – thus reinforcing the status quo.

EU CLIMATE POLICY, ENERGY TRANSITION AND LEADERSHIP

In December 2019, the European Commission launched the EGD as a green-growth strategy, emphasizing innovation, new ‘green’ jobs, and sustainable transformation (EUROPEAN COMMISSION 2019). The EGD aims for no net emissions of GHGs, economic growth decoupled from resource use, and a socially ‘just’ transition geographically and individually, all of which are to be achieved by 2050 (SKJÆRSETH 2021). It also aims to strengthen the EU’s ambitions to be a global climate leader. It is specifically noted in the EGD roadmap that the “*EU [is] to continue to lead the international climate and biodiversity negotiations, further strengthening the international policy framework*” (EUROPEAN COMMISSION 2019, ANNEX 4).

In autumn 2021, when the EU deliberations on the climate/energy part of the EGD – the ‘Fit-for-55’ package – started, Russian gas supplies to Europe were falling, as Gazprom did not fill up gas storages as expected.¹ Russia was the largest energy supplier to the EU, accounting for 36% of its natural gas, 45% of its coal and 25% of its oil imports (EUROSTAT 2022A). After the invasion, gas prices increased more than ten times compared to 2020 (as of August 2022), contributing to a crunch in the EU electricity markets. The stepwise reduction of Russian gas exports in 2022 and the sharp increase in energy prices for households and businesses caused economic and social problems that threaten to divide the EU (BORRELL 2023). This might also spill over to the ‘Fit for 55’ deliberations, which would result in elevating energy security concerns while pulling sustainability down the EU agenda.

Two weeks after the invasion, the Versailles Declaration by the 27 EU leaders demanded that Russia withdraw from Ukraine. To sever the EU dependence on Russian fossil fuels, the Declaration called for diversifying

energy supplies away from Russia, increasing gas storage, speeding up renewables and improving energy efficiency. In May 2022, these priorities culminated with the REPowerEU Plan for making the EU independent of Russian fossil fuels. The aims are to save energy, produce more renewable energy, and diversify EU energy supplies, including through massive imports of hydrogen. The previous goal of 10 million tons of annual hydrogen production within the EU is to be complemented by the goal of 10 million tons of annual hydrogen imports to be achieved by 2030 in order to meet the EU's climate target (SKJÆRSETH ET AL. 2023).

The Commission proposed strengthening several short- and medium-term measures on energy efficiency and renewable energy compared to its initial 'Fit-for-55' proposals. The renewable energy consumption target would be increased from 40% to 45%. This would also include new legislation for more rapid granting of permits for solar and wind power in dedicated 'go-to areas' with low environmental risk (EUROPEAN COMMISSION 2022). The European Parliament supported the 45% target, whereas a majority of the member states in the Council wanted to retain the 40% target. In March 2023, the European Parliament and the Council reached a compromise on a provisional agreement on the Renewable Energy Directive (RED): the EU's binding renewable energy target for 2030 would be raised to a minimum of 42.5%, but with the aim of (voluntarily) reaching 45% by the same year. The Directive also included easier and faster permissions procedures.

For energy savings, new ambitions for the EU-wide energy efficiency target were proposed, as it was raised from 9% to 13% by 2030. As for the RED, the Council refused to support the Commission's REPower plan proposal, while the European Parliament pushed for a 14.5% energy efficiency target (ENDS 2023). A provisional agreement was reached: to reduce final energy consumption by 11.7% by 2030, compared to projections made in 2020. Although these outcomes are less ambitious than those proposed in REPowerEU, they are more ambitious than those initially proposed by the Commission in 2021.

As to climate policy, in October 2022, the Council and the European Parliament agreed on a provisional deal involving stricter performance standards for new cars and vans with the aim to move towards

zero-emission mobility. The co-legislators agreed to a 55% emissions reduction target for new cars and a 50% target for new vans to be reached by 2030 compared to 2021 levels. The target is a 100% CO₂ reduction for both new cars and vans by 2035. In November 2022, a provisional deal was reached on the Effort Sharing Regulation covering 60% of EU GHG emissions from road transport, agriculture, waste, buildings and small industries. The new target is a 40% reduction by 2030 compared to 2005 for these sectors, differentiated by new binding targets for each member-state in line with the Commission's 2021 proposal. The Council preferred more flexibility to transfer emissions among the member-states, and the European Parliament preferred less, but they agreed on a compromise close to the Commission's initial proposal (E&K 2023A). A provisional agreement was also reached on the land use, land-use change and forestry regulation (LULUCF). The objective is 310 Mt CO₂ equivalent of net removals by 2030 from 2026 in the use of soils, trees, plants, biomass and timber, which both emit and absorb CO₂ from the atmosphere. This target is in line with the Commission's 2021 proposal.

In December 2022, the Council and the European Parliament reached a deal on the EU ETS. The revised Directive will reduce emissions from power production, energy-intensive industry and aviation by 62% by 2030 compared to 2005 – up from 61% in the Commission's 2021 proposal.² The deal also establishes an EU ETS 2 for direct emissions from buildings and road transport. To protect needy households challenged by the energy crisis, the ETS 2 would enter into force one year later (2027) than initially proposed by the Commission (ICAP 2022). It can be further postponed to 2028 if energy prices are exceptionally high (more than 106€/MWh for gas and oil). Revenues going to the ETS 2 will flow into the Social Climate Fund – which is also a part of the December deal.

Shipping will be included in the new ETS Directive, and free allowances accorded to EU companies will be gradually phased out between 2026 and 2034. Also in December 2022, a political agreement was reached on the Carbon Border Adjustment Mechanism (CBAM) to compensate for the phasing-out of the free allowances, and prevent 'carbon leakage,' whereby energy-intensive industries relocate production to countries with more lenient climate policies. The CBAM will apply to imports to the EU of cement, iron and steel, aluminium, fertilizers, electricity and hydrogen.

Building on earlier initiatives for a wider CBAM and responding to higher hydrogen ambitions in the REPowerEU plan, the European Parliament proposed that hydrogen be included, thus widening the scope of the CBAM compared to the Commission's initial proposal ([HYDROGEN EUROPE 2023](#)). Importers of these goods will be required to buy certificates – based on the weekly average price of EU ETS allowances – corresponding to the GHG content of the goods imported to the EU. A carbon price paid in the country of origin will be deducted from the CBAM credits.

Amid the negotiations on the 'Fit-for-55' files, COP 27 in Sharm-El-Sheikh was convened in November 2022. This COP, expected to be one of 'implementation', was complicated by the prolonged impacts of COVID-19 and the war in Ukraine, with rising energy and food prices ([ENB 2022](#)). On the one hand, critical observers indicate that the EU was largely inward-focused and reactive at COP 27 – which could be expected, given the ongoing 'Fit-for-55' deliberations ([IDOS 2022](#)). On the other hand, the REPowerEU plan, and agreements already reached and expected shortly after the COP, led the Commission Executive Vice President for the European Green Deal, Frans Timmermans, to announce an increase in the EU NDC from a 55% to an 57% reduction by 2030 compared to 1990. This announcement indicated that the EU would strengthen its leadership-by-example ambitions, but this would subsequently need to be formalized and adopted by the member-states.

There have been few signs thus far that the energy shock caused by the Russian invasion has slowed or weakened EU climate/energy policy-making. Several of the 'Fit-for-55' files proposed by the Commission before 24 February 2022 have been strengthened or widened in scope after the invasion, and there have been no major changes in the overall structure or principles underlying the policy package. On the other hand, the postponement of the ETS 2 also shows that the energy crisis may weaken or delay specific parts or elements of the Commission's proposals – but this instrument has been controversial since its inception. As of April 2023, most of the 'Fit-for-55' files had been finally adopted, including the revision of the EU ETS Directive, the regulations establishing the Social Climate Fund and the CBAM, the Effort Sharing and LULUCF Regulations and the file regarding CO₂ emissions from cars and vans.³

Whereas these results may strengthen the EU's aspirations to leadership by example, the 'Fit-for-55' package embedded in the EGD may also strengthen the EU's entrepreneurial leadership potential by taking a comprehensive cross-sectoral approach to climate, nature and environmental challenges linked to 'green' growth and a 'just' transition. Moreover, the carbon border tax mechanism is based on the EU's structural economic capabilities. The aim is to tax products imported from countries with more lenient climate policies, which may provide incentives for other major trading partners and emitters to step up their climate ambitions. However, the CBAM is expected to encounter substantial opposition from countries with industries dependent on fossil fuels, such as the USA and China (OVERLAND - SABYRBEKOV 2022). Moreover, Russia and Ukraine were candidates for CBAM influence before the war, which is now unrealistic.

The EU's credibility in terms of leading by example also depends on what happens on the ground. As the energy sector is responsible for some 75% of EU GHG emissions, energy policies and developments are pivotal for reducing GHG emissions. At this early stage after Russia's full-scale invasion of Ukraine, we may attempt to indicate some energy-transition developments. In line with the REPowerEU plan, the EU has been largely successful in diversifying its fossil-fuels supplies and filling gas storage sites for the 2022/2023 winter (EUROPEAN PARLIAMENT 2023). Following the Save Energy plan linked to REPowerEU, and further facilitated by a mild winter and high gas prices, energy saving led to a 20% reduction in gas consumption in August–November 2022 compared to the same months in 2021 (EUROSTAT 2022B). Moreover, in the third quarter of 2022, electricity consumption decreased by 2% compared to the same period in 2021 (COMMISSION 2022B). Initially, however, demand for coal increased, as coal was intended to compensate for the reduced gas consumption and (partly) replace gas as a backup power source (EURACTIVE 2023).

Renewable energy is a key element in the EU's energy transition with the aim to reduce GHG emissions and dependence on energy import. In 2021, the share of renewables showed a minor drop. Preliminary data for 2022 show that renewable energy production in the third quarter of 2022 rose by 1% (in TWh) compared to 2021. The increase in solar, wind and biomass energy was nearly matched by a decrease in hydropower generation

due to low water reservoirs ^(EUROPEAN PARLIAMENT 2023), although this reduction is likely to be temporary.

In the third quarter of 2022, EU GHG emissions increased by 2% compared with the same period in 2021. This increase is mainly related to the growth in GDP after the sharp decline in activity due to COVID-19. GHG emissions decreased by 4% in the same period compared with the pre-pandemic third quarter of 2019 ^(EUROSTAT 2023). Both coal consumption and CO₂ emissions have apparently decreased since September 2022 ^(CRE 2023). According to the think-tank Ember, coal production decreased by 27 TWh and gas by 38 TWh from October 2022 to March 2023, saving 40 million tons of CO₂ ^(E&K 2023B).

Preliminary data on the energy transition shortly after the invasion of Ukraine are mixed, and some developments are not necessarily related to the war, but observations do not indicate that the energy transition has been put on hold – quite the contrary. That being said, the longer-term consequences of the Russian invasion for the EU’s energy transition remain highly uncertain.

CONCLUSIONS

This study has explored the consequences of the full-scale Russian invasion of Ukraine for EU climate/energy policy, the energy transition and the EU’s leadership potential. Drawing on insights from the literatures on leadership and exogenous shocks, it has explored the consequences for the deliberations on key ‘Fit-for-55’ files, COP 27 in Sharm-El-Sheikh and the European energy transition. The main observation on EU policy-making is that the invasion has strengthened rather than weakened the ‘Fit for 55’ package ambitions. However, there have been no major changes in the overall structure or principles underlying the package compared to the Commission’s proposals before the invasion. Second, at COP 27, the European Commission signalled higher NDC ambitions, indicating that the EU may strengthen its ambitions to leadership by example. Third, the invasion has not dealt a blow to the ongoing European energy transition on the ground – indeed, quite the contrary – due partly to a surprisingly high level of energy savings. These observations indicate that the policy outcomes and behaviour thus far lie somewhere between the status quo

and the somewhat higher ambitions compared to the situation prior to the invasion. This may in turn be explained by the resilience of the EU institutions, the unified response to the invasion among the member-states and multi-level reinforcement dynamics (SCHREURS – TIBERGHIE 2007). However, the greater focus on the energy transition, as exemplified by the more rapid permissions procedures for renewables, may exacerbate the potential conflicts over land use, nature and biodiversity.

The EU will have to shift from crisis response to long-term governance of energy diversification, gas and electricity markets, grid interconnection, renewables, energy efficiency and energy poverty. These energy policies must be linked to EU climate policies – not only in policymaking, but also in implementation among the member-states and societal actors. Further, climate and energy policies need to be aligned to the EU's industry strategy, which has been increasingly linked to the energy transition through the net-zero industry and raw materials initiatives. Success here may enhance the EU's ability to lead internationally by example towards 2030 and beyond.

ENDNOTES

- 1 Although not a breach of contract, this action was widely seen as a move by Russia aimed at achieving changes in the terms for the gas trade.
- 2 To accomplish this, the *linear reduction factor* will be increased from 2.2% to 4.3% from 2024 to 2027, and to 4.4% from 2028 to 2030.
- 3 After pressure from Germany, the European Commission will make a proposal for CO₂ neutral e-fuels which allow for combustion engines after 2035.

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