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Promoting a global green transition following the Russian invasion of Ukraine

THE EXTERNAL DIMENSIONS OF THE EUROPEAN GREEN DEAL

CLIMATE CHANGE

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The European Green Deal is being reassessed in a highly securitised environment. This not only has an effect on Europe's own transition perspectives, but can also alter the global green transition and long-term credibility of the EU. This paper zooms in on the green energy transition and food systems change under the Farm to Fork Strategy, identifying key challenges in maintaining an ambitious and effective EU 'Green Deal diplomacy'.

The changing context calls for a fundamentally outward-looking and global approach to green transition, one that more structurally links the EU's own transition with the economic development, industrialisation, sustainable transition and security needs of countries in the Neighbourhood and Africa. Lowering ambitions of the external dimensions of the Green Deal or simply staying the course is not an option. Being seen as a genuine partner in the global sustainability transition is a geopolitical imperative for the EU, as it looks for more resilient and more stable energy partnerships, but also as it seeks to strengthen its competitive offer vis-à-vis China in an overall more challenging geopolitical environment.

Concretely, an outward-looking and global approach includes: prioritising energy partnerships that create co-benefits through green industrialisation; aligning all relevant EU policy instruments and deepening cooperation to support more sustainable food systems abroad; addressing more effectively the structural barriers for a more context-specific green transition; showcasing the EU's ability to mobilise public and private finance for a comprehensive green transition; and responding to perceptions of double standards and a unilateral EU decarbonisation.

Table of Contents

Acknowledgements	iii
Acronyms	iii
1. Introduction	1
2. The green deal as a security issue	2
3. Four key changes since 24 February 2022	3
3.1. Emergency energy measures	3
3.2. Global food crisis slowing down the EU Farm to Fork strategy	6
3.3. Aid budget redirections and economic crisis	7
3.4. A new wave of supply chain problems	9
4. Three scenarios for the external dimension of the European Green Deal	9
4.1. Lowering ambitions	10
4.2. Staying the course	11
4.3. A more outward-looking Green Deal	13
5. Conclusions	15
References	16

List of Figures

Figure 1: External components of REPowerEU	4
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List of Tables

Table 1: Indicative overview of ODA planned reduction and/or redirection towards Ukraine	8
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Acronyms

AfCFTA	African Continental Free Trade Area
AU	African Union
AUC	African Union Commission
BMWK	Federal Ministry of Economics and Technology (Germany)
CAP	Common Agricultural Policy
CoEU	Council of the European Union
COP27	2022 United Nations Climate Change Conference
DFI	Development Finance Institution
EBRD	European Bank for Reconstruction and Development
EC	European Commission
ECB	European Central Bank
ECDPM	European Centre for Development Policy Management
EFSD+	The European Fund for Sustainable Development plus
EGD	European Green Deal
EIB	European Investment Bank
EU	European Union
EUMS	European Union Member State
F2F	Farm to Fork Strategy
FDI	Foreign Direct Investment
H2	Hydrogen
HR/VP	High Representative of the Union for Foreign Affairs and Security Policy
JETP	Just Energy Transition Partnership with South Africa
KfW	Kreditanstalt für Wiederaufbau (Germany)
LNG	Liquefied natural gas
ODA	Official Development Assistance
PV	Photovoltaic (solar)
RE	Renewable energy
RRP	Recovery and Resilience Plan
UNGA	United Nations General Assembly
VAT	Value-added Tax
WFP	World Food Programme
WTO	World Trade Organization

1. Introduction

Mid 2022, the EU's global climate action is caught in a perfect storm. The Russian war in Ukraine has fully shaken up global energy markets and is putting the EU on an accelerated, albeit extremely fragile, pathway to green transition. While Europe looks towards Africa to diversify its natural gas supply, the food price crisis is hitting North and East African economies particularly hard, highlighting the vulnerability of high net-importing food systems. The war will continue to disrupt food supply chains for at least another two years, resulting in heightened risk of famine, at a time when international food markets are increasingly subject to climate shocks.

The war is also changing European politics and decision-making. The EU is struggling to adapt to a more adverse geopolitical environment and is quickly reviewing its strategic dependencies on third countries (Borrell 2022a; Medinilla 2022a). The European Green Deal (EGD), which was meant to be a testament to the bloc's regulatory power and its aptitude for long-term planning, is now seen through the lens of European citizens' security (Medinilla 2022a). This can both propel and delay green transition. Justified by the security threat of a continued Russian dependence, the EU is accelerating green energy transition in ways that would have been unthinkable before. At the same time, visions of food shortages have led conservative forces to question the feasibility and desirability of the Farm to Fork Strategy (F2F), bringing back a focus on food production unencumbered by its environmental constraints.

The European Green Deal, its Fit for 55 package and actions under the F2F are being reassessed in a highly securitised environment. This not only has an effect on Europe's own transition perspectives, but can also alter the global dimensions of the European Green Deal, and the EU's status as an aspiring global climate leader. As the EU reviews all of its external policies in a light of European security and geopolitical power, interventions under the European Green Deal will be of critical importance, as an instrument to counter Russia's influence and power, and as a test-case of the EU's commitment to the Green Deal's external ambitions in a more adverse geopolitical environment. This paper zooms in on two key European priorities with a strong external component, namely the green energy transition and food systems change under the F2F, and identifies key challenges in maintaining an ambitious and effective EU 'Green Deal diplomacy'. It reflects on the direct effects of economic crisis and supply chain disruptions on the EU's external climate and energy objectives, and the potential indirect effects of a 'securitised' green transition on the EU's partnerships with neighbouring countries in Africa and beyond.

It argues that the changing context calls for a fundamentally outward-looking and global approach to the European Green Deal, one that more structurally links the EU's own transition with the economic development, industrialisation and sustainable transition needs of countries in the Neighbourhood and Africa. Lowering ambitions or simply staying the course in the current global political and economic context would lead to a loss of momentum and credibility of the EU. Instead, the EU should (1) prioritise energy partnerships that create co-benefits through green industrialisation; (2) align all relevant EU policy instruments and deepening cooperation to support more sustainable food systems abroad; (3) address the structural barriers to a context-specific green transition; (4) showcase the EU's ability to mobilise public and private finance for a comprehensive green transition; and (5) respond to the perceptions of double standards and a unilateral EU decarbonisation.

Doing so is not a 'nice to have', but a geopolitical imperative. Any loss of momentum will reflect badly on the EU which has staked its own future on the idea of green growth. Developing countries, especially those in Africa, need infrastructure and investment, and are looking at all partners, not least an increasingly green China. In short, it is in the EU's strategic interest to make the external dimension of the green deal a success.

2. The green deal as a security issue

The Russian war in Ukraine changed the EU's approach to foreign policy, leading to what has been called a 'geopolitical awakening' for Europe (de Hoop Scheffer and Weber 2022). The invasion tore down several long-term EU policy taboos in a matter of months. This includes unseen levels of sanctions early on in the war, triggering the temporary protection directive for Ukrainian refugees, and a rapid reversal on defence spending and new applications for NATO membership across the union. The war has also led to a significant change in public EU discourse. High-level EU officials now actively cultivate the narrative of a strengthened geopolitical Europe (Borrell 2022a), and the threat of Russia "weaponising" both its energy and food supply chains (von Der Leyen 2022; Borrell 2022b; Islam 2022). EU officials and European leaders have also made a clear effort to link the European Green Deal to the idea of a more geostrategic and decisive Europe, presenting it as a critical solution to the threat of Russian aggression, and a cornerstone of its coveted strategic autonomy.

"We all agree that affordability, sustainability and security concerns ultimately have the same answer: the Green Deal" - Energy Commissioner Kadri Simson (EC 2022).

Recent statements by HR/VP Josse Borell in particular underscore the strategic imperative of an accelerated decarbonisation, emphasising that not doing so plays into the hand of Russia (Borrell and Hoyer 2022). The European Commission's Executive Vice President for the European Green Deal Frans Timmermans also consistently adopts a security narrative to strengthen the profile of the EGD, while several EU member states are following suit, including countries that were already on board with an accelerated green transition like Germany (Habeck 2022), but also countries that were initially more reluctant like Poland (Simon 2021). While Timmermans defended the F2F with a similar security narrative (Timmermans 2022; Fortuna 2022), member states are generally more critical of the F2F's effectiveness to secure Europe's food supply (Struna 2022).

Reframing energy and food as a security issue has a critical effect: it justifies 'extraordinary measures' (Waever 2002). Decisions that until recently were seen as too difficult, too expensive, or otherwise 'politically unfeasible' are now presented as unavoidable, even if they come at a great cost. The effects of this shift in political and public discourse can already be seen. The 'securitisation' of energy policy in 2022 helps explain the absence of widespread popular protests at a time that energy poverty is set to affect record numbers of households across Europe (Jack 2022). Several European green parties are also relaxing their positions on nuclear energy, a move that at the start of the year would have been impossible. But most importantly, it has led to a series of new measures that seek to strengthen the EU's power over member state natural gas acquisition, storage and distribution, and to force an accelerated renewable energy transition across Europe, all in the name of public security.

Similarly, Russia's move to disrupt global wheat supply by withholding its own exports and attacking and blocking Ukraine's production and exports has led to actions aimed at securing the EU's food supply. The EU in recent years has increasingly sought to integrate its agricultural sector in global markets and played a constructive role in supporting the international agricultural trade regime under the WTO (Bureau and Swinnen 2018). With the onset of the COVID-19 pandemic and the Russian war in Ukraine, Europe's dependence on external markets for feed and fertilisers became seen as a strategic liability, particularly the dependence on Russian and Belorussian fertilisers. Concerns that the F2F will worsen the food crisis and lead to more dependence on international markets have renewed criticism of the F2F. The Commission has effectively put the Strategy on 'pause' to ensure food security for Europe and its neighbours (Foote 2022a), even if it maintains that the F2F remains the EU's long-term vision.

All this is taking place in an increasingly adverse geopolitical environment for Europe. The war not only highlighted the urgency to strengthen Europe's strategic autonomy, it also shook up the geopolitical order, leaving Europe to search for allies in the face of adversity. As the war drags on, the threat of a strengthened Chinese-Russian autocratic alliance remains a major source of concern. Europe also faces serious difficulties in getting political support for its sanctions on Russia from African countries, illustrated by the abstentions of 17 countries in the March 2022 the United Nations General Assembly (UNGA) vote condemning the Russian Invasion (Tawat 2022), and recent statements calling to reintegrate Russia in the global economy. Chairperson of the African Union Commission (AUC) Moussa Faki Mahamat in May declared that Africa is a collateral victim of a distant conflict (Faki Mahamat 2022a), and has repeatedly called for a peaceful resolution, while avoiding to take sides (Faki Mahamat 2022b). Senegalese President Macky Sall in turn, has called on Western countries to lift (financial) sanctions¹ so as to facilitate Russian exports of grain and fertilisers (Wax 2022). As the food crisis continues, pressure on both the Russian and Western sides will likely further increase.

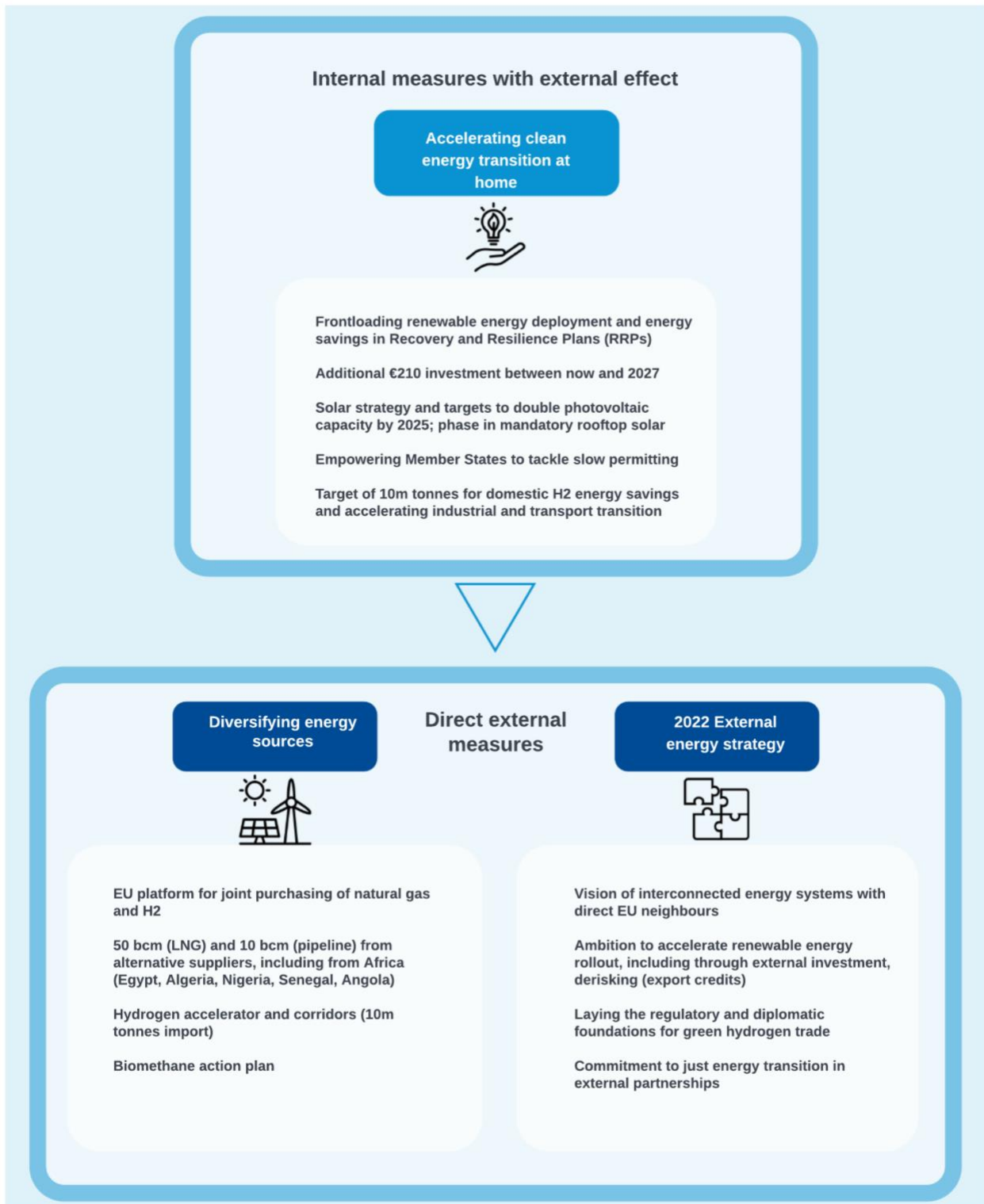
3. Four key changes since 24 February 2022

3.1. Emergency energy measures

The EU's emergency energy measures are the most visible and direct expression of how the green transition is being reframed as a security measure. On 18 May 2022, the EU presented its REPowerEU package, a series of (proposed) measures to rapidly reduce dependence on Russian natural gas, while also strengthening the EU's climate action. In essence, the EU seeks to rapidly phase out Russian energy imports by diversifying natural gas supplies, fast-tracking renewable energy transition, and laying the groundwork for a long-elusive European energy union (EC 2022a). Figure 1 below gives an overview of the external components of the REPowerEU package and lists internal EU measures that will likely have a significant external effect.

¹ Neither the EU nor the US have sanctioned Russian grain and fertilisers. EU officials accuse Russia of 'weaponising food trade' (Foote 2022b), yet African countries fear that Western sanctions on Russia's financial system make it more difficult to buy these goods (Wax 2022).

Figure 1: External components of REPowerEU



Source: Authors

REPowerEU illustrates the fractured nature of the EU's energy interests and the difficult split member states face between ensuring short-term supply and its long-term vision of a renewables-based energy security. On the one hand, the plan puts a strong emphasis on replacing Russian gas with new LNG suppliers, including from Africa. This is heavily criticised by the climate action community and civil society groups that see it as a risk of locking the EU and its partners into new long-term fossil fuel dependencies, and a backdoor for the fossil-fuel industry to maintain its dominance in the coming years (Rees 2022; Corporate Europe Observatory 2022; Sabido and Mikolajczak 2022). Several EU member states, including Germany and Italy are actively pursuing new deals with African countries in order to diversify their pipeline and LNG supply (Chimbelu 2022; Mugabi 2022). High energy prices also make it more attractive to invest in overseas fossil fuels, a long-term ask from African countries, regardless of the EU's internal struggle on whether or not natural gas can still be seen as a transition fuel under the EU taxonomy for sustainable investments (Kurmayer 2022).

On the other hand, however, the plan comes with an explicit commitment to accelerate the green transition. The EU will frontload planned investments in renewable energy infrastructure, solar rooftops, heat pump deployment and to jumpstart the EU's vision of a green hydrogen economy using both domestic production and imports. The European Commission also hopes to use the full extent of the EU's regulatory power to make this possible, empowering member states to push through renewable energy projects in a way that until recently would have likely led to significant opposition. REPowerEU, for example, comes with a recommendation and guidance note for EU member states to fast track permitting for renewable energy production and storage facilities, qualifying these projects as being in the "overriding public interest and in the interest of public safety"² (EC 2022b). It also calls for designating 'go-to areas', on and off-shore locations that are particularly suitable for renewable energy deployment, and therefore warrant an expedited process.

"We need to speed up permitting procedures to grow our on- and offshore wind capacity, and roll out large-scale solar projects. This is a matter of overriding public interest" - Executive Vice-President Frans Timmermans (EC 2022).

Several EU member states have also moved to accelerate renewable energy in the interest of public security. Germany's proposed 'easter package'³ for example seeks to expand renewable energy to a new level, reaching 80% by 2030, and will include measures to tackle bottlenecks, but also developing more sites including low-wind areas (Habeck 2022). At the launch of REPowerEU, Germany, Belgium, Denmark and the Netherlands also issued a pledge to increase offshore wind power capacity in the North Sea to 65 GW by 2030 and 150 GW by 2050, and to review existing regulation to enable a fast-track approach in the overriding public interest (Esbjerg declaration 2022).

On the diplomatic front, targets are less clear-cut, but REPowerEU does show a clearer vision for an interconnected green energy system with neighbouring countries, and a higher degree of integration between Europe and North Africa, Ukraine and Central Asia. In particular, the plan hopes to prepare the EU for renewable hydrogen trade, facilitating imports of 10M tonnes of H₂, primarily from the Southern Mediterranean and Ukraine by 2030 (EC 2022c). This comes on top of plans for new electricity interconnections between the EU and North African countries, that were already flagged in the EU's 2021 'new agenda for the Mediterranean' (EC 2021; Medinilla et al. 2022).

² While EU member states still need to translate these measures into domestic regulations, some environmental groups warn against the risk of environmental deregulation in the name of fast-tracking permitting (Vela 2022). Others argue that qualifying renewable energy projects is unlikely to effectively speed up permitting due to existing safeguards in EU nature directives, and that it is no quick fix or replacement of proper spatial planning and bureaucratic streamlining (Dottinga 2022).

³ The so-called 'easter package' is a series of five legislative changes proposed by Vice Chancellor and Federal Minister for Economic Affairs and Climate Protection Robert Habeck, and is currently going through the parliamentary legislative process in the Bundestag (Habeck 2022).

Taking a closer look shows that the Commission hopes to implement this vision largely by existing commitments under the EU's global gateway investment package (EC 2022c; Teevan et al. 2022), while it also signals future efforts to de-risk investment, including with a much anticipated EU export credit facility (CoEU 2022a).

All these measures have the potential to fundamentally alter first and foremost the domestic market for renewable energy transition, which will inevitably have a knock-on effect on the external investment in renewable energy capacity, hydrogen plans and interconnection infrastructure. At the same time, the plan also presents an easy way out.

3.2. Global food crisis slowing down the EU Farm to Fork strategy

The war started a global food crisis. Ukraine is a major agricultural exporter and known as the breadbasket of Europe, but also exports a lot to the Middle East and Africa. The Russian invasion blocked most Ukrainian exports at a time when food markets were already trading thin due to bad harvests elsewhere. This led to a rapid rise in global food prices, which fueled by export bans and high production costs, increased the risk of food insecurity worldwide. The World Food Programme projects that on a global scale, an additional 47 million people will experience acute hunger this year (WFP 2022).

The crisis highlights the risk of overdependence on global markets. From the onset of the crisis, the EU has tried to assuage fears of European citizens by pointing out that it is largely self-sufficient in its food needs thanks to the Common Agricultural Policy (CAP) (EC 2022d). The greatest concern is in the Middle East and Africa, where governments also have limited capacity to mitigate food insecurity.

Food has also become a geopolitical problem for the EU. The European Council accuses Russia of weaponising it by blocking Ukrainian exports, destroying or stealing grain and spreading the narrative that the high food prices are the result of Western sanctions (CoEU 2022b). This makes agriculture a crucial security issue for the EU, and its continued contributions to the global food markets a fundamental matter of geo-strategic importance (EC 2022d; Fortuna and Foote 2022). In March 2022, EU institutions urged member states to revise their national strategic plans under the CAP, including lowering their dependence on fertilisers (Dahm 2022), in light of the volatile global food markets. While African countries are by far the most vulnerable, the AU has avoided picking sides, putting the EU in a difficult spot. At the start of the crisis, AU officials joined the EU in blaming Russia for the food crisis (Foote 2022c), more recently, however, Senegalese president and Chairperson of the AU Macky Sall called upon all parties to lift all sanctions targeting Russian wheat and fertilisers.

Apart from emergency measures to ramp up production, the Green Deal's Farm to Fork Strategy is now also increasingly under fire as some EU member states see it as an obstacle to greater food security. Concerns about the F2F's potential impact on food production, productivity, and trade were raised before the Russian invasion of Ukraine (JRC 2021; Dekeyser and Woolfrey 2021). However its implementation would in fact help Europe become less dependent on Russian and Belarusian fertilisers. While the Commission reconfirmed the F2F as its long-term ambition, it has pressed a short-term 'pause button' and has approved some exceptions to environmental rules to help ramp up food production (Foote 2022d; Foote 2022a; EC 2022d). These exceptions can help increase production, but they can also jeopardise food security in the longer term (Rampa 2022). More importantly, the crisis has altered public discourse on the F2F. The agricultural sector has long lobbied against the strategy, but today, member states, including the French and Czech governments, are openly questioning the long-term viability of the strategy in light of the current crisis (Foote 2022e; Struna 2022).

At the same time, efforts are being made to tackle acute food security through EU humanitarian assistance and dedicated funding programmes. This includes €225 million mobilised in emergency funds for North African states, a pledge of €67 million additional funding to the Sahel countries for more humanitarian assistance, and the development of a €500 million African food and aid programme with unused European Development Fund reserves (EC 2022e; Africa Confidential 2022). Such support is part of a strategy to stabilise neighbours and other vulnerable regions, as food insecurity can spillover into social protests and political instability, as seen in the Arab Spring (Knaepen and Dekeyser 2022). However, it does not replace long-term investment in transforming food systems under the external window of the F2F. The Strategy's external dimension proposes 'Green Alliances' of partners to cooperate on a transition to sustainable food systems. As food systems are impacted by many policy themes, this would require the EU to align its trade policy and international cooperation with this transition ambition.

3.3. Aid budget redirections and economic crisis

Despite the European economic slowdown, the EU and its member states have increased domestic spending to mitigate the economic and political impact of the Russian invasion of Ukraine. Many countries, including Germany, Italy, Romania and Poland increased their military budget (Mackenzie 2022), while others like France, Estonia and Spain are taking expensive measures to mitigate the increase in energy prices. In addition, EU member states and institutions have committed more than €25 billion in total government support to Ukraine between 24 February and 7 June 2022 (Antezza et al. 2022). This figure will further rise as the war continues, while the EU - including through the European Investment Bank (EIB) and European Bank for Reconstruction and Development (EBRD) - is likely to provide comprehensive support to Ukraine's reconstruction in the future.

ODA flows by EU member States to other countries, including Africa, are already affected by the war. Table 1 below illustrates recent decisions by some European countries to reduce ODA and/or redirect ODA flows to Ukraine and where these funds are coming from. ODA reallocation to in-country refugee costs⁴ is likely to have a significant effect on EU member states' international cooperation budgets in 2022 and 2023, and could have a negative impact on the EU's climate finance. Sweden, for example, reduced its 2022 contribution to the Green Climate Fund by 46% (Chadwick 2022). Less ODA supporting the green transition of developing countries will affect the EU leadership on climate action, and its commitments - such as the annual USD 100 billion of climate finance pledged to developing countries in Copenhagen in 2009.

⁴ Ukraine is classified as an ODA recipient, and costs for reception of asylum seekers and people in need of protection from low- and middle-income countries can be counted as ODA on humanitarian grounds during the first year in the host country (MFA of Sweden 2022).

Table 1: Indicative overview of ODA planned reduction and/or redirection towards Ukraine

Countries	Amount of ODA redirected	Indicative impacts
Sweden	<ul style="list-style-type: none"> Up to SEK 10.3 billion from 2022 ODA redirected towards asylum costs (equivalent of 18% of total ODA budget) (MFA of Sweden 2022) Assumption: support provided to 76,000 refugees 	<ul style="list-style-type: none"> Contributions to Gavi, Global Fund, Green Climate Fund and the Climate Investment Fund were reduced by 29%, 32%, 46% and 100% respectively (Chadwick 2022)
Denmark	<ul style="list-style-type: none"> DKK 2 billion of 2022 ODA to be redirected to support refugees from Russia's war in Ukraine. This amount is expected to increase in 2023 and fall to DKK 700 million in 2024 (Szumski 2022). Assumption: support provided to 20,000 refugees 	<ul style="list-style-type: none"> ODA budget to Syria, Mali and Bangladesh will be cut down by respectively DKK 50 million, DKK 70 million and DKK 100 million. War-torn Syria and neighbouring regions are to lose 50 million kroner due to the decision (The Local 2022).
United Kingdom	<ul style="list-style-type: none"> UK to cut ODA from 0.7% of Gross National Income (GNI) to 0.5%, from GBP 14.5 billion in 2020 to GBP 11.1 billion in 2021 (BBC 2021) Part of the ODA is expected to be reallocated to respond to the crisis in Ukraine (Petitjean et al. 2022) 	<ul style="list-style-type: none"> TBD
Norway	<ul style="list-style-type: none"> While the Norwegian government increased its aid budget for 2022 by NOK 3.6 billion, about 50% of this increase will be targeted towards refugee-related measures in Norway. The Government is also proposing to reallocate NOK 4 billion of the aid budget to finance increased costs associated with receiving refugees in Norway (Norwegian MFA 2022). 	<ul style="list-style-type: none"> Funding to the United Nations Development Programme, UNICEF and WHO would fall by NOK 440 million, NOK 357.5 million, and NOK 118 million respectively. ODA sectoral budget lines would also be affected: education, health and support to Africa would be cut by NOK 553 million; NOK 470 million; NOK 250 million (Chadwick 2022)
The Netherlands	<ul style="list-style-type: none"> No announcement thus far - though the country will likely reallocate funding from ODA budget (Petitjean and Kitchens West 2022) 	<ul style="list-style-type: none"> Ongoing discussions on ways to reduce the ODA- in-country refugee cost tradeoff (Petitjean and Kitchens West 2022)

Increasing public funding constraints may also interfere with the future rollout of the EU's Global Gateway Investment Package, which to a large extent relies on EU member states contributions (Teevan et al. 2022). Reduced ODA will make it more difficult to achieve the EU's €300 billion investment target, and to deliver the expected impact and benefits including those stemming from green energy infrastructure. This will affect Africa-EU relations, where the EU has previously faced criticism for overpromising and underdelivering (Gavas and Pleeck 2022).

The war will also significantly affect commercial operations and EU Foreign Direct Investment (FDI) to Africa. The increase in interest rates of the European Central Bank to curb rising inflation (ECB 2022) is likely to slow down

economic growth and private investment will become more expensive (World Bank 2022). Geopolitical risks and increasing uncertainties may further disincentivise EU businesses to engage in FDI in developing countries, whose economies are still recovering from the pandemic. All these elements may result in a significant reduction in FDI levels, as well as a concentration in safer/closer markets.

3.4. A new wave of supply chain problems

Green energy transition is highly dependent on imported products (e.g. PV panels) and raw materials, much of which are currently sourced from China (Bloomberg 2020). Global supply chains have been in turmoil since the start of the pandemic, with imports from China facing particularly severe disruptions. The Russian invasion, however, dealt a new blow to an already struggling global logistics system. Not only did the Black sea route to the Mediterranean and imports from Russia (and Belarus) come to a near complete halt, the start of the war also coincided with a new series of harsh lockdowns in mainland China, leading to further supply chain pressure in the first half of 2022 (Benigno 2022).

The cost of critical raw materials such as polysilicon, aluminium copper and steel skyrocketed over the past years, with an increase of 300% for polysilicon, and a +50% increase for aluminium and copper in 2020 (Rivero 2021). Prices rose again following the invasion of Russia in Ukraine (Radowitz 2022). This drives up the costs of production, while supply chain disruptions⁵ increase the expected labour costs linked to renewable energy projects (Malik 2021). Shipping costs have also surged. Bringing a container over from China in 2021 was six times more expensive than before the pandemic (Malik 2021). All this makes it more difficult for the renewable energy industry to take investment decisions: firms have to base their decisions on current material and labour costs, while the time required to put in place and operationalise, let's say a wind farm, could take up to five years, which is plenty of time for those costs to vary (Taylor 2022).

Increasing costs and supply chain risk could have a serious impact on the delivery of new and the maintenance of existing projects (Hannam 2022). Recent estimates indicate 56% of worldwide utility-scale solar projects planned for 2022 could be postponed or cancelled (Rivero 2021). It is expected that with the Russian invasion of Ukraine and the recent supply disruptions, this share could increase. The EU's REPowerEU plan (see section 2.1) could therefore be faced with limited supply at a time of growing and competing demand. Supply chain problems can further weakened the business case of renewable energy projects, as increasing costs and uncertainties will threaten the profitability of the investments⁶. This may deter both private and public investors focusing on short-term benefits.

4. Three scenarios for the external dimension of the European Green Deal

All this shows that Europe's sustainability and energy transition depends as much on external factors as on the internal choices it makes. The EU therefore has a clear interest in ensuring a sufficiently ambitious global response to these challenges. At the same time, crisis can lead to rapidly shifting priorities, and a more inward-looking perspective, which may drive the EU and member states to at least temporarily lower their ambitions for supporting green transition outside of Europe.

⁵ The Shanghai port, for example, was de facto closed from March to May 2022 for COVID restrictions (Schiffing and Kanellos 2022).

⁶ Though the costs of clean energy generation are a lot cheaper than fossil fuels (Hannam 2022).

This section uses three scenarios to illustrate the tensions between short-term crisis response thinking and long-term transition ambitions objectives in the current political and security environment, and reflects on how this can influence the EU's external climate action and Green Deal diplomacy.

A first scenario explores the detrimental effects of 'lowering the EU's external ambitions' under the European Green Deal, and what would happen if short-term thinking derails long-term objectives over time. A second scenario looks at the effects of simply 'staying the course', or what would happen when the EU fails to strengthen and steer its Green Deal partnerships in an increasingly difficult geopolitical and economic environment. A third scenario outlines the way forward with a more ambitious and outward-looking approach, one that creates a stronger direct link between the EU's own transition and geopolitical interests, and the economic development, industrialisation and sustainability needs of developing countries in the Neighbourhood and Africa.

4.1. Lowering ambitions

While the EU and its member states hope to accelerate the renewable energy transition, and remain broadly committed to a more sustainable European food system, the war also inspired a more short-term crisis response that can delay or derail these long-term sustainability transitions.

An inward-looking approach to energy security

In a low ambition scenario, the EU is seen to frontload investment and accelerate renewable energy transition at home yet gradually lowers its global commitments for the green transition. Regulatory and fiscal reforms, streamlined procedures and new financial incentives, coupled with the investment power of National Promotional Banks⁷, create new business opportunities for the EU's renewable energy industry at home. At the same time, the EU's external energy policy shifts towards securing greater quantities of alternative natural gas suppliers in the short term, including in Africa, to offset further cutoffs from Russia. New demand pushes those economies to significantly invest in fossil fuel development lowering those countries' incentives to prioritise green energy transition. Yet at the same time, the EU's demand is still set to phase out in the medium term, increasing the risk of stranded assets, and locking those countries in an unsustainable development pathway.

The political priority for long-term overseas renewable energy investments is in the first place be on establishing a new supply of renewable energy and green hydrogen from North Africa, focusing on new export-oriented infrastructure, while investment in grid development and a clean economy transition fails to pick up pace. External investment by the EU renewable energy industry further suffers from i) increasing interest rates in the EU⁸, affecting the profitability of their investments⁹; ii) the difficulties to develop a pipeline of bankable projects; iii) the risks and uncertainties arising from unstable business environments, in a sector that is often subject to political moves and iv) sustained supply chain problems which severely constrain the operational capacity of European renewable energy companies. The overall economic climate will make it increasingly difficult to deliver on the targets set by the EU's new Global Gateway initiative, leading to a further concentration of public investment in the domestic market, where bankable projects are easier to find.

⁷ Such as KfW in Germany, Caisse des Dépôts/Bpifrance in France or Cassa Depositi e Prestiti in Italy.

⁸ So far, the European Central Bank (ECB) has not changed the interest rates. However, there could be an increase in July 2023, which would be the first time in a decade where the ECB increases interest rates. See more information at: <https://www.nytimes.com/2022/06/09/business/ecb-interest-rate-increase.html>

⁹ Contrary to e.g. shale gas in the United States, investments in renewable energy are often recouped over a 30-year period. This makes them more sensitive to long-term interest rates. See more information at: <https://ramboll.com/media/rgr/what-do-rising-energy-prices-mean-for-the-green-energy-transition>

Turning back the clock of CAP reform

Even if Europe is relatively well shielded from the food crisis, the war sees a remarkable resurgence of a traditional food security narrative across Europe, emphasising the need for ramping up domestic production and self-sufficiency. In a low-ambition scenario, we see calls to further delay the F2F and to rely less on the international markets. As the war continues, the initial objectives of sustainable and climate-proof reforms are increasingly presented as reckless measures that Europe and the world simply cannot afford.

Ramping up food production to substitute Ukrainian exports remains a geopolitical priority. At the same time, more self-sufficiency, especially in feed, requires more land, leading to a loss in biodiversity and disrupting the provision of key ecosystem services. With the F2F on pause, the European agricultural system becomes more and more vulnerable to climate change, leading to fluctuations in the EU's agricultural exports. Externally, the F2F's global 'Green Alliances' are effectively mothballed. Instead, the EU's external support to food systems focuses on alleviating the record-high food insecurity following the Russia-Ukraine war mostly through humanitarian assistance. Initiatives to make African export value chains more sustainable have difficulty attracting investments, as the European market does not adopt stringent sustainability standards for imports. This causes a negative feedback loop: without the sustainability transition as a political priority, fewer investments are made to adapt food systems, which over time makes investments riskier.

Implications

This remains an unlikely scenario, yet as the conflict drags on, and potentially escalates, pressure on the EU's external engagement and investment could increase. Lowering external green deal ambitions, even temporarily, can have a knock-on effect on the transition in developing countries, leading to a less sustainable and more climate-vulnerable future. It risks locking the EU's external energy partnerships into fossil fuels and a low-ambition approach to renewables, leaving room for other actors to step up, gain influence, and take advantage of opportunities globally. China in particular will be in a unique position to leverage its dominance in renewable energy technology, and critical raw material value chains, which will have a negative effect on the EU's geostrategic ambitions and its renewed partnership with Africa.

Similarly, turning back CAP reform and not sufficiently supporting the sustainability transition abroad would leave African food systems structurally vulnerable, trapping policymakers into short-term emergency responses to stop the spillover to broader social and political upheaval. In absence of strong investment in sustainable productivity, African leaders will ramp up domestic production by converting more land - such as the rainforest of the Congo Basin - into farms. But overall import dependence will remain high, which may be used by conservative forces in Europe to continue opposing more environmental limitations.

In the medium term, lowering ambitions risk severely eroding the credibility of the EU as a global climate actor. This will lead to growing resentment and accusations of double standards and an anti-development climate agenda that works against economic development in the Global South.

4.2. Staying the course

Changes in the EU's energy and food systems reform may not fully filter through to its external action and international cooperation. The war broke out after the finalisation of the programming of the EU's external cooperation instrument, the launch of a new external investment strategy, a €300 billion target under the name of Global Gateway (Teevan et al. 2022), and new commitments at the EU-AU summit in February 2022 (Medinilla and Knaepen 2022). As the EU exhausts the built-in flexibility in its external budgets, and faces increasing economic pressure, it may find it increasingly difficult to achieve these self-imposed targets and objectives.

New priorities with obsolete tools?

In this scenario the EU and its member states prioritise short-term energy security through new natural gas deals, and an uptick in bilateral investment in hydrogen production, yet they largely stick to stated policies for promoting overseas renewable energy transition, without critically reviewing the financial instruments and investment flows it has at its disposal. Concretely, the EU remains committed to ‘replicating’ Just Energy Transition Partnerships (JETPs) in a number of African countries, building on the example of the South African partnership presented at COP26, the African Green Energy Initiative, and the 2021 ambition to mobilise €3.2 billion in grants for renewable energy to African countries in the hope to mobilise a multitude of that figure in private finance.

At the same time, however, the EU’s ability to leverage both private and public finance may be increasingly compromised as the war drags on, leading to a gradual deterioration in ODA and FDI outflows due to continued supply chain difficulties and a general economic downturn in Europe, and in those African economies most affected by the crisis. This results in delays in existing programmes like the South African JETP, and a gradual loss of momentum across the highly publicised Team Europe Initiatives for renewable energy. EFSD+ guarantees and the financial institutions for development implementing them do not succeed in mobilising private investments, especially in a context of increasing inflation and higher capital costs.

Higher standards in a world with other priorities

After the worst of the food crisis has passed, the EU re-commits to the F2F. The EU adopts a legislative framework that allows for rebalancing its food security, climate, and biodiversity ambitions after a pause due to the war. European producers are frontrunners in sustainable food production, receiving ample support through the CAP. In addition, the EU attempts to promote more sustainable (and climate-proof) diets, which has had some success in the affluent, urban areas of Europe.

But the world has changed drastically due to the subsequent COVID-19 and food crises, with record-high food insecurity and the attainment of the Sustainable Development Goal of Zero Hunger firmly out of reach. The EU scrambles to frontload initiatives in its portfolio to increase its support for food security through humanitarian and development assistance, focusing its efforts particularly on its neighbours and the worst affected countries in the Sahel and the Horn of Africa. But much is spent already on COVID-19 and support to Ukraine, and the needs outstrip what Europe can mobilise. With towering humanitarian needs, investments in making food systems more resilient abroad take a back seat. Food systems, particularly in North Africa, continue to be vulnerable to an increasingly volatile climate and international food markets.

To protect European producers, and as a tool to externalise its EGD and F2F, the EU pushes mirror clauses in its trade agreements. Its ODA supports small and medium enterprises to attain this new setting, but many cannot invest enough to continue exporting to the EU. Instead, they start to export more to less demanding regional and Asian markets, leading to a decline in Africa-EU food trade and the draw of the EU’s market on the continent.

Implications

‘Staying the course’ is a more likely scenario. It is compatible with bureaucratic incentives and the path dependency of the EU’s international cooperation architecture. At the same time, the external dimension of the European Green Deal largely depends on external factors and market dynamics outside of the control of the EU and its member states. As such, underestimating the overall more challenging environment for external investment and food systems reform may lead to a gradual loss of momentum. Failure to deliver on just transition partnerships in the short-to-medium term would severely erode the credibility of the EU as a global climate actor, leading to renewed tensions in the EU’s relationship with African countries and the AU, which would look to China as a preferred infrastructure partner. Similarly, a loss of momentum for transitioning to more sustainable food systems in the name

of food security risks deepening global inequalities in terms of food system performance, sustainability and climate resilience.

4.3. A more outward-looking Green Deal

The previous scenarios illustrate the political and transition risks that come with reducing ambitions or failing to adapt to a new global reality. A more ambitious, outward-looking approach recognises that the fallout of the war is truly global, and seeks to better align the EU's transition agenda with the evolving needs and priorities of its neighbours. It puts green transition at the heart of its geopolitical agenda, and seeks to build more resilient and ultimately more stable partnerships with Neighbours and African countries based on a more comprehensive green economy transition. Doing so requires the EU to own up to its self-declared global leadership role in the global transition to sustainability and climate neutrality, and ensure it is seen to create clear and tangible external benefits alongside its internal transition. A more outward-looking Green Deal also seeks to strengthen the EU's competitive offer vis-à-vis Chinese investments in critical energy infrastructure, land and other natural resources.

More secure green energy partnerships based on co-benefits

In an outward-looking scenario, the EU seeks to combine its own accelerated transition with a fundamental shift in how it approaches energy partnerships with third countries. Beyond establishing new short-term transactional partnerships with neighbouring countries, for electricity and green hydrogen, the EU and its member states adopt a more ambitious approach to just transition, one that is firmly rooted in the development and industrialisation ambitions of developing countries and societies, particularly in Africa (Bilal, Knaepen, Medinilla 2022). External investment in new energy infrastructure goes hand in hand with increasingly ambitious support for the productive use of electricity, leveraging Africa's clean energy potential for higher value addition in manufacturing, agricultural processing and service industries while generating employment, revenues and new exports at scale (Medinilla 2022b; Bilal, Knaepen, Medinilla 2022). The EU banks on the African Continental Free Trade Area (AfCFTA), and actively promotes the development of new green and low-carbon industries in African countries. This creates new opportunities for European businesses as African markets recover and grow, while it contributes to establishing more stable and secure interdependencies with Europe's neighbours.

Institutions and member states work with governments to address more quickly the structural and regulatory barriers to green energy deployment in African economies, reducing political and financial risk perception in African energy systems to facilitate and increase the attractiveness of European investments while establishing a stronger competitive niche. Since ODA flows will likely stagnate or even decrease in the short term, the EU and its member states work with DFIs and the private sector to streamline their combined architecture for external investment (Teevan et al. 2022). Additional efforts are made to facilitate the mobilisation of private finance, including through a future EU export credit facility (CoEU 2022a), and working with EU member states on an effective green strategy for export finance (ExFi lab 2021). The EU further counters the more challenging environment for external investment, not by spreading itself too thin, but by focusing on a more limited number of transformative interventions, starting with the Southern Mediterranean and key oil and (new) gas exporting countries including Angola, Nigeria, and Senegal. Investing in local productive use of renewable electricity creates more stable energy systems, which are more suited for long-term integration with European grids, ultimately benefiting the EU's long-term energy security.

In parallel, the EU also works to address the perception of a unilateral EU decarbonisation, working against African economic development and industrialisation, and the accusations of double standards in how Europe sees the role of natural gas in a global green transition. It avoids overly normative statements, but instead focuses on establishing

clear timelines and managing expectations for any EU investment in overseas fossil fuel, while linking it to fast-tracked European green energy investment (Medinilla et al. 2022c).

Green transition as the weapon of choice

Recognising that many of the F2F's measures will lower its dependence on Russian exports of fertilisers and could help in addressing the global food crisis, the EU makes its Green Deal and F2F the cornerstone of its response to the Russian war against Ukraine. It helps that the F2F is seen as addressing other crises as well, namely the need for agriculture to adapt to a changing climate, and reversing the loss of biodiversity in Europe and globally. An ambitious legislative framework for sustainable food systems is passed, including an international dimension linked to trade policy (Baldock and Hart 2021). Banking on the crisis atmosphere, the EU halts its biofuel mandate and launches a package of initiatives to shift toward more sustainable diets. As a result, the EU uses fewer fertilisers, and with European diets less resource-intensive, can continue to export much to the global food markets.

The EU, recognising that more sustainable and resilient food systems in its neighbours – and especially in Africa – have become a fundamental security issue, channels support to partners through the Green Alliances and multilateral institutions. With the EU employing a variety of policy instruments - trade, R&I, and development aid among others - that target different segments of the transition, its Green Alliances can complement the many international institutions active in food security (Rampa et al. 2019). None of this is easy, though: attracting the necessary investments for more sustainable value chains is particularly difficult in agriculture given its complexity and vulnerability to a changing climate. But a shared understanding that the social costs and security risks produced by vulnerable and unsustainable food systems are just too high to ignore, provides the basis for continuing the difficult transition.

Implications

An outward-looking approach to green transition establishes a more structural link between the EU's own transition imperative and the economic development, industrialisation and sustainable transition needs of the EU's partners in the neighbourhood and Africa. By showcasing the EU's ability to mobilise public and private finance for a more comprehensive green transition it helps build credibility and support for the EU's global climate and energy diplomacy and establishes a series of more secure and mutually beneficial (energy) partnerships. This strengthens the credibility of the EU's foreign policy, and creates a much-needed track record of effective EU investment under the Global Gateway.

5. Conclusions

The Russian war in Ukraine led to the successful securitisation of public discourse on energy and food security in Europe. The threat of energy and food insecurity is used to justify a series of interventions that can both strengthen a global green transition (e.g. by accelerating renewable energy deployment) or weaken it (e.g. by delaying the implementation of the F2F strategy). This paper looks at how these –primarily internal– changes also have an impact on the EU’s role in a global green transition.

While the EU’s overall climate agenda appears to have survived the first 100 days of the war, its status is fragile, and subject to rapid changes, making it more and more difficult to adhere to the phased and regulatory approach the EU has sought to introduce. The duration and intensity of the conflict will define the extent of supply chain problems but also the depth of the current economic crisis. The EU continues to emphasise its cooperative role, committing to supporting green transition and sustainable food systems in its external relations. Yet the economic fallout of the war, and the urgency to strengthen energy and combat high food prices at home, raises the level of uncertainty on these external objectives

The changing context calls for a fundamentally outward-looking and global approach to the European Green Deal, one that more structurally links the EU’s own transition with the economic development, industrialisation, sustainable transition and security needs of countries in the Neighbourhood and Africa. This is a geopolitical imperative, as the EU is looking for more resilient and more stable energy partnerships, but also as it seeks to strengthen its competitive offer vis-a-vis China in an overall more challenging geopolitical environment.

The EU should think long-term and raise its ambitions to support and facilitate the green transition in neighbouring countries and Africa. This is not only in line with the EU’s geostrategic objectives and ambitions to be a global climate leader, it will ultimately be more secure, creating more lasting interdependencies and a more credible EU external action. Concretely this includes:

1. Prioritising energy partnerships that create co-benefits through green industrialisation;
2. Aligning all relevant EU policy instruments and deepening cooperation to support more sustainable food systems abroad;
3. Addressing more effectively the structural barriers for a context-specific green transition;
4. Showcasing the EU’s ability to mobilise public and private finance for a comprehensive green transition; and
5. Responding to the perceptions of double standards and a unilateral EU decarbonisation.

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