



## EUROPEAN POLICY ANALYSIS

# A New Phase in EU Climate Geopolitics: Steps Forward and Back

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### Summary

For some time now, the notion that climate policy is an integral pillar of modern foreign and security policy has been prevalent. The aims of the European Union to link climate, energy and security into a coherent EU foreign policy intensified in the wake of Russia's invasion of Ukraine in February 2022. However, several factors have hampered these ambitions since then, and other policy priorities have gained in prominence at the expense of strengthening EU climate geopolitics.

This European Policy Analysis unpacks the discourse and policy proposals taken by EU institutions to merge climate imperatives with foreign and security policy, and then proceeds to contrast this backdrop with recent policy development after Russia's invasion of Ukraine. It finds that the war has had some positive but also negative impacts on EU policies, in light of a tighter focus on traditional and national notions of security. Despite its ambitious aspirations, the EU still has a way to go in its climate geopolitics.

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The opinions expressed in the publication are those of the author.

## 1. Introduction

The EU has long argued that climate and environmental actions are an integral part of security goals. For more than a decade it has been developing policies ostensibly aimed at tightening the connections between its climate change and foreign policies. While making some low-key progress, this agenda has struggled to assume first-order significance for EU external action.

Russia's invasion of Ukraine appears to have changed this, as it has triggered ubiquitous talk of climate policy becoming pivotal to EU security policy and geopolitical power. It seemed as if 2022 was the year when the foreign policy dimensions of the energy transition embedded themselves firmly at the heart of EU priorities. A running narrative has been that EU states must urgently accelerate the green transition for environmental but also for strategic reasons and must upgrade their commitments to do so both within Europe and globally.

In many ways, they did just this in 2022. The EU made unprecedented progress on the climate agenda internally and in the form of significant new foreign policy initiatives. Many of these have moved the EU in important and valuable directions that many governments had refused to contemplate before the invasion. However, some factors suggest that the link between climate policy and security is far from being fully established and even that sharper tensions are emerging between climate and security aims. In some ways, the EU's approach to what is often termed climate or ecological geopolitics has curiously narrowed in scope.

Three limitations are evident:

- First, the EU has oriented its efforts more towards domestic priorities and traditional military security since early 2022, with less relative attention to external climate geopolitics.
- Second, the EU has increasingly focused on extracting renewables and critical minerals for European climate targets in ways that do not assist wider stabilisation in third countries.

- Third, the EU still invests relatively little in the kind of 'deep adaptation' on which ecological stabilisation depends at a global level.<sup>1</sup>

In sum, although the climate-energy transition became more clearly securitised in 2022, the EU's approach to the geopolitics of ecological crisis has not advanced towards full-spectrum climate security. This article argues that such a comprehensive climate geopolitics depends on the EU overcoming the three weaknesses of *security traditionalism*, *neo-extractivism* and *shallow adaptation*.

## 2. Climate action as geopolitics

The EU has formally had in place strategies to develop the security dimensions of its climate policies for well over a decade. Since an initial strategy aimed at addressing the role of climate change as a 'threat multiplier' in 2008, the EU has introduced scores of policy documents and funding initiatives in the area of so-called climate security. Few summits of EU leaders go by without council conclusions reiterating commitments to mainstream climate and ecological question within core foreign and security policies.

These EU strategies have conceived such climate geopolitics in a notably comprehensive fashion. It is an agenda that has developed multiple elements, including

- support for the energy transitions of third countries,
- renewables supply partnerships,
- the strategic use of climate aid,
- conflict interventions and peacekeeping to dampen climate-related instability and risks,
- climate disaster management,
- greening European militaries,
- addressing the challenge of environmental displacements and migration,

<sup>1</sup> 'Adaptation' refers to the regeneration of ecological systems destroyed by climate change, while 'mitigation' refers to the reduction of carbon emissions.

- coherence between climate and trade policies,
- supporting good governance reforms to ensure more inclusive management of climate stresses and
- an external projection of the formal regulatory change integral to the European Green Deal.

The EU formally recognises the climate geopolitics agenda as the kind of multi-dimensional strategic priority that calls for more attention than traditional approaches to military security and defence. If the EU's entire range of formal commitments were to be implemented, this would amount to what might be referred to as a full-spectrum climate geopolitics.

Just prior to and after the Russian invasion of Ukraine, European powers and the EU collectively continued to issue new and ostensibly upgraded commitments in the field of climate geopolitics. In October 2021, the European External Action Service published a 'Concept for an integrated approach on climate change and security'.<sup>2</sup> The EU's 2022 Strategic Compass and the 2021 Climate Defence Roadmap promise to make security deployments more climate-sensitive, and they commit to making Common Security and Defence Policy (CSDP) missions less resource intensive and to building better early warnings for climate stresses to trigger more effective action. New council conclusions on climate security were agreed upon under the Czech presidency in late 2022.<sup>3</sup>

In May 2022, G7 foreign ministers committed to a Climate, Environment, Peace and Security Initiative that would deliver more analysis of the topic, a doubling of adaptation funds and climate-attuned peacekeeping missions.<sup>4</sup> The new NATO Strategic Concept agreed upon in July 2022 promised new 'efforts to assess the impact

of climate change on defence and security and address those challenges', along with a new centre for climate and security.<sup>5</sup> France introduced a new Climate and Defence Strategy in April 2022.<sup>6</sup> After a summer of extreme weather events, the Commission made a pitch for more extensive crisis management powers to deal with climate disasters.

However, despite all of the policy documents, conferences, internal dialogues and council conclusions, the agenda of climate security has maintained a relatively low profile for many years. The EU has done a huge amount in standard climate diplomacy, pushing for international agreements to reduce carbon emissions, but much less to mainstream the more indirect and geostrategic elements of the climate crisis. For all of the EU claims that climate change is not just the most crucial challenge in its own right but also the top security priority, it has been difficult to identify concrete changes to European foreign and security policies that reflect this. Geopolitical and security strategies have not in fact accorded any great priority to climate issues; the crossovers between climate action and traditional foreign policies have remained relatively limited. In practice, a full-spectrum climate geopolitics has failed to take root.

### 3. New momentum

The Russian invasion of Ukraine and its aftershocks have led the EU to make a number of enhanced commitments related to climate change and the green transition. Many of these are focused on the core areas of internal policies and an accelerated roll-out of renewables within Europe. But many are within the EU's external policies – the subject of this report. The EU has signed many new external agreements that enshrine upgraded cooperation on renewable energy with third countries. Of the over 50 energy deals that European countries and the EU have signed since the invasion, half of them

<sup>2</sup> European External Action Service, 'Concept for an integrated approach on climate change and security', 5 October 2021

<sup>3</sup> Council of the European Union, '[Council conclusions on the civilian CSDP compact](#)', 12 December 2022. See also European External Action Service, '[The EU's climate change and defence roadmap](#)', 31 March 2022

<sup>4</sup> Foreign, Commonwealth & Development Office, '[Climate, environment, peace and security: G7 foreign ministers' statement](#)', May 2022

<sup>5</sup> NATO, '[Strategic concept](#)', 2022

<sup>6</sup> Ministère des Armées, '[Climate & defence strategy](#)', April 2022

have included clean energy commitments.<sup>7</sup> While the EU has focused on negotiating increased gas supplies to offset the loss of Russian supplies in the immediate short-term, these agreements have generally built in renewables commitments, too.

Numerous new generation energy partnerships are underway with more support for renewables and especially for hydrogen investments.<sup>8</sup> As part of its seminal May 2022 energy package, the EU published proposals for upgraded energy-transition cooperation with Arab Gulf states, focusing on solar and hydrogen especially.<sup>9</sup> An EU-Morocco Green Partnership notably focuses on hydrogen supplies. A new H2MED pipeline will be built between Barcelona and Marseilles to help transport hydrogen from North Africa through to European markets. The EU-African Green Energy Initiative entails upgraded cooperation, while the EU's new accord with Azerbaijan includes a focus on green hydrogen exports from the country.

At the end of the year, the EU signed a major new energy deal to bring renewables from Georgia and the South Caucasus across the Black Sea to Romania. The EU ran a green energy cooperation forum with Turkmenistan. The union has allocated funds to help Ukraine export hydrogen to the EU to offset its loss of gas pipeline revenues – a crucial security aim being to wean the country off hydrocarbon transit fees that have left it economically vulnerable. The union is setting up a Global European Hydrogen Facility and Bank to press for EU rules to serve as the basis of hydrogen markets.<sup>10</sup> It has also moved forward on implementation of its Carbon Border Adjustment Mechanism, which will serve as further leverage over energy transitions in third countries.

The EU has promised a new Critical Materials Act and a more strategic approach to securing access to minerals crucial for energy transitions. The EU

has also supported more critical mineral mining projects within Europe itself to reduce external dependencies, especially on China. At the 2022 United Nations Climate Change Conference (COP27), the EU signed a group of new critical mineral supply agreements from countries like Kazakhstan and Namibia.

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European global climate funding has increased and is set to rise further; the EU has promised to pay particular attention to the need for more adaptation funds, as opposed to the longer standing prioritisation of mitigation. Germany is now a clear leader in climate aid, while the Netherlands, Spain, Italy and Sweden all increased their commitments in 2022. The EU has rolled out new programmes with the Iranian government on climate-smart rural livelihoods and climate transition projects.<sup>11</sup> The EU put funds into backing Egypt's climate strategy in the run up to and after the COP27 meeting in Sharm el-Sheikh.<sup>12</sup> In June, the G7 agreed on new Just Energy Transition Partnerships with Indonesia, India, Senegal and Vietnam, based on an earlier EU–South Africa accord. The EU agreed to pump one billion euros into the 20-billion Indonesian partnership, the biggest funding initiative ever.<sup>13</sup>

In what was perhaps the most widely reported breakthrough of the year, at the COP27 summit European countries supported new ‘loss and

<sup>7</sup> ECFR, [‘EU energy deals tracker’](#), November 2022

<sup>8</sup> European Commission, [‘State of the energy union’](#), 18 November 2022

<sup>9</sup> European Commission, [‘A strategic partnership with the Gulf’](#), 18 May 2022

<sup>10</sup> European Commission, [‘In Focus: Renewable hydrogen to decarbonise the EU’s energy system’](#), 15 November 2022

<sup>11</sup> European Commission, [‘Hamoun is our breath – Restoring wetlands to save livelihood’](#), 15 November 2022

<sup>12</sup> European Commission, [‘COP27: EU and Egypt step up cooperation on the clean energy transition’](#), 16 November 2022

<sup>13</sup> European Commission, [‘The EU and international partners launch ground-breaking Just Energy Transition Partnerships with Indonesia’](#), 15 November 2022

damage' funding – finally agreeing to the kind of de facto climate compensation for which developing countries had long pushed. The EU and five member states are set to be in the lead in rolling out this new financing. European involvement was also key in creating a new fund for victims of climate disaster: Germany launched a climate disaster insurance scheme called the Global Shield Against Climate Risks,<sup>14</sup> putting 170 million euros into this fund, with France adding 20 million and Ireland adding 10 million euros. At the summit, the EU also agreed on additional aid for forestry in countries such as Uganda, Zambia and the Democratic Republic of Congo (DRC).

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In sum, 2022 was the year in which climate, ecological, renewables and critical materials issues seemed to be conspicuously mainstreamed within EU external actions, as well as in the funding programmes of member states. The Ukraine war fuelled this new momentum. This was true not just in the most direct sense of European governments now being more alert to hydrocarbon dependencies but also in more indirect ways as well: diplomats acknowledged that the EU's need to build alliances against Russia lay behind the new support offered to developing states and especially the 'loss and damage' breakthrough at Cop27. Many analysts assess these EU trends positively in the sense of the war bringing the green and security agendas together, with the EU leading the way in more fulsome commitments to both – and with this climate-security nexus providing a natural extension to EU power internationally.

#### 4. Limits to EU climate geopolitics

Notwithstanding these impressive advances and strands of new momentum, EU climate geopolitics remains limited in a number of important ways. These limitations are of significant strategic concern and suggest that the upbeat assessments of EU external climate action since the invasion are not entirely merited. Crucially, the limitations all revolve around tensions between different aspects of EU security.

##### 4.1 Priority on traditional security

First, the foreign policy dimension of climate policy has not attracted nearly the same degree of attention or funding as either **domestic energy priorities** or other elements of security. The priority of governments has clearly been on the domestic politics of energy and especially on bringing down the price of gas, either through various forms of subsidy or bringing down the price of imports. European governments have introduced schemes that de facto subsidise fossil fuels as energy prices soared after the invasion in February 2022. The funds they have pumped into domestic financing schemes exceed many times over external climate-related funds – Germany's 200 billion euro package alone is ten times the climate aid expenditure of the entire EU plus member states.

Events have also understandably pushed the EU back towards a focus on **territorial security**. The big increases in European foreign policy expenditure are now centred on defence budgets. Defence investments in 2022 have been about defence against possible Russian attacks. Nearly all European governments have committed to significant increases in their defence budgets, with these increases amounting to several hundred billion euros. European supplies of military equipment to Ukraine total nearly 30 billion euros, with over 3 billion euros made available from the European Peace Facility for weapons.

Despite its policy statements, **the EU's ambitions on climate security have in fact plateaued**. The main foreign policy documents of 2022 have, naturally, reflected the challenges flowing from the Ukraine conflict. While the Strategic Compass mentions climate security, it primarily focuses on

<sup>14</sup> Federal Ministry for Economic Cooperation and Development, '[Global shield against climate risks](#)', 21 September 2022

the defence of territorial integrity, sovereignty, and borders. European climate funding has increased, but the OECD reported in 2022 that the pledge made at the 2009 Copenhagen COP summit for 100 billion euros in climate aid has still not been met. More than half of member state climate financing comes from one state, Germany, with others providing extremely modest amounts. The European Court of Auditors has recently reported that the EU exaggerated its climate funding in the 2014–2020 budget period by 72 billion euros: instead of the claimed 20 per cent of total aid, only 13 per cent was genuine climate funding.<sup>15</sup> The UK used some of its climate aid to fund weapons for Ukraine. The Loss and Damage fund mentioned above does not actually increase the amount of climate aid – for the moment no new commitments have been made to the fund – and the EU insisted that it focus only on vulnerable island states and not serve as a general climate-transition or development instrument.

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While the focus on traditional hard security does not necessarily contradict work on climate security, it does appear, in practice, to have diverted the EU's attention and resources from the latter. No upgrade has been forthcoming on climate interventions or defence preparedness for climate conflicts. A European Parliament resolution in June 2022 lamented the lack of tangible progress under the Climate Defence Roadmap agreed in 2021,<sup>16</sup> and officials acknowledge some diversion of attention away from the climate security agenda.<sup>17</sup> No CSDP missions have been deployed tailored to climate-related conflicts and tensions. It is difficult to identify missions in 2022 that have actually incorporated climate and ecological factors in any

significant way. Indeed, the EU has in fact wound down its deployments in the Sahel, meaning there is little security presence left into which climate factors can actually be incorporated.

#### 4.2 Neo-extractive policies

Second, in its raft of new climate-transition agreements and policies, the EU tends to focus on extracting renewable energy for export to European markets. This is what formal documents and statements and indeed much of the analysis generally refers to when they point to the EU's increasing fusion of climate and security policies. However, this neo-extractivism (an ecological version of the longstanding pattern of Western powers extracting oil and gas resources from source countries) is far from representing a balanced approach to climate geopolitics and may, over the longer term, actually prove detrimental to European security. This concern has been present for many years in European debates: the dash for renewables in 2022 has arguably worsened the risks of a green extractivism that ends up being as pernicious as the hydrocarbon extraction that dominated the last century.

In many places, EU efforts to gain access to non-hydrocarbon supplies risk driving greater instability, with knock-on harm to the wider security environment. Analysts point out that the green hydrogen projects now being supported in developing states are primarily oriented to solving the European energy squeeze and that such expensive and complex projects are hardly attuned to the needs of local populations or helpful in offsetting the scarcity they are facing.<sup>18</sup> The EU's push for access to developing countries' critical minerals militates against these states being able to progress with transforming their societies around the energy transition. Many third countries are increasingly complaining that the EU is pushing them to adopt renewables targets and regulations under the European Green Deal in a way that puts their own processes of social stabilisation and modernisation reforms at risk.<sup>19</sup>

<sup>15</sup> European Parliament, '[Climate mainstreaming in the EU budget](#)', April 2022

<sup>16</sup> European Parliament, '[EEAS' climate change and defence roadmap](#)', June 2022

<sup>17</sup> SIPRI Research Policy Paper, '[Advancing European Union action to address climate-related security risks](#)', September 2022

<sup>18</sup> Foreign Policy, '[Rich countries' climate policies are colonialism in green](#)', 3 November 2021

<sup>19</sup> ECFR, '[A new climate for peace? How Europe can reconcile energy and climate security](#)', 31 October 2022

While the EU routinely insists that security is a matter of wholesale social, economic and political transformation, these elements are not prominent in its new green partnerships. Under the Just Transitions Funds mentioned above, the EU is pressing states to advance on emissions reductions in return for funds, but in a way that falls short of a well worked out strategy for managing the social and political aspects of transitions. In places such as Georgia, Serbia and Turkey, the EU has actually backed large critical-mineral mining or renewables projects that have circumvented democratic checks and balances and triggered local protests and turmoil. A major current EU focus is on getting private sector funds into renewables projects in developing states, which is an approach to the climate agenda driven more by profit motives than the social factors conducive to stability.

#### 4.3 Shallow adaptation

Third, the EU's approach to climate adaptation is still unduly circumscribed. The EU and national European donors have certainly increased their focus on adaptation. A tighter environment-security nexus requires funding to pivot away from mitigation and towards adaptation. From a stabilisation and security perspective, the need is not simply to reduce carbon emissions (mitigation) but to invest in greening and regenerating the ecological systems destroyed by climate change (adaptation). Recognising this, the EU and European donors are beginning to fund projects aimed at repairing local environments in a way that reduces societal tensions. The EU has committed to spending much more on adaptation; Denmark, Finland, the Netherlands and other countries are now switching in significant measure from mitigation to adaptation.<sup>20</sup> The EU is certainly moving beyond simply focusing on 'mitigation diplomacy' as security – that is, pushing other states to meet their emissions

targets. The EU now funds a wide range of resilience and capacity building, and this includes ecological issues beyond climate emissions.

Still, funding for adaptation lags behind the focus on mitigation and is far short of what is needed to help temper the wide-ranging social, economic and political impacts of ecological stress.<sup>21</sup> Still only a third of developing states have adaptation plans and the EU does not require these as a precondition for funding. The EU view is still at best ambivalent about adaptation and reluctant to distract from mitigation. Member states still give very small percentages of their aid to help adaptation in third countries.<sup>22</sup> With disagreements over definitions and how projects are labelled, by some accounts only a quarter of global climate funding goes to adaptation, instead of the promised 50 per cent.<sup>23</sup> At an Africa Adaptation summit in the Netherlands in 2022, no EU leader showed up other than host Mark Rutte, and there were few new concrete commitments.

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Moreover, the EU's approach to adaptation is not tailored specifically to conflict or geopolitical risks.<sup>24</sup> One account notes that the EU is keener to pump resources into water infrastructure and the like, but less into the underlying drivers of scarcity.<sup>25</sup> A Chatham House report similarly notes that EU climate funds are more focused on infrastructure rather than on getting the necessary buy-in from local communities to adaptation, and

<sup>20</sup> Chatham House, '[Climate finance is the elephant in the room at COP26](#)', 5 November 2021

<sup>21</sup> Centre for European Reform, '[Boiling dry: How the EU can help prevent instability in the water-scarce Maghreb](#)', 20 April 2021

<sup>22</sup> ACT Alliance EU, '[An analysis of the climate finance reporting of the European Union](#)', January 2021

<sup>23</sup> The Economist, '[Broken promises, energy shortages and COVID-19 will hamper COP26](#)', 23 October 2021

<sup>24</sup> SIPRI Research Policy Paper '[Mapping European Union Member States' responses to climate-related security risks](#)', September 2022

<sup>25</sup> Centre for European Reform, '[Boiling dry: How the EU can help prevent instability in the water-scarce Maghreb](#)', 20 April 2022

that new initiatives such as the Global Gateway move even further in the direction of supporting the hardware but not the software of adaptation.<sup>26</sup> Recent research has found that the EU is still failing to build into climate security an acknowledgment or understanding of how its own renewables projects can generate more *insecurity* where they are tailored to its own narrow interests.<sup>27</sup> EU initiatives still decline to support migration into Europe as an adaptation strategy. The US has moved to link climate adaptation funding more tightly to fragile-state strategy and doing this through a focus on specific countries:<sup>28</sup> diplomats acknowledge in private that the EU lags behind in terms of such tailored strategic connections.

## 5. Conclusion

The EU has recognised that the need to move away from oil and gas dependencies, and especially those from Russia, is clearly all the more urgent after the tragedy in Ukraine. However, while focus intensified in 2022 on reducing energy dependency, this has not yet entailed a comprehensive approach to climate geopolitics. Notwithstanding all the ‘climate policy is now security policy’ rhetoric, the EU has retrenched further from having a full spectrum ecological security.

The wider climate geopolitical component of EU policy has been oddly inactive amid such momentous change. There has been no step change forwards, and in some ways climate geopolitics are being displaced by other geopolitical calculations and a swing back to more traditional security. Both geo-economic and political interests explain this situation. Governments have been constrained by the domestic politics of the energy crisis that erupted in the wake of the Ukraine war; this crisis has pressed them into a tighter focus on immediate economic interests, and at the same time, the war has obliged them, by necessity, to consider traditional defence and security concerns in Ukraine itself and in the wider European region.

While governments have been justified in prioritising these immediate imperatives, their narrowed view of climate geopolitics is a concern. The EU’s upgraded climate agreements may help boost renewable supplies in the short term but risk worsening the social tensions and instability associated with energy politics over the longer term. European policy is increasingly concerned with diversification of the EU’s own supplies, and much less with helping developing states move in a stable way towards ecological regeneration – even though the latter will be far more important for systemic security.

**‘The EU’s upgraded climate agreements may help boost renewable supplies in the short term but risk worsening the social tensions and instability associated with energy politics over the longer term.’**

In these ways, the invasion and its geopolitical implications have accentuated concepts of security that sit uneasily with full-spectrum climate geopolitics. This report has unpacked the different strands of policy change needed if the EU is to develop a full spectrum climate geopolitics. The EU needs to arrive at a better balance between traditional and climate security; it needs to reverse away from self-defeating neo-extractivism; and it needs to invest heavily in deep adaptation that fully incorporates social, economic and political elements.

Deeper effort is still needed to tackle the reasons why progress on climate geopolitics or ecological security is so limited. It is not clear that the geopolitical crisis unleashed in February 2022 will push the EU beyond this impasse.

<sup>26</sup> Chatham House, ‘[What near-term climate impacts should worry us most?](#)’, 19 October 2021

<sup>27</sup> SIPRI Insights on Peace and Security, ‘[A reassessment of the European Union’s response to climate-related security risks](#)’, March 2021

<sup>28</sup> The Center for Climate and Security, ‘[Exploring the security risks of climate change, 2022](#)’