

For Energy Independence, the EU Must Think Bigger than REPowerEU

Article by Rafael Pinto

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With Russia's invasion of Ukraine, a strategic tool in the EU's climate policy toolkit has awoken: energy independence. However, as the EU Commission's plan for energy independence looks towards other fossil-fuel-rich suppliers to wean member states off Russian energy imports, Rafael Pinto argues the EU is missing an important opportunity to bring its energy security policy in line with its climate goals.

In 2021, the EU imported more than 40 per cent of its total gas consumption, 27 per cent of oil imports and 46 per cent of coal imports from Russia. This amounted to 99 billion euros paid to Putin and his oligarchs.

Dependence on Russian fossil fuels has been such a long-standing issue in Europe's geopolitics that it seems the EU just decided to live with it. Although imports have been steadily decreasing, from 148 billion euros in 2011, there was never a target or policy designed to fully ensure independence from Russia. That is, of course, until now.

After the invasion of Ukraine, the EU is taking major steps to leave Russian imports behind and for the first time, set a goal to end it all by 2027 with the REPowerEU plan. As it turns out, climate activists have been right all along: the best defence policy for the EU is energy transition.

The plan is based on four main pillars: increase energy savings, diversify energy supplies, accelerate the transition towards renewables, and increase investments. It builds on the Green Deal targets, increasing the goal for renewables energy from 40 to 45 per cent by 2030 and energy efficiency from 9 to 13 per cent.

The plan encourages member states to develop their own REPower programmes which will be funded by the remaining EU recovery loans (currently 225 billion euros), new recovery grants from the 20-billion-euros worth Emission Trading System allowances, and other EU funding sources. Given the size of other sources of funding, selling extra emissions allowances might not be a good strategy for the environment, especially at a time when the prices of the emission trading system would need to go up in order to meet climate goals.

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False hope for renewables after all?

Although ambitious in ending Russian fuel imports, the plan might not be forward-thinking enough, and it could even put in place sunk-cost measures that harden the transition away from fossil fuels altogether. Instead of replacing energy sources, the EU is really just replacing dictatorships and human rights infringements. With the introduction of the 6th sanctions package on Russia, after the approval of the REPowerEU programmes, ambition was increased. The new package contains a complete import ban on all Russian seaborne crude oil and petroleum products, which covers around 90 per cent of total imports.

Becoming independent of Russian fossil fuels should have been a goal all along. Not only do our societies need to become fossil-fuel-free as fast as possible, but they should also stop supporting authoritarian dictatorships that disregard human rights or rule of law. With renewables already being cheaper and Europe equipped to develop a cluster of renewable technologies, the economics of fossil fuels never quite made sense. The fact that curbing energy dependence was not a target before the war in Ukraine is symptomatic of how much the EU needs to strengthen its climate and human rights ambitions as well as close the gap between rhetoric and action.

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REPowerEU is a plan to stop funding Putin but only, fully, in 2027. Although Russian coal and oil are to be phased out by the end of 2022, imports of natural gas are still expected to continue for another five years. And although the renewable target increased 5 per cent, the plan is a missed opportunity to ditch fossil fuels as the EU just plans to shift its imports to other countries, some of which are known to violate human rights, including Qatar, Egypt, Algeria, and Israel. Instead of swapping energy sources the EU is really just swapping dictatorships and human rights infringements. In 2020, EU energy import dependency was 57.5 per cent. REPowerEU should have set a clear target to lower this number, not just shift country dependency.

Even with the transition to renewables, because the EU is dependent on China for the production of solar panels and wind turbines, it cannot become truly energy independent without bringing the production capacity home.

It is also worth noting that the EU plans to invest in new natural gas infrastructure at a time when it aims to phase out this fossil fuel by 2050. Some NGOs and scientists are even calling for a natural gas phase-out by 2040 or 2034. The sunk cost of new projects could hinder climate performance for the next decades and compromise the Green Deal. The programmes also plan a 1.5 to 2 billion euros investment in oil infrastructure at a time when the EU should be divesting as much as possible.

To be fair, the plan includes a target to double solar energy by 2025 and double heat pump deployment. Still, doubling solar to 320 gigawatts would still only amount to 11 per cent of EU electricity production (considering 2780 terawatt in 2019). By 2030, the EU expects to

double again to 600 gigawatt which is not a particularly ambitious target, compared to the 2025 one. According to these targets, the EU has two and a half years to double solar production but would take another five to double again.

As far as wind energy, the plan does not set a clear target, but together with solar and hydrogen, it should reduce the need for gas imports by 50 billion cubic metres, about 33 per cent of total imports. Given the lack of clarity and the need for fast technological advances on hydrogen, this figure seems ambitious, to say the least. The REPowerEU Plan sets out an additional 15 million tons of renewable hydrogen – on top of the 5.6 metric tons already planned under the Fit for 55 initiatives. Numbers that, as of now, seem like a pipe dream.

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It is also expected that a communication campaign will reduce needs equivalent to 13 billion cubic metres of gas and 16 metric tons of oil, which is optimistic for a communication campaign. This campaign is set out as being accompanied by a rapid programme to replace gas-powered residential and industrial appliances. This replacement is mentioned in the plan but without clear targets or dedicated funding.

An extreme programme should also be put in force to install photovoltaics in every roof possible. Although there is still hope with the European Solar Rooftops Initiative making it mandatory for commercial buildings over 250 square metres by 2026 and residential ones by 2029, given the urgent need for transition, and the timeframe of 2027, these goals could be strengthened.

The plan will tighten regulations on hydrogen, energy efficiency of buildings, transport and heating methods while loosening rules for the implementation of new renewable projects, especially wind and solar.

Overall, the policy is a step in the right direction but underwhelming for the action needed. It adds little to the plans already in motion for the energy transition with the Green Deal and its impacts on Russia will be less significant than the sanctions applied. For climate, issuing more pollution allowances and investing in oil and natural gas infrastructures remains a counterproductive and incoherent, long-term policy. As for human rights and democracy, shifting dependence to problematic countries is also not a sound option.

In the face of the pandemic, the EU surprised the world with fast, coordinated action that mobilised serious and unforeseen amounts of funds. In the midst of the humanitarian, security and energy crisis brought on by the war in Ukraine as well as the climate crisis, we should ask nothing less than a programme with the same ambition. A new Recovery and Resilience Fund is needed. Such an investment programme could fund reshoring the renewables industry, solar panel installation, on every roof possible; home renovation that can end energy poverty and replace oil- and gas-powered home systems; public transport investment; and the development of local energy communities.

With such a plan, the EU could not only gain independence from Russia much faster, but

also achieve 100 per cent renewable energy by 2035, whilst creating jobs and guaranteeing a just transition. Without it, the REPowerEU programme, as with most climate measures, seems too little almost too late.



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