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**Geopolitics: Friend or foe of Climate Action?**  
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The present contribution was submitted on the day of the attack on Israel by Hamas fighters. While the attack jeopardizes recent political initiatives (e.g., the Abraham Accords), it highlights the progressive resignation and renouncement of the International Community in progressing a negotiated peace solution in the Israeli-Palestinian conflict. At a time of highest geopolitical tensions, a new war in the Middle East is likely to have deep long-lasting consequences and might accelerate global geopolitical destabilisation.

### 1. A profound reshuffling of the post-Cold War geopolitical order

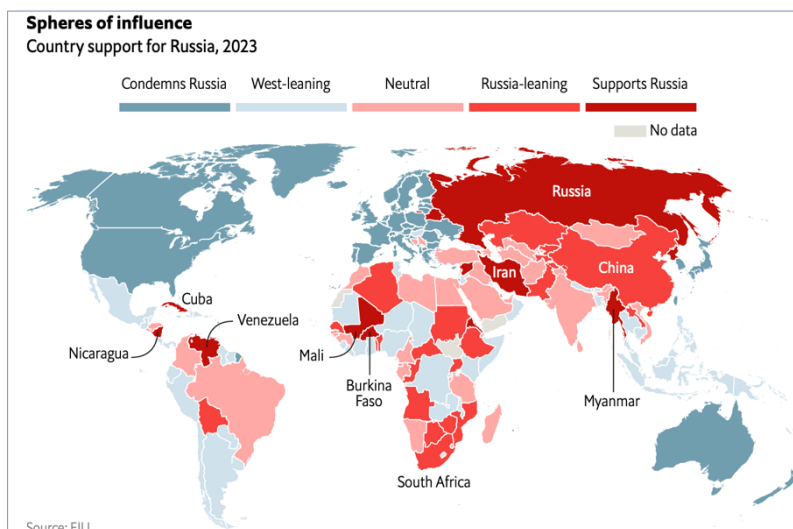
“We are essentially faced with the task to build a new World” were words of Russian President Vladimir Putin in his Valdai speech of October 5<sup>th</sup>, 2023 (27). Are we witnessing the collapse of the post-World War II Rule Based International order? A reckless and uncertain proposition, but food for concern.

The undisputed US supremacy established after the collapse of USSR in 1991- also called “the unipolar moment” - has been increasingly challenged from the very beginning of the 21<sup>st</sup> century, evidenced by a cascade of events such as, the twin towers attack (09/2001), the 2007/2008 Financial Crisis, the war in Syria and the Islamic State (2011/2013), the election and rise of Xi Jinping as President of China (2013/2018/2023), the Russian invasion of Crimea (2014), the accession of D. Trump as President of the USA (2017), the US withdrawal from Afghanistan(2021), and the Russian invasion of Ukraine (2022) to name a few.

The trade competition with China progressively turned into a deep economic and system rivalry which has taken a radically new form in the wake of the Russian invasion. But beyond the Sino-American rivalry, the undergoing tectonic change is no less than a profound reshuffling of the post WWII Ruled Based World Order. Evidence is numerous.

The UN resolution condemning the Russian invasion of Ukraine was supported by 143 countries. However, the 5 countries rejecting it and 35 abstaining represent all together more than 60% of the

world population. And the trend has been leaning towards widening support to Russia since the war has started (1) (2).



The BRICS have been recently scaling up, admitting 6 new countries (3), with a stated ambition to offer an alternative to Western powers. In this new configuration, India’s ambitions to lead the Global South interest is getting closer to reality.

China has been rapidly moving from an economic competitor to a systemic rival (28), with a fierce affirmation of a new bellicose military standing, as shown by its strong military presence in South China Sea and Western Pacific, growing naval presence in Africa (4) and its stated ambition to take control of Taiwan.

The announcement of a highly ambiguous Chinese military cooperation with Russia and North Korea is obviously another subject of concern.

F. Fukuyama, anticipating some 30 years ago the “End of History” through the generalisation of liberal democracy (5) could not have been more ridiculously wrong. The World sees to the contrary a dramatic “Return of History”, with a weakening of the democratic model against autocratic regimes, the re-emergence of economic blocs and protectionist policies, and a massive reinvestment in the military.

As a result, the world is more divided, uncertain, and dangerous than ever before.

The Western (and European) Values are not anymore dominant, neither do they constitute anymore a global aspiration.

The post-World War II Rule Based Order (RBO) – aka. Liberal International Order (LIO), defined by structured relationships based on political and economic liberalism, and liberal internationalism entailing international cooperation through multilateral institutions (such as the UN, WTO and IMF, ...) - is overtly challenged. China, Russia individually, and the BRICS collectively project alternative models supporting different values, principles, and institutions. At the same time, the United States democratic system and its institutions, challenged at their very foundations, are submitted to a stress test (6). USA has become deeply polarised society that some observers believe potentially at the verge of a civil breakdown.

The upcoming presidential elections in November 2024 might confirm the return of a Republican Administration which could have untold consequence on the further collapse of multilateralism, the evolution of the global balance of Power, the development of existing wars and conflicts and the emergence of new ones across the globe.

## 2. Europe: Can the last herbivore survive in a geopolitical world of carnivores?

The European Union has been imagined, designed, and constructed on the model of liberal democracies, assuming an irreversible evolution towards a peaceful world, orchestrated by international institutions, and flattening under the effect of vanishing trade barriers and borders, fostering the development of trade flows across increasingly interdependent nations, progressively embracing democratic values.



EU is therefore fundamentally ill equipped to face the emerging new world order. It finds itself hostage of the growing Sino-American rivalry for global dominance, with at the same time, highly critical trade dependencies with China, and a waning strategic relationship with an enfeebled USA.

If the Biden Administration heralded the return of some level multilateralism after the

rather isolationist policy of his predecessor D. Trump, it is essential to understand how the strategic historical transatlantic ties have shifted towards a now highly uncertain and opportunistic alliance.

The unilateral retreat from Afghanistan, the AUKUS (7) case and the IRA (8) are just a few evidence of the now highly fragile and opportunistic nature of this relationship.

From a defence perspective, the strongly convergent interests of EU and the US in the Russian aggression war against Ukraine have highlighted the strategic importance of NATO, but also its overdependence on the uncertain future US commitment to it.

What would be the fate of transatlantic relationships, and therefore of EU all together, should a Republican Administration take office in 2025, remains a critical question.

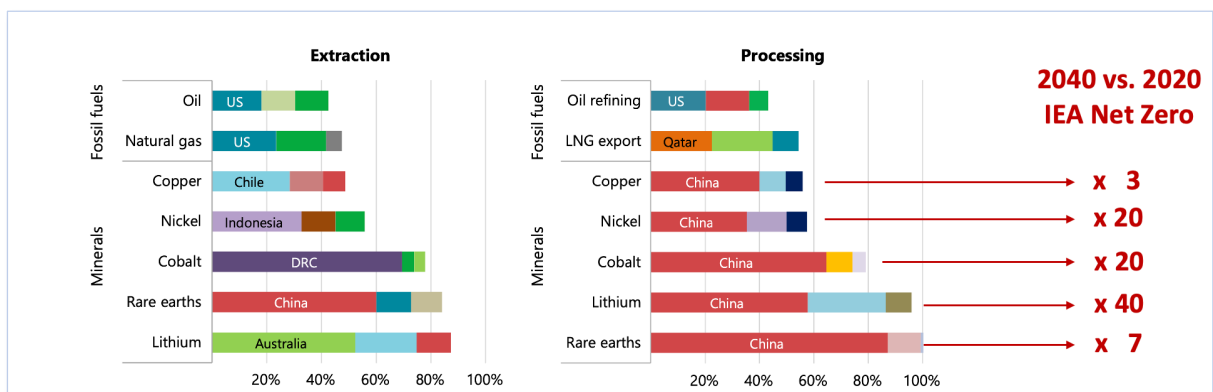
When Taking office, U. von der Leyen pledged to lead a “Geopolitical Commission”, reinforcing EU’s role as international actor. In that respect she was visionary; both the stake and the challenge have never been higher.

### 3. EU Green Deal and Strategic Autonomy

In the recent years, the notion of “Strategic Autonomy” has gain traction in the EU political discourse. Originally rather voluntarily ambiguously defined as “*the capacity to act autonomously when and where necessary and with partners wherever possible*” (9), the concept has taken most recently a much more dramatic and tangible signification.

The Russian invasion in Ukraine has revealed EU’s vulnerabilities resulting from dependency on Russian fuel supplies and on NATO/US defence capacities.

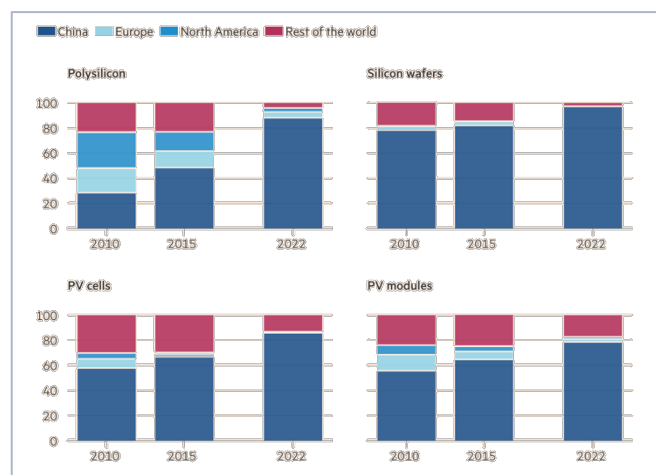
The EU Green Deal, the landmark flagship policy of U. von der Leyen’s commission, to stimulate economy, drive the clean energy transition, and lately to wane EU off the fossil fuel dependency is unfortunately also plagued with major vulnerabilities.



In fact, the very ability of EU to transition to a Net Zero Economy is notably essentially dependent on its capability to secure the required Critical Raw Materials that are needed for most of required low carbon technologies (10, 11).

In 1987, the then-Chinese President Deng Xiaoping famously said, “*The Middle East has oil. China has Rare Earths*”. 3 decades later, China has built an uncontested dominance on mining and processing of critical raw materials. This is particularly the case for Rare Earths, which provide permanent magnets essential for EVs and wind turbines; EU currently imports 98% of its Rare Earths needs from China.

Lithium is another example, with about 2/3 of EU lithium batteries supplied by China.



Finally, when it comes to solar PV, a technology which is central to EU Clean Energy Transition, and an industry mostly borne in EU 15 years ago, China dominates the entire value chain of PV production with a quasi-global monopoly on the critical stages relating to production of polysilicon, wafers, and cells (13).

Both mining and PV production are capital intensive industries with long cycle times where Chinese dominance will be very long and difficult to overcome. De-risking strategies should therefore not rely only on the uncertain promise of reshoring critical supply chains but should also consider building stronger interdependence.

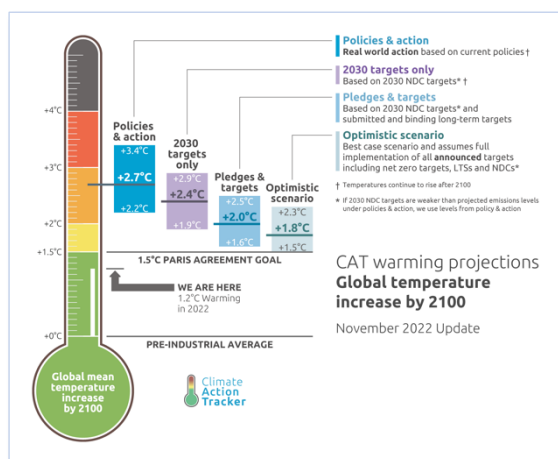
How Chinese authorities might react against the recent EU investigation launched against Chinese subsidised EVs remains to be seen.

The mere ability for EU to achieve its “Strategic Autonomy” and to drive its “Clean Energy Transition” are fundamentally challenged by the current geopolitical developments.

The EU was built over the post-World War 2 context but must adapt rapidly to pressures of the new century. The risk of falling further behind is both likely and existential. It is time now for EU to redesign its fate and embrace swiftly and openly the dual challenge of deepening and widening its Union, pre-requisites to keep its geopolitical significance.

#### 4. The global Clean Energy Transition: A Planet 1,26°C warmer today

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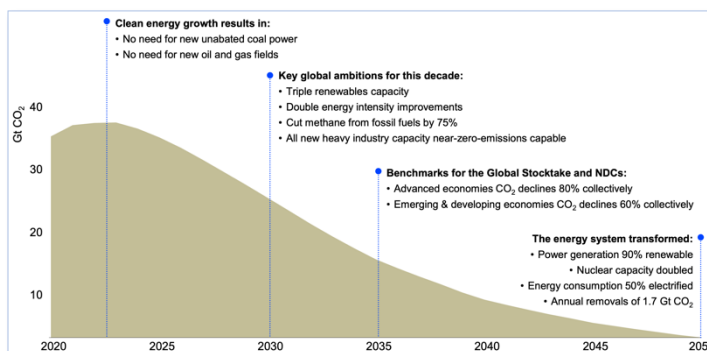
The Climate Action Tracker below (14) indicates that, in the very unlikely case where global 2030 commitments (i.e., from all nations) would be executed, the planet would still be on track towards a 2,4°C warming by the end of the century. Science tells us such a trajectory might soon trigger tipping points that would irreversibly propel human society into an unpredictable future.

Last year, the global average temperature was 1.26°C higher than that of pre-industrial levels (15), and a very recent study established that

2023 has seen for the first time 6 out of 9 planetary boundaries being transgressed, with pressure increasing on all of them (16).

This is the combination of continuously growing global emissions together, with climate warming found to occur faster and to have more widespread impacts than initially modelled by scientists.

The IEA latest Net Zero scenario (17) indicates the headline milestones to achieve, in order to remain compatible with the Paris Agreement targets. A plan no CEO would probably ever dare to present to a Board, since all milestones are individually highly unlikely to be met, not to speak about all of them being met collectively.



### ***Reaching Paris Agreement: “one covid crisis year on year” up to 2050”***

As a way to illustrate the societal meaning of emissions reduction, the one-time decrease in global emissions consequent to a world in “quasi-standby” during the 2020 Covid lock down was just 5.8%. This is about the rate of emissions reductions to be cumulatively achieved year on year up to 2030, then progressively increasing afterwards, precisely when decarbonisation will then entail the hard to abate sectors (18).

### ***No realistic pathway without harnessing oil and gas industry***

Instead, emissions are still continuously growing with record levels observed in 2022.

The IEA has been consistently clear on the subject: No new coal, oil and gas project is needed (17).

To the contrary, oil and gas majors, after reaping the gigantic supereprofits realised on the back of the war, have been all denouncing their recent decarbonisation commitments, while at the same time doubling down on new drilling projects.

In the words of UN Secretary General Mr. A. Guterres, “the Era of global boiling has arrived”.

Continuing along this course is inexorably leading us to an announced short-term chaos.

And there is little hope that Sultan al Jaber, CEO of Abu Dhabi National Oil Company and, incidentally, President of the upcoming COP28, will reverse this course.

### ***Political responsibility: Facing the truth and embracing it***

There is very thin evidence, if any, that reaching – or approaching - Paris Agreement targets is still within reach. Governments and governmental agencies should fully embrace and communicate this reality against the risk of losing credibility and further fuelling distrust in science and democratic institutions. It will then be high time for populist voices and conspiracy theorists. The window is closing fast.

## **5. Key Recommendations – Global Perspective**

Global Warming is an existential threat to humanity, only second to the correlated one of biodiversity loss. Accelerating the transition to a low carbon economy is an imperative, and the biggest global challenge ever encountered by human being.

***Continuity is leading human society to a short-term chaos. The urgency and the size of the challenge calls for discontinuous thinking.***

Harnessing climate change and the correlated collapse of biodiversity calls for immediate, decisive, and radical action. Below are highlighted some of the key pre-requisites, which currently all fall short of being met:

#### **1. Critically restore Global Cooperation:**

Restated by the IEA in its 2023 Net Zero Update (17), there is no net zero transition without much increased global cooperation. In a divided world undergoing its highest tensions in decades, well-functioning international system of reliable and enforceable agreements and efficient multilateral (or international) organisations such as the UN must be decisively restated and reinforced to spearhead global collaboration on advancing Sustainable Development Goals and, singularly, on fighting Climate Change.

#### **2. Renewed Political Leadership supported by Expert Advice:**

The chasm between climate cycle times and electoral terms makes it difficult to devise long term strategies featuring unpopular short-term, even temporary, impacts. The impunity of major incumbent players who intentionally derail the transition for maximising short term private profits should be brought to an end, and when relevant brought to Justice.

Political leaders should establish more structural reliance on independent scientific/expert advice, in order to close the gap between the anticipated trajectory of stated and/or



implemented policies and an increasingly untenable and misleading political discourse. Energy is highly political but also a highly complex matter requiring deep scientific understanding often absent from underpinning the political debate. Political commitments should be backed and audited by independent expert constituencies; Progress should be reported and subject to public debate.

### **3. Supporting wide Societal Engagement**

The energy transition will deeply reshape our work and living environments.

The generally wide public acceptance on the need to drive the clean energy transition is being seriously challenged as soon as the general public faces some of its more concrete impacts. The reshoring in Europe of heavy industrial activities, the CRMA provision to increase EU mining activity (29), and the deployment of new energy infrastructures such as power grids, gas pipelines, PV or wind farms, is meeting increasing resistance from the population. In parallel, the adverse short-term impact of the transition on vested interests is pushing governments across Europe to lean towards a regulatory pause on green policies and towards a more business-friendly agenda. The waning public and governmental support in EU for pushing the EU Green Deal agenda constitutes a growing risk to derail the EU Clean Energy Transition, particularly considering the proximity of the upcoming EU election in June 2024.

Policies should address this acceptance issue by transparently communicating on the odds of the transition and building a robust narrative focusing on the long-term sustainable benefits for the European society as a whole.

### **4. Supporting Bold Demand Reduction Strategies**

Considering decarbonisation of the supply side of the economy is undeniably too slow to meet required decarbonisation rates, reason compels us to urgently addressing the demand side as well.

Demand Reduction strategies, to the notable exception of “Energy Efficiency” have been historically absent from the policy debate, let apart “short term fix” measures in reaction to energy crises. This was the case during the oil crises in the 70’ and in the 2022 REPowerEU policy response to the energy crisis consequential to the Russian war against Ukraine. Instead, the wider scope of Demand Reduction strategies should urgently be integrated into the core of policymaking to accelerate the global decarbonization rate. The notion of Energy Sufficiency is central to demand reduction: reducing the aggregated absolute energy use by decreasing or avoiding energy service’s needs. This is essentially about reconsidering the amount of production and consumption necessary to ensure a satisfactory level of well-being (19).

### **5. Investing massively in Education and Science:**

There is increasing debate on the incompatibility of the current consumerist growth model with the planetary boundaries (16), suggesting a close correlation between sustainability and societal model (20). Education on sustainability should be integrated as base foundation of curricula across the globe. Investments in research and innovation should be strongly increased to build required knowledge and advance the deployment of low carbon technologies; more than 35% of carbon abatements to be achieved after 2030 will rely on novel technologies (17).

### **6. Embracing Adaptation Imperatives**

Warming is happening quicker than anticipated. It is now generally accepted that the world will overshoot (perhaps not definitively) the 1,5°C warming threshold in the current decade. And the current trend points to warming largely overshooting 2°C by the end of the century. At the same time, recent history indicates that the consequences and impact of warming are deeper than expected. While efforts have been so far primarily directed towards climate mitigation, they should now be properly balanced to address adaptation measures. This should entail both the protection of human beings against warming and exceptional weather events, as well as adaptation of critical infrastructures to changing climate patterns (21, 22)

### **7. No Energy Transition without a Just Transition**

Climate change is generally vastly concurring to increasing social divide, at regional, national and

global scales (30). Wealthier social groups are generally least impacted by the effect of climate change on environment and economy. The clean energy transition will furthermore generate a rapid shift in required skills and work profiles, with often fractional opportunity for reskilling and upskilling of existing workforce.

At a global scale, “Global South Countries”, which generally bear least historical responsibility on Climate Change are at the same time the most impacted and the least able to financially cope with climate adaptation, not to speak about already incurred “Loss and Damages” (21).

Policy instruments need to be developed at regional, national and global levels to ensure fairness in burden sharing and opportunities of the energy transition at all levels.

## 10 Recommendations to Belgian Political Leaders and Policymakers

The following recommendations are framed in the particular context of Belgium.

While global recommendations of §5 apply, they must be considered in the context of Belgium forming an integral part of the European Union, and therefore shared or delegated to the Union’s level of which competences notably cover international climate action and climate diplomacy. These have been complemented with Belgium specific recommendations, taking into consideration the energy/climate, geographical, socio-economic, and industrial specificities of the country.

They are also put in relationship, where relevant with the **Belgium National Security Strategy (24)**

### 1. **“Dramatically” reverse Belgium regional fragmentation**

Considering the magnitude and global nature of the challenge, restore interregional collaboration, achieve critical mass, and deliver excellence by supporting landmark flagship knowledge initiatives and projects at National level. Infighting and fragmentation are adversely impacting Belgium’s ability to thrive in an increasingly unstable and competitive context. The moral and strategic relevance of drivers of the Belgian Community Policy, in a world increasingly sliding from hybrid to military war must be brutally questioned. (Supporting (24), priority 1)

### 2. **Supporting a Rule Based International Order**

In its dual capacity of UN Founding Member and Member State of the European Union, Belgian diplomacy must support maintaining and reinforcing an international Ruled Based Order orchestrated by multilateral and international institutions warranting a stable and peaceful global environment. Focusing on climate, the role and capacities of UN and UNFCC singularly must be strongly restated and reinforced (Supporting (24), priority 5)

### 3. **Advocating for a deeper, wider, and stronger European Union**

The influence and fate of Belgium are intimately linked to the geopolitical standing of the European Union. The latter is at risk of falling behind, should it not swiftly reform to the pressures of the new century. It will need to consolidate its integration for higher efficiency, swifter response to rapidly changing contexts, better protection to unfair trade practices, and to develop a new defence capability to protect its core values and assert its role in a more divided and dangerous world. The widening of the Union is a short-term imperative but needs to embrace new mechanisms recognizing the different stages of political, social, and economic integration. (Supporting (24), priority 6)

### 4. **Demonstrate Political Leadership supported by Expert Advice**

Belgium is no exception to the widely observed increasing distrust of citizens in democratic institutions and governments across Europe, and globally. This must come as no surprise for

Belgium, considering the track record of poor governance efficiency, the perceived absence of political vision, the reflexive focus of political action, and the poor Belgian performance against EU benchmarks in many key dimensions, that all translate in a growing disconnect between citizen's and government.

Energy/climate matters are both highly political and complex matters. Credible and efficient political action and planning in those matters must imperatively rely on independent scientific and expert advice, and progress must be subject to independent assessment, transparently opened to public debate. Government action in energy matters over the last legislatures sadly demonstrated counterexamples thereof. (Supporting (24), priorities 1 & 3)

**5. Foster Societal Engagement & integrate SSH at core of policymaking**

The Clean Energy Transition is a deep, complex, and divisive process that will inherently affect all individuals and businesses. It will impact most aspects of the economy and will require sweeping changes against a perceived more secure status quo. Exerting Political Leadership will only be possible insofar there is a wide societal engagement and public support to drive the transition. The early inclusion of Social Sciences & Humanities at the core of the policymaking process is essential to reach this objective. (Supporting (24), priority 1)

**6. Boldly Integrate Demand Reduction Strategies**

There is converging evidence that decarbonisation rate of the supply side of the economy is not compatible with the urgency of emission reductions. Integrating structural long-term Demand Reduction strategies and targets at the core of policymaking, in complement to existing Energy Efficiency measures, offer multiple benefits including, higher and faster emission reductions, lower and de-risked investments in new infrastructures, while at the same time reducing critical technology and import dependencies, and supporting the "Strategic Autonomy" objectives. EERA recent White Paper (19) on this matter offer a detailed analysis and proposes related key policy recommendations. (Supporting (24), priorities 1 & 3)

**7. Boost investment in Education and Scientific Research**

Belgium should leverage its scientific and academic excellence so to create an EU knowledge hub/ Centre of Excellence for those selected low carbon technologies in which it already has built a strong knowledge base and competitive edge. Furthermore, beyond technologies, knowledge needs critically to be built on the higher levels of transition planning and drivers of the societal transformation underpinning the clean energy transition (25).

If pooled together around a national flagship initiative gathering research, industry, and government, Belgian knowledge institutions (universities, research centres) could constitute the backbone of such an EU Transition knowledge hub. EnergyVille initiative in the North of the country is an excellent blueprint thereof at regional level (Supporting (24), priorities 1 & 3).

**8. Decarbonize Belgian built infrastructure**

The building sector is responsible for more than 20% of GHG emissions in Belgium (26)

The important Belgian building legacy, generally featuring low thermal efficiency, represents a significant decarbonization opportunity. Because of the important upfront investment requirement, public intervention is critically needed to accelerate the rate of buildings retrofit and/or new construction. Particular attention should be laid to target most vulnerable groups and to provide an instrument alleviating energy poverty (30). (Supporting (24), priorities 3 & 4)

**9. Accelerate North Sea Powerhouse development**

Over the years, Belgium has been dynamically developing its offshore wind capacities.

As signatory of the recent Ostend Declaration (31), Belgium alongside with 8 other European Member States, joint forces to overshoot the already ambitious EU offshore capacity targets,



aiming collectively to reach installed offshore capacities of 120 GW and 300GW respectively by 2030 and 2050, in the North Sea basin. Such an objective could spur distinctive knowledge and industrial leadership in the entire offshore wind value chain, including fields such as artificial islands, interconnectors, offshore grids, market design etc. It will furthermore constitute an essential infrastructure component supporting the needed future production of green hydrogen.

#### **10. Reinforce Belgium as EU Energy hub.**

Belgium already constitutes today an important infrastructure hub for natural gas, that has proven strategic in the rapid reconfiguration of EU gas supply following the cut off of pipeline gas supplies from Russia last year. Though natural gas is expected to remain an essential component of EU energy supply in the coming years, the repurposing of this infrastructure to be hydrogen compliant will progressively represent a strategic asset for Belgium, and for Europe as a whole, as production of green (and possibly blue) hydrogen will ramp up. In addition, the decarbonisation of the industrial basin, and singularly of the chemical and petrochemical industry complex around the port of Antwerp, is anticipated to likely require significant recourse to CCS technology. The pipeline infrastructure enabling the transport of captured carbon up to the sites of sequestration might constitute an increasingly important element of competitiveness for the port of Antwerp and the Belgian economy.

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