

The Adverse Effects of the Outbreak of Russia-Ukraine Conflict on the Energy Supply System of Europe

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Abstract. Energy is the foundation of modern civilization and national prosperity. The production, distribution and utilization of energy have become an indispensable pillar in the world economic structure and influence the development of international relations. However, due to the deterioration of the earth's environment, issues such as climate change have become a common concern all over the world. The international community needs to build a new order of energy transformation, from the use of fossil energy to the choice of natural gas as a transitional energy, and finally make renewable energy become dominant. In this context, carbon neutrality has been proposed and has gradually become a political chip in the new pattern since the 21st century, which is highly colored by geopolitical games. Regional power system integration, control of mineral resources and energy trade layout become the trend, so the traditional energy exporters try to realize the energy as possible diplomatic leverage before the energy transition, and countries and organizations trying to become leaders of the energy transition put forward the new concept of carbon border tax, trying to further implement new forms of international intervention of carbon intervention. This phenomenon has been demonstrated incisively and vividly in the Russia-Ukraine full-scale conflict since February 24, 2022, that is, the impact of international security situation and relations on energy supply, among which the most severely damaged is undoubtedly the European Union. This paper will analyze the adverse effects of the outbreak of Russia-Ukraine conflict on the energy supply system of Europe from three perspectives.

Keywords: Energy transition; carbon neutrality; international relations; Russia-Ukraine conflict; the European Union; the energy supply system of Europe.

1. Introduction

Energy is the foundation of modern civilization and national prosperity. The production, distribution and utilization of energy have become an indispensable pillar in the world economic structure and influence the development of international relations. With the great impact of human beings on the Earth's environment since the Industrial Revolution, the Earth is entering a completely new era, namely the Anthropocene [1]. In such a special era, global climate change is the most prominent feature, and in order to mitigate the deterioration of this situation, the human beings in this context proposed carbon neutrality, the active management of the atmosphere strategy, in the international community to take the necessary and feasible geological shaping behavior [2]. This reshaping of the energy system must be based on the success of the global energy transition.

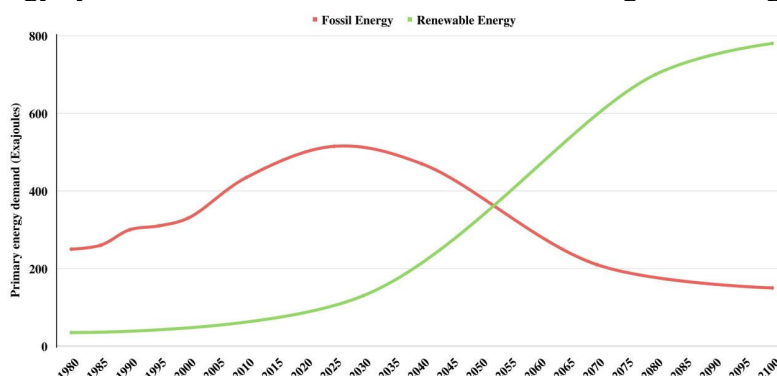


Fig. 1 The Framework of Global Energy Transition[3]

In the current global energy transition, fossil fuel use is set to peak by 2025, and its market share will be completely overtaken by renewable by 2055 [4]. In such a century-by-century measure, large energy consumers seek to diversify the types and channels of energy they import, with some countries becoming attractive energy exporters by virtue of their resource advantages. Natural gas, a traditional transitional fuel with very low carbon emissions, has become a medium for accelerating the construction of a new global energy trade pattern [5]. This shift will also be a major factor and driving force reshaping geopolitics in the 21st century, with implications for globalization and traditional energy politics.

Now, the global energy transition has become a major geopolitical force, as complex circumstances continue to shape the decisions of governments around the world. These forces are changing the structure of power between regions and countries. Such changes are often reflected in specific global events, such as the international response to wars and natural disasters.

Among the major economies' strategies for gas imports and clean energy, the European Union's strategy is the most geopolitical. This overly aggressive approach has undoubtedly exacerbated deep-seated geopolitical tensions, especially in the pan-Eastern Mediterranean region [6]. In order to reconcile this contradiction, diplomacy has become an inevitable solution, and the development of diplomatic relations between countries along with the wheel of history has significantly affected the reconstruction of the international energy political situation and the life of people in some regions. More recently, the Russia-Ukraine conflict, which has received the most international attention, can serve as evidence of the interplay between military or political forces and international energy cooperation.

Diplomatic relations between the former Soviet Union's two largest republics, Russia and Ukraine, have been the focus of international attention. As Ukraine seeks to join the North Atlantic Treaty Organization, Russia announced special military operations in Eastern Ukraine starting from February 24, 2022.

Relations between Europe (especially the member states of the European Union) and Russia have long been interdependent and also fraught. Russia, the European Union, the United States, and even China and Japan are all players on the chessboard called Ukraine, and their chess pieces are not only army, navy and air forces, but also natural gas, hydrogen energy, electricity and clean-energy manufacturing technology. Specifically, the full-scale conflict about Russia has led to the risk to the European energy supply system. These pressures come from political, economic, livelihood, international relations and other perspectives.

In these three different perspectives, energy supply, carbon neutrality goal, and economic stability are the three core considerations. In the first aspect, the energy supply of the EU has fallen into a downturn due to the sanctions against Russia, which directly leads to the reduction of natural gas supply and the reduction of sustainability and reliability. Then, a choice now lies ahead for Europe, which is bound by convention to seek to continue to meet the targets it set out in its 2021 European Climate Law. If the EU chooses to buy energy from other regions, it will inevitably require higher costs, which means recession. When the economic recession becomes a fact, the EU needs to face the dilemma of development and people's livelihood. Therefore, the EU will most likely choose to negotiate with Russia, and it will be questioned and trapped by the United States, and eventually fall into a dilemma. It can be said that the three aspects are interrelated and progressive.

2. Decline in Sustainability and Status in Energy Transition

Specifically, first of all, the sustainability of the energy supply system of Europe has been negatively affected by the side effects of the Russia-Ukraine conflict, which will shake Europe's status as a self-claimed leader and staunch advocate in the process of energy transition and carbon neutrality in the international community. So it's not just an energy or environmental issue, it's an international political issue. In other words, the proposal and implementation of carbon neutrality is essentially a

concrete manifestation of a political game, in which Russia and China are undoubtedly the biggest winners in this period after the outbreak of conflict.

In Britain in the early 20th century since the decision to use fleet fuel oil imports from domestic coal changed to, energy security has become a key strategic issues all energy importer, has long been profoundly affects the development of international politics, in fact, the endless war in the Middle East is a good case in point, just at this moment, The game of energy has changed from directly competing for oil to restricting and threatening natural gas as the medium. The occurrence of war inevitably leads to a negative impact on trade, or even complete suspension. Resources trade is not immune either, especially to the rancorous mood on both sides.

In this way, Russia has long been Europe's source of energy, but the European Union has chosen to side with the United States in diplomatic and military terms in facing the conflict. So after the outbreak of the conflict between Russia and Ukraine, this hidden danger was quickly exposed. The company operating Nord Stream 2 went bankrupt after Germany suspended the pipeline's start-up approval process and the US imposed sanctions, and gas trade between Russia and the EU stalled. "Following the recent geopolitical developments leading to the imposition of the US sanctions on Nord Stream 2 AG, the company had to terminate contracts with employees. We very much regret this development [7]." Says a German government official. It is indeed a vivid example of how international politics and war affect energy trade. The pipeline of Russia has long been Europe's energy lifeline and a significant part of Russia's energy exports [8]. There is no doubt that Nord Stream 1's operations will suffer greatly with the early bankruptcy of Nord Stream 2. Then, a shortage of Russian gas supply has forced EU countries to revert to unsustainable energy sources. The EU can only focus on the use of coal, again to restart the nuclear power plant, in order to make up for the inadequacy of the supply on Russian natural gas [9]. EU countries that live in peace still need stability in their livelihoods and electricity supplies. When the supply of clean energy fails to meet the needs of the people in Europe, their governments are left with the option of reviving old industrial facilities left over from the last century. Of course, this will sacrifice the achievements of environmental protection since the conclusion of the Paris Agreement, but it is also a price that Europe cannot avoid paying. The German government announced in early June that it would restart retired coal-fired power plants as a transition from the current energy crisis. Similarly, Denmark, Netherlands and Italy have activated gas emergency plans, and Austria has switched to coal for its national gas-fired power plants [10]. There is no doubt that, as the Russia-Ukraine conflict enters a prolonged see-saw phase, Europe's energy crisis will become more serious, resulting in more countries being forced to restart unsustainable energy sources. The international community must come up with an aggressive response to solve another environmental disaster caused by the energy crisis.

As a result, the energy transition, or the process of carbon neutral, which is directly linked to clean energy supplies, has become a doll of energy trade and politics. Since its inception, the concept of carbon neutrality has often been regarded by experts as a new form of geopolitical struggle. The birth of carbon interference and carbon border tax makes the conflict between interference and anti-interference appear among countries. Simultaneously, the choice of trading partners for clean or transitional energy remains highly politicized, leading to the rise of trade barriers and the emergence of "carbon clubs", reinforcing the hidden dangers of monopoly [11].

In this process, the European Union appears to be acting most directly and quickly. From 2013 to 2020, the EU invested more than 5 billion euros in the planning and construction of 41 gas projects, mainly the NSI West Gas project and NSI East Gas project in Western and Southern Europe [12]. These projects seek to circumvent Russia's strategic influence by redirecting gas supplies to Middle Eastern or Central Asian countries such as Israel and Azerbaijan. At the same time, the EU is also trying to build Liquefied Natural Gas (LNG) terminal projects in Croatia, Cyprus, Sweden, Ireland, Greece and other countries to increase the EU's LNG imports from outside Russia by 22 billion cubic meters [13]. There is no doubt that the EU's strategic layout resonates with international politics. It tries to highlight the strategic independence and self-defence capability of European energy and thinks that it has succeeded in weakening the development prospects of Russia.

But at a moment when everything seemed to be going well, the sudden onset of the Russia-Ukraine conflict caught the EU by surprise. Europe's energy supply system is in crisis. The resumption of coal-fired power projects has delayed the process of becoming carbon neutral, and the use of water and electricity for ordinary households has been curtailed. This is a big weakening of the environmental protection and emission reduction strategy advocated by the EU for a long time, and also makes the countries and people who are watching and evaluating gradually lose confidence to meet the carbon neutrality goal.

For one thing, there is a question mark over whether the European Union's 2050 target for carbon neutrality, and the 2060 target promised by many countries around the world, will be met on time. According to the United Nations, since the outbreak of COVID-19 and the Russia-Ukraine conflict, the global carbon peak due to 2025 will be delayed, and investment in fossil fuels continues to outpace investment in global climate and carbon markets. This makes people think that the proposal of carbon neutrality target and the planning of the path are extremely fragile, which is extremely unfavorable to the macro strategy of the EU [14].

Second, the authority and advancement of the EU in the field of energy transition will be questioned. As a pioneer in pushing for carbon neutrality, the EU has long wanted to be a structural leader in global climate governance, shaping global distribution and power structures to its interest. At the same time, the European Union is mired in energy shortages caused by wars on its periphery. Imagine a company executive who has been setting macro profit targets for years going bankrupt for some external reason. What will people think of the company's future development prospects? There is no doubt that this is a blow to the EU's efforts to establish itself as a leader in sustainable development and energy transition.

Third, the EU's direct competitors, the other two energy giants and leadership candidates in different aspects, China and Russia, will be the direct beneficiaries of the EU's energy crisis, which is disastrous for the EU. Europe has long been regarded as the centre and main engine of human technological innovation. But real data show that China is the largest producer of clean energy technologies, has the highest share of clean energy manufacturing economy and the most renewable energy patents [15]. China is simultaneously ramping up research, development and investment in renewable energy, aiming to overtake Europe and the US as leaders across the board.

At the other end of the spectrum is Russia, which, though technologically undeveloped, has a monopoly on gas, electricity and clean energy in much of the European Union [16].

Table 1. Dependence rate of major EU countries on Russian gas imports, 2017-2020[17]

Country/Year	2017	2018	2019	2020
Finland	100%	99%	100%	99%
Slovakia	100%	100%	100%	98%
Austria	100%	100%	100%	100%
Hungary	100%	100%	100%	100%
CzechRepublic	64%	60%	62%	66%
Poland	76%	74%	72%	65%
Germany	52%	55%	55%	56%
France	35%	30%	25%	16%
Italy	42%	47%	43%	37%
Netherlands	21%	15%	18%	23%

Arguably, the gradual collapse of Europe's energy supply system will lead Russia to shift its energy exports eastwards, while both China and Japan have a higher share of clean energy than the EU [18]. China and Russia are also deepening their energy partnership, despite China's neutral stance in the conflict with Ukraine.

3. Economic Recession and Social Instability

As the European Union's largest energy exporter, the conflict has left Russia with less energy to export, pushing up unit prices sharply. Russia is the world's largest natural gas exporter, and if the EU still chooses to sanction Russia and imports natural gas from other countries so as to meet the sustainable and transition goal claimed in 2021 European Climate Law, it will inevitably face higher costs [19]. Therefore, the second huge impact is that the outbreak of the conflict between Russia and Ukraine has increased the economic downward pressure on the energy supply system of Europe. If history is any guide, such energy monopolies and antitrust, structural crises in the supply system, and uneven delivery of interests between countries usually lead to economic recession, followed by social unrest. Many have linked Europe's current situation to the financial crisis that swept the world in 2008. Mika Lintila, Finland's economy minister, said the current gas crisis in Europe had all the prerequisites to become a "Lehman Moment" for the energy sector [20].

In the midst of the global economic crisis caused by the subprime mortgage crisis, international oil prices plummeted, leading to unrest in the Middle East. So there was the Arab Spring, followed by the Arab Winter. These chain events killed more than 1 million people and caused more than \$1 trillion in infrastructure damage [21]. At the time, the victims were all Arabs, because it was the people in the Middle East who were unable to earn income due to the energy crisis. Now, if something like that happens in Europe, the victims will most likely be the people of Europe themselves.

Many phenomena since February show the rationality of this assumption. Already before the full-scale crisis, natural gas prices had increased significantly. The current crisis is likely to have a major impact on price levels in Europe [22]. European benchmark gas prices rose by more than 50% in the week of June 13-19, as EU member states faced the increasing of economic pressure due to energy shortages since the full-scale conflict between Russia and Ukraine officially broke out on February 24. Gas prices in the Eurozone are at least six times what they were before the war [23]. It is clear that European countries have been hit hard. Otherwise, it would be hard to imagine the European Union, which has a reputation for being developed and liberal, adopting government-managed resource allocation and restrictions. After the energy and economic crisis at the national level, this is the misery that everyone in society will face. Ms. Von der Leyen, the President of the European Commission, stressed that the EU must not return to long-term coal use and ignore climate change targets in order to replace Russian gas [24]. If the EU continues to pursue carbon neutrality and to reach it in 2050 according to the 2021 European Climate Law, all EU countries must invest in renewable energy to cope with the crisis of resource shortage, which will significantly raise the price of energy within each society and cause energy shortage in less developed regions [25]. By investing in renewable energy instead of fossil energy in the face of Russian aggression in Ukraine, these countries can meet their sustainable development goals, but are likely to face supply shortages in the coming winter months, and the price of this renewable energy is not suitable for all social classes [26].

More recently, indeed, stress on the power system has alarmed the European Union. Electricity prices in the European Union are five times higher than before the war, and all the pressure will fall on taxpayers. The European Union has tried to prevent the collapse of Europe's electricity supply system by raising taxes. The source of this problem also comes from Russia's strategic layout for a long time. If the Russia-Ukraine conflict cannot be reconciled soon, and trade between the EU and Russia cannot resume, the cold and famine of the underclass in the coming winter may become the EU's new crisis in the near future.

Under the background of carbon neutral action, regional electric power integration has become a new theme. Its appeal is to accelerate the overall development of clean energy in the region and drive economic and political integration with energy integration. Russia, as a regional power, has managed to gain control of the power grid in many Eastern European countries. Experts and scholars have long argued that regional powers are competing for dominance in electric power integration, and transnational power grids are bound to be weaponized in the event of international conflicts. Now, then, is the time for Europe to respond to weaponization [27].

4. The Dilemma between United States and Russia

Besides, Europe's energy supply system's diplomatic status and interests have been shaken by the Russia-Ukraine conflict, which has led to deeper political problems. And what we're talking about here is primarily the Thucydides Trap, and the main actor is the United States.

Thucydides Trap, proposed by Graham Allison, a professor at Harvard University, is based on the conclusion drawn by Thucydides, an ancient Greek historian, about the Peloponnesian War. The rise of Athens brought fear to Sparta and made war inevitable. Graham Allison uses this concept to explain that an emerging power will inevitably challenge the status of the established power, and the established power will also take measures to contain and suppress, and the conflict or even war between the two is inevitable [28].

The United States, then, is not on the same page as Europe in the race for global leadership in the concept and action of carbon neutrality. The United States was terrified that Europe would regain its glory and escape the economic and military interference. Europe's dependence on Russian natural gas imports has led it to try to balance multiple goals for a long time. However, due to the current international situation and policy contradictions, Europe is in a dilemma [29].

Thus, the United States has been able to seize on the European Union's pain points and use the alliance as an excuse to disrupt the EU's energy and economic systems.

Let's look at this from the perspective of the European Union. At the behest of the United States, the European Union has made tough talk about weaning itself off Russian energy. But the inability of European countries to find alternative energy solutions after sanctions on Russia will further convince Russia of Europe's dependence on it. That will make the future import situation for the EU even tougher. The oil supply shortfall caused by EU sanctions against Russia could be as high as 4 million to 6 million barrels per day, equivalent to 4.5 to 6.7 percent of global oil production in 2020. And While the member states of Organization of Petroleum Exporting Countries have considerable spare capacity, they are not keen to fill the gap left by a possible Russian supply cut-off, because of the pressure made by the US [30]. In a sense, the US has put the EU in an awkward position as a political pawn. The US allies in the Middle East have no intention of filling Russia's void in Europe, and Iran, also the member state of Eurasian Economic Union (same to Russia), has no interest in helping the EU in crisis. Europe must secure a healthy trade relationship with Russia, and more compromises will be needed. This compromise, after solving the resource shortage problem, may lead to problems in another area. After the outbreak of the conflict, in response to the sanctions imposed by the United States and Europe, Russia declared that all exports of Russian energy to unfriendly regions must be settled in Rubles, which promoted the "de-dollarization" (The movement against dollar hegemony, means opposing to take the US dollar as the standard currency of international trade) of the international energy trade market. At a time when Europe would be forced to continue importing Russian energy, it would incur the wrath of the US. Europe's gas market is too huge for the US to accommodate. In the financial sector, by contrast, the dollar's status as the world's currency is being severely challenged. The sanctions have helped accelerate the "de-dollarisation" of energy trade that Russia has been trying to promote [31]. If the EU chooses to stand firmly behind the US and Ukraine, Europe's energy supply shortfalls cannot be filled by the US. If the EU chooses to improve relations with Russia, the US will question Europe's position.

But is the United States really entitled as a "suzerainty" to question the EU's "loyalty"? Because of the Thucydides trap and the threat played up by American politicians, the United States has long wanted to be a leader in global climate governance and use it to push back against the European Union and China. This is a far more aggressive carbon intervention than the EU's oversight. For example, at the EU-China Summit in June 2020, the EU urged China to implement its commitments under the Paris Agreement and to ensure that developing countries follow through on their emission reduction commitments through the establishment of a normative implementation framework [32]. The United States, on the other hand, has gone from overseer to arbiter. The U.S. State Department has established a global review mechanism on climate change in its annual country reports on human rights to name and shame wrongdoers who undermine global climate action and hold accountable

countries that fail to comply with their commitments under the Paris Agreement [33]. There is no doubt that both Europe and the United States see carbon neutrality as a new medium for their return to imperialist hegemony. It is just that the US has often turned climate governance into a political issue, while the EU is more collaborative. It is clear that the United States is terrified of having a higher voice in the hands of other countries, whether the European Union or China.

In short, when carbon neutrality becomes a political issue, the impact of the Russia-Ukraine conflict on the energy supply system will not only affect Russia and the European Union, but also affect the United States, China, and even all the energy importing and exporting countries in the world. In the current situation, the EU is in the most awkward position. It has had to join the United States in diplomatic condemnation of Russia and China's treatment in Ukraine and these separatist regime in Taipei, but the United States will not only fail to meet its deficit, but will even worsen it further.

5. Conclusion

In the context of the energy transition and the politicization of carbon neutrality, the outbreak of the conflict between Russia and Ukraine has caused an overall negative impact and blow to the energy supply system of Europe. The bankruptcy of Nord Stream and restart of coal-fired power plants exemplify the inevitable environmental crisis and unsustainability that Europe will face. The development of the war and the decision to further defend the goal of carbon neutrality have led to an economic crisis in Europe's energy system. Moreover, Europe is in trouble because of political pressure in the US and pressure on Russian energy supplies. There is no doubt that the international community does not want to see Europe and the world plunged into a new post Cold War crisis because of the outbreak of the conflict between Russia and Ukraine. It is hoped that the coming end of the Russia-Ukraine conflict and the arrival of peace can solve the above serious problems.

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