

The impact of the gas supply crisis on the Just Transition Plans



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The issue of energy supply is one of the key topics of EU policy – the EU intends to become the first climate neutral continent in the world. The main lines of the transformational change to achieve this goal are outlined by the European Green Deal (EGD). The EGD represents the EU's long-term strategy for achieving economic growth to create a modern, resource-efficient, and competitive economy with zero net emissions of greenhouse gases by 2050.

Main observations

Natural gas represents a crucial component of the EU energy mix. **The dependency on natural gas has been increasing in the recent years**, also caused by the shift from other more CO₂ intensive fossil fuels to gas. The EU imports more than half of its total energy demand of oil and petroleum products and coal. **The external dependency on gas imports had been relying predominantly on one supplier: Russia.** Despite the significant decrease in gas imports from Russia in the last year, the EU overall gas supply is still not diversified.

The study provides information on the current and potential impact of the gas supply crisis on the Just Transition Plans (JTPs).

The EU-wide regional risk assessment to the gas supply crisis revealed that **there are significant differences in the exposure to the current and future disruptions in gas supply.** The presence of highly gas dependant sectors combined with little differentiation of the

regional economy was observed predominantly in Italy, France and Germany. Higher diversification of the regional economy can counterbalance the risk level based on the country's significant dependence on Russian gas imports.



If the region has a less differentiated economy, but in sectors which are less gas dependant, it may not be at the highest risk due to the current Russian gas supply crisis. Still, it is potentially highly exposed to the occurrence of other possible crisis situations directed at the specific sectors of economic specialisation in these regions.

The study introduces for the JTP territories a Regional Exposure Index based on different parametres, especially the dependence on gas imports from Russia.

Conclusions and policy recommendations

The findings of the study can be used by regions that are likely to be particularly affected by the transition to climate neutrality. Since the regions setting up JTPs have already elaborated tailor-made strategies for the transformation, they act as the pioneers of the transformation. Therefore, a majority of **the**



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recommendations derived from the study apply to all EU regions.

Findings and policy recommendations **at EU level** focus on:

- the necessity of diversification of the energy mix and energy supply chains;
- coordination between different EU programs supporting transition to lift more synergies;
- intensification of the knowledge exchange to enable mutual learning;
- adoption of implementation of the JTPs to exploit its opportunities, and

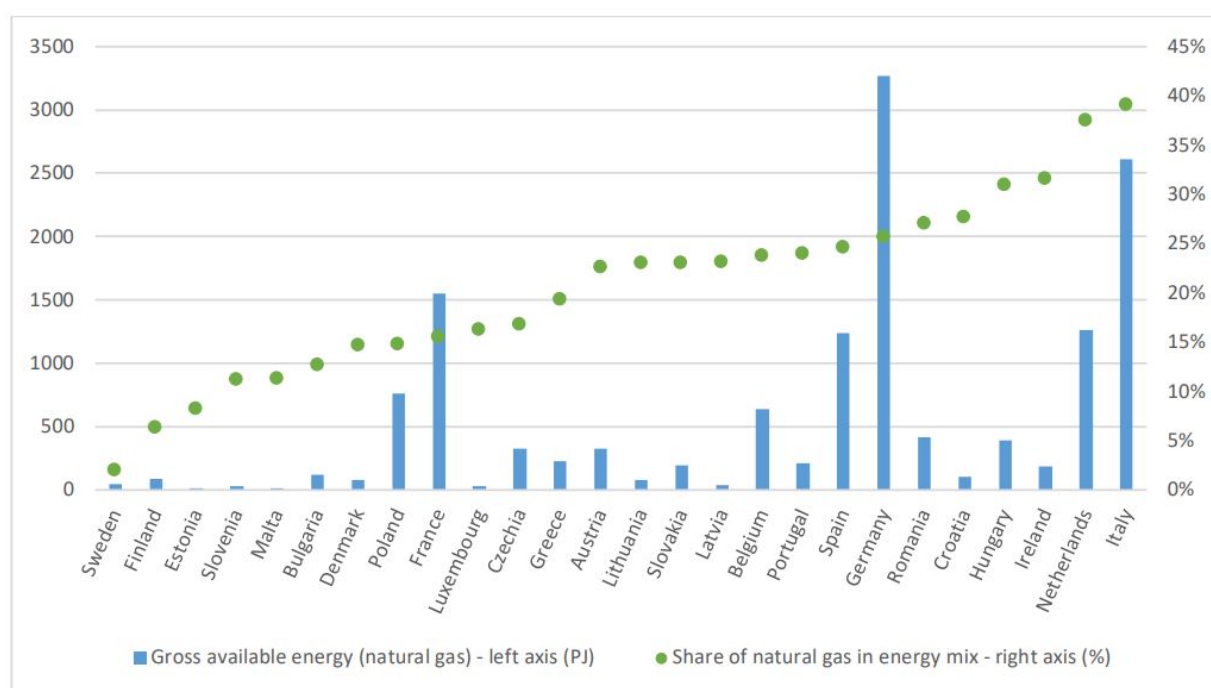
- improvement of the knowledge base to broaden the regional knowledge and the mechanisms of implementation.

At national and regional level:

- improvement of support structures for the regions to implement the JTP, and
- improvement of the communication between national and regional authorities are recommended.

Raising awareness and preparedness to reduce the vulnerability is relevant for all levels of governance.

Dependency on Natural gas by Member State (2021).



Source: consortium elaboration on Eurostat dataset "Gross available energy" (NRG_BAL)

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