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**A just transition
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neutrality for the EU:
debates, key issues
and ways forward**



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A just transition towards climate neutrality for the EU: debates, key issues and ways forward

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Executive Summary

Building an environmentally sustainable economy will require radical transformations of European economies and societies. These transformations – referred to by the European Union (EU) as **'the green transition'** – will have significant social consequences, and may affect disproportionately the most vulnerable territories and social groups. Since the latter are already paying the highest price in terms of climate change impacts and environmental degradation, green transition policies may further exacerbate existing inequalities, and may thus be considered as socially unfair and therefore unacceptable.

The notion of a **just transition** has the potential to ensure consistency and integration of social and ecological objectives and policies, acknowledging the **essential role of the welfare state in achieving a fair green transition**. Just transition principles can indeed be considered as a blueprint for making welfare states compatible with ecological imperatives and supportive of green transition policies.

The 2019 European Green Deal (EGD) – the EU growth strategy aimed at making EU economies and societies environmentally sustainable and reaching climate neutrality by 2050 – stresses the objective of a just transition that leaves no one behind, identifying the European Pillar of Social Rights (EPSR) as a key instrument to achieve this. Since the publication of the EGD, **an EU framework for a just transition has been gradually emerging**, comprising policy orientations and instruments aimed at ensuring that the EU and its Member States can make the most of the opportunities deriving from the green transition while addressing and cushioning the related social challenges. While these initiatives are an important step towards a more integrated and effective approach to the socio-ecological transition, they are unlikely to be sufficient, given the magnitude of the challenges ahead.

This Background paper provides some **reflections on the way forward** to further develop and strengthen the EU framework for a just transition, making it more consistent, comprehensive and effective. We maintain that future initiatives undertaken at the EU level should be more ambitious and should:

- i) **explore ways to make national welfare states more sustainable**, reducing their environmental footprint and increasing their ability to anticipate and 'buffer' the social impacts of climate change, environmental degradation, and of the economic transformations needed to achieve the green transition;
- ii) **integrate just transition initiatives into EU socio-economic governance**, by strengthening their link with the implementation of the EPSR and with the European Semester;
- iii) recognise the essential role of democracy in a just transition by strengthening and renewing the structures for **social and civil dialogue**.

Accordingly, in this Background paper we provide some **recommendations to EU policy-makers**, including both short and long-term actions.

First, **full and balanced implementation of the 20 principles of the EPSR** is a precondition for ensuring a just transition. Given the weakness of policy buffers in the emerging EU framework for a just transition, more ambitious initiatives will be required for the full implementation of the Pillar's principles on social protection and social inclusion, including on minimum income guarantees.

Second, an EU-wide policy discussion should be launched on how to **implement the EPSR principles through innovative eco-social policies, less dependent on sustained growth in Gross Domestic Product (GDP)**. The sustainable welfare perspective provides an interesting array of policy options for satisfying human needs while staying within planetary boundaries.

Third, while the European Semester is a key process for **monitoring the implementation of the EU just transition framework** and for ensuring its consistency, further reflection is needed on how this can be done without excessively burdening the Semester process. The possibility of using the reporting on the National Energy and Climate plans for this purpose should be explored.

Fourth, to monitor the implementation of the 2022 Council Recommendation on fair transition, **joint reviews** of Member States' elaboration and implementation of policy packages for just transition could be carried out **by the Employment Committee (EMCO) and the Social Protection Committee (SPC)**. Furthermore, **peer reviews and other Open Method of Coordination mutual learning tools** could be organised on specific policies, in particular to discuss elements that appear less developed in emerging EU policies, as well as more innovative eco-social policies.

Fifth, it is essential to **include just transition indicators in the monitoring of social and ecological policies**. The EPSR's Social Scoreboard should be further strengthened, the assessment of eco-social policy expenditure should be improved, and there should be regular evaluations of the distributional implications of these policies. Finally, indicators should be developed with a view to creating an EU Just Transition Scoreboard.

Sixth, **the democratic dimension** of the green transition should be enhanced, broadening and strengthening the scope and structures of the social dialogue as well as providing genuine civil dialogue opportunities. It would seem necessary **to go beyond the standard EU participation procedures**, further exploring more innovative methods, and scaling up successful experiments such as the citizens' panels.

Introduction ⁽¹⁾

'The cumulative scientific evidence is unequivocal: Climate change is a threat to human well-being and planetary health. Any further delay in concerted anticipatory global action on adaptation and mitigation will miss a brief and rapidly closing window of opportunity to secure a liveable and sustainable future for all' (IPCC, 2022a: 33)

'Prioritising equity, climate justice, social justice, inclusion and just transition processes can enable adaptation and ambitious mitigation actions and climate resilient development' (IPCC, 2023: 33)

The recent reports of the Intergovernmental Panel on Climate Change (IPCC) show an overall gloomy picture. The progress achieved so far in fighting human-induced climate change and addressing its impact is uneven and insufficient. On the one hand, many consequences of climate change are already considered as irreversible (including changes in the ocean, melting ice sheets and rising sea levels) (IPCC, 2021: 14) and climate and weather extremes are increasing in frequency and intensity, entailing losses and damages to nature, people, and infrastructure that disproportionately affect the most vulnerable people and systems (IPCC, 2022a: 9). On the other hand, evidence shows that global warming of 1.5°C and 2°C will be exceeded during the 21st century 'unless deep reductions in CO₂ [carbon dioxide] and other greenhouse gas emissions occur in the coming decades' (IPCC, 2021: 14). Hence, considering that total net anthropogenic greenhouse gas (GHG) emissions have continued to rise during the period 2010-2019 (IPCC, 2022b: 10), and policies implemented by the end of 2020 are projected to result in higher global GHG emissions than those implied by countries' nationally determined contributions (NDCs) ⁽²⁾ (ibid.: 18), the IPCC (2022a; 2022b) urges more ambitious and integrated climate change mitigation and adaptation policies, designed and implemented in the context of sustainable development pathways. Since these policies will have significant distributional consequences within and across countries, support will depend on attention paid to equity considerations and on ensuring participation of all relevant actors in decision-making at all levels (IPCC, 2022b: 47). Hence, the IPCC maintains, 'applying just transition principles and implementing them through collective and participatory decision-making processes is an effective way of integrating equity

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 2. In the Paris Agreement, NDCs reflect efforts by each country to reduce national emissions and adapt to the impacts of climate change.

principles into policies at all scales, in different ways depending on national circumstances' (IPCC, 2022b: 47).

At the European Union (EU) level, one of the first, highly symbolic initiatives taken by the current European Parliament soon after its election was to declare a climate and environment emergency, calling on the European Commission, the Member States and all global actors to take urgent and concrete action (European Parliament, 2019). In December 2019, the European Commission (2019a) published the European Green Deal (EGD), a growth strategy aimed at guiding European economies and societies towards climate neutrality and high levels of environmental sustainability, making sure that this process (dubbed as the 'green transition') is socially just.

Since the publication of the European Green Deal, the notion of a 'just' or 'fair' ⁽³⁾ green transition has gained in importance at the EU level. The European Climate Law of July 2021 enshrined in EU legislation the EGD's goal to make Europe's economy and society climate-neutral by 2050, while further emphasising the need to achieve this objective in a socially just manner. In a nutshell, the EU acknowledges that, besides providing opportunities, the green transition will have significant social impacts. To address these challenges, a just transition should be promoted, ensuring that both the opportunities and the risks of the green transition are fairly distributed across territories and social groups, 'leaving no one behind'. This said, the notion of the just transition is becoming a 'contested concept' (Stavis et al., 2020), with blurred conceptual boundaries and open to a multiplicity of interpretations: according to Galgóczi and Pochet (2022: 310), '[n]o one knows precisely what a just transition means'. Promoting a just, green transition – we maintain – would require, among other things, closer integration of ecological and social objectives and policies: however, the scale of changes to policy design, content and policy-making needed to achieve such a result is open to debate, and, in particular, reflection is needed on how welfare states could contribute to the objective of a just transition for all.

While the inextricable link between green transition and social objectives and policies is increasingly evident in the context of the climate crisis (see IPCC, 2022a, 2022b; Section 1), it is more urgent than ever for the EU to simultaneously address environmental/climate change-

3. Both international organisations and actors and the EU (including in the European Green Deal) traditionally refer to 'just' transition. More recently, however, the EU has started to refer to 'fair' transition. While the move from the notion of 'justice' to 'fairness' may not be neutral and may have some substantive implications (Tomassetti, 2022), in the Commission's view, according to interviews conducted with European Commission officials, 'just' and 'fair' transition have basically the same meaning: the latter notion was introduced in order to better align just transition (from a terminological point of view) with the 'fairness' dimension of 'competitive sustainability', a notion central to EU socio-economic governance since 2020 (see Section 4.2). In this Background paper, we thus attribute the same meaning to the two notions: we nevertheless mostly use the expression just transition, unless dealing with EU documents/initiatives explicitly referring to fair transition.

related, social, and economic challenges. This task is made (even) more complex in a situation tellingly dubbed an age of permacrisis (Zuleeg et al., 2021), with one challenge seamlessly followed by the next, from the 2008 financial crisis, to the Covid-19 pandemic, to the consequences of the Russian military aggression against Ukraine. The latter has entailed important consequences for European economies and societies, which were slowly recovering from the Covid-19 pandemic, including high inflationary pressure on energy prices and essential goods and services, heavily affecting low-income groups and the middle classes. In an economic and geopolitical context constantly in flux and characterised by growing tensions – the opposite of the international cooperation dynamics needed to effectively address the climate crisis and achieve the United Nations’ Sustainable Development Goals (SDGs) – the outlook for the global economy is increasingly gloomy and uncertain, and it is likely to stay so for a long time.

Against this background, tackling climate and environmental-related challenges – described by the European Commission as ‘[...] this generation’s defining task’ (European Commission, 2019a: 2) – by means of a socially just green transition will require ambitious, courageous, and innovative action, based on policies that are able to closely integrate and simultaneously pursue ecological and social objectives. One of the key questions to be answered is whether European welfare states are up to this challenge and how they could be adapted in order to support a just, green transition.

The main objective of this Background paper is thus to contribute to the debate on how to ensure a just, green transition in the EU, and on the role that the welfare state could play in this process, by:

- i) clarifying the close links between social and ecological/green transition policies;
- ii) reflecting on how to build ‘transition-proof welfare states’ and what could be the role of the EU in supporting them;
- iii) discussing both the added value and limitations of the initiatives undertaken to date by the EU in order to achieve a just transition, and suggesting areas for further action in order to strengthen what we define as an emerging ‘EU framework for a just transition’⁽⁴⁾; and
- iv) discussing a number of recommendations to policy-makers, with a view to strengthening the EU framework for a just transition and contributing to the development of ‘transition-proof’ welfare states.

4. By ‘EU framework for a just transition’, we mean EU-level policy orientations and instruments aimed at ensuring that the EU and its Member States can take advantage of the opportunities deriving from the green transition while addressing and cushioning the related social challenges.

In more detail, Section 1 sets the scene, illustrating the main issues and stressing the need for increased 'eco-social' integration. Section 2, after describing the main features of the EU green transition strategy launched with the EGD, reflects on the notion of a just transition and on the functions that welfare states should perform in order to support this objective. Section 3 describes some of the key initiatives constituting the EU just transition framework and their limitations, notably: the Just Transition Fund (JTF), the Recovery and Resilience Facility (RRF), the proposal for a Social Climate Fund (SCF), and the 2022 Council Recommendation on ensuring a fair transition towards climate neutrality. Section 4 explores possible areas to be developed in order to strengthen such an EU framework. These include: i) exploring solutions to make welfare states more sustainable; ii) implementation through the European Semester and better alignment between EU just transition initiatives and the principles of the European Pillar of Social Rights (EPSR); and iii) the key role of social and civil dialogue in ensuring a just transition. Section 5 concludes and discusses the implications of our research for policy-makers, providing some policy recommendations.

1. SUSTAINABLE DEVELOPMENT AND THE 'SOCIO-ECOLOGICAL NEXUS'

In this section, we set out the starting point for this Background paper: the notion that social and ecological issues are interdependent. Staying within planetary boundaries is a prerequisite for safeguarding social welfare and reducing climate-induced inequalities, while reducing inequality and meeting everyone's needs is a prerequisite for attaining a successful ecological transition. This is a major policy challenge because many climate policies currently have unequal effects, often burdening those on a low income and in high carbon jobs. This interdependency of social and ecological issues needs to be reflected in policies. Ecological policies need to be fair and contribute to social goals, and social policies need to be assessed with regard to their environmental impacts.

The idea of a social-ecological nexus, which highlights the interconnection between the two spheres, can be traced back to the concept of sustainable development. 'Sustainable development' is a term that was coined in the 1987 Brundtland report, where it was defined as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs'. The term was subsequently taken up by the 1992 United Nations (UN) Earth Summit in Rio de Janeiro. In this context, 'sustainability' is commonly understood to consist of three pillars: environmental, social and economic. However, there is much discussion about how exactly these three dimensions relate to each other (Purvis et al., 2019), for instance whether they are on an equal footing, or whether the environmental sphere should be considered as more fundamental than the other two, given that the liveability of the planet depends on the functioning of vital earth systems (Rockström et al., 2009; Steffen et al., 2015). Highlighting the dependency of economic and social functioning on the ecosphere aligns with the ecological economics perspective that conceives of the economic system as a sub-system of the ecosystem (Daly and Farley, 2011: 15).

In the late 1990s and early 2000s, a debate emerged among social policy scholars, calling for greater integration between social and ecological policy objectives. For instance, contributors to this debate argued that social policy research should pay attention to justice for future generations, who are more likely to be impacted by environmental damage than current generations; they also pointed out that issues such as energy, transport, water, and food, which are usually treated as 'environmental' issues, have important social dimensions (Cahill and Fitzpatrick, 2002; Fitzpatrick, 2011; Fitzpatrick and Cahill, 2002).

With rising awareness of climate change since the 2000s, the debate started to focus on interlinkages between climate change, social policy and justice, with the publication of a first symposium on climate change and social policy (Gough et al., 2008) and analyses of justice issues related to climate change (Büchs et al., 2011; Walker, 2011). This debate highlights four dimensions of climate injustice: impacts, responsibility, capacity and cost (Martin et al., 2021: 7).

Climate change impacts disadvantaged groups and countries most strongly, even though they are least responsible for climate change; at the same time, these disadvantaged groups and countries have the lowest capacity to mitigate or adapt to climate change and they are often hardest hit by the cost of such mitigation (ibid.). For instance, poorer countries and people tend to be more vulnerable to climate change impacts since their livelihoods are more likely to be affected (for instance due to the impact of droughts or flooding on agriculture) and they are less able to protect themselves against these impacts (because, for example, of a lack of flood defences, or because of lower house prices in areas at risk of flooding, which attract poorer people). This can be considered unfair given that poorer countries and poorer people have contributed less to climate change. The situation is reflected in a very unequal distribution of emissions between and within countries. A recent estimate states that 'since 1990, the bottom 50% of the world population has been responsible for only 16% of all emissions growth, whereas the top 1% has been responsible for 23% of the total' (Chancel, 2022). Globally and within countries, richer people have significantly greater carbon footprints and energy use than poorer people (Chancel, 2022; Ivanova and Wood, 2020; Oswald et al., 2020).

At the same time, climate change mitigation policies often disadvantage poorer or vulnerable people, for instance by impacting labour markets or through their distributional implications. Initially, 'just transition' debates have focused on employment issues, emphasising the potential risks for jobs and livelihoods of a transition to a low carbon economy for workers in high carbon sectors (Morena, 2018; Newell and Mulvaney, 2013). Just transition approaches emphasise the need for designing processes of low carbon transitions in ways that protect affected workers, for instance through retraining programmes, employment protection and procedural justice (Galgóczi, 2020).

In addition, market-based climate change instruments such as carbon or energy taxes or emission trading schemes, as well as subsidies for low carbon technologies, often disadvantage poorer people. Taxes on necessities such as domestic gas or electricity often have regressive distributional impacts, placing higher tax burdens on poorer than on richer people relative to income (Büchs et al., 2021). Only taxes on 'luxuries' such as air travel have shown to have progressive distributional impacts, burdening richer people more than poorer people. However, while domestic energy is taxed in many countries, aviation fuel for international flights is currently exempt from any tax due to an international agreement from 1944 (Büchs and Mattioli, 2022). The distributional impacts of emission trading schemes very much depend on the design of these. If allocation mechanisms favour high emitters, distributional impacts tend to be regressive (Dirix et al., 2015), while equal per capita schemes tend to be progressive (Burgess, 2016). Subsidies for low energy technologies, for instance feed-in tariffs for solar panels, often also favour richer people because they are more likely to be able to afford the large upfront cost (Grösche and Schröder, 2014). According to some

observers, in several European countries, including Belgium, government subsidies for renewable energy have been financed through additional taxes on domestic gas and electricity, with regressive distributional impacts (while energy-intensive industries were often shielded from these costs through various compensation schemes) (Bollen et al., 2021).

The social outcomes and justice implications of environmental policies are only one dimension of the social-ecological nexus. The role of social policy in the low carbon transition and the environmental impacts of social policies should also be considered. Current welfare states are insufficiently equipped to support the green transition or to protect citizens from the social risks related to climate change and environmental degradation. For instance, social insurance systems do not currently cover risks associated with climate impacts, such as from severe weather events. Recent contributions to this debate have also highlighted the broader role that welfare states play within advanced capitalist economies, and have especially focused on the relationships between welfare states and economic growth (Büchs, 2021b; Corlet Walker et al., 2021; Gough, 2017). The role of growth is contested in environmental policy debates: while 'green growth' approaches assume that environmental impacts can eventually be decoupled from economic growth (Antal and Van Den Bergh, 2016), 'post-growth' approaches are sceptical about the feasibility of decoupling, based on the lack of empirical evidence of absolute decoupling of economic growth, emissions and material footprints at the global scale and at the speed required to meet climate targets and stay within planetary boundaries (Haberl et al., 2020; Hickel and Kallis, 2020; Parrique et al., 2019). These debates have implications for social-ecological discussions, as welfare states and economic growth are closely intertwined. On the one hand, the financing of welfare states currently depends on economic growth, since revenues fall during economic contraction when demand for welfare spending increases. On the other hand, welfare states support economic growth because they stabilise consumer demand, improve productivity and generally contribute to greater social stability (Büchs, 2021b). Social protection, labour market, health and education policies are therefore currently designed to support economic growth, and hence indirectly contribute to environmental damage associated with growth.

These discussions highlight the persistence of large gaps in integration between social and ecological goals and policies in today's welfare states. Gough (2021) and Kempf and Hujo (2022) propose the term 'eco-social contract' to combine respect for environmental boundaries with the social goals of the welfare state. This would require bringing welfare states into line with what is ecologically sustainable, and engaging with the challenges posed by poverty and inequality in the design of climate and environmental policy. A growing body of scientific literature is reflecting on how to design and implement integrated 'eco-social policies', combining environmental and social goals (see Mandelli, 2022).

The concept of 'just transition' has the potential to acknowledge the essential role of the welfare state in the process of climate proofing our society, and to ensure that social and ecological objectives are pursued in an integrative way. Such closer integration is urgently needed to facilitate the transition to a low carbon economy. This transition needs to be fair and contribute to social goals, and at the same time, welfare states need to be transformed to play a more supportive role within the green transition. The scale of this transformation, however, is a topic for debate. In this respect, Galgóczi and Pochet (2022: 309-310) note that two options are on the table. First, green transition policies aiming (among other things) at promoting green growth should be accompanied by strong, traditional welfare policies. Second, according to a growing number of academic and societal actors, more in-depth changes could be made to the welfare state, designing more innovative and growth-independent welfare policies fully integrated with environmental objectives, as part of a social-ecological contract. The latter perspective has been dubbed 'sustainable welfare' (see Section 4.1). Importantly, these two options are not mutually exclusive: besides the possibility to design welfare states in a way which combines traditional with more innovative provisions, the former option could be considered as a step towards fully sustainable welfare systems (Galgóczi and Pochet, 2022; Gough, 2017; Pochet, 2019) ⁽⁵⁾.

2. EUROPEAN WELFARE STATES AND THE GREEN TRANSITION

2.1 The European Green Deal and the objective of a just, green transition

In December 2019, the European Commission published a Communication on 'The European Green Deal' (European Commission, 2019a), '[...] a new growth strategy that aims to transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases (GHG) in 2050 and where economic growth is decoupled from resource use' (ibid.: 2, bold in the original removed). The EGD has two main objectives. First, it aims to guide the transition towards an economy (and a society) characterised by 'zero net emissions' of greenhouse gases and by the decoupling of economic growth from resource use. Secondly, it is intended 'to protect, conserve and enhance the EU's natural capital, and protect the health and wellbeing of citizens from environment-related risks and impacts' (European Commission, 2019a: 2). In order to do so, the EGD identifies eight macro-areas for action, considered as interlinked and mutually reinforcing (ibid.: 4.). These include policies related to climate, environment, energy, industrial strategies and circular economy, transport, agriculture, ecosystem and biodiversity.

5. As Pochet (2019: 326) puts it, the socio-ecological transition will not take the form of sudden, radical transformations, but will be characterised by gradual, sequential changes spurred by a process of interaction between a vast array of actors and interests and by the identification of inconsistencies and limitations of the solutions adopted over time.

The objectives of combining growth and competitiveness with the achievement of climate neutrality and a high level of environmental sustainability are the building blocks of what, in EU jargon, is labelled 'the green transition' ⁽⁶⁾. While it is important to stress that the EGD is primarily a growth-centred strategy aimed at promoting the growth of gross domestic product (GDP) and the EU's economic competitiveness, it differs in many respects from previous EU overarching economic strategies such as the Lisbon Strategy and Europe 2020 (Mandelli et al., 2021; Sabato and Fronteddu, 2020). In particular, the centrality attributed to 'environmental' objectives is unprecedented. Moreover, the EGD recognises the interconnected nature of the policy objectives that it pursues, not taking synergies for granted: it rather acknowledges, much more explicitly than previous EU overarching strategies, that 'careful attention will have to be paid when there are potential trade-offs between economic, environmental and social objectives' (European Commission, 2019a: 4). The three spheres referred to – the economic, environmental and social spheres – are in line with the three 'pillars' of sustainable development promoted by the United Nations (2015); and, indeed, the European Commission (2019a: 3) considers the EGD as an integral part of the EU strategy to implement the UN 2030 Agenda for Sustainable Development and the SDGs. When it comes to addressing trade-offs and exploiting synergies between policies for the green transition and social objectives, the EGD stresses the importance of achieving a 'socially just' ecological transition – i.e. of ensuring that the cost of the transition is not borne by the most vulnerable populations (European Commission 2019a: 16).

While several contingent factors can explain the elaboration of such an ambitious EGD strategy and narrative (Domorenok and Graziano, 2023; Kyriazi and Mirò, 2022), doubts were raised regarding the possibility and willingness of the EU institutions to implement it after the outbreak of the Covid-19 pandemic. However, despite contestations, contradictions and ambiguities, implementation of the EU green transition strategy has continued, proving that the EGD was not 'just a public relations exercise' (Galgóczy and Pochet, 2022: 310). Hence, in 2021, the 'European Climate Law' (European Union, 2021a) was passed, setting out, as legal obligations, the objectives to reduce net greenhouse gas emissions by at least 55% by 2030 compared to 1990 levels and to achieve climate neutrality by 2050. In July 2021, the European Commission (2021a) proposed a broad legislative package – the 'Fit for 55' package – aimed at revising relevant EU legislation in order to facilitate the implementation of the EGD and, notably, to achieve the 2030 emission-

6. More specifically, 'green transition means the transition of the Union economy and society towards the achievement of the climate and environmental objectives primarily through policies and investments, in accordance with the European Climate Law [...], the European Green Deal and international commitments [...]' (Council of the European Union 2022a: art. 3(a)). The phrase 'climate and environmental objectives' refers to the six objectives laid down by Regulation (EU) 2020/852, namely: climate change mitigation; climate change adaptation; the sustainable use and protection of water and marine resources; the transition to a circular economy; pollution prevention and control; and the protection and restoration of biodiversity and ecosystems (European Union 2020: art. 3b).

target. The theme of the social implications of the green transition has become a visible part of the institutional and societal debate around the Fit for 55 Package, especially in relation to the Commission's proposal to revise the EU Emissions Trading System (ETS), which was accompanied by a proposal to set up a Social Climate Fund (see Section 3.1).

2.2 From green transition to just transition

As the EGD acknowledges, addressing climate change will require an unprecedented policy effort, stretching across different domains and policy competence levels. An adequate climate policy will include a combination of technological innovation, regulation, infrastructure investments, behavioural changes and structural reforms in each of the identified domains. Energy supply, spatial planning, agriculture, transport and building infrastructure, industrial systems, and many more sectors will have to go through major transitions to become compatible with the objective of achieving net zero emissions by 2050.

In all these domains, policy measures have consequences for equity: because they can rearrange or strengthen existing power relations, because they can phase out or spare certain harmful practices, because they can deepen or reduce existing inequalities between people, groups or countries. Climate policy therefore always has social effects. No policy measure is free from normative assumptions about what constitutes a 'good' social distribution. Examining social and justice aspects more explicitly makes it possible to identify what one considers to be unjust, who is confronted with it, and what policy approach is best suited to address it.

'Just transition' has emerged as the reference concept to highlight the justice dimensions of ecological transitions. The practice originated in the labour movement in the context of disarmament in the U.S. during the 1960s (Mazzocchi, 1993). Faced with expected job losses for workers in the nuclear sector, union leaders chose to engage in peacetime planning and emphasized the need for support for affected workers in the transition to a peacetime economy. Drawing upon these experiences, Mazzocchi in the 1980s conceptualized the idea of a Superfund for workers. Following new environmental regulation, he proposed to protect and compensate workers who were laid off due to the closure of plants with toxic environmental and health effects (Labor for Sustainability, 2016). Advocating for public policies that protected both the environment as well as workers, unions sought to reconcile financial support and decent jobs for affected workers with the necessary interventions to protect health and the environment. This ran counter to the 'jobs vs. environment' discourse, leading to collaboration between unions and environmental justice groups (Cahill and Allen, 2020).

After the term 'just transition' was adopted in the context of the United Nations Conference of the Parties (COP) climate negotiations in the 2000s, the International Labour Organisation (ILO), in

2015, developed both a more comprehensive policy framework for what constitutes just transition policies and specific guidelines for its implementation, closely linked to the implementation of the UN sustainable development agenda. In a nutshell, in its 'Guidelines for a just transition towards environmentally sustainable economies and societies for all', the ILO (2015) identifies a number of constitutive elements of such a just transition framework. First, since the situation in the various countries and economic sectors is extremely diverse, just transition strategies and policies should be context-sensitive. At the same time, these strategies should take into account the interrelations between the various levels of governance (from local to global) and the possible impact of policies adopted at one level on other contexts. Second, a just transition would require the elaboration of consistent policy frameworks, taking into account and creating synergies between a multiplicity of policy areas linked to the economic, environmental, and social dimensions of sustainability. Third, a significant degree of policy coordination would be needed between the different levels of governance and actors. Fourth, given the complexity of these issues, capacity building should be ensured at all levels and for all the actors concerned. Fifth, the green transition should be based on social consensus: stakeholders should be consulted in meaningful ways and, in particular, social dialogue should be ensured at all levels. Sixth, adequate financial resources should be made available, and both public and private investment should be mobilised.

The multiple contexts in which ecological transitions are linked and raise social questions proved fertile soil for re-interpretation and adaptation of the 'just transition' concept by organisations, governments, or corporations to fit their own scope, interests and priorities. While the recognition that any climate transition encompasses multiple justice dimensions also grew outside the labour movement, the exact boundaries of the concept of just transition became vaguer (Cahill and Allen, 2020; Galgóczi and Pochet, 2022; Kalt, 2022; Stevis et al., 2020). In the literature which addresses the concept of just transition beyond its initial context of impacts on workers through changes in employment, job losses and reskilling, four dimensions of 'justice' can be identified (see Newell and Mulvaney, 2013; Goddard and Farrelly, 2018; McCauley and Heffron, 2018): i) distributive justice concerns the question of how the different impacts, burdens and benefits are distributed across the members of society; ii) procedural justice relates to the decision-making process: how and by whom are decisions taken on the definition of the problem, the approaches and solutions?; iii) recognition justice emphasises the need to recognise human dignity as well as valid divergent perspectives, rooted in social, cultural, ethnic, racial and gender differences; and iv) restorative justice considers how the damage suffered by the (most) affected groups and countries can be repaired.

Furthermore, the various dimensions of justice are not independent of each other: recognition, for example, can be seen as a pre-condition for real procedural justice. Or, when procedural justice is enhanced and stakeholders have a real say in the design of the policies that affect them, it

becomes less likely that an inequitable distribution of costs and benefits will be tolerated. The reverse, harmful dynamic also applies: since inequalities tend to be multi-dimensional, those most affected by environmental degradation and climate change have less power to raise their concerns, denounce any damage suffered or be heard in the design of alternative policies.

Through a just transition lens, concerns over distributive justice are indisputably woven into the EGD strategy. The EGD stresses the importance of achieving a 'socially just' ecological transition – i.e. of ensuring that the cost of the transition is not borne by the most vulnerable populations (European Commission, 2019a: 16). This is presented as key for building a broad societal consensus on the transition towards a zero-emission economy and, eventually, as a precondition for the success of the green transition. In this respect, an 'active' social dialogue (ibid.) would play an important role. Arguably, the scope of the notion of a just transition in the EGD is rather narrow and a number of criticisms have been raised in this respect (see Section 3.3). First, the approach is too 'targeted', focusing on the negative implications that the green transition could have on specific European territories and economic sectors. In this respect, the Commission proposes to set up a 'Just Transition Mechanism' (including a 'Just Transition Fund'), which has now been implemented to support those regions and sectors that, given their reliance on fossil fuels or carbon-intensive processes, will be hardest hit by the transition (see Section 3.1). Second, the emphasis is on social investment policies, focusing on the social policy areas with the highest potential to provide workers with the skills needed in a 'green economy'. Besides this targeted focus, the European Pillar of Social Rights is presented as the reference framework to ensure that no one is left behind in the transition (European Commission, 2019a: 4) ⁽⁷⁾. However, the EGD Communication remains vague on the specific policy instruments to achieve the objective of a just transition 'for all', and details on how the EGD and the EPSR would be concretely linked are missing (Sabato and Fronteddu, 2020). Third, a certain ambivalence can be observed with respect to citizen participation. With the European Climate Pact, the aim is to 'build on the Commission's on-going series of citizens' dialogues and citizens' assemblies across the EU, and the role of social dialogue committees' (European Commission, 2019a: 22). However, the citizens' dialogues are mentioned as a way of sharing information and fostering public understanding, rather than as initiatives for enhancing democracy in the participatory or deliberative sense ⁽⁸⁾. As support action for the Green Deal Call for Research & Innovation ⁽⁹⁾, citizens' panels were organised and

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7. Jointly proclaimed by the EU institutions in 2017, the EPSR has a broad scope, covering 20 principles and rights to be promoted by the EU and its Member States in relation to equal opportunities and access to the labour market, fair working conditions, and social protection and inclusion.
 8. The Climate Pact aims to provide virtual space and capacity for more bottom-up initiatives of people to 'express their ideas, creativity and work together on ambitious action' (European Commission, 2019a: 23).
 9. Referred to as 'support to the engagement of European Citizens in the transition to the European Green Deal'.

facilitated with the explicit aim of deliberation (European Commission, 2022e). These incorporated a deliberative methodology, but without a clear link to a policy process. All in all, the level of ambition regarding the procedural justice dimension appears relatively modest. In Europe specifically, deepening and widening the reach of social and civil dialogue (see Section 4.3) is key to achieving a successful just transition.

These limitations notwithstanding, the EGD can be considered as an ambitious policy framework for including climate and environmental priorities at the core of EU policies, and for combining them, at least at the discursive level, with social fairness and inclusion concerns.

2.3 Welfare states for a just transition

As emerges from the previous sections, the promotion of a just transition would require a high degree of consistency and integration between a vast array of policies implemented at different levels of governance, taking into account and creating synergies between a multiplicity of policy areas linked to the economic, environmental, and social dimensions of sustainability. The elaboration and implementation of such integrated policies (which should be endowed with sufficient financial resources) would in turn require significant intra- and inter-institutional coordination. Additionally, to be considered as socially fair, the transition cannot be a top-down process but, rather, should be based on social consensus. Citizens and stakeholders should be involved in meaningful ways at all levels in the formulation, decision-making and implementation of strategies and policies.

While the simultaneous pursuit of environmental and social objectives should be mainstreamed across policy domains (macro-economic and industrial policies, environmental policies, social policies), it is evident that social policies will have to play a key role in this respect. Strong and comprehensive welfare states – accompanying and facilitating the green transition, strengthening social cohesion and addressing old and new inequalities – are fundamental to ensure a socially just transition, based on the principles of distributional, and procedural justice (see McCauley and Heffron, 2018; Newell and Mulvaney, 2013). In this respect, according to some observers (Sabato et al., 2021; Sabato and Theodoropoulou, 2022.), traditional welfare states can play four key ‘functions’ in the green transition ⁽¹⁰⁾.

10. The distinction between different functions appears useful to identify the key features of and assess just transition policies (and the EU just transition framework) from a welfare state perspective. However, while for each specific social policy measure it is usually possible to identify a prevalent function, these measures often perform several functions. This is, for instance, the case of minimum income schemes: while the prevalent function of these schemes is to provide citizens with buffers, they increasingly perform an enabling role due to their close links with active labour market policies.

First, the principles and rights embedded in welfare states can contribute to policies for the green transition by defining social criteria and objectives to be considered and respected while designing and implementing these policies. Such a *benchmarking function* would include, for instance, policies ensuring the quality of 'green jobs', access of vulnerable households to measures enhancing the energy efficiency of residential buildings, consideration of the distributional consequences and the impact on the most vulnerable when designing environmentally friendlier fiscal systems.

Second, welfare policies can facilitate the achievement of the objectives of the green transition (*enabling function*). Social investment policies can do this if they are targeted at the provision of skills needed for a greener economic model or aimed at facilitating transitions of workers between economic sectors. In addition, welfare policies can also contribute directly to the green transition if these policies (and the related social infrastructure) are purposely designed to reduce the ecological footprint of the welfare state, for instance through carbon-neutral services.

Third, social protection and assistance policies providing income protection (e.g. unemployment and minimum income schemes, pensions, healthcare) can act as *buffers*, ensuring that all citizens are protected and/or compensated during the green transition and tackling any transition-related increases in inequalities. These buffers can also help to boost acceptance of the green transition, as greater social security could increase public support for climate policies.

Finally, welfare state institutions could be used to build a consensus on the green transition or to manage the associated conflicts (*consensus building/conflict management function*). Both social dialogue structures and broader instances of civil dialogue could be used for these purposes.

While, in Section 3, we will assess the emerging EU framework for a just transition on the basis of these four functions, Section 4 reflects on the adequacy of traditional welfare policies to perform these functions when confronted with the challenges of climate change, environmental degradation, and green transition policies. Furthermore, we will discuss more innovative policy solutions, based on closer integration between environmental and social objectives, that could complement traditional welfare state policies.

3. THE GRADUAL EMERGENCE OF AN EU FRAMEWORK FOR A JUST TRANSITION

3.1 EU strategies and instruments for a just transition

Achieving a just transition is among the objectives of the EGD. The latter, however, proposes a restricted and sometimes vague interpretation of the just transition, with a marked sectoral and territorial focus and an emphasis on (a few) social investment policies (see Section 2.2). While initiatives originally foreseen in the EGD are far from constituting a comprehensive EU 'just transition framework' (Galgóczi, 2018), new initiatives have been elaborated over the years. Hence, we maintain, a more developed EU just transition framework, linked to the implementation of the EGD, is gradually emerging, made up of legislation, funds, guidelines and recommendations.

One of the main components of this framework is certainly the Just Transition Fund, an initiative already foreseen in the 2019 EGD Communication. Approved in 2021 (European Union, 2021b), the JTF ⁽¹¹⁾ has been equipped with €17.5 billion (2018 prices) for the period 2021-2027. The main objective of the fund is to address the economic, environmental, and social costs of the transition towards climate neutrality for specific sectors and territories, identified as the most vulnerable in the green transition (ibid.: 2). Originally, these territories were mostly regions that rely heavily on fossil fuels for energy use or on greenhouse gas intensive industries, as identified by the European Commission in the so-called Country reports of the 2020 cycle of the European Semester. However, the scope of the JTF was then broadened, and Member States' Territorial Just Transition Plans (TJTPs) actually include more territories and sectors than originally proposed by the European Commission (e.g., territories relying on the automotive industry) ⁽¹²⁾. The JTF is thus expected, on the one hand, to 'alleviate' the economic and social implications of the transition and, on the other hand, to 'enable' regions and people to cope proactively with the transition (European Union, 2021b: par. 8), mostly creating economic and employment opportunities in more environmentally sustainable sectors.

The JTF is a cohesion policy instrument, jointly managed by the European Commission and the Member States. To access the financial contributions, the Member States must elaborate Territorial Just Transition Plans, setting out the challenges identified in each territory, the objectives to be met, and the types of measures envisaged. The final beneficiaries of the investments funded through the JTF are workers, enterprises and communities in the identified territories. For Member States and regions, the JTF is expected to support the transition to low-carbon and climate-

11. The JTF is one of the three pillars of a broader 'Just Transition Mechanism'. The two other pillars are a public sector loan facility channelling funds from the European Investment Bank and a 'just transition' scheme mobilizing private investment within Invest EU.

12. For an up-to-date list of territories covered and projects financed by the JTF, see European Commission (n.d.).

resilient activities, create new jobs in the green economy and invest in public and sustainable transport. For companies, the JTF could support the transition to low-carbon technologies and climate-resilient economic diversification; help to create attractive conditions for public and private investors; and invest in research and innovation activities. Additionally, it is to provide easier access to loans and financial support, while also investing in the creation of new firms, small and medium enterprises, and start-ups. When it comes to workers and citizens and, in particular, to welfare policies, the JTF focusses on enabling policies in the form of social investment, i.e. upskilling and reskilling of workers and jobseekers, job-search assistance and active inclusion measures for jobseekers (European Union, 2021b: art.2). Other provisions envisage a benchmarking role for the welfare state, highlighting that investment in the energy efficiency of buildings should help to reduce energy poverty (ibid.: 12), and point to the need to 'greening' social infrastructure by investing in the energy efficiency of social housing (ibid.: 13). Finally, from the perspective of 'conflict management/consensus building', the TJTPs, importantly, should be prepared 'in social dialogue and cooperation with the relevant stakeholders' (European Union, 2021b: (18)), and the JTF is also linked with a dedicated stakeholders' platform.

The second component of the emerging EU framework for a just transition is the Recovery and Resilience Facility (European Union, 2021c). Unlike the other EU initiatives analysed in this section, promotion of a just transition is not among the main objectives of the RRF. However, according to the RRF Regulation, the Member States are required to ensure that the measures funded through the Facility contribute to the achievement of a just transition. Consisting of €672.5 billion – €360 billion in loans and €312.5 billion in grants (2018 prices) – the RRF is the main instrument for implementation of the Next Generation EU recovery plan. It is structured around six policy areas ('pillars') considered as fundamental to recovery from the Covid-19 crisis and enhancing the long-term resilience of the EU and of its Member States. The RRF has a strong emphasis on promotion of the green transition and on implementation of the EGD (Bongardt and Torres, 2022). While all the measures funded through the RRF must respect the 'do no significant harm principle' ⁽¹³⁾, the first RRF pillar specifically addresses the 'green transition', and the Member States must allocate a minimum of 37% of expenditure in their Recovery and Resilience Plans (RRPs) to investments and reforms that support this objective. Other pillars of the RRF have more marked 'social' objectives, including pillar 4 (social and territorial cohesion), pillar 5 (health, and economic, social and institutional resilience), and pillar 6 (policies for the next generation, children and youth).

13. Meaning that those measures should not support or involve economic activities that do significant harm to any environmental objective of the Union. These objectives are defined in the Regulation establishing the EU Taxonomy for Sustainable Investment, a classification system setting out a list of environmentally sustainable economic activities, which entered into force in July 2020.

While its constitutive pillars show that the RRF has both a green and a social dimension, in some cases these two dimensions interact. In this sense, Sabato et al. (2021) refer to a 'socio-ecological dimension' of the RRF. First, when implementing measures related to the green transition, Member States are asked to take into account the social dimension of the transition and the impact of these measures on equality, also justifying how their plans will ensure a just transition. This benchmarking role of welfare policies is set out as a general principle in the RRF Regulation, and a further requirement is that the national RRFs contribute to the implementation of the EPSR. This said, only a few specific policies based on this general principle are explicitly mentioned in the constitutive documents of the RRF, including: i) reforms aimed at 'greening' fiscal systems, which should be designed also taking into due consideration their possible distributional effects (European Commission, 2021b: 15); and ii) actions for the renovation of buildings and the promotion of energy efficiency, which are explicitly linked to housing policies and energy poverty (ibid.: 25). Second, the enabling function of welfare states emerges clearly from the documents related to the RRF. The importance of active labour market policies, education, training and skills development policies is strongly highlighted and explicitly linked to the green transition, while building-renovation schemes to improve energy efficiency should include welfare infrastructure such as social housing, hospitals, schools and other public buildings (European Commission, 2021b: 25). Conversely, the buffering function of welfare policies in the transition is absent in the RRF: references to social protection and social assistance systems are not explicitly linked to the green transition. Similarly, while reforms and investment linked to the RRF's 'social and territorial cohesion' pillar are expected to strengthen social dialogue in the Member States (European Union, 2021c: recital 14), no references are made in the constitutive documents of the RRF to the role of social and civil dialogue in ensuring a just transition ⁽¹⁴⁾.

While numerous studies have made separate assessments of the green and social components of the national RRFs, analyses of how these two dimensions have been integrated (i.e. of the socio-ecological dimension of the RRFs) are scarce. Existing studies conducted on a limited number of national RRFs find that, in line with the indications provided in the RRF Regulation (European Union, 2021c) and the Commission's Guidelines (European Commission, 2021b), 'socio-ecological' measures in the national RRFs mostly pertain to what we have referred to as the benchmarking and enabling functions of the welfare state (Sabato and Theodoropoulou, 2022). Conversely, measures related to the consensus building / conflict management functions are more limited, and 'buffering' measures almost non-existent (ibid.). Hence, measures linking the promotion of energy efficiency in buildings to social concerns, setting up schemes and incentives for the most vulnerable households or focusing on the renovation of social infrastructure such as social housing or schools seem to be frequent in national RRFs, together with measures aimed at creating or

14. Documents related to the EPSR emphasise the role of social dialogue in the green transition (e.g., European Commission, 2021c: 36).

improving social infrastructure in an environmentally sustainable way. Similarly, many measures designed to link education, training and skill development policies to the needs of the green transition emerged from this analysis, together with other measures to increase 'skills intelligence' and adapt employment services. This said, the analysis by Sabato and Theodoropoulou (2022) only considers, through a qualitative text analysis, measures reported by national governments in their national RRP. Although instances can be identified in which social and environmental concerns are linked in a single measure, it is not always possible to understand from these documents the 'weight' attributed to each dimension. For instance, when it comes to measures related to training and skill development, national governments often briefly state that these policies should be aimed at – among other things – facilitating the green transition by providing workers with the necessary skills. However, only an in-depth analysis of the formulation and implementation of national initiatives linked to the plans would demonstrate to what extent this is actually the case. Importantly, the Member States are currently revising their RRP, in order to add new 'RePower EU' chapters. The REPower EU Plan was presented by the European Commission in May 2022 in the context of the Russian aggression to Ukraine, with the objective of making the EU independent from Russian fossil fuels by promoting actions for saving energy, increasing the production of 'clean' energy, and diversifying the EU's energy supplies (European Commission, 2022a). At the time of writing, the impact and implications of RePower EU on the socio-ecological transition are not clear. On the one hand, the European Commission's proposal highlights the objective of the transition to a carbon-free economy and stresses that 'fairness and solidarity are defining principles of the European Green Deal' (European Commission, 2022a: 2), confirming the objective of 'ensuring a fair transition for all' (ibid.: 12). On the other hand, the text of the provisional agreement on RePower EU between the European Parliament and the Council of the EU only briefly recalls the 'Union's role for a just and inclusive transition' (Council of the European Union, 2022b: (2)) and opens a possibility for measures implemented by the Member States to exceptionally diverge from the 'do no significant harm' principle 'to safeguard the EU's immediate energy security concerns' (ibid.: 13).

The third key component of the emerging EU framework for a just transition is the proposal to establish a Social Climate Fund. This proposal was part of a broader legislative package (the so-called 'Fit for 55' package) put forward by the European Commission (2021a) in July 2021 to facilitate the implementation of the EGD and the achievement of the 2030 GHG emission target (see Section 2.1). In particular, the SCF accompanies the proposal to include the buildings and road transport sectors in the EU Emissions Trading System. Since this revision of the ETS is expected to entail an increase in fossil fuel prices, the SCF aims to address the social and distributional impact of the proposed new emissions trading system on the most vulnerable households, micro-enterprises, and transport users. Following presentation of the Commission's proposals, the European Parliament and the Council of the EU entered into the inter-institutional

negotiation stage, eventually reaching a provisional agreement, in December 2022, on both the revision of the ETS and the SCF. According to this agreement (European Parliament, 2022), the SCF will enter into force in 2026 (one year before the implementation of the reformed Emissions Trading System (ETS2) and, during that year, it will be financed through the revenues obtained from auctioning 50 million ETS allowances (for an estimated value of around €4 billion). Then, for the period 2027-2032, the SCF will be funded from the auctioning of ETS 2 allowances (i.e. including from buildings and road transport) up to an amount of €65 billion, with an additional 25% covered by national resources. The estimated total amount of the SCF would thus be €86.7 billion' (ibid.).

In order to have access to the SCF, the Member States must draft national 'Social Climate Plans', after consulting local and regional authorities, economic and social partners and civil society. The SCF can be used to implement two types of activities, provided that they respect the principle of 'do no significant harm' and aim to reduce fossil fuel dependency (European Parliament, 2022). First, it can fund long-lasting structural investments to increase energy efficiency of buildings, for the decarbonisation of heating and cooling of buildings, and granting improved access to zero and low-emission mobility and transport (ibid.). While these measures will primarily promote 'green' objectives, the choice of the target group (vulnerable households and transport users) is based on a just transition approach: principles of equality and solidarity enshrined in welfare states are a benchmark for the design of the SCF. Second, SCF resources can be used to finance temporary direct income support for vulnerable households and transport users, in order to absorb the impact of higher prices. The resources to be devoted to these financial buffers are capped at 37.5% of the national Social Climate Plans, with this share gradually decreasing.

3.2 The 2022 Council 'Recommendation on ensuring a fair transition towards climate neutrality'

Adopted by the Council of the EU in June 2022, the Council Recommendation refers to international just transition initiatives, including the Paris Agreement, the ILO guidelines, the 'Silesia Declaration on Solidarity and Just Transition', and the declaration 'Supporting the Conditions for a Just Transition Internationally' (Council of the European Union, 2022a: recital 6). The Council Recommendation recognises, first, the uneven impact of the green transition between sectors, occupations, regions, and countries, and therefore invites the Member States to adopt 'granular approaches, focusing on the individual regions and ecosystems concerned' (ibid.: recital 10). Second, after restating the principle that nobody should be left behind in the transition, the Recommendation identifies 'people and households most affected by the green transition' as the main focus of actions to be undertaken by the Member States, with an invitation to pay particular attention to population groups who are already vulnerable (i.e. irrespective of the transition), such

as low- and lower-middle income households (Council of the European Union, 2022a: recital 11) ⁽¹⁵⁾.

While this wording seems to repeat the targeted approach of some of the instruments discussed in Section 3.1, some awareness of the limitations of these initiatives emerges from the Council Recommendation, which stresses the need 'to enhance the design of policies in a comprehensive and cross-cutting manner and to ensure the coherence of spending efforts, at Union and national level' (Council of the European Union, 2022a: recital 16). In order to do so, the Member States are invited to adopt and implement 'comprehensive and coherent policy packages, addressing the employment and social aspects to promote a fair transition across all policies, notably climate, energy and environmental policies, as well as to make optimal use of public and private funding' (ibid.: art. 2). These policy packages should consist of a comprehensive and coherent set of policy measures integrating social policies with green transition policies through a well-coordinated cross-sectoral approach (ibid.: art. 3h). In particular, policy packages should include measures ensuring: i) active support to quality employment; ii) quality and inclusive education, training and lifelong learning, as well as equal opportunities; iii) fair tax-benefit systems and social protection systems, including social inclusion policies; and iv) access to affordable essential services and housing.

When designing, implementing and monitoring policies for a fair transition, the Member States are invited to adopt a 'whole of society approach' (Council of the European Union, 2022a: art. 8), involving regional and local authorities, the social partners, civil society and stakeholder organisations. In particular, social dialogue is expected to play an important role in defining and implementing measures related to active support to quality employment, and to equal access to quality, affordable and inclusive education, training and life-long learning, and equal opportunities. While promoting citizens' involvement, the use of participatory models to involve people in vulnerable situations is encouraged (ibid.: art. 8d).

The European Semester is identified as one of the main governance procedures to monitor the implementation of the Council Recommendation (Council of the European Union, 2022a: art. 11), and exchanges of best practices among the Member States are to be promoted. In particular, the Employment Committee (EMCO) and the Social Protection Committee (SPC) are invited to review

15. The Council Recommendation defines 'people and households most affected by the green transition' as 'those [people and households] whose effective access to quality employment, including self-employment, and/or to education and training and/or to a decent standard of living and essential services is significantly limited or at risk of being significantly limited as a direct or indirect consequence of the green transition' Council of the European Union, 2022a: art. 3c). 'People and households in vulnerable situations' mean 'those who, independently of the green transition, face or are at risk of facing a situation of limited access to quality employment, including self-employment, and/or to education and training and/or to a decent standard of living and essential services, implying low capacities to adapt to the consequences of the green transition' (ibid.: art. 3d).

progress in implementation as part of their monitoring frameworks, including in cooperation with other relevant committees such as the Economic Policy Committee (EPC). Importantly, monitoring the implementation of the Council Recommendation would require broadening the available knowledge base, strengthening the knowledge and measurability of key concepts, and developing robust and comparable indicators, including, for instance, on energy poverty, transport poverty, green jobs, and the distributional implications of green transition policies (Council of the European Union, 2022a: art. 9, art. 11d).

3.3 The emerging EU framework for a just transition: challenges and limitations

A number of criticisms have been levelled at the EU framework for a just, green transition described in the previous sections. While some of them highlight limitations and shortcomings of specific initiatives already enacted, other criticisms consist of more fundamental questioning of the overall approach and assumptions on which the entire EGD strategy is based.

3.3.1 Overall EU approach to a just, green transition

In order to achieve the stated environmental and climate objectives, the EGD relies on green growth / ecological modernisation approaches, combined with the aim to simultaneously pursue inclusiveness and fairness in the transition (Mandelli et al., 2021; Petmesidou and Guillén, 2022; Sabato et al., 2022a; Zimmermann and Gengnagel, 2022). There has been criticism of both the effectiveness of this approach in addressing environmental and climate change-related challenges and the role therein attributed to social justice considerations. According to Laurent (2021), the EGD's aim to tackle climate change and environmental degradation by decoupling greenhouse gas emissions from economic (read, GDP) growth is unrealistic. Given its assumption that sustained economic growth, environmental sustainability and social fairness can all be increased simultaneously, the EGD seems to be 'a strategy for a century past: its objective should [instead] be the wellbeing of all Europeans' (Laurent, 2021: 109). Furthermore, Laurent (2020) notes that there are no references to inequality in the EGD Communication, and only a few references to the notion of social rights. In a similar vein, Haas et al. (2022) maintain that the social dimension of the EGD is weak and does not fundamentally challenge the power relations which characterise the capitalist system. Consequently, there is a risk that the eco-modernisation agenda promoted by the EGD – based on technical modernisation and the stabilisation of global power relations – will reproduce and renew the social inequalities within the EU and at the global level. As for the latter aspect, according to Akgüç et al. (2022), in the EGD and subsequent EU initiatives for a just transition there is little recognition of the social impact of decarbonisation beyond the EU, particularly in the Global South, while Claar (2022) argues that the approach adopted in the EGD may end up reproducing international dependency structures, potentially leading to 'green colonialism'.

3.3.2 Weaknesses of the EU's social dimension

As mentioned in Section 2.2, there are some limitations and ambiguities in the way the notion of just transition is used in the 2019 EGD Communication, which only refers explicitly to a limited set of geographically and sectorally targeted initiatives and policies (Sabato and Fronteddu, 2020). In this respect, Fleming and Mauger (2021: 79) speak of a 'restrictive interpretation' of the concept of just transition by the EU institutions, while, in order to bolster the social justice dimensions of the EGD, McCauley and Pettigrew (2022) maintain that it would be necessary to mainstream the priority of a just transition across the eight macro-areas of the strategy and closely link the EGD implementation to the European Pillar of Social Rights. Indeed, while the EPSR is presented in the EGD as the reference framework to ensure a just transition for all, the 2019 EGD Communication contains no clear indication as to how this should be done, while the proposals in the subsequent European Commission (2020) Communication on 'A strong social Europe for just transitions' are rather vague.

As noted by Petmesidou and Guillén (2022), close integration of green transition and social policies at the EU level would not be easy, due to the weakness of the EU's social dimension, its reliance (in large part) on 'soft law', and ambiguities in its approach to social policies. While the European Pillar of Social Rights is expected to play a key role in ensuring a socially just transition – Petmesidou and Guillén (ibid.) maintain – it remains a non-binding instrument, presenting some ambiguities when it comes to identifying a balanced social 'policy mix' combining social investment policies with more traditional social transfers. Hence, as argued by Akgüç et al. (2022), there is a risk that the emerging imbalance between EU green transition policies, increasingly adopted through legislation, and non-binding social initiatives (such as the 2022 Council Recommendation on fair transition) may hinder the achievement of a just, green transition.

3.3.3 Integration, comprehensiveness, consistency and funding

Key EU initiatives for a just transition, such as the JTF and the SCF, were developed in parallel with policy strategies and legislation primarily pursuing 'green' objectives (respectively, the EGD Communication and the Fit for 55 package), as complementary initiatives to the latter, addressing their possible social consequences. According to some observers (Akgüç et al., 2022; McCauley and Pettigrew, 2022), the fact that these initiatives were conceived as a sort of add-on to green transition policies can be seen as a shortcoming of the emerging EU just transition framework⁽¹⁶⁾. Indeed, according to Akgüç et al. (2022: 2-3), 'just transition means that addressing both the

16. The relationship between green and social objectives in the implementation of the JTF may be more complex and needs to be explored further. As it emerges from our interviews with European Commission officials, in a number of Member States, the preparation of the TJTPs – instead of being a 'social add-on' to already established 'green' objectives – could have helped to make the latter more ambitious, for instance regarding the planning of the national coal phase-out. More in general, further research is needed on the implementation of the JTF across EU countries.

employment and the distributional effects of a shift to a net-zero economy should be seen as an integral part of the package and not only as supplementary corrective measures'. Consequently, what is needed, they say, is a more integrated approach to policy-making and the mainstreaming of social concerns in climate and environmental legislation.

This 'supplementary character' of key EU just transition initiatives (combined with limited EU competences in some social policy domains) may have affected the comprehensiveness and consistency of the EU just transition framework, potentially reducing its effectiveness. Given existing gaps and limitations of both the JTM and the forthcoming SCF in terms of territorial and sectoral scope, beneficiaries, and measures promoted (Akgüç et al., 2022; Berghmans et al., 2022; Gore et al., 2022; Strambo et al., 2022), the EU framework has thus been described as 'patchy' (Akgüç et al., 2022). Together with a lack of comprehensiveness, the insufficient financial resources of both the JTM and the SCF ⁽¹⁷⁾ compared to the objectives they are meant to achieve entail the concrete risk that not all individuals, households and enterprises seriously affected by the green transition will be reached by EU initiatives (Akgüç et al., 2022; Cameron et al., 2020; Colli, 2020; Gore et al., 2022, Strambo et al., 2022) ⁽¹⁸⁾.

All in all, greater integration between actions in a variety of policy areas and better coordination across different levels of governance are needed, in order to ensure that the initiatives implemented are balanced and mutually supportive, and that they cover adequately the audience of potential beneficiaries. For instance, policies aimed at decarbonising buildings and road transport, such as the ETS reform and the SCF, should include, in a balanced way, income support, measures to provide vulnerable households with viable alternatives to fossil-fuel intensive energy, and incentives for changes in consumption habits (Strambo et al., 2022). Additionally, these policies should take into account the local/regional context and structural factors that influence households' consumption habits, such as socio-economic status and access to services (ibid.).

More specifically, when it comes to the 'social policy mix' promoted through EU just transition policies, what we have referred to as the benchmarking and enabling functions of welfare states (see Section 2.3) seem to be most prevalent. The buffering function, however, is significantly underdeveloped – for instance, the provision of income support, with the exception of the SCF – and the conflict management/consensus-building function appears weak. This is partly due to the

17. The aim is not for EU funds to completely cover the expenditure on green and just transition policies. Member States through their public budgets and the private sector are expected to cover a substantial part of the investment needed.

18. Analysis of the SCF refers to the initial European Commission proposal or to various texts published during the inter-institutional negotiations between the European Parliament and the Council of the EU.

distribution of competences between the EU and its Member States: direct income support cannot usually be provided from traditional EU funds, and the Member States independently define the contexts and modalities of national social and civil dialogue. Nevertheless, there is a risk that these gaps may affect the perceived legitimacy of the EU initiatives and the effectiveness of the just transition strategy. On the one hand, (monetary or non-monetary) buffers would be essential to ensure distributional justice in the transition. On the other hand, mechanisms and procedures to ensure meaningful involvement of the social partners, civil society organisations, and citizens are vital to enhance procedural and recognition justice, and they should be strengthened. Indeed, the EU green transition strategy cannot succeed without the involvement of citizens, workers and business (Petmesidou and Guillén, 2022): strong societal consensus on the objective of achieving a just, green transition is needed. A number of studies have thus explored the possible factors which will determine public support for the green transition (or, more generally, for environmental policies), indicating combinations of institutional, structural, and individual variables. Gugushvili and Otto (2023) make it clear that societal consensus should not be taken for granted: on the contrary, transition policies are likely to exacerbate conflicts, especially more radical 'eco-social policies' which combine environmental concerns and less traditional welfare provisions often linked to low growth or degrowth perspectives (*ibid.*: 1-2). This risk could be attenuated by careful attention to the design of these policies, seeking, among other things, to combine traditional welfare provision with more innovative arrangements and to target both the most vulnerable section of the population and the middle classes (*ibid.*). In particular, fair distribution of the opportunities and costs deriving from the green transition seems to be a key factor in ensuring broad societal support. While fairness is to a large extent a subjective concept (d'Hombres and Neher (2020), quoted in Strambo et al., 2022: 14), it is important to note that the perceived fairness of decisions, their acceptability and sustainability depend not only on the outcome of the decision-making process, but also on the features of the process itself (Strambo et al., 2022: 14).

Against this background, the 2022 Council Recommendation on fair transition can be seen as a step towards a more comprehensive and consistent EU just transition framework. In particular, the Council Recommendation fills (at least in part) some gaps left by previous initiatives in the scope, targets, and measures to be implemented, also calling for enhanced policy integration and coordination between levels of governance and actors. This said, the instrument is not binding: Member States' willingness to take action and adequate monitoring at the EU level will be key for a successful implementation.

3.3.4 Implementation by Member States and EU monitoring

A growing body of scientific literature is now exploring the relationship between domestic environmental and welfare policies (among others, Gough, 2017; Koch and Fritz, 2014; Zimmermann and Graziano, 2020). Starting from established analyses of welfare regimes and

more recent analyses of environmental states, these studies have not yet reached conclusive results. Nevertheless, they highlight differences in the ways environmental and social policies interact in various countries – or, to use Zimmermann and Graziano's (2020) terminology, in different 'worlds of eco-welfare states'. Hence, domestic starting points and specificities should be taken into account when elaborating EU just transition initiatives that combine environmental and social objectives, since they are likely to affect the domestic implementation of these policies.

Only a few studies have explored national implementation of the JTF or of the socio-ecological measures funded through the RRF, since these initiatives have only recently been adopted. Available studies looking at the elaboration of the national TJTPs show significant variation across EU countries and regions, including in measures to ensure the involvement of social partners, stakeholders and citizens in the preparation of these plans (see, for instance, IndustriAll and Syndex, 2021). Studies investigating the socio-ecological dimension of national RRFs are often limited to a textual analysis of the documents, providing no information on actual implementation (see Section 3.1).

Among the multiplicity of factors potentially affecting domestic implementation of EU just transition initiatives, particular attention should be paid to two – partially interrelated – aspects: administrative capacity and the ability to absorb EU funds (Petmesidou and Guillén, 2022). Given the complexity of the issues at stake and the need to elaborate and implement initiatives linking a multiplicity of policy areas and levels of governance, considerable administrative capacity is needed at domestic level, meaning a sufficient number of properly skilled staff, with high-quality jobs and an innovation-oriented organizational culture (ibid.: 326). High levels of administrative capacity, together with a political class able to mediate between short-term needs and medium/long-term objectives, are particularly essential to ensure satisfactory usage of the financial resources for a just transition made available by the EU. In this respect, the limited ability of some Member States to absorb EU funds is a well-known issue in relation to EU cohesion policy. There is a risk that the same shortcomings may apply also to the usage of EU resources for a just transition, including the future SCF (European Court of Auditors, 2022: 6). Enhancing Member States' ability to correctly use EU funds appears thus to be a priority, especially considering the increasing usage by the EU of a 'performance-based financing' approach, linking EU payments to the achievement of concrete and time-specific milestones and targets (Bokhorst, 2022).

At the EU level, the European Semester is expected to play a key role in monitoring and facilitating domestic implementation of both the EGD and of specific EU just transition initiatives. Launched in 2011, the European Semester has proven to be a rather dynamic process: initially focused on macro-economic and fiscal policies, it has gradually integrated (although to varying degrees) social and environmental policies (Sabato and Mandelli, 2021). Close monitoring through the Semester

appears particularly necessary for the non-binding 2022 Council Recommendation on the fair transition. However, such closer integration of the EU just transition framework into the Semester could prove challenging for a number of reasons. Among them, first, it might further stretch the scope of the Semester, thus increasing the burden on EU and national administrations and, according to some observers and institutional actors, entailing a loss of focus and effectiveness of the whole Semester process. Second, since the Semester process is based on a delicate balance between political considerations and evidence-based, technical considerations, full integration of a just transition approach would require timely, adequate and reliable indicators. In this respect, while sets of indicators measuring economic, social, and environmental performances are available at the EU level (and are used either in the Semester or in other EU processes), the same cannot be said for indicators measuring the interlinkages between environmental and social aspects (Petmesidou and Guillén, 2022: 325). This said, full integration of just transition objectives and policies in the European Semester seems essential to strengthen the EU just transition framework (see Section 4.2).

4. THE WAY FORWARD: FOOD FOR THOUGHT

Despite the limitations and ambiguities mentioned in the previous section, the EGD, in a global perspective, can be considered as '[perhaps] the most developed practical programme [for integrated environmental and social actions], providing both a vision and a roadmap' for the transition (Gough, 2021:7). While the EGD's social dimension was quite narrow (ibid.: 7-16), the strategy has the potential to be an intermediate step towards more ambitious, and innovative, solutions for a socio-ecological transition. This is key and urgent since, as Galgóczi and Pochet (2022: 313) put it, 'we are living through a historic moment of synthesis: environmental policies are becoming social policies, and vice-versa'. In this respect, the EU just transition initiatives described in Section 3 can be considered as an important step towards a more integrated and effective approach to the socio-ecological transition. However, given the magnitude of the challenges ahead, these initiatives are unlikely to be sufficient. As highlighted by Zimmermann and Gengnagel (2022), delivering on the commitment to achieve the green transition in a fair and inclusive manner will be a crucial test for the credibility of the EU. Keeping this in mind, in this section we provide some reflections on the way forward to further develop and strengthen the EU framework for a just transition.

4.1 Making the welfare state more sustainable

Debates about the compatibility between economic growth and staying within planetary boundaries remain eminently topical and have started to shape policy agendas. Here we discuss implications for welfare state debates in the context of the climate crisis.

Already in 2007, the EU adopted a 'Beyond GDP' initiative supporting the development of a broader set of social and environmental indicators to measure social progress (European Commission et al., 2007). In May 2023, the European Parliament will host a high-level conference on 'Beyond Growth'. Several governments, including Finland, Iceland, New Zealand, Scotland, and Wales, have adopted a 'wellbeing economy' approach which seeks to prioritise social and ecological objectives over economic growth (Fioramonti et al., 2022). Promoting an 'economy of wellbeing' was also among the priorities of the Finnish Presidency of the Council of the EU in 2019 (Council of the European Union, 2019).

While post-growth approaches can appear distant from political realities and citizens' concerns in the midst of a cost-of-living and global economic crisis, these approaches can provide useful input to debates on just transitions towards climate neutrality, given that low growth rates are probably a reality that policy-makers will have to respond to for a while to come. Post-growth does not simply suggest a reduction of welfare in a 'business as usual' scenario, but proposes more transformational changes to the economy and society with the aim to improve equity and wellbeing for all, while staying within planetary boundaries (Kallis, 2020).

In the context of post-growth debates, the sustainable welfare literature takes a transformative stance to consider options that would require more radical innovations of current welfare models (Büchs and Koch, 2019; Corlet Walker et al., 2021; Gough, 2017; Koch, 2022). Sustainable welfare has been defined as policies that support needs satisfaction for all within planetary boundaries and within a post-growth economic context (Büchs et al., 2023; Koch, 2022). Sustainable welfare would therefore require a reorientation of policy-making and of decision-making at the corporate and organizational level. Policy-makers would need to prioritise social and ecological objectives over economic growth. Achieving economic growth would no longer be the guiding criterion according to which governments make decisions about regulation, spending and fiscal matters (Raworth, 2017). Instead, these decisions should be guided by democratically agreed social and ecological priorities, for instance to ensure that everyone's basic needs are met, population health and social integration improve, and emissions fall. Some economic sectors would be allowed to grow in this scenario, for instance low-carbon industries, care and education, or environmental conservation, while the overall material throughput and environmental impacts would fall. Sustainable welfare approaches also imply that decisions at the corporate level would no longer be primarily guided by profit maximisation but by the contribution to democratically agreed social and ecological objectives. Some of these ideas are already being put into practice by members of the Wellbeing Economy Governments group (currently Finland, Iceland, New Zealand, Scotland and Wales), which subscribe to a focus on the promotion of social and ecological objectives (Hayden and Dasilva, 2022).

Several policy approaches have been proposed in the sustainable welfare literature, including making welfare state funding more independent of growth, more redistributive policies, minimum and maximum incomes, decoupling of work and welfare, working time reduction and redistribution of work (Büchs et al., 2023; Corlet Walker et al., 2021; Gough, 2017; Koch, 2022). Additional recommendations can be made as to ways in which welfare states can support the zero carbon transition.

Welfare state funding could be made more resilient if it drew more strongly on tax sources that are less dependent on economic growth. Taxes on wealth, such as on financial assets, property, land, inheritance, and natural resources, fall into this category. Since assets are stocks, unlike income or consumption which are flow, taxes on assets are less dependent on economic growth (Büchs et al., 2023). Greater taxation of 'environmental bads' such as emissions or other pollution could also help to fund welfare states, although this option is limited if societies manage to reduce environmental impacts over time (ibid.). At the same time, governments could repurpose current fossil fuel subsidies and expenditure currently needed to deal with environmental impacts if they successfully tackled the ecological crisis.

Sustainable welfare policies would also aim to reduce social inequality through more redistributive policies. Social inequalities can have negative impacts on a range of social outcomes, including physical and mental health, social conflict, and crime rates (Wilkinson and Pickett, 2009). In a post-growth economic context, policy-makers would need to reduce inequalities more actively since the living standards of poorer people could not be improved through 'trickle down' economics⁽¹⁹⁾ (Jackson and Victor, 2016). Greater redistribution could be achieved through more progressive income and wealth taxation systems. Some authors have even suggested the introduction of minimum and maximum incomes to curb inequality (Buch-Hansen and Koch, 2019). However, recent research in Sweden found low public support for maximum income policies, especially among those with higher incomes (Khan et al., 2022). The redistributive effects of policies that tax or cap high incomes and wealth are therefore likely to be unpopular among richer groups in society.

Many authors within the sustainable welfare literature have proposed policies that decouple welfare from work (e.g. Koch, 2022). Welfare benefits are dependent on labour market participation in most current welfare systems, and this coupling has been strengthened over the last two or three decades, through welfare-to-work and 'activation' policies (Serrano Pascual and Magnusson, 2007). In contrast, sustainable welfare policies would focus more on ensuring that

19. 'Trickle down' economics refers to the idea that the living standards of the poorest in society will improve through economic growth. While this can be the case in absolute terms, the relative position of the poorest in society can worsen during growth if social inequality increases at the same time.

everyone's basic needs are met, independent of labour market participation, for instance through basic or minimum income schemes and the provision of universal basic services (Büchs, 2021a; Coote and Percy, 2020). The underlying idea is that relaxing the requirement for participation in the formal labour market 'decommodifies labour' and frees up time that people can spend on other socially or ecologically beneficial activities, such as nurturing relationships, care and cultural work, and 'slow' travel and food practices.

Proposals for Universal Basic Services (UBS) have only emerged in recent years (Institute for Global Prosperity, 2017; Coote and Percy, 2020). UBS would offer publicly or collectively provided essential services for everyone, free at the point of use and based on need. UBS would therefore offer a 'public' or in-kind-income (Gough, 2021) to everyone, through which people can satisfy basic needs. Public or collective provision of UBS could also be beneficial for reducing the ecological footprint associated with basic services, by making service provision more efficient and ensuring it complies with environmental targets. In many countries, UBS are already offered in certain essential spheres such as health care and education. The recent UBS debate proposes to expand service provision to other necessities such as social and child care, housing, domestic energy, transport and internet access (Gough, 2021; Coote and Percy, 2020; Büchs, 2021).

Working time reduction and redistribution of work are other, much discussed proposals in the sustainable welfare literature. Both are expected to have social and environmental benefits by making labour market inclusion more equitable, while reducing production and consumption through working time reduction and freeing up time for other socially and ecologically useful activities (Koch, 2022; Schor, 2005).

More generally, welfare states could play a more proactive role in facilitating the zero carbon transition by helping people to take up new jobs in low carbon sectors, through better social security and active labour market policies (e.g., training and re-skilling). Current trends towards an expansion of precarious work situations run counter to this ambition, as they provide less job security and reduced eligibility for active labour market policy programmes.

4.2 Just transition and EU socio-economic governance: the European Pillar of Social Rights and the European Semester

In this section, we reflect on how to enhance the implementation of the EU just transition framework through the European Semester and the EPSR. While both the Semester and the EPSR are promising instruments in this respect, further action is needed in order to: i) ensure full implementation of the EPSR's principles, in particular those related to social inclusion and social protection; ii) reflect on the possibility of implementing key EPSR principles through more innovative eco-social policies, in line with a sustainable welfare approach; iii) make use of the

European Semester's 'mutual learning tools' in order to discuss and monitor the implementation of the EU just transition framework, as well as to identify, assess and promote the dissemination of good practices; and iv) strengthen the analytical basis on the linkages between environmental and social policies as a way to enact more effective and fairer policies.

Putting forward an ambitious EU just transition agenda would require, first of all, the mainstreaming of social justice considerations and objectives in legislative initiatives and in instruments for funding the green transition, as well as enactment of specific social legislation taking into account environmental and climate-related objectives. Importantly, legislation should integrate, in a mutually reinforcing way, the achievement of 'green' and 'social' objectives: indeed, as pointed out by McCauley and Pettigrew (2022: 36), measures implementing the EGD 'should explicitly consider not only their impact on processes and outcomes, but also how they can proactively improve both social justice and Green Deal actions'. In particular, as shown in Section 3, the current EU framework for a just transition appears weak when it comes to ensuring buffers for citizens particularly affected by the green transition. More in general, as shown by Cantillon et al. (forth.), there are still important gaps in the implementation of the EPSR's chapter on social protection and inclusion: although multiple EPSR principles highlight the importance of well-functioning, accessible and adequate social protection systems, EU initiatives in this domain mostly rely on soft law (ibid.). In this respect, given the importance of social protection to meeting the EU poverty target, Cantillon et al. (ibid.) recommend a stronger focus on the accessibility and adequacy of social protection and minimum income schemes in the Member States, and call for the enactment of an EU framework directive on minimum income. In order to adapt national minimum income schemes more effectively to the challenges of the green transition, in our view, further EU action in this domain should explicitly foresee the possibility of targeted, direct income support to people and households in vulnerable situations. This would be in line with the Council Recommendation on fair transition towards climate neutrality (Council of the European Union, 2022a: art. 6 (c))

This said, legislative initiatives and the provision of EU funds may not always be possible and, in any case, would not be a sufficient solution. This is for a number of reasons. First, the EU may not have competence to intervene through legislation on key aspects of just transition policies, or the Member States may not be willing to support EU intervention. Second, despite important new initiatives such as the RRF, the EU budget would clearly not be sufficient to address the current challenges: EU policies also need to create conditions favourable to investment and action by the Member States, social economy actors and the private sector. Third, the knowledge basis for sound, evidence-based legislative initiatives at EU level may not yet be sufficiently developed. Finally, the multiple legislative initiatives and funding require, in any case, strong coordination and monitoring at the EU level, to make sure that the initiatives implemented are mutually supportive,

to avoid duplication, and to ensure consistency between actions undertaken in various policy domains (including, importantly, macro-economic and fiscal policies).

In this respect, the European Semester could be a key vehicle for the implementation of a comprehensive just transition framework, ensuring consistency in EU analyses and recommendations to the Member States, and closely monitoring domestic implementation. Since it is based on a balance between political considerations and evidence-based policy-making, and given its iterative, cyclical nature, the European Semester has the potential to be the process ensuring consistency between EU economic, social, and environmental objectives and policies, assessing the effectiveness of solutions adopted by the EU and its Member States, and proposing new solutions when inconsistencies and shortcomings emerge. This, however, would seem to require a better balance between economic, social, and environmental objectives – and their interlinkages – within the European Semester, and macro-economic and fiscal policies would need to be fully supportive of social and environmental objectives. Although, some steps have recently been taken in this direction ⁽²⁰⁾, the European Semester still seems unbalanced, dominated by economic and fiscal considerations. In view of the formidable challenges related to climate change and environmental degradation, and of the risks of a deterioration of the social situation in the EU deriving, among others, from the consequences of climate change, green and digital transition policies and from an increasingly unstable international scenario, both the environmental and social dimensions of the Semester need to be significantly strengthened ⁽²¹⁾. The European Semester is expected to be a key process for monitoring the implementation of each of the EU initiatives for a just transition analysed in Section 3, and each of those initiatives (except for the

20. In particular, the EPSR and its Social Scoreboard have strengthened the role of social policies and of social actors in the Semester (Vesan et al., 2021), while, as of the 2020 European Semester, there has been an attempt to focus the Semester's narrative around the notion of 'competitive sustainability' and to integrate the UN Sustainable Development Goals into the process (Mandelli et al., 2021; Sabato and Mandelli, 2021). Competitive sustainability, a notion that somehow recalls and includes the three pillars of sustainable development, was presented by the European Commission (2019b: 3) as 'a new paradigm to address interrelated key challenges', based on four dimensions: (i) environmental sustainability; (ii) productivity growth; (iii) fairness; and (iv) macro-economic stability. The first dimension focuses on achieving the key objectives of the EGD – the fight against climate change and the transition to climate neutrality – and is a striking new feature of the Semester, which previously lacked an 'environmental dimension'. The notion of competitive sustainability has been confirmed as central also in the post-2020 cycles of the Semester, and, although the EU economic governance approach is currently under review (European Commission, 2022b), it features prominently in the 2023 cycle (European Commission, 2022c).

21. In this respect, a number of proposals have been made to develop, at the EU level, macro-economic and fiscal policies more in line with (and facilitating) the achievement of the environmental and climate-related objectives of the European Union (among the most recent proposals, see CAN Europe, 2023; Corti et al., 2022; De Angelis et al., 2022; Simon et al., 2021). On the social side, proposals to strengthen the ability of the European Semester to detect social imbalances in the Member States – such as the setting up of a Social Imbalances procedure based on the EPSR's Social Scoreboard – are currently being discussed by the Employment, Social Policy, Health and Consumer Affairs (EPSCO) Council configuration and its committees (see Sabato et al., 2022b; Vanhercke and Sabato, 2022).

2022 Council Recommendation) requires the Member States to draw up plans (e.g., the TJTPs and the Social Climate plans). However, there is still no system for monitoring Member States' *overall* just transition strategies to ensure a coherent implementation of the EU framework for a just transition. Given the already heavy administrative burden on the Member States in the Semester, doubts have been cast on the feasibility of using the Semester process for such a purpose. Some have therefore proposed that just transition considerations could be enhanced in the reporting procedures on the National Energy and Climate plans (NECPs) ⁽²²⁾ (Oberthür et al., 2023). For instance, the Member States could be required to develop, in these documents, coherent just transition strategies, which would then be periodically assessed by the European Commission (ETUC, 2021). The Regulation on the Governance of the Energy Union and Climate Action (European Union, 2018) requires Member States' NECPs to be updated by mid-2024; this update should include assessments of the socio-economic impacts of the measures proposed (with a focus on energy poverty), including fair transition aspects (European Commission, 2021d: 19). Further analysis would however be needed in order to assess to what extent the NECPs would allow for comprehensive reporting on national just transition strategies, and how to ensure a structured feed-in/feed out dynamic between the NECP reporting and the European Semester.

While strengthening environmental and social policies in the Semester would be (together with legislation) a step towards a just transition path for the EU, this may prove to be insufficient to simultaneously achieve the objectives of environmental sustainability and social equity. More integrated eco-social policies, based on more innovative and sustainable welfare provisions, will also be needed. Some of these policies are discussed in Section 4.1, an open discussion on whether and how implementing some of the principles of the EPSR through this kind of policies would be useful. Here again, procedures related to the European Semester may prove valuable. Open Method of Coordination (OMC) tools available at the EU level could be used, such as mutual learning programmes and peer reviews in the domains of employment and social policies, and various types of reviews of national policies conducted by the EMCO and the SPC. After all, the EU has historically played an important role in providing its Member States with cognitive support to develop their policies (Vandenbroucke et al., 2021), and OMC mutual learning tools have proved effective in setting in motion EU action in a number of policy domains. These tools seem particularly useful to produce dynamics of 'reflexive learning' when the scope of the problems at stake is not fully clear, if there is anyway no agreement on the policy action to be implemented (Visser, 2005), and, potentially, to frame consensus among actors (Vanhercke, 2016; Vanhercke and Lelie, 2012). Importantly, sustainable welfare policies, to be considered as fair by a large part of the population, would have to be based on/accompanied by strong redistributive policies. In this

22. Some consistency between the national Social Climate Plans and the NECPs should be ensured by the fact that – according to the results of the ongoing negotiations on the SCF – the former documents are expected to be submitted together with the latter.

respect, fiscal policies would be crucial. In a recent report, the High-Level Group on the future of social protection and of the welfare state in the EU (2023: Chapter 3) has proposed a number of options on how to ensure the financial sustainability of the welfare state, highlighting the essential role of the EU in ensuring a level playing field between the Member States and in promoting the exchange of information and good practice. In this paper, in line with a sustainable welfare approach, we highlight the need to enhance action on funding sources less reliant on economic growth, such as taxes on wealth (see Section 4.1).

More integrated eco-social policies, however innovative, require a stronger analytical basis. In this respect, the need to develop concepts and indicators to measure the complex interrelations between environmental and social aspects – including the social impact of green transition policies⁽²³⁾ – has been underlined by both academics and institutional actors (Council of the European Union, 2022a; European Commission, 2021d; McCauley and Pettigrew, 2022; Petmesidou and Guillén, 2022; Strambo et al., 2022). In their seminal assessment of whether the EU can lead on a just transition through the EGD, McCauley and Pettigrew (2022: 37) call for the development of '[t]ransparent, accountable, and publicly accessible indicators and data on each area of the [European] Green Deal [since the] dearth of up-to-date open access data in relation to each EGD [action area] is severely hampering efforts for it to be understood, recorded and reframed'⁽²⁴⁾. Assessing Member States' performances by combining available green transition indicators from a variety of data sources with the headline indicators of the EPSR's Social Scoreboard, McCauley and Pettigrew (2022) identify a number of EGD areas for which the justice dimension of the transition should be further explored, and new indicators would probably be needed. These include, in particular (ibid.): i) measures to enhance the energy and resource efficiency of buildings; ii) measures on social protection and inclusion in relation to the smart mobility initiative; iii) the EGD 'Farm to Fork strategy'; and iv) the relationship between social objectives and biodiversity and ecosystem management strategies. Other contributions (Council of the European Union, 2022a; European Commission, 2021d; Strambo et al., 2022) concur that further work (on definitions, indicators, and data collection) is needed on key dimensions of energy and transport exclusion and inequalities, and of green jobs and skills, while Petmesidou and Guillén (2022: 325) highlight the need for more granular data on issues such as exposure to environmental hazards and cumulative vulnerability and health risks, on energy consumption and greenhouse gas emissions by socio-economic group, and on the distributive impacts of various environmental policies.

23. In this respect, 'Distributional impact assessment' (DIA) has been identified by the European Commission (2022d) as a promising methodology.

24. At the end of March 2022, Eurostat (n.d.) released an European Green Deal Dashboard, monitoring 26 key indicators for the achievement of the EGD's objectives.

Hence, indicators and data enabling better monitoring of the linkages between the social and environmental dimensions should be developed, and a reflection on whether and how these indicators should be integrated into the Semester process appears necessary. While the EPSR's Social Scoreboard is a fundamental tool to monitor social developments and the starting point for building more integrated just transition indicators, it is important to note that the indicators linked to education, health care, and inequalities in this Scoreboard are rather limited, there are no headline indicators related to access to basic transport services, and the headline indicators related to employment may not adequately reflect key issues related to employment quality. These are key areas where information is needed to monitor the fairness of the transition and to make sure that basic needs of citizens are guaranteed in the green transition (see Gough, 2021).

4.3 The role of social and civil dialogue

From its first use, the notion of a just transition has always incorporated the procedural justice dimension as one of its key axioms (Cahill and Allen, 2020; Pai et al., 2020). The ILO (2015) Guidelines see participation of stakeholders in the design and implementation of practices and policies as a prerequisite for genuine transition. In this section, we discuss two specific forms of participation: social dialogue in the context of employment relations, and civil dialogue in a broader societal context.

Traditionally, the welfare state already has a diverse array of institutional structures for dialogue and consultation, which are regarded as an indispensable part of decision-making processes (Ishikawa, 2003). Besides social dialogue practices, from town hall meetings (and their online equivalents), to the advisory bodies that bring together civil society representatives to give feedback on specific policy areas, their existence and use implicitly acknowledge the need to proactively mediate societally harmful power imbalances. The legal establishment of fora where mutual exchange can take place and disputes can be managed serves both democratic accountability and social welfare goals (Pestoff, 2008).

In theory, the rationale behind the need to include and enforce ecological sustainability in decision making runs remarkably parallel to the social demands underpinning existing social dialogue institutions: they are 'natural allies' (Rosemberg, 2010), with an 'inherently cooperative relationship' (Galgóczi, 2020). As experienced mediators in social dialogue, trade unions – when to some extent reconfigured with respect to their scope – should be especially well placed to incorporate sustainable development along with societal objectives and rights (Hampton, 2018). As Galgóczi (2020) notes, there is however a gap between: i) narratively reconciling social and environmental issues in a robust just transition framework and discourse, as is done by most national unions and umbrella organisations involved in international bodies and discussions; and ii) tackling the changes brought about by the implementation of decarbonisation strategies 'on the

ground', especially in carbon-intensive workplaces, regions, and sectors. These changes often take the form of pressure on employment, on workers, and on required flexibility, pushing logics and patterns which run directly counter to workers' interests (Räthzel and Uzzell, 2011). Given the variety of real-life combinations of workplace practices, industrial structures, the societies in which they are embedded, and the regional economies they make up, there is no silver bullet 'just transition' solution to the challenges faced (Galgóczy, 2020). Responses will need to be equally varied, and their success often requires deviation from the traditional capital/labour relationship with its known actors and interests (Parker et al., 2021).

Although this pushes the boundaries of what social dialogue is traditionally equipped to deal with, its role is ever more important in exploring the implications of a just transition in specific contexts. This comes with substantial challenges, but the core principles of social dialogue themselves point to the need to re-define its role for the 21st century (Rosemberg, 2010; Räthzel and Uzzell, 2011; Hampton, 2018). For example, acknowledging the right of affected parties to be heard implies that: i) a broader range of impacts need to be identified and considered, going beyond the immediate consequences for the participants (such as global impacts and impacts felt elsewhere); and ii) in some way or another, account must be taken of a much broader range of affected parties than usual, including parties which cannot be directly represented at the negotiation table, who may be elsewhere in place and time (Upham et al., 2022).

Looking beyond the labour movement sphere to political democracy in general, this tenet can be extended, since attention to (economic and political) power inequalities and how they are systematically maintained is a fundamental part of the just transition (Wang and Lo, 2021). Calling for efficient and responsive governance of an inclusive green transition, the OECD expresses this as a need for 'clear and regular entry points in the policy-making process' for citizens and civil society (OECD, 2021: 4).

Over the past two decades, a 'deliberative turn' in democratic studies has been reflected in numerous applications in several areas (Chambers, 2003). These practical examples of deliberative mini-publics, such as citizens' assemblies or community boards, can provide valuable empirical evidence on how and under which conditions civil fora drawing on 'reasoned discussion' between citizens live up to their theoretical claims to enhance democratic values in participants and to result in adequate decisions or policy proposals (Ryfe, 2005; Fishkin and Mansbridge, 2017).

The climate crisis, as a global, long-term systemic problem entangled in powerful vested interests, has been highlighted as a textbook example of what our current representative democratic systems are ill-equipped to deal with (Smith, 2003; Fiorino, 2018; MacKenzie, 2018). Postulating that 'more democracy' is the answer to this analysis, rather than 'less democracy', Willis et al.

(2022) argue that creating the right conditions for considered debate about how societies can respond to the climate crisis can bring about more thorough, more supported and faster policy responses than we observe in democratic systems based on competition to capture citizens' votes. The French Citizens' Convention on Climate is a well-known and researched example (Eymard, 2020; Giraudet et al., 2022; Buge and Vandamme, 2022; Torney 2021). Established in 2019 by President Macron, it was conceived to an important extent as a response to the 'gilets jaunes' protests. Its 150 members were randomly selected to be broadly representative of the French population. Their mandate was to propose policy recommendations and actions to be taken by the French government 'that will allow to achieve a reduction of at least 40% in greenhouse gas emissions by 2030 (compared to 1990) in a spirit of social justice' (Buge and Vandamme, 2022). The assembly met for seven weekends over the course of nine months (Giraudet et al., 2022). The citizens could invite along experts on the topics they wished to discuss, received support from a technical advisory team, and were accompanied by 'process guides' to ensure independence. They deliberated on their own and made proposals, which were submitted in June 2020 (CCC, 2020). The 149 proposals are generally regarded as a coherent whole, a consistent strategy to reduce greenhouse gas emissions by 2030. To achieve this, they formed an effective consensus beyond individual interests (Eymard, 2020). Around a quarter of the proposals have been enshrined in legislation, about half have been 'partially' taken up (in a watered-down version), and around a fifth have been disregarded (Garric et al., 2021): overall, however, the actual implementation of the proposals is mostly regarded as disappointing.

Climate change is a wicked problem. Organising inclusive public deliberation on questions such as which risks require which solutions, is therefore a societal task that is as difficult as it is necessary (Sen, 2009). The EGD acknowledges the role of participation but does not really aim at enlarging its reach and depth compared to what already exists. In a context where we can expect to experience the intensifying impacts of climate change along with policy measures further tightening the window of societally tolerable carbon emissions, there is still considerable potential to be unleashed from reinforcing social and civil dialogue in order to navigate the coming decades in a democratic and inclusive way.

5. RECOMMENDATIONS TO POLICY-MAKERS

In this Background paper, we have described the extent to which ecological and social challenges are linked, and the need to fully acknowledge such interrelations in policy design and policy-making, if the objective is to simultaneously achieve environmental sustainability and social fairness. Since the publication of the EGD in 2019, this objective has been included in the EU green transition strategy, which stresses the aim of promoting a socially just transition. The notion of the just transition, however, suffers from certain ambiguities and definitional shortcomings, and the role to be played by the welfare state in supporting a just, green transition is open to debate. While, on the one hand, strong welfare states based on traditional social provision appear necessary to ensure fairness of green growth strategies such as the EGD, many observers are calling for more innovative welfare provisions, which display closer integration of environmental and social objectives, are less reliant on GDP growth, and reduce the ecological footprint of the welfare state itself.

The EPSR was presented in the EGD as the reference framework to ensure a just transition for all. However, the 2019 EGD Communication contains no clear indication as to how it would be applied, while the proposals in the subsequent European Commission (2020) Communication on 'A strong social Europe for just transitions' are rather vague. A more concrete EU framework for a just transition is nevertheless emerging, made up of legislative initiatives, guidance, and funding. This framework includes the JTF, some provisions in the RRF, the proposal for a SCF, and the 2022 Council Recommendation on ensuring a fair transition towards climate neutrality.

We maintain that the emerging EU framework for a just transition should be significantly developed and strengthened. In order to do so, we **recommend action** on three main fronts: i) strengthening the link between implementation of the EPSR and the achievement of just transition objectives; ii) enhancing monitoring and developing the knowledge basis of just transition policies; and iii) strengthening social and civil dialogue.

While some of the changes and innovations needed in this respect will require time, and will be the result of disagreements and negotiations between a vast array of actors with diverging interests, a number of specific initiatives could be undertaken in the short term.

5.1 Strengthening the link between implementation of the EPSR and the achievement of just transition objectives

First, green and social objectives should be more closely integrated in EU legislation, with a view to enacting policies that, by design, simultaneously address social and environmental/climate change-related concerns. Full implementation of the 20 principles of the EPSR is a precondition for ensuring fairness, and future initiatives implementing the EPSR

should ensure that social policies and European welfare states are adapted to the challenges of climate change and environmental degradation. In this respect, given the weakness of policy buffers in the emerging EU framework for a just transition, more ambitious initiatives will be needed for **full implementation of the Pillar's principles on social protection and social inclusion**, including on minimum income guarantees.

Second, in a context characterised by high uncertainty about economic growth prospects, and given the doubts on the possibility of achieving EU climate change and environmental objectives through a pattern of continuous GDP growth, a reflection should be launched on how to implement the EPSR's principles through **more innovative, less growth-dependent eco-social policies**. In this respect, the **sustainable welfare** perspective provides an interesting array of policy options, including, for instance, the provision of universal basic services, proposals for working time reduction, and less growth-reliant ways of financing welfare policies. These policy options should be carefully explored, both at the EU level and in the Member States

5.2 Enhancing monitoring and developing the knowledge basis of just transition policies

Third, effective monitoring of how the Member States are implementing just transition policies (including the 2022 Council Recommendation) is key. While the European Semester seems to be a key process for **monitoring the implementation of the EU just transition framework** and to ensure coherence between the various policy instruments made available by the EU, further reflection is needed on how, concretely, this could be done **without excessively burdening the Semester process**. In this respect, the possibility of using the reporting on the National Energy and Climate plans seems worth exploring, asking the Member States to develop comprehensive just transition strategies as part of the update of these plans. However, in that case, closer links should be ensured between the NECPs and the Semester.

Fourth, when it comes, more specifically, to monitoring the implementation of the 2022 Council Recommendation on fair transition, one proposal would be to **organise joint EMCO-SPC reviews of Member States' elaboration and implementation** of the comprehensive policy packages for just transition. These reviews, that could be conducted jointly with other Council committees, should also include an assessment of the arrangements and procedures for the involvement of the social partners and civil society organisations in the elaboration and implementation of these policies (leading on from the Committees' review of social dialogue practices in the Member States in the framework of the European Semester). **Peer reviews and other OMC mutual learning tools** could be organised on specific policies. In particular, these instruments could be used **to discuss elements that appear less well developed** in the emerging EU framework for a just transition, as well as more innovative eco-social policies on

which the degree of consensus may be low. Examples would include 'buffer' policies such as the provision of financial and non-financial support and compensation, insurance-based solutions for climate/environmental degradation-related risks, innovative instruments to address energy and transport poverty, and universal basic services.

Fifth, broadening the knowledge basis on the linkages between green transition and social policies is essential in order to design and implement effective just transition policies, and this could help to launch a reflection on how, concretely, the implementation of the principles of the EPSR could be linked more closely to a just transition approach. In this respect, a first step would be to **further develop the EPSR's Social Scoreboard** to include indicators for (better) covering areas particularly important to monitoring the fairness of the green transition, such as education, healthcare, inequalities, access to basic transport services, and employment quality. In particular, definitions and data related to energy and transport poverty should be further developed. A further step would be to **improve the assessment of eco-social policy expenditure** and to regularly perform **assessments of the distributional implications of these policies**. Assessments of eco-social policy expenditure should allow to precisely track funding devoted to the simultaneous achievement of 'green' and social objectives (e.g. using the recent European Commission methodology for reporting social expenditure in the RRF). In particular, given the EU's emphasis on the role of social investment policies in ensuring a just transition, it would seem urgent to develop instruments to adequately identify social investment needs for the green transition (e.g. in terms of skills). Distributional assessments of eco-social policies could be carried out using the **Distributional impact assessment methodology** currently being discussed at the EU level (see European Commission, 2022d). Finally, indicators should be developed which could capture, in an integrated way, the situations and trends in Member States in relation to both the green and social dimensions of the transition, with a view to **creating an EU Just Transition Scoreboard**.

5.3 Strengthening social and civil dialogue

Sixth, the importance of **enhancing the democratic dimension** of the green transition should not be overlooked. Not only will strengthened social dialogue structures and genuine civil dialogue opportunities make it possible to broaden public support, but the involvement of more and diverse stakeholders will also **bring about better policy** to address the complex social-ecological nexus: aligned with societal priorities, and strengthening communities in their ownership, knowhow and agency. **An approach which goes beyond the standard EU participation portfolio**, and develops and employs more innovative methods for this purpose, such as deliberative mini publics, appears, from the initial experiments (European Commission, 2022e), to be a promising way to go.

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