

# IENE Comment

## Europe's Dilemma: Emission Reduction or Energy Security



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*By Irina Slav\**

Last week, the European Parliament made headlines by essentially gutting two directives from the Omnibus that the European Commission released earlier this year. Both focused on sustainability and emission reduction, which for the Commission is the same thing, the two directives threatened to leave Europe in the literal cold and dark. EP chose energy security over emission reduction. It is Europe's most pressing—and most baffling—dilemma.

The Omnibus, which Ursula von der Leyen's Commission presented in February this year, aims to simplify one of the most complicated bureaucratic systems in the world. The purpose of the simplification: boosting the competitiveness of European companies. When it comes to sustainability, the Commission thought it would be best to do that simplification by mandating non-European companies to subject themselves to the same degree of meticulous emission tracking, reporting, and reduction as European companies if they want to keep exporting their goods to Europe. That mandate included exporters of LNG from the United States and Qatar.

Both countries indicated clearly they were not going to dedicate the amount of time, workforce, and financial resources required by the Corporate Sustainability Due Diligence Directive to track every ounce of CO<sub>2</sub> released during the production of a molecule of LNG. Qatar put things most plainly: if the directive remains, we will stop selling you LNG. The U.S., in the face of Energy Secretary Chris Wright, delivered a similar message. Finally, gas traders from Europe joined the choir of warnings that the CSDDD would compromise the European Union's energy security and that was not something to look forward to.

For years, the EU's leadership has been prioritizing emission reduction over literally everything else, except perhaps the Ukraine. Now, this leadership was faced with the very real possibility that its biggest suppliers of a vital energy commodity might simply choose to stop supplying it because they don't like the legislation being drafted in Europe and no one can force them to comply with it. Luckily for Europeans dependent on U.S. and Qatari gas imports, common sense prevailed.

It is a fact that, in response to criticism from the LNG exporters, the Commission tried to tweak its directive. It is also a fact that neither Qatar nor the United States wanted “tweaks” – or, indeed, any other large exporter to the EU under threat of the new emission-reporting mandates. They all want to directive gone and one could quite confidently predict that the CSDDD will be removed from the scene quietly, even though Parliament voted for a massively watered down version of it last week. The directive might nominally remain in effect, but its teeth, as it were, are out, as are the teeth of the other controversial directive, about emission reporting specifically.

Companies will not be forced to prepare net-zero transition plans, Parliament voted. Companies will not be forced to track, report, and reduce emissions unless they really want to. Naturally, activists are not happy. Yet everyone else should be, because the reduction of CO2 emissions, which is the EU’s reductive view of sustainability, cannot trump the security of energy supply and yet for a while, a lot of people were worried that this was exactly what had happened in Brussels: emissions were made a priority over the availability of energy.

Parliament corrected course last week, thanks in no small part to what legacy media love to call the rise of “the far-right”. The only thing that seems to be on the rise in Europe is a natural reaction against the net-zero agenda as drafted with zero regard for the inevitable trade-offs in a transition, such as soaring electricity prices. That zero regard has now come back to bite those who succumbed to it in the form of a growing opposition to the trade-offs, because no one was prepared for them. Everyone was told we would have cheap and abundant energy. Instead, we got expensive, unreliable energy and countless lectures about reducing our carbon footprint to save the planet, notably by consuming less energy.

It is that last part that proved to be too much. The inordinate amount of net-zero propaganda and calls for less energy consumption broke the EU’s net-zero camel’s back. It made more people vote for “far-right” politicians, meaning politicians who did not refuse to see where the emission reduction obsession was leading European economies. More of these politicians entered the European Parliament and managed to make the biggest EP party admit this transition business was not doing much good at all.

The saga is not over yet. The EU's top leadership is still fully dedicated to net-zero and still obsessed with emission reduction while Asia builds new coal plants because Asia knows just how important energy security is. The good news for Europe is that the backlash against the leaders' emission obsession is growing – and there is precious little that can be done about it.

*\* Irina Slav is an Energy Journalist and Contributing Editor, IENE Newsletters*

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3, Alex. Soutsou Str. 106 71 Athens, Greece, T: +30-210 3628457, 3640278, F: +30 210 3646144,  
[marketing@iene.gr](mailto:marketing@iene.gr), [www.iene.eu](http://www.iene.eu)

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