OR SOMETHING WORSE

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Why We Need to Disrupt the Climate Transition

Nicholas Beuret

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All too often books on climate politics end on this note, turning from the authors' children to their hopes for the future. But the future is what we are missing. This book is dedicated to our struggle in the present, so that we all might do more than just survive.

Introduction

The Debate Is Over – on to the Green Transition

We are in the midst of a profound social, political and economic transition. Despite the rise of the far right and climate denialist demagogues, despite covert campaigns by oil companies to weaken regulations and ban protests, and despite the seemingly relentless rise of carbon emissions, the transition to a so-called greener global economy is underway.

The central paradox of not only climate politics but all politics today is that this transition is also one into a much hotter future. The green transition is moving away from fossil fuels and into climate catastrophe. Between the professional optimists on one side, endlessly celebrating each increase in solar panel installation rates, and those declaring the transition nothing more than a lie on the other, is the reality of the transition. It is both already happening and won't stop climate change at anything we could regard as a 'safe' level.

The core argument of this book is that we are in the middle of a war of transition, but only one side is fighting. What is needed is for us to understand the shape of the transition, to map its contours and contradictions, as a process that is already underway. We need to do so in order to organise not against it, but through it.

This transition is the terrain of contemporary class and social conflict, one that is reshaping our everyday lives and radically transforming political strategy and action. Business and government are remaking the social contract, squeezing our living standards and transforming work, while forcing us to pay for the transition. The transition to a green economy is returning us to a state of economic nationalism and neo-mercantile politics, underpinned by the shadow of 'security interventions' and a renewed round of resource colonialism and outright war.

The unsettling of previous industrial paradigms and governmental regimes, not to mention the collapse of past ideologies and hegemonies, presents us nevertheless with an opportunity. A moment of transition is one where old orthodoxies and contracts come undone, and where new ones are yet to cohere. It is a political terrain where any conflict can seize not only the imagination but the agenda, driving profound, previously unthinkable change. In a war of transition everything becomes immediately political, while social forces rapidly emerge in seemingly impossible situations.

The struggle around the climate crisis is measured in degrees. And while each degree matters, the stakes of the transition to a decarbonised economy have been profoundly underappreciated. Climate change doesn't occur with one catastrophic event but arrives instead as a series of crises, each provoking political reactions and attempts by capital to profit from disaster. As the climate degrades further, this risks becoming a downward spiral. Within this spiral are the changes most people experience in their day-to-day lives – in the workplace, their wallet, the supermarket, in the decline of local services and in what people think they can and can't expect from the future.

Both the Left and the climate movement are at an impasse. Hopes for the revival of a 'green' social democracy have faded. Electoral politics largely appears to have been lost to the reactionary forces of the far right. Much of what passes for climate action is little more than symbolic, obsessed with the spectacle of dissent and building public support for 'acting now'. Radical action itself seems impossible. Instead, climate action has reached the dead end of policy obsession. Or, perhaps worse, it has retreated into arcane questions of strategy far removed from the reality of either the transition or the actual social forces that could enact such a programme.

This book sets out the transition as a field of social and class struggle, outlining what political, economic and social transformations are being pursued under the guise of the shift to a low-carbon economy; how they relate to social conflict, and what the strategic and organisational implications are for workers, environmental campaigners and the Left. While much of the transition is a question of renewed rounds of enclosure and colonialism in the Global South, this is a book focused on the transition in the Global North. By Global North I mean wealthy, industrialised nation-states, primarily located in Europe, North America and parts of East Asia, that make use of military, political and/or economic power to dominate and exploit the rest of the world.[1] This is because the 'Imperial Mode of Living'[2] in the North is the principal cause of climate change, and it is production and consumption in the Global North that must be radically changed if there is to be any hope of preserving a liveable climate. The war of transition in the Global South

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is qualitatively different as a political struggle, the more so as the transition is a profound reorganisation of the international order, one that affords innumerable opportunities for regional and national movements in the South.

This is not a book about what the transition should look like. It is not a perfect analysis of the new industrial paradigm of the transition economy, or a plan for when the Left finally seize control of government. It is an attempt to articulate the ways things are changing right now, and to outline what social forces already exist which are capable of intervening in the transition.

This book is about how we fight the war of transition – and win.

The Future of Port Talbot

On 11 November 2023, 400 steel workers and their families took to the streets in Port Talbot, south Wales, to protest the threat of job losses at the largest steel mill in Britain. The sky was bright as the workers and their families marched along the waterfront. Talking with the small number of journalists covering the protest, workers told of the terrible cost the job losses would have, on not just them but the local community.

One in six jobs in Port Talbot are in the mill. Four thousand people are employed at the mill, and 2,800 jobs are set to be cut when the blast furnaces are shut down. Port Talbot owners Tata Steel had threatened outright closure without more government support, citing a lack of profitability, high energy costs and competition from cheaper Chinese steel. Tata Steel is far from struggling financially, having paid £1.4 billion in dividends to their shareholders since 2019. Yet it is true that steel can be made more cheaply elsewhere, and that blast furnaces must be closed as a part of the effort to reduce carbon emissions. Tata Steel demanded support for a transition away from coal-fired blast furnaces to greener, lower-carbon electric arc furnaces. The government obliged, committing £500 million to the transition – around a third of the total cost.

Tata Steel then announced the job losses. The government spun the story in a different direction, declaring it a win for workers; saying it had 'saved' thousands of jobs through 'one of the biggest government support packages in history' as a part of the shift to a low-carbon economy.[3]

After the announcement of potential job losses, Unite the Union, representing over a quarter of the Port Talbot workers, put forward an alternative plan. Unite's plan was to keep using the blast furnaces until the end of their functional life – 2027 for one furnace, 2034 for the other – and to install an electric arc furnace alongside the blast furnaces while investigating ways to make the latter less polluting, possibly using alternative fuels like hydrogen. This plan didn't just maintain existing levels of steel production – it called for production to be doubled. Alongside this, Unite demanded the government invest in the entire region to turn it into a green industrial hub.

However, the union's plan always relied on the British government being something that it's not, and on the transition being a project of national renewal rather than a plan to revive economic growth through pro-market policies.

Since the 1970s, the steel industry across the Global North has been in decline. Port Talbot once employed 18,000 people, making it the single biggest employer in Wales. In 1971 there were 323,000 steel workers in Britain.

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Now there are only 35,000. Similar falls have occurred across the Global North, and numbers are set to shrink further in the course of the green transition. As steel production is transformed into a green industry, fewer workers will be required, meaning that as the transition gathers pace the number of jobs lost and communities gutted by deindustrialisation will only grow.

Steel production is vital for the foundational technologies of our so-called green future: electric cars, wind turbines, solar panels and infrastructure projects such as rail links. Yet while it is essential for the green transition, it is also very much part of the problem. Steel production is responsible for 11 per cent of global carbon emissions. Port Talbot steel works is the single biggest carbon emitter in Britain. Switching from coal-fired blast furnaces to electric arc furnaces will shave 1.5 per cent off Britain's emissions in one stroke – a huge amount for such a site-specific change.

Electric arc furnaces use scrap metal as raw material. Despite claims to the contrary, the steel produced through this process is strong and durable, fit for almost any use. Thirty per cent of all steel is already produced this way, making steel the most recycled material in the world. And Britain produces more than enough scrap to supply all its needs, exporting more scrap than it uses in new steel each year.

The money Britain's government has committed to Port Talbot is part of a global return to strong national industrial policies. Billions have been allocated to the transition away from carbon-intensive processes and towards solutions for industries such as steel. Tax breaks, funding for research, direct grants and not-so-subtle adjustments to pricing and market policy – all these instruments and more have been deployed to underpin the transition towards a low-carbon economy. Despite this, however, the decarbonisation of steel is not happening nearly fast enough. The steel industry is not on track to halve emissions by 2030, or to fully decarbonise by 2050. In fact, total emissions from the sector are still rising, and there are significant plans to build new high-emission blast furnaces around the world.

Putting Food on the Kitchen Table

During the November 2023 march and in union meetings, Port Talbot's steel workers questioned how they would pay their mortgages and bills or put food on the table. We could just as easily have started this story there, on the kitchen table.

That kitchen table would have looked very different only a few years prior. Not because of any major shift in what people liked to eat, but because there would have been less on it. In Wales, as across the rest of Britain, people are buying less food. Four in ten people in Britain, and as many as six in ten in poorer areas, are cutting down. What food they buy tends to be cheaper, more highly processed and less nutritious. People have also cut back on fruit and vegetables as prices have increased, sometimes by huge percentages, while there has been a shocking rise in illnesses like scurvy and rickets, as well as a four-fold increase in malnutrition. This deterioration is not confined to Britain. In 2023 hunger continued its multi-year rise in the US, reaching its highest point in a decade, while Europe did not fare much better. Between 2022 and 2024, global prices for a wide range of foods exploded, rising between 15 and 30 per cent. Millions were driven into malnutrition and hunger. At the same time, shortages and disruptions to basic supplies, from wheat and rice to cooking oils and vegetables, became commonplace.

The year 2022 was one of extreme weather. Heatwaves and drought devastated crop yields in Britain, Spain, France and Italy, sparking fears that 'heatflation' had taken hold of Europe's food supplies. While drought parched Britain, Italy declared a state of emergency due to flooding, and France was lashed by storms. Flood waters also covered a third of Pakistan while parts of the United States, including California and the Midwest, the country's breadbasket, continued to bake under a twenty-two-year-long mega-drought. Floods destroyed 1 million hectares of farmland in West Africa, and a combination of drought, floods and powerful storms produced food shortages and famine along the east coast of Africa. Disaster continued into 2023, with countries responding to shortages with export bans on key crops such as rice, and price controls to ward off social unrest. Agriculture executives, farmers and industry analysts all concurred that this level of simultaneous agricultural disruption was unprecedented.

It wasn't just food that became more expensive and scarce. Energy prices shot up, while storms and flooding affected supply. Everything from sand and glass to critical minerals experienced shortages and added to soaring inflation. Mounting disruptions and disasters cost national economies billions, while millions of people lost their homes and were displaced.

All of this is taking place at a time when wages are largely stagnant or in real-terms decline. Across the board living standards have dropped, sometimes dramatically, as millions are un- or under-employed, forced to turn to charities and food banks, or go without heating or food. Meanwhile, economists warn that people will just have to get used to living with less as the price of adjusting to a new economic reality.

Between the Climate Squeeze and the Installation Economy

Port Talbot is a story that will be repeated. The emerging transition economy will steadily shed industrial jobs, while making, and breaking, vague promises of future employment. Broken promises, not new industries, are what we can expect. Broken promises form the emotional and discursive foundation of the transition. As the assurances stack up, industry by industry, then fail again and again to be fulfilled, what emerges is a political atmosphere thick with a sense of betrayal.

Across the Global North, the financial crisis of 2008 initiated a long period of anxiety and economic deterioration. Industry and government both tell us that thanks to the green transition, this crisis can be overcome and there will once more be a future for us. Climate change is not a threat but an opportunity, if we can only embrace the project of that transition.

The bleaker truth is that the transition will not revive our economic fortunes. It does not offer hope of a manufacturing revival or a return to strong economic growth. The transition economy is, at best, an installation economy. The work of installing solar panels or maintaining newly built green infrastructure, is, despite its manual nature, service work. And it is service work organised largely in and through small and medium-sized businesses: a far cry from the mass employment of corporate factories. Conditions and pay are poor, and firms survive on razor-thin margins. Installing products made elsewhere, or managing the downstream waste – that is the green work of the future. This is not to say all manufacturing will disappear, or that there will be no jobs in construction and engineering. It is to say that the hoped-for industrial revival is not coming anytime soon.

Green growth is supposed to renew the compact between capital and workers, leading to increased wealth for all. Instead, what we see is a deepening social crisis. Climate change is driving up prices and creating sustained disruptions to food supply. Coupled with the steady increase in the price of energy and other core materials, due to the impacts of both the climate crisis and the buildout of the transition economy, what we find is a steady squeeze on real incomes. Climate change plus the effort to transition to a low-carbon economy is making us poorer. And as prices go up and supplies fluctuate, most of us will become not just poorer but exhausted.

Climate change is creating an increasingly hostile working environment for millions of people. There has been a fivefold increase in workers' exposure to extreme heat globally over the past twenty years. If the cost to business has been huge, the cost to workers has been even higher. Hundreds of thousands of people have died due to extreme heat in recent decades, with agricultural, installation and construction workers faring worst. At the same time, rising temperatures are also a problem for workers labouring in buildings and factories not suited to changing climates. This affects not only the obvious candidates of factory labourers, but also teachers, nurses and warehouse workers, making exposure to heat a unifying workplace condition.

Besides heat stress, climate change will drive a seemingly endless series of disruptions. Homes will be flooded, businesses forced into bankruptcy. Essential services will become harder to access while everyday tasks become less certain and more anxiety-inducing. Climate change will worsen our health, exacerbating everything from diabetes to disease. The current mental health crisis across the Global North will intensify, making it harder not just to get by but to organise against the crushing pressure of climate change.

The demand for care will surge. Women, already doing the vast majority of waged care work, will be asked to do even more, under worsening conditions. At the same time, against a continuing backdrop of government austerity, the burden of the double shift, of caring for family and friends, will intensify. While the stories told of the losses faced in the green transition overwhelmingly feature men, it is women who will bear the brunt of the impact.

This is the squeeze. During the transition life will become meaner, diminished, as we all learn to live with less. And not just live with less but hope for less. As incomes fall and security disappears, our horizons will shrink. Hope, already battered by broken promises and failed investments, will dwindle along with our horizons.

This Doesn't Feel like We've Won

The world's major fossil fuel producers are all expanding production. The biggest oil and gas companies are projected to spend US$932 billion on new oil and gas fields by 2030 and US$1.5 trillion by 2040. From new coal mines and power stations to long-term deals on LNG supplies – coal, oil and gas all seem not only here to stay but unlikely to decline in a substantive way anytime soon. This planned production would not only kill the chance of keeping future

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global warming below 1.5°C stone-dead, it would also make it impossible to stop it at 2°C. By most accounts, fossil fuel production must start declining right now, almost completely ending by 2050, to have even a chance of staying under 2°C.[4] Even this strikes many as optimistic.

Instead, demand for coal, oil and gas reached record levels in 2023. While the International Energy Agency (IEA) suggests that demand for all three will peak by 2030, it is likely that oil and gas demand will plateau around then rather than start to decline, and stay high until at least 2050, in line with oil and gas company expectations. Alongside this, efforts to curb deforestation, reduce pollution and protect the world's oceans have all fallen far short of promises, and in some instances, such as deforestation, gone into reverse.

Across Europe, regulations and laws mandating the switch to heat pumps, electric cars and building insulation are all being weakened or pushed back to later dates. Trump has been re-elected to the White House, vowing to wind back government spending and support for green industrial programmes and climate commitments. Industry after industry is securing either delayed regulation or weaker targets and special exemptions. Countries are refusing to strengthen their already inadequate pledges to reduce carbon emissions, with many planning to renege on the existing ones. At the same time, grassroots and union opposition to climate measures is growing, joining the already existing anti-green campaigns run by business interests.

The gap between what's been promised and what is needed to arrest the climate crisis is huge. The brutal reality is that we are on track for around 3°C of global warming, possibly as soon as 2080. Given this, it would be fair to ask whether the transition to a low-carbon economy is really happening, whether talk of a green transition is just a lie and a distraction. Indeed, there is no shortage of people saying exactly that.

Yet for each critic there is a corresponding optimist, pointing out that, yes, progress is not rapid enough, but look! Look at the exponential growth of renewable energy, growth so fast and energy so cheap that we can see the end of fossil fuels much sooner than predicted. Even China is predicted to reduce its emissions faster than expected! The optimists point to the remarkable surge in electric car sales, the fact that almost all economic activity and most major corporations are covered by net zero targets and regulations. From the adoption of circular economy principles and policies to massive subsidies and take-up of heat pumps, they argue that a profound transformation really is underway and is happening more rapidly than many expected.

Green capitalism is no mirage. Just the listed green economy has an annual revenue of US$5 trillion.[5] Investment in Greentech will rise to US$2 trillion in 2024, double that of fossil fuels, according to the IEA.[6] As a sector – or fraction – of capital, it is growing faster than any other bar the tech sector.

The transition is happening, and yet it's not. It's both too slow and much faster than expected. We can begin to square this circle by understanding that the main purpose of the green transition isn't to keep future climate change to 1.5°C, or even 2°C. The function of the green transition is to turn the problem of climate change into a new capitalist frontier. And while some of the profiteering involved in cashing in on the climate crisis is deeply cynical, much more is pragmatic in its commitment. But we should be clear: the implementation of this solution is first and foremost driven

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by economic imperatives, not scientific ones. It's a means to restore the economic growth and fortunes of the national economies of the Global North.

The idea of using climate change to tackle social and economic problems dates back to the late 1990s, but the particular mix of government interventions and policies that characterise the transition economy first gained favour after the 2008 financial crisis. Since then, governments in the Global North have made some attempts to shape their domestic and regional economies to revive economic growth and spur both innovation and productivity. China started earlier, with by and large the same ends in view.

The transition economy is organised around making business feel secure in its investments, not the direct organisation of production by state industries. Government contents itself with encouraging and derisking investment. It mobilises legislation and policy to create new markets for green goods where prices are set to ensure reasonable profit margins. The aim of this conducive investment environment is to persuade business to build out the transition economy, pushing it forward on a wave of privately funded – and state-supported – innovation. Success is measured not only, or even primarily, by counting carbon reductions but by capital expenditure (capex) figures and how effectively these innovations drive growth rates.

It is an economy built on borrowed parts, many of them neoliberal. It is an economy that ruthlessly punishes the poor, enables the continued assent of asset managers and monopolists, encourages rentierism and calls for the relentless draining of resources from the Global South to build this shiny green high-tech future. All in the name of ending the iron grip of stagnation that is suffocating the economies of the Global North.

The War of Green Transition

Despite it being a very real social and environmental disaster, we can't simply oppose the green transition. But this doesn't mean reducing our political actions to symbolic protests against false solutions, or merely hoping for the best while voting for the lesser evil. There are two tasks ahead of us. We must leverage our power to block not only their transition but continued fossil fuel use. And we must do so while creating an alternative path to a sustainable social economy. The second task is the harder one by far: we have to accomplish it while building the movement we need.

Any alternative to their transition must start from the most basic of facts. Without a militant progressive environment movement capable of forcing an end to the fossil economy, there is no chance of making a different economy, let alone a better world.

The fossil economy is a vast web of infrastructure. It is refineries, pipelines and mines. It is not an abstract system beyond our reach. It exists in physical space, and that makes it vulnerable. If we are to disrupt this destructive carbon web, we need to do more than perform symbolic actions in city centres, or protest against government inaction. We need to physically put ourselves in the way. We need to blockade the fossil economy.

The blockade as a form of militant action disrupts the smooth operation of critical infrastructure, stopping flows and isolating key nodes within the fossil economy. But it is more than just a physical obstruction. It gains its effectiveness not from the disruption it causes, but because it is a machine that enables the disruption to endure. A blockade extends well beyond the protest site into a network of recruitment, training and support. It is a means by which we can create militants and sustain them in action.

Blockades have impacts far beyond the site of struggle. They exert pressure on business finances, enforce compliance and ultimately weaken the target, forcing change. They are a means of inflicting a war of attrition on fossil capital, wearing it down and making an energy transition away from oil, gas and coal a reality.

As our lives are crushed by the transition, as shelves grow bare and the cost of living increases, we have to organise against the climate squeeze. The green transition as a project continues the naturalisation of the market undertaken through neoliberal policies. Where neoliberal politicians worked to liberate business from public control, to weaken the threat of democracy to capitalism, the transition will push this project further. Climate change will be invoked to make markets seem beyond political demands and social control. It will be climate change that increases prices and makes us all poorer. But there is nothing natural about a price. Prices are political objects. We need to organise to contest them from below, to impose controls on necessities and fight against being made to pay not only for the climate crisis, but for the costs of the transition.

Finally, we must grab hold of the transition in order to transform it, to make it into something that meets our needs and our dreams. We can't fight the war of transition on the defensive. We can't resist their transition plans one workplace at a time, nor can we simply hang onto polluting industries or destructive jobs. There is no one workplace or industry that holds leverage over the entire economy. The transition is work – it is made piece by piece. But that work is not reducible to heavy industry or even waged work. If we are to take hold of the transition as a process, we need to go beyond the workplace as the privileged site of our demands for a just transition.

Waged work has always been embedded in place: it is always somewhere, bound up in a community. The closing of blast furnaces in Port Talbot means more than the loss of thousands of jobs – it's the gutting of a community. And not just in terms of income and post-industrial decline, but of the very sense that a future exists to be had there. What is being transformed are communities. Therefore, the focus of our organising efforts has to exceed any one workplace, and start within the community.

Approaching the community as a single site, drawing on both workplace and community-organising tools, opens up the possibility of building a broader struggle, one that can be anchored in local institutions and leverage the power of a mass, community-based movement. It also creates the possibility of embedding workplaces within a community, and asking how they can serve our needs, rather than those of business. Putting our needs and those of the community at the centre of our organising makes it possible to move from defensive struggles to campaigns that aim to recreate the economy for our own ends. Whole community organising in the transition means making counter-plans, plans that set out not just our opposition, but what we want our lives to look like.

The seemingly inevitable decline of the steel mill in Port Talbot is both the emerging reality of the green transition economy and a symptom of the impasse in which progressive and environmental movements find themselves. The Left ought to have answers beyond defending polluting industries, and environmentalists should have more to say than platitudes about a 'just' transition. Port Talbot is a story being repeated around the globe, and we witness a growing sense of betrayal as the promises of the green transition turn out to be all too obvious lies.

We are in the midst of a profound moment of transformation. Hegemony is yet to be established, and old norms and rules are breaking down. This should be a time of feverish activity and organising. We should be pushing forwards, building our power and imposing ourselves on the transition. The stakes of this war of transition are nothing less than a future worth living in.