

The New EU Energy Security Reality And Its Impact on The Wider Black Sea Region

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Abstract

This brief in-depth research “The new EU energy security reality and its impact on the wider Black Sea region” on a security Studies was organized by David Aghmashenebeli National Defence Academy of Georgia, Germany. Its goal is to support the security of the Wider Black Sea Region energy supply chains. The purpose of this project is to answer to the main question: Will EU energy security impact the south-eastern flank of the Euro-Atlantic space.

Russia’s war in Ukraine has created new problems that are not addressed by outdated security programs and old-fashioned traditional defence approaches. That the war in Ukraine is not the cause of a future conflict against the world order is not a new point of view, furthermore, the war in Ukraine is one of the results of the already existing conflict. It is a real possibility that the Kremlin will continue its aggressive foreign policy towards its neighbours and neighbours of neighbours in order to consolidate global power and “legitimacy”.

The eternal war in the region exposed the EU’s economic weaknesses in energy exports and supply chains. Military professionals believe that whoever controls the east of the Euro-Atlantic space and/or dominates the Black Sea, can easily project power on the European continent, Central Europe, the Mediterranean, the North/South Caucasus and the Middle East.

Russia eternal war has shown us more dependence, weaponization, interference and more vulnerability of the EU Countries; Security is no longer based on the previously established rules. In the near future It’s unlikely that relations between the EU and Russia will be based on beneficial energy relations. The European Union is moving beyond the binary dependency that binds international actors, creating a new reality in which the inclusiveness of energy security extends to several different areas, diversification will be critical for the EU. Supply chains are complicated and messy, it’s implausible to make positive changes overnight.

Taking into account Russia sharp growth in military spending, its ability to integrate state resources and masses and it’s “great propensity for risk” makes Russia both a “capable and unpredictable actor”. Russia’s blackmail to use nuclear weapons indicates that Kremlin is losing the war due to lack of ammunition and low technological capabilities and in the short term wants to take this war into a protracted or frozen conflict phase.

According to the analysis of the processes of the recent past, the stability of the region cannot be successful and effective only with the support of NATO member states on EU’s eastern flank. NATO, EU and their partners should have an emergency and long-term assistance strategy for the parties. From the lesson learnt in the last 30+ years on international cooperation issues it is vital that in the next 10-30 years the Euro-Atlantic and regional countries (except Russia) in the region, must counter challenges with collective deterrence of cooperation. Actively promoting stability is possible through the existence of the theory of Russian deterrence. Stability should be achieved by promoting collective deterrence and integration of Russia; a strategy of emergency and long-term assistance not only for alliance members, but also for partners, plus collective deterrence equals fixing and integration of Russia.

Speeches and workshops used in editing this paper, Organized by the Research and Policy Analysis Department (RPA) project of Strategic Competition Seminar Series-FY23 SCSS of George C. Marshall European Center for Security Studies (GCMC) at Workshop I held in Garmisch-Partenkirchen, Germany, 20-24 February 2023 entitled “Alternative Ukrainian Future Trajectories: Implications for Russia and the West” and Workshop II held in Berlin, Germany on 16 May 2023“ (A summary of FY23 SCSS#8 hybrid seminar entitled “What if? Russian Variables, Inflection Points and Game Changers?” at SCSS Workshop II) have been very supportive in the preparation of the paper.

For the EU and its partners in the region to support the most desirable outcomes and mitigate the worst considering all scenarios discussed in the paper includes following key take-aways:

- 1.Relationships and cooperation matter
- 2.Security guarantees matter

Keywords:

Black Sea region, Economic, Energy, Russia, Ukraine, Military.

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Intradauction

On the one hand, energy plays an important role in the human development and economic growth of the country, on the other hand, it drives complex systems and encourages conflicts. According to the main international agencies Eurostat and EIA, the demand for energy is growing steadily. Scarcity of natural resources and geographical location increase the level of dependence of governments on energy politically, economically and geographically.

An unprovoked war in the wider Black Sea region has greatly complicated an already difficult strategic environment. Kiev took the confrontation with Moscow very seriously and made the wider Black Sea region the center of attention. This study presents the weaponization of the export of energy resources on the eastern flank of the Euro-Atlantic space. One of main question is indeed the sensitive dependence of the EU and its partners on Russian energy supplies; using various experiences in international relations, the question of the work will be: How relevant is it today to talk about weaponisation interdependence of energy relations between Russia and the EU?

Various open reports, books, academic journal articles, official (unsealed) documents, politicians' speeches, and parliamentary results were used in the editing of this paper, and publications of electronic news agencies, which are very supportive of obtaining a general idea about the energy sector both in the Russian Federation and in Western countries.

In the artical "The new EU Energy Security Reality and its Impact On The Wider Black Sea Region" includes an introduction, tree chapters, three figures (graphs), key takeaways. The introduction conveys the relevance of the issue, goals and motives, which motivated me to choose this topic for the 2023 annual international scientific journal of the National Defense Academy of Georgia. The first chapter focuses on the fragile energy security environment created by the EU's lack of attention, and then next chapter delivered in the period of modern history, using the historical evolution of the Security Concept, we briefly evaluated the history of EU energy security and the current set-up of EU energy security.

Here we can draw a simple conclusion of the brief research work: energy security and dependence on it is a vital issue, closely related to national security and, therefore, a daily concern of national governments and alliances. There is no doubt that the Kremlin is bolstering its foreign policy and power on the European Union's eastern flank through energy export revenues and violating international rules. Research by reading, viewing, and observing is not intended to solve problems, but to help those who are interested in better understanding the problem.

Energy policy is one of the most important political security issues of our time. Russia and the EU are the main subjects of this research for two reasons: firstly, they represent two main different actors in the international field, and secondly, before the invasion of Ukraine, the EU was very dependent on imports of carbohydrates from Russia. The purpose of this chapter is to demonstrate how outdated the one-way energy dependence between consumer and supplier is in modern relationships. It should be noted that the Russian-Ukrainian war and the protracted conflicts on the southeastern flank of the European Union are seriously jamming the economic potential of the region and have turned the security system into a zone of growing tension. According to the definition of the European Environment Agency (EEA), security of gas supply is "the availability of energy at any time in various forms, in sufficient quantities and at reasonable and acceptable prices"².

Main Part

History Of Eu Energy Security

Just a few months after the invasion of Ukraine, we are witnessing a political and economic crisis at the regional and national level (empty gas storage facilities), which have significantly affected the global energy sector (a catastrophic increase in natural gas prices) and the security of supply channels (Nord Stream). The unjustified war in the region exposed the EU's economic weaknesses in energy exports and supply chains. Regional experts believe that whoever controls the east of the Euro-Atlantic space and/or dominates the Black Sea can easily project power on the European continent, Central Europe, the Mediterranean, the North/South Caucasus and the Middle East³.

According to the definition of the European Environment Agency (EEA), security of gas supply is "the availability of energy at any time in various forms, in sufficient quantities and at reasonable and affordable prices". Taking into account several important circumstances: a. The Russian Federation was the largest supplier of gas to Europe before the war in Ukraine; b. The European Union has had a single

² Eurostat (nrg_ti_gasm) <https://ec.europa.eu/eurostat/statistics-explained/SEPDF/cache/10590.pdf>;

³ 25 May 2018. What is happening in and around the Black Sea and how does it affect NATO? Published by Pavel Anastasov. <https://www.nato.int/docu/review/articles/2018/05/25/the-black-sea-region-a-critical-intersection/index.html>;

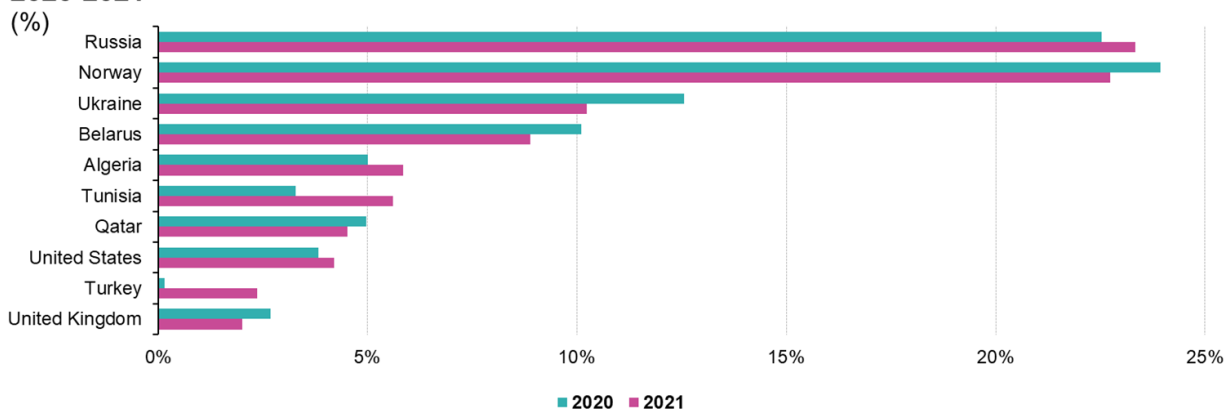
gas market since the 90s; c. The provision of European economic and important social service activities is largely dependent on from natural gas, deliberately neglecting other energy sources, In this brief study, we will mainly talk about the security of European gas supply.

European demand for energy is growing steadily. The European consumer mainly relies on energy resources and their supply chains to meet social demands and to ensure economic activities (industry, cooking, transportation, and many others); The scarcity and geographical location of natural energy sources increases the degree of dependence of national governments on energy politically, economically and geographically. The EU has a high import dependency, more than half of energy needs to be imported, though the situation varies greatly in the different member states. Some countries have an energy dependence of ~80% and even 100%, whereas Denmark is a net exporter of energy⁴.

At the national, regional and international levels, energy security is vital and closely linked to national security; The rise in tensions between Ukraine and Russia in recent history and the war in Ukraine have clearly shown us its close relationship with the security of energy supply (gas pipelines and storage, energy markets, LNG terminals, transportation, normal functioning of transit facilities and supply chains).

Before the invasion of Ukraine, Russian gas exports to Europe amounted to 42%. According to Eurostat statistics (Eurostat, Statistic Explained, April 2023), before the Russian-Ukrainian war in 2021, the European Union imported 83% of natural gas from other countries, of which the highest percentage - 23% of natural gas came from Russia, after Russia Norway is the largest importer of natural gas (22.7%), gas was imported to Europe through Ukraine (10.2%) and Belarus (8.9%), the supplier of which is Russia (as ultimate origin). According to Eurostat, in 2021 dependence on natural gas was more than 90% in 15 EU member states. Until February 24, 2022, Brussels' dependence on gas imports from Russia was higher than from Norway. In recent years, the Russian Federation has been the largest supplier of gas to Europe, see image below⁵.

Extra-EU imports of natural gas, transit from neighbouring countries, 2020-2021



Note: This figure refers to the entries of natural gas from non-EU countries in the EU; Switzerland is nevertheless excluded from the list of origins as the gas transiting Switzerland (and entering to the EU from this country which is enclaved into the EU) has been by definition already reported as an entry by another EU Member State.
Source: Eurostat (online data code: nrg_ti_gasm)

eurostat

Figure 1: Percentage of extra-EU imports (entries) of natural gas by country of origin.

In terms of energy resources dependency, a brief overview of energy consumption levels usually shows that the EU's level of dependence on Russian gas until 24 February 2022 was one of the highest in the world. The outdated unilateral energy dependence of the parties is likely to have a significant impact on modern relations and national agendas between the Russian Federation and EU member states.

Taking into account that Russia often obstructed the supply of energy resources to the eastern flank of the European Union, established spheres of influence and created closed spaces (we will discuss this in the next chapter), the Wider Black Sea region was given great importance not only - regionally, but also on the energy security agenda in European continent. A number of key issues are becoming relevant, such as trade in natural resources in the region, their safe transportation and transit opportunities; However, the changing security environment raises a legitimate question about the future of the

⁴ December 2011. Susanne Langsdorf, EU Energy Policy: From the ECSC to the Energy Roadmap 2050. Heinrich Boll Stiftung, Green European Foundation – GEF;

⁵ Eurostat (nrg_ti_gasm) <https://ec.europa.eu/eurostat/statistics-explained/SEPDF/cache/10590.pdf>;

region’s security: To what extent will EU energy security make the Wider Black Sea region secure?

In the recent past, natural gas supply interruptions were frequent due to geopolitical factors on the part of Russia; In relation to NATO and EU member states and partner countries Russia “successfully” used not only regular, irregular and hybrid challenges, but also blackmail through natural gas supply. Below, the table summarizes some of the main cases of challenges in the supply of natural gas from Russia.

Uncertain Event	Reasons/Caused	Impact on Countries	Consequences	Outcome
2008-09 The gas crisis, Gazprom threatened to reduce the supply of natural gas to Ukraine	failure to reach an agreement on gas prices and supplies	Hungary, Moldova Romania, Poland, Bulgaria, Greece, Macedonia, Turkey, Slovakia, gas supply was dropped	On 31 December 2008 gas supplies interrupted. On 1 January 2009 were halted completely	EU member states to hold consultation on the gas crisis
2013-14 clamorous gas dispute, June 2014 gas supplies to Ukraine cut off	delayed debt payments; Annexation of Crimea	Ukraine, European countries. gas supply was dropped	30 October 2014 a deal was reached	Trilateral talks EU, Ukraine and Russia
2022 Russia-EU rattling gas dispute	Ukraine war related gas issues	Ukraine, European countries. gas supply was dropped	On 26 February 2022 Ukraine transit gas exports would be prohibited	EU sanctions on Russia, established shortly after the invasion
September 2022, the leaks Nordstream pipelines from Russia to Europe	Leaks in two gas pipelines were caused by sabotage	The West believed that sabotage would not have a significant impact on Europe’s energy stability	the leaks were lasted for at least a week, until the gas from pipes runs out	The EU’s security of gas supply is fragile

Table 1. Overview of some key cases related to the security of energy supply from Russia.

Although countries generally deal with energy issues at the national level in their own way and by choosing their internal energy balance, it often happens that the impact on one country or region is felt throughout the Union. This attitude, not only in the EU region, but also in hundreds of other organizations, creates the basis for the security of energy supply. Even though, Europe’s gas storage capacity is around 100 billion cubic meters (bcm), in case of necessity, it would cover only a quarter of European demand⁶.

The European Union’s (neighborhood policy) and Russia’s specific interests in the region have a great impact on European Union’s energy security; On the one hand, Russia is creating “spheres of influence” on the eastern and south-eastern flanks of the European Union and disruptions in energy supply chains, on the other hand, it has its own reintegration plan for the region, which at the first stage is aimed at the reintegration of the post-Soviet space. Russia perceives the growing potential of energy transit corridors in the region as a risk and adds an additional dimension to its conflicting interests. The fact that energy exports are a key element of Russia’s overall foreign policy strategy is well captured in a study by Daniel Hamilton, director of the Center for Transatlantic Relations at Johns Hopkins University, entitled “The Wider Black Sea Region in the 21st Century: Strategic, Economic and Energy Perspectives⁷.”

Russian commodity sales have been under a spotlight a months before the war amid heightened tensions between Moscow and the West over Ukraine. January 21, 2022 Reuters published an interesting study titled “Russia’s oil and gas revenue windfall”. To confirm my opinion here are some numbers from this study. It is a very large figure from the state budget. Russia’s sales of oil and natural gas far exceeded initial forecasts for 2021 as a result of skyrocketing prices, accounting for 36% of the country’s total budget⁸.

Given the very brief overview of energy consumption in the EU provided in the introduction, the context of wars, trends and intentions in the recent past, the next chapter of the paper examines Russian budget revenues and the current set-up of EU energy security.

A huge source of revenue for Russia’s budget

6 February 23, 2023. Analysis: Healthy gas storage warms Europe, but not enough. <https://www.reuters.com/world/europe/healthy-gas-storage-warms-europe-not-enough-2023-02-23/>;

7 June 30, 2008. Edited by Daniel S. Hamilton, is director of the Center for Transatlantic Relations - SAIS and Gerhard Mangott. pg. 113 Energy Politics, The Wider Black Sea Region in the 21st Century: Strategic, Economic and Energy Perspectives. Washington, D.C.: Center for Transatlantic Relations - SAIS, Johns Hopkins University);

8 Factbox: Russia’s oil and gas revenue windfall Reuters January 21, 2022 <https://www.reuters.com/markets/europe/russias-oil-gas-revenue-windfall-2022-01-21/>

Monitoring Russian energy revenues make sense because it accounts for about 18 percent of Russia's gross domestic product (GDP) and more than a third of its state budget revenues. Despite the EU embargo on refined products of Russian origin, tax revenue cuts from Russian gas and oil sales, and a price cap that came into effect on February 5, 2023, the damage to the Russian economy remains surprisingly minor. At least according to the official figures, it raises some questions.

Before the war in Ukraine, tax revenue from the sale of Russian oil and gas in 2021 accounted for 45 percent of the Russian's federal budget. According to results for the first half of 2023, a combination of Russian oil price caps, import bans, economic sanctions and low market prices is working even as Russia's energy exports are flowing. The figure below presents the West's efforts to limit the Kremlin's ability to finance the war with Ukraine in 2022 and the first two months of 2023 from Russian oil and gas tax revenues⁹.

Figure 2: Tax revenue from Russia's oil and gas sales (\$1 ≈ 82 rubels in 2022)

Current set-up of EU energy security

Considerable attention should be paid to gas supply disruptions: both regional and global energy security processes require the stability and diversity of energy supply; However, prior to the Russian invasion of Ukraine, trade in energy resources between the EU and Russia, mutual benefit from Russian pipelines and storage facilities in the EU space did not cause any inconvenience to Brussels. Going back, in the short term, it appears that Russia's share of natural gas supplies to EU countries was potentially high; However, relations between Russia and the European Union have not been stable. Before the Russia-Ukraine war, the EU was still too dependent on Russian gas.

The increase or decrease in natural gas consumption, both nationally and regionally, has a profound effect on the international energy and security architecture. The extremely dependent position of the EU countries on natural gas imports is aggravated by the fact that gas supplies to the EU are provided by a narrow group¹⁰. February 14, 2023. Gas: a history of Energy Security in the EU. And what's next post-Russia? <https://energypost.eu/gas-a-history-of-energy-security-in-the-eu-and-whats-next-post-russia/>

After Russia sharply reduced natural gas supplies to the EU, namely from 42% to less than 10%, It appeared that Europe, due to a mild winter, a sharp reduction in industrial needs and diversification of suppliers in 2022-2023; he spent the winter more comfortably than Russia's possible calculations suggested. Moreover, the European Union now has more natural gas in its gas reserves than it did before the start of the unjustified war in Ukraine. The instant shock caused by Russia's invasion of Ukraine and the 10-fold increase in natural gas prices forced EU countries to buy alternative fuels. If earlier Germany received half of its consumer gas from Russia, now it has refused to do so.

However, a good forecast does not mean that there will be no interruptions in natural gas supplies in individual EU countries. Eastern and southeastern EU countries are particularly vulnerable (Figure 3). The gas infrastructure is still arranged in such a way that the vast majority of gas comes through pipelines through Belarus and Ukraine. It is unlikely that the entire supply of gas to the East will be realized from Western Europe. Although the EU has averted an energy security crisis, serious challenges still remain: 1. replacement of Russian volumes in the short term, 2. still fear of rising and unpredictable prices, 3. security of gas infrastructure and supply chains of non-Russian suppliers, and 4. The untapped potential of the wider Black Sea region's pipelines.

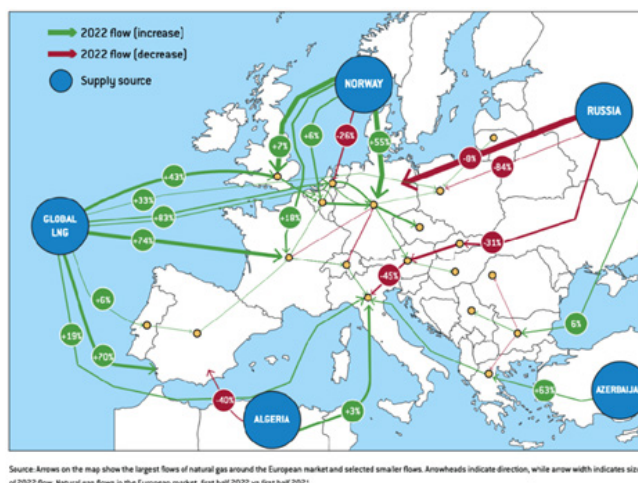


Figure 3: Natural gas flows in the European market, the first half of 2022 vs the first half of 2021, (Bruegel, 2022)

9 APRIL 13, 2023 Increasing pressure on Russia's oil industry <https://www.gisreportsonline.com/r/russian-oil-industry/>

10 February 14, 2023. Gas: a history of Energy Security in the EU. And what's next post-Russia? <https://energypost.eu/gas-a-history-of-energy-security-in-the-eu-and-whats-next-post-russia/>;

As the historical experience of the recent past, Russia uses the export of energy resources as a geopolitical tool. Russian-Ukrainian energy and conventional conflicts have shown us that energy independence and stability and security of supply chains are vital to the EU. The diversification of energy supplies, aimed at reducing the dependence of the EU on Russia, has further increased the geo-economic importance of the Black Sea region, as Daniel Hamilton noted back in 2008¹¹.

The region is of growing and attractive importance both for Europe's energy security and stability, as well as in terms of transport infrastructure. The Region is also increasing geo-economic importance especially with regard to developing European energy security via the import of hydrocarbon resources from the Caspian Basin and Central Asia and its potential as a hub within a Pan-European Transport Area. The new 2022 Istanbul Grains Agreement and the 2022 Green Energy Transit Agreement raise the importance of the Black Sea.

The Region is a zone of common interest for the two principal institution of the EURO-Atlantic community. Both institutions have close relations with interested parties and aspirant members in the Region. Such relations are essential for the strategic interests of the countries and organizations concerned but not sufficient to ensuring the effective security of European energy security via the import of hydrocarbon resources from the Caspian Basin and Central Asia and its potential as a hub within an European Transport Area.

Five days before the invasion of Ukraine, the Atlantic Council's electronic agency published an extensive study by the Council's senior adviser under the title "NATO must seize the strategic opportunity in the Black Sea". The author of the article rightly points out in the research that unlike the steps taken by the alliance in the Baltic region to contain Russia, it did not consider similar actions in the Black Sea region before the Russian-Ukrainian war¹².

Military Experts believe that the European Union and NATO have almost nothing in the Black Sea, except for Turkey's limited capabilities and The Joint Task Force East of the US Army Europe. The Black Sea Region is at the forefront of a military realignment in Europe seeing a shift from central to south-eastern Europe. The US Army Europe (USAREUR) has created the Joint Task Force East of the US Army Europe and is developing an active military relationship and presence in Rumania and Bulgaria, including pre-positioning of equipment and the forward-deployment of forces when necessary.

To conclude this article we can say; By bypassing Russia, Europe can cooperate with other countries and regions in energy policy. Through energy diversification there is a good experience of relations, the cooperation between the South-East European countries and the South Caucasus countries, in Q2, 2023 Oil transport through the Baku-Tbilisi-Ceyhan oil pipeline increased 18 times from 19,200 tons in Q1 to 347,100 tons in Q2. This trend represents an effective export diversification strategy of Kazakhstan in transporting crude oil to European countries¹³.

Conclusion

At the end, it should be noted that International security structured is likely to changing, we have to be prepared for it. The Russia-Ukraine war has shown us more dependence, weaponization, interference and more vulnerability between Russia and the EU Countries; security are no longer based on the previously established rules. In the near future it is unlikely that relations between the EU and Russia will be based on beneficial energy relations. The European Union is moving beyond the binary dependency that binds international actors, creating a new reality in which the inclusiveness of energy security extends to several different areas, diversification will be critical for the EU. Supply chains are complicated and messy, It is implausible to make positive changes overnight.

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