Master's thesis

NTNU
Norwegian University of Science and Technology
Faculty of Humanities
Department of Historical and Classical Studies

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Resilience in the Energy Sector of the European Union

A Qualitative Document Analysis of Energy Policy Development from 1952 to 2023

Master's thesis in European Studies
Supervisor: Lise Rye
May 2023

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Abstract

2022 marked the beginning of significant geopolitical changes as Russia's invasion of Ukraine brought with it a fast-changing situation shifting the EU's energy policy priorities. The invasion of Ukraine on 24 February 2022 was the impetus for this thesis.

As such, the thesis aims to address two objectives. Firstly, it provides a comprehensive understand why the EU has been unable to create a resilient energy sector. Secondly, the thesis examines the impact of the EU's response to the invasion of Ukraine, specifically the REPowerEU plan, in relation to the objective of establishing a resilient energy sector.

By utilising the EU's energy objectives of economic competitiveness, sustainable climate mitigation, and security of energy supply as an analytical framework, this research makes a valuable contribution to the existing literature on EU energy policy development. The thesis provides a deeper understand of why the EU has faced challenges in building a resilient energy sector and examines the impact of the REPowerEU plan in relation to increasing energy resilience. This analysis is particularly important considering the recent events related to the Russian invasion of Ukraine and offers a fresh perspective on how the REPowerEU plan has influenced the EU's energy policies between February 2022 and April 2023.

To address these objectives, the thesis adopts the energy policy triangle as an analytical framework, analysing the development of EU energy policies from 1950 to 2023. Two research questions guide the inquiry, and the analysis draws from a qualitative examination of over 150 documents, encompassing primary, secondary, and tertiary sources. Given the two objectives of the thesis, there are also two main findings. Firstly, there has been a been reluctance among Member States to relinquish sovereignty which has left limited legal competence to further EU energy policy development. Secondly, the EU has employed a diverse range of tools in response to the invasion of Ukraine and to implement measures outlined in REPowerEU. As a whole, the thesis reveals a greater willingness among EU Member States for an EU-wide energy policy and the importance of the European Commission in furthering energy policies.

Sammendrag

2022 markerte begynnelsen på store geopolitiske endringer da Russland invaderte Ukraina. Dette førte til en raskt skiftende situasjon som endret EUs energipolitiske prioriteringer. Invaderingen av Ukraina den 24. februar 2022 var drivkraften bak denne avhandlingen.

Oppgaven har to formål. For det første gir den en omfattende analyse av utviklingen av EUs (EU) energipolitikk for å gi innsikt i utfordringene knyttet til å skape en robust energisektor. Oppgaven undersøker også EUs respons på invasjonen av Ukraina, nemlig REPowerEU-planen og hvordan denne har påvirket EUs energipolitikk i henhold til å etablere en robust energisektor.

Ved å bruke EUs energimål om økonomisk konkurranseevne, bærekraftig klimatilpasning og energiforsyningssikkerhet som en analytisk ramme, er denne oppgaven et verdifullt bidrag til den eksisterende litteraturen om EUs energipolitiske utvikling. Oppgaven tilbyr en dypere forståelse av hvorfor EU har møtt utfordringer med å skape en robust energisektor og undersøker implikasjonen REPowerEU-planen har hatt i henhold til å skape en robust energisektor. Denne analysen bidrar ved å belyse hvordan REPowerEU-planen har påvirket EUs energipolitikk mellom februar 2022 og april 2023.

Oppgaven tar i bruk det energipolitiske triangelet som et analytisk rammeverk, og analyserer utviklingen av EUs energipolitikk fra 1950 til 2023. To forskningsspørsmål styrer undersøkelsen, og analysen bygger på en kvalitativ undersøkelse av over 150 dokumenter, både primær-, sekundær- og tertiærkilder. Oppgaven har to hovedfunn. For det første har det vært en motvilje blant EUs medlemsland for å avgi suverenitet, som har begrenset den juridiske kompetanse til å fremme energipolitisk utvikling på EU nivå. For det andre har EU tatt i bruk et bredt spekter av verktøy i respons til invasjonen av Ukraina og for å implementere tiltakene lagt frem i REPowerEU. Som helhet viser oppgaven at det er en større vilje blant medlemslandene for en felles energipolitikk og viktigheten av EU-kommisjonen for å fremme energipolitikk.

Acknowledgements

First and foremost, I would like to express my deepest gratitude to my supervisor, Lise Rye. The importance of your much-needed feedback, reassuring words, and motivational advice cannot be emphasised enough. Thank you for believing in me and helping me believe in myself. It has been a pleasure to collaborate with you.

Thank you to my fellow master's students at Krampesal, the process of writing this thesis would not have been the same without all of you. I am especially grateful for the opportunity to start every morning by reflecting upon which international leader I am that day. Thank you for your great companionship, lousy humour and hilarious memes.

A million thanks to my family for your unwavering support and for always being my biggest fans. Thank you to my Mom and Dad for your emotional support and comforting words during the most stressful moments. Another big thank you is dedicated to my sisters for calling me non-stop, always making me laugh and talking to me about anything but my thesis.

I am also very grateful to my colleagues at ADS Insight for always lending me a hand when I need one and giving me valuable advice. My proofreaders, Kristina Åbø and Ada Fraser, also deserve a big thanks for dedicating their time and effort.

As my time in Trondheim is drawing to a close, I would like to give a big shoutout to Hannah Richardsen and Marie Hynne Østvang. I am so thankful we got to experience all the highs and lows of the past five years, together.

Lastly, I'd like to thank myself, for doing all the work and always striving to do my best.

Ingeborg Tveter Lunde
Trondheim, 15 May 2023

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Abbreviations

Bcm	Billion Cubic Meters
DG	Directorate-General
ECSC	European Coal and Steel Community
EGD	European Green Deal
EP	European Parliament
EU	European Union
EUMS	European Union Member States
ETS	Emission Trading System
GHG	Greenhouse Gas
GW	Gigawatt
IEA	International Energy Agency
IPCC	Intergovernmental Panel on Climate Change
ITRE	Committee on Industry, Research and Energy
LNG	Liquified Natural Gas
NECP	National Energy and Climate Plans
PCI	Project of Common Interest
Q	Quarter
RED	Renewable Energy Directive
RQ	Research Question
TFEU	Treaty on the Functioning of the European Union
UK	United Kingdom

1 Introduction

1.1 The European Union, Russia's War in Ukraine and Energy

"A truly interconnected and resilient EU energy network
will provide energy security for all." (European Commission, 2022j)

The excerpt above is penned by the European Commission and taken from the REPowerEU plan from 18 May 2022. REPowerEU is the response of the European Union (EU) to the hardships and global energy market disruption caused by Russia's invasion of Ukraine on 24 February 2022 (European Commission, 2022k). Since imports of Russian energy is helping Russia sustain its war against Ukraine, REPowerEU aims to rapidly reduce the EU's dependence on these fossil fuels as well as fast forward the green transition.

When Russia invaded Ukraine, this immensely affected the Union's energy sector. Inter alia, the war has led to high energy prices, heightened concerns for security of energy supply and revealed the EU's over-dependence on Russian natural gas, crude oil and hard coal. Since 2013, all 27 EU Member States (EUMS) have been net importers of energy. While the main origins of the EU's energy imports have changed in recent years, Russia has maintained its position as the leading supplier of the EU's main primary energy commodities: gas, oil and coal (Eurostat, 2023b). In 2021, the EU imported more than 40% of its total gas consumption, 27% of its oil imports and 46% of its coal imports from Russia (European Commission, 2022e). The war has caused a double urgency for the EU, to transform Europe's energy system and to end the EU's dependence on Russian fossil fuels. As such, the actions outlined in REPowerEU are based on three pillars: diversifying energy supplies, saving energy and boosting renewable energy supply (European Commission, 2022j). These pillars coincide with the overarching objective of EU energy policy to deliver secure, sustainable and affordable energy for citizens and businesses (European Union, n.d.-b). This thesis delves deep into the topic of energy policy development in the EU from 1952-2023 in relation to these objectives.

The EU has been developing energy-related policies since its inception in 1952. While two of the three founding treaties of the EU were explicitly concerned with sources of energy, these did not establish a supranational energy policy (Birchfield & Duffield, 2011, p. 1). Nevertheless, over the years, policymakers have borrowed legal competence from the economic and environmental sections of the treaties to justify the proposal and passing of energy measures (Buchan, 2015, p. 347). Existing literature finds that one of the first areas to evolve in EU energy policy was the aspect of energy security on the backdrop of supply crises (Birchfield & Duffield, 2011; Eikeland, 2011; Tosun, Schulze, & Biesenbender, 2015). On the other hand, Eikeland (2012, p.1) argues that the road to EU energy policy integration is strewn with failed efforts. Taking these arguments into account, adding that the overall goal of REPowerEU is to build a resilient EU energy system, this invites the first research question of this thesis:

(1) Why has the EU not been able to build a resilient energy sector?

Existing literature argues that the EU has made strides towards a common European energy policy over the last decade (Birchfield & Duffield, 2011, p. 1; Skjærseth, 2021).

Three years before the invasion of Ukraine, the EU adopted an ambitious set of proposals to become the first climate neutral continent by 2050, also known as the European Green Deal (EGD) (European Commission, 2023a, p. 11). As a means to achieve this goal, EUMS have pledged to reduce emissions by at least 55% by 2030, compared to 1990 levels. Existing literature finds the EGD to be a landmark in the EU's climate and energy policy by setting these binding targets (Perez de las Heras, 2022, p. 63). The EGD set the EU on a long-term path towards climate neutrality in a fair, cost-effective and competitive way (European Commission, 2023a). While a historical analysis that includes the EGD would be intriguing research, the Russian invasion of Ukraine has brought a fast-changing situation for the EU's energy policies and therefore invites deeper research. Given the nature and implications of this significant geopolitical event, this raises the second research question of this thesis:

(2) How does the Russian war in Ukraine and the subsequent launch of the REPowerEU plan affect the EU's energy policies?

The objective of this thesis is two-fold. The first objective is to provide a thorough historical analysis of the EU's energy policy development to better understand why the EU has been unable to create resilience in its energy sector. The resilience perspective is interesting to examine, particularly due to the invasion of Ukraine and the significant changes that have occurred in light of this development. The second objective is to analyse the effect of REPowerEU on the EU's energy policies in light of the resilience objective between February 2022 and April 2023. While short-term gas supply disruptions have occurred in the past, several factors distinguish the situation in 2022 from previous security of gas supply crises (Official Journal of the European Union, 2022c). Combined, this warrants further investigation. Moreover, the infancy of the REPowerEU makes this thesis an important contribution to the field of EU energy policy development.

To answer the research questions, it is imperative to understand what is meant by a resilient energy sector and energy policy development. While many definitions of the term exist in the literature, the most widely accepted and used definition is provided by the International Energy Agency (IEA) (Jasiunas, Lund, & Mikkola, 2021, p. 2). Nonetheless, Jasiunas et al. (2021, p.2) also explain that the IEA definition includes an "exceptionally long set of specifications". Therefore, I base the definition on a simplified version provided by O'Brien (2009). A resilient system can absorb disturbance and re-organise while maintaining its function, structure and identity (O'Brien, 2009, p. 403). Moreover, it can deliver the triple win of security, sustainability and contribute to climate mitigation targets, as explained by O'Brien (2009, p.403). To this end, O'Brien states that a resilient system will act to reduce vulnerabilities by using indigenous and renewable energy sources, meaning its architecture will be diversified and integrated. These are aspects I incorporate, analyse and discuss in my thesis. The factors outlined by O'Brien are also identical to the EU's energy policy objectives of a functioning and interconnected internal energy market, sustainable climate mitigation and security of energy supply. In my thesis, these factors also define EU energy policy development and make up my analytical framework (to be elaborated below). Within energy policy, I focus on the EU's three primary fossil fuels; natural gas, oil and coal. However, I place a particular spotlight on oil and gas. In addition, I consider energy policy in tandem with climate policies as the two have been directly interlinked in the EU. As such, I also analyse climate policies and renewable energy.

The main finding of my thesis is that the three objectives of economic competitiveness, sustainable climate mitigation and security of energy supply have been continuous throughout the EU's energy policy development. However, throughout energy development, the EU has not been able to consolidate all three objectives simultaneously. Nonetheless, in my thesis, I argue that with the Russian invasion of Ukraine and the subsequent launch of REPowerEU, the EU is actively pushing to build a resilient energy sector that fulfils all three energy policy objectives thereby ensuring economic competitiveness, sustainable climate mitigation as well as security of energy supply.

My thesis contributes to the existing literature by using the EU's own energy objectives as an analytical framework to determine why the EU has been unable to create a resilient energy sector. Moreover, considering the recent occurrence of the Russian invasion of Ukraine, my analysis examining the impact of REPowerEU on EU energy policies stands out as a pioneering analysis in the area. The thesis builds upon extensive literature on the EU's energy policy development (Biesenbender, 2015; Birchfield & Duffield, 2011; Eikeland, 2012; Kanellakis, Martinopoulos, & Zachariadis, 2013; Tosun et al., 2015), by bringing the literature one step further through an analysis of substantial recent developments such as the EGD and REPowerEU. Moreover, my research investigates how the EU has been and is currently pursuing resilience.

1.2 Research Design

To answer the research questions, I conduct a qualitative document analysis. Qualitative research allows in-depth information collection but from fewer cases (Burnham, Lutz, Grant, & Layton-Henry, 2008, p. 40). Document analysis involves carefully examining and interpreting the collected data to uncover meaning, gain understanding and generate empirical data (Bowen, 2009, p. 27). While documents are often used as secondary or additional sources of data in research projects, document studies solely focus on analysing the information contained within them (Tjora, 2017, p. 181). Performing a general document analysis is beneficial for my thesis as it is an unobtrusive method that allows me to collect empirical data without the involvement of research participants (Tjora, 2017, p. 183). Moreover, the careful use of a wide range of documents is considered one of the most reliable methods open to a political researcher (Burnham et al., 2008, p. 212).

The usefulness of document analysis for the analysis of EU energy policy development is underscored by the fact that existing literature on EU energy policy development has used the same method (Birchfield & Duffield, 2011; Eikeland, 2011, 2012; Tosun et al., 2015). At the same time, the novelty of REPowerEU and hence the limited literature examining its effects present a challenge since it somewhat limits the choice of research methods as it does not allow me to refer to or compare with previous findings. Nonetheless, the availability of other related documents, such as primary sources and web pages, still allows me to conduct research. Therefore, I analyse more than 150 documents to collect and generate empirical data.

Table 1 offers an overview of the analysed documents organised by category:

Table 1 Categorisation of documents

Primary sources	Primary EU law (treaties) EU Regulations EU Directives European Commission Communications European Commission Recommendations European Commission White papers European Commission Green papers European Commission Strategies European Council Conclusions European Parliament Resolutions European Parliament Research Service Briefings Press releases Speeches Statements
Secondary sources	Academic journal articles Books
Tertiary sources	Official EU webpages Media/Newspapers Other webpages

Source: Author's compilation

To collect data, I use the EU's energy policy objectives as a starting point for both research questions. As such, the documents I analyse relate to at least one of the EU's energy policy objectives. Just like the EU's energy policy objectives, the aim of the REPowerEU plan is to achieve more affordable, secure and sustainable energy. As such, I have used the three factors of economic competitiveness, climate mitigation and security of energy supply as the selection criteria for the documents I analyse.

I use the EU's online database, EUR-Lex, to collect relevant EU primary law, legislative acts and policy documents. Due to the large number of legislative acts and policy documents relevant to my research questions (RQs), I set boundaries to narrow the focus of my analysis. While the two RQs are related, they have different limitations in scope. Additionally, because they cover different timeframes, I use different document types to analyse them.

To answer the first RQ of why the EU has been unable to build resilience in its energy sector, I conduct a document analysis of energy policy developments from 1950-2021. To collect the data for this analysis, I draw upon existing literature that has performed similar studies as well as the official web pages of the European Commission (hereafter Commission) and European Council (hereafter Council). These web pages have led me to identify the most relevant energy and climate policy developments from 1950-2021.

In my analysis, I mainly draw upon the Commission and the Council to answer the first RQ. I include the Commission due to its role as the representative of the EU and its interest in addition to its right of initiative to propose new legislation. In addition, existing literature finds that the Commission has been instrumental in the agenda-setting and policy-making dynamics of the energy packages. On the other hand, the Council is composed of the EUMS heads of state and determines the general direction and priorities of the Union. I include

the Council since existing literature finds that EUMS reluctance or support has been instrumental in determining EU energy policy development. Thus, by analysing the policy choices of the two institutions, I can determine whether the position of the Commission or EUMS mainly influenced a policy choice.

To answer the second RQ of how the Russian war in Ukraine and the subsequent launch of the REPowerEU plan affects the EU's energy policies, I analyse the effects of the REPowerEU plan from 24 February 2022 to April 2023. Given the novelty of the war, this means that there is finite existing literature on the topic. Therefore my thesis contributes an initial but short-term analysis of the impact of the invasion on EU energy policy. The finite literature limits the data collection related to this RQ. As such, I primarily rely on EU sources. As my starting point, I use the actions outlined in REPowerEU in relation to the three EU energy policy objectives. To this end, I have consulted the Commission and Council official web pages in search of the most relevant policy developments. I also draw upon various EU reports as these provide practical examinations of the relevant effects on the EU's energy sector and essential policy developments.

Since the war is ongoing, I focus on analysing the short-term implications of the war and REPowerEU. Therefore, I explore the EU's efforts to phase out Russian fossil fuels using the three EU energy policy objectives. To analyse efforts to phase out Russian fossil fuels, I investigate the EU's sanctions against Russia, the diversification of natural gas, crude oil and hard coal, and policy efforts to accelerate renewable energy. The relevance of this approach is underscored by the fact that the EU's primary energy commodities are natural gas, oil and coal, with renewable energy also being on an upward trend over the last few years (Eurostat, 2023b). While REPowerEU also calls attention to the need for higher levels of biomethane and hydrogen, these are excluded due to their classification as long-term energy solutions.

1.2.1 Potential Weaknesses

While qualitative research allows an in-depth study of a phenomenon, this comes at the expense of being able to make generalisations (Burnham et al., 2008, p. 40).

For document studies, quality control criteria include authenticity, credibility, representativeness and meaning (Burnham et al., 2008, p. 208). While the first two criteria are more easily established for documents obtained from official EU publications, there might be more bias in the studied literature. In my thesis, particular limitations arise when considering the latter two criteria. The representativeness and meaning of the analysed documents is largely based on author interpretation. As Moses and Knutsen note, even descriptions of events are not free from the bias surrounding us (Moses & Knutsen, 2019, p. 10). Also, while there is value in understanding, there can be more than one way to understand something (Moses & Knutsen, 2019, p. 10). This implies the potential for author bias in my thesis.

Moreover, there is limited comprehensive literature available that studies primary documents related to the EU's energy developments over time. Thus, in my data collection, I have assessed which documents should be analysed, again implying the potential for author bias. In addition, I have not included the European Parliament (EP) perspective in my thesis. The EP has been excluded since existing literature has not highlighted the institution as essential in EU energy policy development. Nonetheless, investigating EP

initiations/blockings could possibly have provided additional perspectives and is thus a limitation in my thesis.

On a similar note, REPowerEU is a very new development and thus lacks extensive academic literature. Consequently, my thesis relies heavily on EU documents. This highlights a potential weakness given that the EU's documents are most likely biased to provide a pro-EU action perspective. Moreover, the limited time frame of my second RQ (February 2022-April 2023) is a limitation of my thesis. While this is out of my control, it does mean that my analysis only produces short-term and hence somewhat limited findings. Furthermore, while policy developments and recommendations for renewable energy have been included in the thesis based on the EU energy policy objectives, the success of these measures cannot be adequately measured as they pertain to long-term goals.

1.3 Structure

To answer the RQs, I have structured the thesis into five chapters. Chapter 2 offers a review of existing literature. Chapter 2s first section elaborates on the interplay between economic competitiveness, security of energy supply and environmental sustainability. This interplay is operationalised as the analytical framework of the thesis, also known as the EU energy policy triangle. To this end, its concepts will also be defined. The second section of Chapter 2 examines various perspectives used to explain energy policy development in the EU. At the same time, the chapter will show the relevance of the thesis and why there is a need for more research on EU energy policy development and the effects of REPowerEU. After that, chapters 3 and 4 analyse the empirical data. In chapter 3, I analyse the EU's energy policy development between 1952-2021 according to the energy policy triangle to answer the first research question. To gain insight as to why the EU has been unable to build a resilient energy sector, I categorise which objectives of the energy policy triangle have been highest on the EU's agenda throughout different periods. In chapter 4, I analyse the effect of REPowerEU on the EU's energy sector. In this chapter, I use the energy policy triangle to demonstrate that the EU is actively pushing to ensure its energy policy will fulfil all three policy objectives. Chapter 5 discusses the analyses of the two preceding chapters are examined in relation to each other, particularly in light of the objective to build EU energy resilience. Lastly, chapter 6 concludes the thesis by answering the research questions and presenting my main findings. This chapter will also discuss the two research questions in light of the objective to increase EU energy resilience.

2 Literature Review

There is vast literature dedicated to energy policy in the EU, and therefore I divide the literature as it relates to the RQs into two main strands. Since energy policy is a complex and interconnected subject, related themes often intermingle within academic literature. Still, the first main strand in the literature on EU energy development is the interplay between the three factors of economic competitiveness, security of energy supply and environmental sustainability. In this regard, the literature debates whether economic, environmental or energy security concerns have primarily driven development. The second main strand of literature provides perspectives to explain the EU's energy policy development. In this regard, the literature debates the extent to which EU energy policy development has been shaped by the national interests of EUMS, the influence of external actors (e.g. multinational corporations and third countries) and/or geopolitical events and crises.

This chapter presents a literature review covering the abovementioned areas. The first section focuses on the energy policy triangle, and the second section examines the various perspectives used to explain energy policy development in the EU, including geopolitics and crises. Throughout the chapter, I will place my thesis within the context of the literature and explain why and how my thesis contributes to the field of EU energy policy development.

2.1 EU Energy Policy Triangle

Academic literature on EU energy policies typically includes one, some or all of the three EU energy objectives. Ollier et al. corroborate my impression of EU energy policy development literature regarding the usage of the three factors by referencing several authors:

> Previous scholarship identifies three key policy goals for the energy sector: (i) limiting costs (ii) securing the supply of energy, and (iii) reducing the environmental- and particularly climate burden. (Ollier, Metz, Nunez-Jimenez, Spath, & Lilliestam, 2022, p. 166)

To exemplify, it is not uncommon to find energy policy discussions within works that address environmental aspects. This is explained by the role clean energy plays in mitigating climate change. Moreover, energy policy has increasingly become a part of the security policy domain following gas disputes with Russia and international turmoil.

The objectives are put together in different constellations but share the same three factors: economic competitiveness, environmental sustainability and security of energy supply or energy security. Several scholars conceptualise the objectives of EU energy policy as an 'energy policy triangle' (Buchan, 2015; Miciula et al., 2021; Slominski, 2016; Szulecki, Fischer, Gullberg, & Sartor, 2016). Other scholars conceptualise the objectives as part of an 'energy trilemma', recognised through the same three factors (Grigoryev & Medzhidova, 2020; Heffron, McCauley, & Sovacool, 2015; Heffron, McCauley, & Zarazua de Rubens,

2018; Kang, 2022; Khan, Zakari, Dagar, & Singh, 2022; Marti & Puertas, 2022). The energy trilemma frequently includes the inability to achieve all three objectives simultaneously (Heffron et al., 2015; Khan et al., 2022). Recent contributions relating to the Russian invasion of Ukraine also include the objectives of the EU energy policy triangle (Lanoszka, Rogers, & Triglavcanin, 2022; Osicka & Cernoch, 2022). Unlike existing literature, I use this finding as an analytical framework and tool to analyse EU energy policy development and find patterns. But first, it is important to investigate how the existing literature conceptualises the three objectives.

Ollier et al. claim that energy policy is shaped by balancing these overarching goals. Moreover, Szulecki, Fischer, Gullberg, & Sartor (2016) declares that these three objectives remain unaltered, but the emphasis given to each goal differs (Szulecki, Fischer, Gullberg, & Sartor, 2016, p. 549). On the other hand, the energy trilemma offers a fascinating perspective as it conceptualises the three objectives as competing. Heffron et al. (2015, p.168) suggest that energy law and policy should strive to balance the three competing objectives of economics, politics and the environment to provide the most favourable outcome for society. Still, the authors argue that economics has typically dominated the energy agenda. Similarly, Khan et al. (2022, p.1) conceptualise the energy trilemma as consisting of three crucial yet contradictory problems: ensuring energy security, affordable clean energy and universal access, and maintaining environmental sustainability. In my analytical framework, I aim to combine the two conceptualisations of the interplay in the energy policy triangle and the competing energy trilemma objectives.

Miciula et al. (2021) highlight that the essential components of a balanced approach account for climate imperatives, the energy security of EUMS, and the economy. Moreover, the authors argue that the EU energy and climate strategy is headed towards two priorities: securing energy supplies to its economy and maintaining the competitiveness of its energy market (Miciula et al., 2021, p. 22). Importantly, Miciula et al. underline that geopolitical conditions and changes in the situation of energy markets demonstrate that the issue of energy security is fundamental for the functioning of modern economies as it directly influences economic development and other strategic areas. The effect of geopolitics on energy markets and economic competitiveness is a particularly interesting perspective of REPowerEU, which I aim to investigate closer. On that note, Buchan (2015, p.348) argues that energy security is the weakest side of the energy policy triangle, all the while highlighting that the 2004 and 2007 eastern enlargements have increased the case for strengthening energy security as the new states in east and central Europe have been eager to establish EU measures to avoid excessive dependence on Russia. I aim to study this closer in my thesis.

Just as I do, Buchan (2015) describes the EU's energy objective as a triangle. The author characterises EU energy development as uneven due to it being part economic policy, part environmental policy and part security. Still, the author explains that a turn towards a more coordinated EU energy policy has occurred on the backdrop of three challenges: (1) creating an internal energy market, (2) playing an active role in combating climate change and (3) increasing energy security policy (Buchan, 2015, p. 344). Likewise, Slominski (2016, p.344) discusses all three objectives but outlines them more simply as the internal market, energy security and climate policy. However, the author places his emphasis on climate-related aspects and finds that scholarly literature discussing the relationship between energy and environmental policies has only increased in recent years (Slominski, 2016, p. 344).

While the EU's energy and climate policies date back to the early 1990s, for many years, these developed with limited connection (Skjærseth, 2021, p. 29; Vogler, 2017, p. 265). Skjærseth (2021, p.29) argues that from 1997-2007 EU climate and energy policies developed primarily in isolation and were based on different concerns: climate change, energy security and economic growth. Even when the two became entangled, Vogler argues that this revealed significant contradictions between energy security on one hand and climate security on the other. In this regard, the author describes energy security as being framed in terms of security of supply and climate security being the perspective in which environmental change threatens the EU's long-term interest (Vogler, 2017, p. 265). While I focus on security of supply, aspects related to climate security, as defined by Vogler, are discussed in my thesis as a part of this concept. Just as the REPowerEU plan outlines, Fischer (2021) conceptualises energy security to incorporate competitiveness and sustainability as means to enhance EU energy security. Fischer argues since climate targets, the increasing cost competitiveness of renewables and the availability of other means to reduce import dependency (e.g. energy efficiency) have opened new avenues to increase EU energy security (Fischer, 2021, p. 1). These are aspects that my thesis will explore further.

Following this line of research, Christou (2021) argues that the energy-climate policy nexus has become interdependent, and to discuss energy policy formulation, climate policy objectives must be included (Christou, 2021, p. 362). This is an interlinkage that I take into account and will further delve into in my thesis. However, unlike Christou, my thesis expands to include the security of energy supply objective. I do this based on previous and ongoing geopolitical tensions between Russia, Ukraine and the EU.

2.1.1 Analytical Framework

Given the broadness of the topic, energy policy development, an analytical framework is helpful. An analytical framework is also a useful tool that helps me to make my argument since facts do not necessarily speak for themselves, as all understanding takes place within a conceptual framework (Burnham et al., 2008, p. 3). While there are more ways to define a conceptual framework, in my thesis, I use it as a set of background assumptions and an ordering framework to interpret events (Burnham et al., 2008, p. 3).

I have chosen to create an analytical framework for my thesis, based on the EU’s energy policy objectives as these are continuously discussed in existing literature relating to the EU’s energy policy development. Moreover, the objectives coincide with the factors that define a resilient energy system. As such, by using the objectives as an analytical framework, I am simultaneously investigating the resilience of the EU’s energy system.

As explained, the EU's energy objectives are often similarly conceptualised as an energy policy triangle or an energy trilemma. The energy policy triangle is a conceptualisation of the EU's energy objectives that together make up the sides of a triangle to visualise the interplay between these in energy policy development. On the other hand, the energy trilemma is concerned with the need to balance the three objectives, as it is impossible to have all three simultaneously. Typically, the trilemma is used to quantitatively assess the performance of countries' energy systems (Marti & Puertas, 2022, p. 3) While a quantitative assessment remains outside the scope of this study, I chose to incorporate the definition of not being able to pursue all three objectives simultaneously. Nonetheless, both conceptualisations share the same three factors: economic competitiveness,

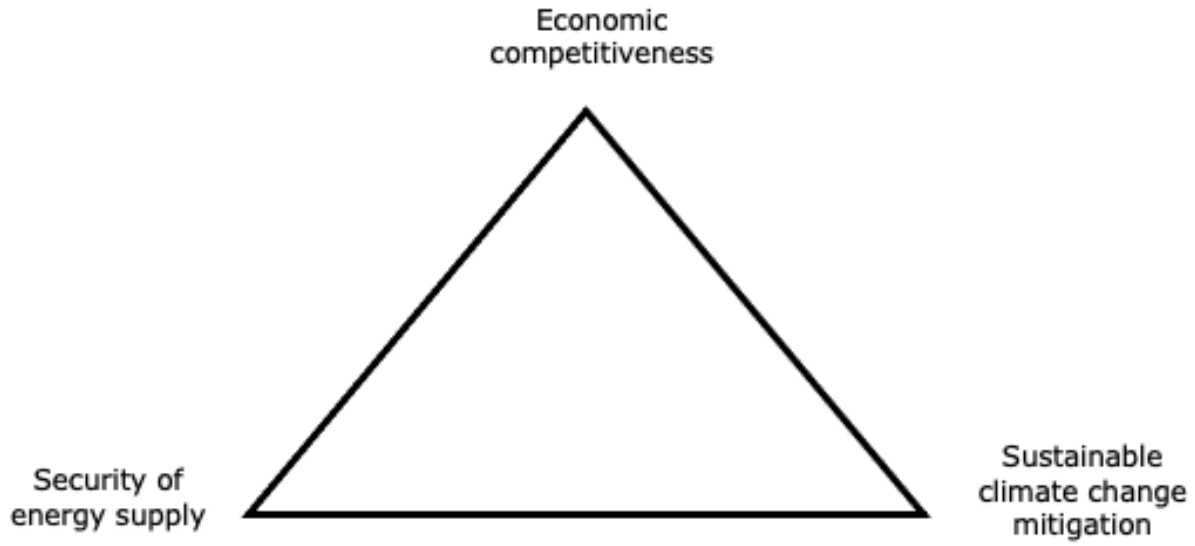
environmental sustainability and security of energy supply or energy security. This aligns with the EU's definition of its energy policy aims:

> ensure the functionating of the energy market; ensure security of energy supply; promote energy efficiency and energy saving and the development of new and renewable forms of energy; promote the interconnection of energy networks. (European Union, n.d.-b).

In addition, in 2015, the EP published a study at the request of the Committee on Industry, Research and Energy Committee (ITRE) to explain the key features of energy governance in the EU related to ITRE's mandate. In this study, the main sides of EU energy policy since the 1990s are represented in the form of a triangle with the three objectives of competitiveness, climate and security of supply (Slingerland, Yearwood, Gancheva, & Rademaekers, 2015, p. 9).

In the literature, the exact terms used for the objectives of the energy policy triangle vary. I have chosen to formulate the three objectives as: economic competitiveness, sustainable climate mitigation and security of energy supply. These make up the analytical framework of the thesis, which is illustrated below:

Figure 1 EU Energy Policy Triangle



Source: Author's compilation

The EU energy policy triangle is the analytical framework of this thesis. In chapter 3, following a similar approach to Biesenbender (2015, p.24), I categorise the development of EU energy policy into distinct phases and emphasise which objectives were highest on the EU's agenda during each time period. My analysis diverges from Biesenbender's approach as I categorise the development according to the objectives of the energy policy triangle. Furthermore, I incorporate the energy trilemma concept that it is not possible to pursue all three objectives simultaneously. This aspect is reflected in my categorisation of the time periods, where I identify the two objectives that were highest on the EU's agenda. Also, unlike Biesenbender, I delve deeper into the periods of policy development. Moving on to chapter 4, I use the analytical framework to support the main argument of my thesis, that REPowerEU has spurred the EU to pursue all three objectives simultaneously. Nevertheless, since various authors give different interpretations of the terms, it is crucial to provide my definition of the objectives to clarify their intended meanings.

2.1.2 Concepts

Firstly, security of supply is a multifaceted concept, and thus it is necessary to dedicate more space to its definition. Much scholarly literature also refers to this concept as energy security. In this regard, the concept is often defined through "the four A's": *availability* of energy resources, *accessibility*, *affordability* of investment and *acceptability* of associated environmental effects (Asia Pacific Energy Research Centre, 2007; Cherp & Jewell, 2014, p. 415; Christou, 2021, p. 361). These are inherently interconnected dimensions.

Traditional conceptions have often delimited the scope of security of energy supplies to the ability of states to maintain uninterrupted energy supply relative to demand at affordable and relatively stable prices (Christou, 2021, p. 361). Hence, previous literature often relies on the definition of the IEA: the uninterrupted availability of energy sources at an affordable price (Bradshaw, 2009; Cherp & Jewell, 2014; Christou, 2021; Misik, 2022). The IEA differentiates between long-term and short-term security, with long-term security being timely investments to supply energy in line with economic developments and environmental needs (International Energy Agency, 2023). Conversely, short-term security is the ability of the energy system to react promptly to sudden changes in the supply-demand balance. The general IEA definition has also been used in a previous EP publication, such as a European Parliament publication examining energy security in the EU's external policy (Russell, 2020, p. 1).

For my thesis, it is necessary to add a geopolitical and security dimension to the definition of security of energy supply as these have been triggered by the REPowerEU and the sudden need to reduce dependency on imports of Russian energy. Scholarly literature also reveals that geopolitics and crises largely affect energy policy. Bradshaw (2009, p.1921) provides a possible definition of geopolitics within energy security as the influence of geographical factors on state and non-state actors to ensure adequate, affordable and reliable energy supplies. Within EU policy, Christou (2021, p.366) has found that energy security has grown in scope from the restrictive perspective of supply security. Importantly, energy independence has been added to certain definitions: reducing imported energy and improving energy self-sufficiency are essential measures for boosting energy security (Matsumoto, Doumpos, & Andriosopoulos, 2018, p. 1737). Building on this, Vogler (2017, p.277) points to the geographical aspect of security of energy supply for the EU, as an objective of seeking energy security through avoiding dependence on a single supplier or route. These are aspects that I will address throughout my thesis.

Taken as a whole, I use the IEA's definition of energy security as my starting point, all the while adding a geopolitical security dimension which is integrated into both short- and long-term security:

> Security of energy supply is the uninterrupted availability of energy sources at an affordable price, yet distinguishing between short-term and long-term security. Short-term security addresses the ability of an energy system to react promptly to sudden changes in the supply-demand balance. Long-term security is focused on timely investments to supply energy in line with economic developments and environmental needs. Within these, the geopolitical security objective of seeking security of energy supplies by avoiding dependence on a single supplier or route and improving energy self-sufficiency shall be incorporated.

Moving on, the literature refers to a vital link between security of energy supply (hereafter security of supply) and sustainability. The link is explained on the basis that once EU energy and environmental policies became entangled, significant contradictions and complementarities between the conceptions of energy and climate security became evident (Vogler, 2017, p. 265). Energy policies have often been formulated with a focus on

ensuring security of supply, an approach which has also had implications for the EU's external policy. In contrast, climate security has been approached differently as it considers the potential risks that environmental changes pose to the long-term interests of the EU. These are aspects that I will address in my analysis.

Secondly, sustainable climate change mitigation (hereafter climate mitigation) is defined as the efforts made to prevent or reduce the sources of greenhouse gas (GHG) emissions and/or enhance the sinks (European Environment Agency, 2020). Mitigation efforts can be achieved by either reducing the source of GHG emissions through increasing the use of renewable energy or developing a cleaner mobility system, in addition to improving the storage of GHG gases, for instance, by expanding forest areas (European Environment Agency, 2023). Thus, mitigation can include using new technologies, making older equipment more energy efficient or changing management practices and consumer behaviour (UN Environment Programme, n.d.). The EU is fixed on reducing GHG emissions; to this end, several EU initiatives aim to do so. This includes the previously mentioned EGD, which will be further elaborated in chapter 3. Still, it is essential to note that the EGD aims to transform the EU into a modern, resource-efficient and competitive economy (European Commission, 2019). Consequently, this establishes a connection between security of supply and climate mitigation to the final objective of the EU policy triangle - economic competitiveness.

Thirdly, I combine the EU's objective to ensure the functioning of the energy market and promote the interconnection of energy networks under the term economic competitiveness. Economic competitiveness (hereafter competitiveness) has long been one of the EU's key political priorities. The EU defines a competitive economy as an economy whose sustained rate of productivity is able to drive growth and, consequently, income and welfare (European Union, n.d.-a). The EGD is significant in linking this concept with the others in the energy policy triangle, as it focuses on creating a resource-efficient and competitive economy. Moreover, REPowerEU highlights the importance of an interconnected EU energy network and underlines that gas and electricity interconnections are essential to ensure uninterrupted energy flow within the EU (European Commission, 2022l).

2.2 Perspectives on EU-level Energy Policy Development

This section examines perspectives on EU-level energy policy development as presented by existing literature. Existing literature presents different contributions. One strand offers explanations of the course of development, whereas another examines developments within specific time periods. Literature also investigates developments in light of the various EU actors. In this section, I will review the literature on the abovementioned perspectives and highlight where my thesis makes an original contribution.

Several scholarly literatures provide overviews of the historical development of EU energy policy (Biesenbender, 2015; Birchfield & Duffield, 2011; Eikeland, 2012; Kanellakis et al., 2013; Tosun et al., 2015).

The work of Tosun, Schulze and Bisenbender (2015) is an example of a comprehensive examination of EU energy development over time. The book consists of individual contributions of a comparative or single case study nature to illustrate how the various actors shape the EU's political agenda (Tosun et al., 2015). Bisenbender (2015) is the first

chapter of this book, which examines EU energy policy development starting in 1950. Similarly, I analyse developments from this early stage of the EU by bringing together perspectives from a wide range of academic literature. In contrast, Tosun et al. provide an improved understanding of agenda-shaping activities. Within the book, each chapter varies in its theoretical underpinning, none of which is the EU energy policy triangle. This is where my thesis contributes to the literature by using an analytical framework. Nonetheless, the various chapters provide several interesting perspectives to explain the EU's energy policy development related to the objectives in the energy policy triangle. Biesenbender (2015, p.24) categorises the EU's energy policy development in three stages: (1) mid-1950s to late 1980s; (2) late 1980s to mid-2000s; (3) since the mid-2000s. In my thesis, I aim to dive deeper into these time periods.

Kanellakis, Martinopoulos and Zachariadis (2013) also examine the historical evolution of implemented energy policies in the EU from the 1950s. To do so, the author classifies implemented policies into seven broad categories: renewable energy, energy efficiency and savings, internal energy markets, security of energy supply, environmental protection, nuclear energy and research and development (Kanellakis et al., 2013, p. 1020). The authors offer a detailed assessment of a descriptive nature, and I find this to be explained due to the lack of an analytical framework. Therefore I aim to provide a comprehensive description of EU energy policy development but in light of the framework of the energy policy triangle to identify patterns in the development. Similarly, Bocquillon and Maltby (2020) examine EU energy policy integration through the theoretical lens of intergovernmentalism. Intergovernmentalism is explored due to the often-used explanation that EUMS have sought to maintain national sovereignty, thus limiting the pace and scope of EU energy integration (Bocquillon & Maltby, 2020, p. 39). This article is also very interesting as the authors explore recent developments up until 2018 and the historical development background.

A common finding in the literature is the issue of consolidating the national interests of EUMS as the most substantial reason for a slow EU energy policy development (Birchfield & Duffield, 2011; Eikeland, 2012; Skjærseth, 2021; Tosun et al., 2015, p. 2). Another common finding in the literature is that the Commission has been instrumental in furthering an EU energy policy through the agenda-setting and policy-making dynamics of the energy packages (Birchhfield, 2011; Brutschin, 2015; Eikeland, 2011, 2012; Herweg, 2015). These are perspectives I aim to examine further.

Eikeland (2012) contributes another rigorous examination of various stakeholders, institutions and issue linkages relating to the analysis of the EU's energy policy integration. According to himself, his most irrefutable finding is the reluctance of EUMS to transfer sovereignty to the Commission. The author argues that his analysis demonstrates clear indications that changes in preferences of key EUMS have allowed an EU-wide energy governance (Eikeland, 2012, p. 89). Eikeland also includes aspects related to all three EU energy policy triangle objectives but in light of EU integration theory, such as intergovernmentalism and neo-functionalism. Relatedly, Tosun et al. (2015, p.4) argue that for a long time, EU energy policy as it relates to energy security was defined by voluntary and horizontal cooperation between EUMS due to the national reluctance to transfer decision-making powers to the Commission (Tosun et al., 2015, p. 4). However, the authors do not specify the years in which this 'long time' is in reference to. With a similar finding related to decarbonisation, Skjærseth (2021) examines the evolution of EU climate and energy policy mixes toward the EGD. Skjærseth's article mainly focuses on measures to decarbonise and policies related to GHG emissions. My thesis offers an

analysis of climate objectives and EU policies related to an interconnected energy market. This is somewhat similar to the work of Eikeland (2012).

Upon examination, limited literature presents the historical development of EU energy policy until today, including the EGD and RePowerEU. This is where my thesis aims to contribute by bringing the literature one step further through an analysis of substantial recent developments. Nonetheless, Palle & Richard (2021) investigate the EU energy and climate policy development and the EGD in light of the multilevel governance theory (Palle & Richard, 2021). While I use a different analytical framework, the article provides a helpful historical overview of energy policy development. In regards to REPowerEU, limited literature exists. For instance, Fouquet (2022) discusses REPowerEU in light of a push for renewable energy. In addition, the author argues that the REPowerEU legislative plan of March 2022 could be and should be the solid background to organise this rapid shift to renewables in EUMS (Fouquet, 2022, p. 1) Another article investigates the various challenges related to natural gas diversification through interviews with European natural gas industry executives and researchers from Europe (Lambert et al., 2022).

Similar to my thesis, some REPowerEU literature discusses the analytical framework I use (Kuzemko, Blondeel, Dupont, & Brisbois, 2022; Osicka & Cernoch, 2022). Kuzemko et al. (2022) analyse the EU's policy responses to the crisis so far and their impact on environmental sustainability, energy equity and social justice. In addition, the authors frame energy policy in terms of meeting the varied social demands encapsulated in the energy policy triangle but identify these as energy security, environmental sustainability and energy equity (Kuzemko et al., 2022, p. 1). Osicka and Cernoch (2022) also include the energy policy triangle, and the authors continuously discuss the three related aspects of sustainability, an integrated market and security of supply. Also, the authors highlight that during times of crisis, it is easier for policymakers to argue that existing policies are obsolete and the need for new ones (Osicka & Cernoch, 2022, p. 2). In contrast, Misik (2022) analyses the particular REPowerEU aspect of external energy security, specifically in light of the 2021/2022 spike in energy prices and fear of natural gas shortage. In my thesis, I particularly aim to investigate security of supply and energy diversification.

Within perspectives on EU-level energy governance, there are two particular strands: the geopolitical dimension of energy policy and the effect of crises. Thus, the following two sub-sections will explore these further.

2.2.1 Geopolitical Implications for EU Energy Policy

Concerns surrounding energy dependency and geopolitical issues have only grown in importance in EU energy literature, making it a very interesting topic to examine. Energy is an exceptionally strategic sector for most countries and often attracts more political attention than most other economic activities. For the EU, this attention often surrounds high energy prices, renewable energy targets, energy market liberalisation and the roles of fossil fuels in the EU energy mix.

Furthermore, energy-dependent importers (which all EUMS are) are mainly concerned with security of energy supply and affordability, whereas producers like Russia or Norway are concerned with security of demand and a fair price for their resources. Thus, the literature on energy policy development also highlights the interdependency between exporters and importers (Austvik, 2019, p. 140; Bradshaw, 2009, p. 1926). Bradshaw (2009, p.1926) points to Europe's reliance on Russian gas as one of the world's key energy security

challenges. The author concludes that it is vital to rethink the geopolitics of energy security, which includes paying greater attention to the demands of energy-exporting states (Bradshaw, 2009, p. 1934). In this regard, it is noteworthy that there are significant variations in energy security perceptions among EUMS and the differences in EUMS level of external dependence and past willingness to expand policy and governance instruments related to the EU's neighbouring countries, both friendly (e.g. Norway) and hostile (e.g. Russia) (Szulecki et al., 2016, p. 562). I aim to examine the geopolitical energy perspective further in my thesis.

Building on this, Caiser (2015) states that energy has always had geopolitical significance. The author determines that energy relations are framed by a complex interaction of various players (Caiser, 2015, p. 176). He further notes that future energy geopolitics will not simply be determined by objective facts but will be a matter of how changes in energy relations are framed (Caiser, 2015, p. 161). In this regard, Caiser argues that seeing energy relations as an arena of geopolitical competition for control over supplies and pipelines is not the result of hard material facts. He argues that it is also determined by understandings these facts in a broader context and how we give meaning to the behaviour of other actors (Caiser, 2015, p. 161). I aim to investigate this perspective by analysing the EU's relationship with hostile (e.g. Russia) and friendly energy partners (e.g. Norway and the U.S). In contrast, Overland (2019, p.74) predicted that "EU climate policy is likely to have far greater consequences for international energy relations than geopolitics or regulatory expansion".

As mentioned, there is also a strong link between energy and economics (Misik, 2022; Wach, Maciejewski, Glodowska, & Sieja, 2021). Wach et al. (2021, p.1) argue that EU energy policy not only represents one of the most crucial concerns for the EU's economic policy but is also a substantial challenge for all EUMS in the environment of regional or global energy conflicts. Existing literature finds that crises have an effect on energy, whether these are initially directly energy-related or not. Frei (2009) expounds upon the link between geopolitics and energy development, especially in regard to energy security. The author argues that changes over time-related to supply, demand, geopolitics and market structure contribute to the call for energy policy to ensure energy security (Frei, 2009, p. 759). Geopolitics and security of supply are perspectives I aim to examine, as this is particularly interesting given that the Russian invasion of Ukraine constitutes a crisis. This makes it important to investigate further the literature on the effects of crises on EU energy policy development.

2.2.2 The Effect of Crises on EU Environmental and Energy Policies

In the literature, crises are often highlighted as having affected EU energy policy development. Interestingly, Homeyer et al. highlight that the existing literature exploring the interplay between EU climate and energy governance and crises arrive at differing conclusions (von Homeyer, Oberthür, & Jordan, 2021, p. 960). Nevertheless, the gas crises of 2005-2006/2009 are highlighted as having specifically placed security of supply high on the EU's agenda in this period (Austvik, 2019, p. 141; Caiser, 2015, p. 161; Lambert et al., 2022, p. 2; Youngs, 2011, p. 41). This is a particular perspective I also examine in my thesis. The economic crisis is also exemplified as having some effect on EU energy policy development (Dupont & Oberthür, 2015; Slominski, 2016). Similarly, Tosun et al. claims that the first area to evolve in EU energy policy was one on energy security, in 1960, as a reaction to the supply of oil supply crisis in the Middle East (Tosun et al., 2015, p. 4).

Christou (2021) highlights how the 2005/2006 gas crisis illustrated many of the risks identified in EU security of supply priorities to that point, including a lingering volatile geopolitical environment that could lead to further incidents, as is evident from several instances in the following years (Christou, 2021, p. 363). Moreover, the author argues that the importance of energy security was only amplified with the 2015 Euromaidan protest and the following conflict between Russia and Ukraine. Following Christou, Caiser further reiterates that in 2014 a different political narrative parallel to the economic and commercial discourse emerged (Caiser, 2015, p. 161). Caiser stresses the gas crises as critical to exposing the EU's perceived excessive dependence on Russian gas. This is a particularly interesting perspective considering the EU's energy dependence has only grown over the years. The objectives of REPowerEU also make this a perspective that warrants further analysis, as I will do in my thesis. Moreover, Lambert et al. claim that gas weaponisation has long reflected European fears and mirrors the geopolitical role of natural gas in contemporary international relations (Lambert et al., 2022, p. 2). In my thesis, I aim to investigate how crises have furthered EU energy policy development, particularly surrounding the topic of security of supply and diversification.

At the same time, the literature also investigates the effects of the 2008 economic crisis on EU energy and climate policies. Slominski (2016) argues that the crisis did not fundamentally change the broad trajectory of EU energy and climate policy development. Nonetheless, it changed the hierarchy of priorities of EU policymakers, leading them to focus more on economic issues rather than climate change, renewables or energy efficiency (Slominski, 2016, p. 344). Additionally, the crisis reinforced concerns about the cost implications of climate measures and, in turn, led to a decline in the ambition of EU climate policy. Similarly, Dupont and Oberthur (2015) argue that the economic crisis led to a less dynamic EU climate policy. Somewhat in contrast, other literature on crises indicates that ambitious climate policies have only grown on the backdrop of political turbulence (von Homeyer et al., 2021, p. 959). Interestingly, Slominski's article demonstrates that the financial crisis cannot be conceived as a critical juncture and thus has not changed the trajectory of EU energy and climate policy. Based on this, combined with the EU's focus on ridding itself of Russian gas imports after the Russian invasion of Ukraine in February, I aim to examine whether or not the war in Ukraine can be seen as a critical juncture for EU energy and climate policy.

3 EU Inability to Build Resilience

The EU has been developing energy-related policies since the establishment of the European Coal and Steel Community (ECSC) in 1952. While two of the three founding treaties of the EU were explicitly concerned with sources of energy, these were not understood as establishing a supranational energy policy. Still, over the years, policymakers have borrowed legal competence from the economic and environmental sections of the treaties to justify the proposal and passing of energy measures. Eikeland (2012) underlines that the road to EU policy integration is strewn with failed efforts, an argument heightened in light of the EU's dependence on imports of Russian fossil fuels. The Russian invasion of Ukraine has only emphasised that the EU has been unable to build resilience in its energy sector.

This chapter aims to answer the first research question of the thesis: why has the EU not been able to build a resilient energy sector? To answer this, I will examine the evolution of EU energy policy since the EU's 1952 inception. In this chapter, I provide a comprehensive overview of the development and explain why the development has taken place. To do this, I consult both primary, secondary and tertiary literature as it relates to the objectives of the EU energy policy triangle. Moreover, I arrange the development of EU energy policy into distinct phases and categorise these according to the energy policy triangle. I do this to illustrate what objectives have been on the top of the EU's agenda in various periods of time. This categorisation is presented in Table 2 below:

Table 2 Categorisation of periods in EU energy policy development according to EU energy policy triangle

Period	Focus
1950-1986	Security of supply, climate mitigation
1987-2000	Climate mitigation, competitiveness
2000-2005	Competitiveness, climate mitigation
2004-2009	Security of supply, competitiveness
2009-2018	Security of supply, competitiveness
2019-2021	Climate mitigation, competitiveness

Source: Author's compilation

The left column presents the various time periods, while the right column categorises these periods according to the energy policy triangle. To recall, the analytical framework highlights that it is only possible to have two of these simultaneously. The objectives are listed according to attention, meaning the first objective received the most attention in that time period. The right column is dedicated to observations and highlights one of the most important factors to explain the development in that period. The table is a helpful overview to understand what topics dominated the EU agenda in the various periods.

To explain why these periods have been categorised as illustrated in Table 2, the chapter is divided into six sections according to periods of energy development. The six sections

proceed chronologically, and within these, the thesis will draw attention to various policy documents as they relate to the objectives of the energy policy triangle. In this regard, the focus on competitiveness, sustainability or energy security often overlap, and thus all three must be considered simultaneously within each section.

3.1 Early EU Energy Policy and Security of Supply (1950-1986)

Like Biesenbender (2015, p.24), I categorise the first period from 1950 to the late 1980s. The length of this section is attributed to the limited energy policy development of this time period, in addition to the development mainly being responses to crises with limited EU policy integration. Nonetheless, the development in this period focused on energy security and sustainability. While two of the three founding EU treaties from the 1950s explicitly covered energy issues, these were not regarded as establishing a supranational energy policy (Slominski, 2016, p. 343). Thus, policymakers have had to borrow legal competence from the economic and environmental sections of the treaties to justify energy measures (Buchan, 2015, p. 347).

Coal was the initial dominating energy source of the ECSC. In 1965 oil became the most important energy supply for the six community Member States (Eikeland, 2012, p. 9). Shortly after, the oil-producing Arab world experienced turmoil, which led to concerns about security of supply, resulting in a 1968 Council Directive obliging EUMS to keep emergency oil stocks. Therefore, the Commission released its "First Guidelines for a Community Energy Policy" to ensure better security of supply and establish a common market in energy (Eikeland, 2012, p. 10).

In the 1970s, local air pollution was a key concern, yet the period was also primarily characterised by opposition from EUMS. In 1970, discussions on energy policy were widened in response to local air pollution problems related to energy use and minimum fuel emission standards. However, a 1975 Resolution determined that EUMS had the primary role in setting environmental standards in energy supply (Eikeland, 2012, p. 11). In 1976, the Commission tried to initiate a new policy to limit the sulphur content of heavy fuel oil; however, this was withdrawn due to EUMS opposition.

The 1973/74 oil crises triggered a push towards energy cooperation. Initially, EUMS acted individually to implement energy policies and failed to coordinate the long-term challenges of meeting future energy needs (McGowan, 2011, p. 487). This resulted in a 1974 Council Resolution on a new energy policy strategy for the European Community, emphasising the added value of close coordination among EUMS to tackle energy-related issues (Langsdorf, 2011, p. 5). The resolution also adopted guidelines on energy supply, including improving security through diversified and reliable external suppliers (Official Journal of the European Communities, 1975). While this was undoubtedly ambitious and, if successful, would have improved security of supply, McGowan (2011, p.502) argues that the underlying framework for the strategy was weak. McGowan points to a modest strategy with non-binding objectives and an absence of enforcement. This period is also characterised by the limited interest of EUMS to develop a European energy policy. This has been made evident from a content analysis of all issued European Council conclusions from its first year (1975), which illustrates that, on average, energy received just over 3% of the total attention (Alexandrova & Timmermanns, 2015, p. 49).

The oil price shock in 1979 further raised concerns about security of supply. Despite this, the response in the early 1980s only produced non-binding energy guidelines for EUMS (Eikeland, 2012, p. 10). In 1986, a Council resolution set new energy policy objectives for 1995 and the convergence of EUMS policies (Official Journal of the European Communities, 1986). The resolution aimed to reduce oil dependency, maximise security of supply, and reduce the risk of sudden fluctuations in energy prices by diversifying external sources of supply and improving energy system flexibility. This highlighted the growing importance of the competitiveness objective. Eikeland (2012, p.10) argues that throughout the 1960s and 1980s, the response to the security of supply concerns was driven by a EUMS desire to guard autonomy and decision-making power to secure national industry and welfare growth. EUMS, rich in energy sources, particularly defended their exclusive right in national resource management. To illustrate, the accession of the United Kingdom (UK) and Denmark in 1973 meant a more substantial fossil energy resource base and vastly differentiated Member State interests (Eikeland, 2012, p. 10). As a result, security of supply slipped down on the policy agenda, and instead, the focus on competitiveness through end-user energy costs received greater attention.

3.2 Environment Policies and the Internal Energy Market (1987-2000)

In the 1980s, environmental policies were placed high on the agenda. The introduction of environmental protection as a chapter in the amending treaty, the Single European Act from 1987 is seen as a significant milestone (Hey, 2007, p. 20; Langsdorf, 2011, p. 5; Tosun et al., 2015, p. 4). By this time, acid rain had become a public issue, specifically concerning clean air policies as well as noise and risk management for industrial sites. Against this backdrop, in 1988, the EU adopted a directive on limiting emissions of certain pollutants into the air from large combustion plants (Official Journal of the European Communities, 1988). This was partly driven by German pressure due to their issues relating to acid rain, advocating for harmonisation at the EU level to avoid competition distortions (Hey, 2007, p. 20). Other EUMS, such as the Netherlands and the UK, also successfully exported national policy innovations to the EU level in this period, including environmental planning and environmental quality objectives (Hey, 2007, p. 20).

Buchan (2010) and Tosun et al. (2015) argue that the mid-1980s was when energy issues acquired an increasingly important role on the EU political agenda. This can be traced to the launch of the Internal Energy Market in 1988, which presented the objectives for the liberalisation of the energy market. This was driven by the oil crises in 1973-1974 and 1979-1982, which had triggered the beginning of the EU energy sector transformation from being a policy based on cheap fossil fuels towards energy saving and improved energy efficiency (Wach et al., 2021, p. 6). In the two following decades, the EU aimed to establish rules for a competitive internal energy market while facing scepticism from some EUMS and the European Parliament (Eikeland, 2012, p. 13; Misik, 2022, p. 2). A particular issue for EUMS was accepting the idea of a more potent Commission force. Not all EUMS were convinced that the internal market would contribute to security of supply and voiced concerns surrounding competition and the dismantling of state aid (Eikeland, 2012, p. 14).

The release of the first report of the Intergovernmental Panel on Climate Change (IPCC) in March 1990 sparked some of the first climate change discussions within the European Council. In a June 1990 Council Meeting, EU leaders emphasised the need for an

enlightened and systematic approach to environmental management (European Council, 1990, p. 8). The Council's conclusions argued that completing the Internal Market in 1992 would promote economic development and accelerate efforts towards sustainable and environmentally sound development (European Commission, 1995). The conclusions also highlighted that environmental legislation could only be effective with full implementation and enforcement by EUMS.

While environmental policies experienced increased attention at the beginning of the 1990s, the energy-specific side mainly focused on economic objectives. This was underlined by the blocking of the Commission's inclusion of a separate energy chapter in the February 1992 Treaty of Maastricht (Langsdorf, 2011, p. 5). Notably, the treaty negotiations took place amid tensions, occurring at the end of the Cold War and the reunification of Germany. Some EUMS sought deeper integration, whereas others wished to retain national autonomy. In the end, the energy chapter was rejected by EUMS, specifically those with substantial energy reserves, including the UK, Germany and the Netherlands (Eikeland, 2012, p. 14; Langsdorf, 2011, p. 5). Nonetheless, the treaty established an EU competence to improve cross-border energy infrastructure and increased the EU's ability to act on the environment, two of the energy policy triangle objectives.

In May 1992, a new EU-level energy/carbon tax was proposed to reduce energy demand and promote low-carbon energy sources, addressing both security of supply and environmental concerns. The initiative was strongly supported within the Commission by both DG Energy and DG Environment (Eikeland, 2012, p. 15). It was seen as a win-win situation for environmental and economic objectives, motivating the publication of the 1993 White Paper on Growth, Competitiveness and Employment. Despite this, several EUMS were unconvinced and feared for their industries' international competitiveness (Eikeland, 2012, p. 15). The UK and Germany prompted the establishment of a high-level expert group with a mandate to scrutinise and propose cutbacks of regulations imposing high costs on the industrial sector (Hey, 2007, p. 25). In tandem, the Commission aimed to harmonise EU environmental standards, but these ended up as guiding principles. Thus, a new approach to environmental regulation arose, emphasising procedural requirements, framework directives, voluntary agreements and self-regulatory resources for information and management, granting more flexibility and autonomy to EUMS rather than harmonisation of taxes at the EU level (Eikeland, 2012, p. 15).

Hey (2005, p. 25) points to resistance from national governments and interest groups as one of the determining factors of the down-scaling of environmental policies in this time. An opposition that especially came from the EUMS who would bear the cost of a new approach. The changes occurring in Germany at the time were also relevant. To recall, Germany was seen as one of the potential leaders of EU environmental policies, but the re-unification had caused economic troubles and a rise in unemployment, thus changing German priorities.

Still, DG Energy tried to keep the idea of an EU energy policy afloat. Energy documents particularly dominated during 1994-1998, such as the 1995 Green Paper for a European Union Energy Policy, which worked out a consensus for reaching a coherent EU energy policy. By then, Sweden, Finland and Austria had entered the EU, meaning their ministers now sat in the Council. These three countries had a great interest in environmental issues as these had been decisive in public debate on the accession to the EU (Commission of the European Communities, 1998). Therefore, environmental policies were placed back on the agenda.

Furthermore, a 1995 White Paper, 'An Energy Policy for the European Union' presented details for the forthcoming EU energy sector reform. In this, the Commission sought to encompass all three sides of the energy policy triangle, stating that an EU energy policy must "aim to reconcile competitiveness, security of supplies and protection of the environment" (European Commission, 1995). In the pursuit of these, the EU highlighted the external dimension of energy policy. The Commission expected a heightened energy dependence due to the increased emphasis on environmental protection. Moreover, the Commission classified the energy scene as "marked by changes in outlook and crises" (European Commission, 1995). Therefore, an emphasis was placed on the importance of flexibility and adaptation in defining and implementing energy policy. Nonetheless, the paper admits that the focus remained on competitiveness, with central EU concerns being job creation and efficiency in the business environment, including energy systems organisation and environmental protection.

Despite the launch of the Internal Energy Market in 1988, it took nearly ten years of negotiations to adopt the first liberalisation directives. This is known as the first energy package and includes the 1996 Electricity Directive and the 1998 Gas Directive (European Parliament, 2022). Prior to the final round of negotiations, EUMS were divided. France and Germany were the most vigorous opponents of market liberalisation, whereas Denmark, Sweden and Finland had joined the UK and Ireland, pressing for a more far-reaching solution. In the end, Germany and France were successful as a watered-down electricity directive was accepted, and both directives offered only a general framework for energy market liberalisation and failed to harmonise national procedures (Eikeland, 2012, p. 17).

EU energy policy developed more rapidly after this but was still only based on legislation on the internal market and environmental regulations, as the 1999 Treaty of Amsterdam did not bring any advances for a common energy policy (Langsdorf, 2011, p. 5). At the beginning of the new decade, EU leaders were concerned by the signs of low productivity and stagnation of industrial growth (Eikeland, 2012, p. 25). Therefore, the Lisbon Strategy was launched in March 2000, which aimed to make the EU the most competitive economy in the world by 2010 (European Parliament, 2000). Eikeland (2012, p.25) argues that the Strategy marked an essential step towards competitive EU energy policies. Similarly, Wach et al. argue that in the period 1988-2000, the EU was confined to the administrative regulation of the energy market in Europe (Wach et al., 2021, p. 6). This is explained because the associated actions included the removal of barriers to trade and competition in the energy market. Skjærseth (2021, p.29) on the other hand, argues that the Strategy was primarily developed independently from climate and energy policies. However, in 2001, an important interlinkage between energy and environmental policy occurred by adding an environmental pillar to the Lisbon strategy, which urged a decoupling of economic growth from using natural resources.

3.3 Rising Support for Climate Policy but Modest Integration of Energy Legislation (2000-2005)

The focus on industrial growth and competitiveness introduced at the start of the new decade was reinforced by significant geopolitical events. The EU was particularly impacted by events such as the 9/11 terror attacks in the U.S. and the war in Iraq. Moreover, rising oil demand from China led to increased oil prices, consequently affecting the EU's gas and electricity prices (Eikeland, 2012, p. 26). The EU faced concerns including declining EU oil

and gas resources, increased import dependency of oil and gas, and the expansion of the EU to include new applicant countries from Eastern Europe after the 2000 Nice Summit. These occurrences placed a bona fide focus on the security of supply aspect in the EU.

The geopolitical events and subsequent price rises determined that "without an active energy policy, the European Union will not be able to free itself from its increasing energy dependence" (European Commission, 2000). This was published in the Commission 2000 Green Paper: Towards a European strategy for the security of energy supply (European Commission, 2000). However, the EU did not view the geopolitical events as threats to the physical security of supply but rather a risk that high energy prices would diminish economic growth and industrial competitiveness. While the Green Paper incorporated aspects related to all three objectives of the energy policy triangle, these were examined through an economic and competition-based lens. This is somewhat odd considering the paper continuously highlighted concerns regarding the impact of EU enlargement on EU energy dependency. It also raised the issue that several EUMS and applicant countries relied on a single gas pipeline that connected them to a single supplier country. Clearly a possible detrimental factor in building a resilient energy sector. Therefore, the paper also stated that priority must be given to the fight against global warming with the development of new and renewable energies. In addition to protecting the environment, this was noted as essential to counter import dependency. Significantly, the paper noted that without introducing counter-measures, "in the next 20 to 30 years 70% of the Union's energy requirements, as opposed to the current 50%, will be covered by imported products" (European Commission, 2000).

Given the limited competence of the Commission, the paper also asked what energy sources, solutions and instruments should be adopted to address the abovementioned concerns. The Commission's consultations concluded that there was solid support to build up strategic oil and gas stocks and investigate new energy import routes (Commission of the European Communities, 2002). Thus, the Commission followed up with new policy proposals that took into account concerns relating to security of supply and climate change. In 2002, the Commission adopted draft directives for joint and coordinated increases in oil and gas stocks, the harmonisation of national security of supply standards, and the vestment of more power over oil and gas crisis management (Eikeland, 2012, p. 27). Ultimately, these were rejected by EUMS.

Despite the Green Paper's increased focus on energy and climate, the 2001 Treaty of Nice did not advance a common energy policy (Langsdorf, 2011, p. 5). More difficulties arose in the Commission furthering climate policies, as evidenced by a clash between DG Energy and DG Environment in 2002. The Energy Commissioner challenged and questioned Environment Commissioner on the rationale and economic costs behind adopting measures to implement the EU's Kyoto Commitment (Skjærseth, 2016, p. 513). This concern was shared by the so-called 'competitiveness-first' Commissioners responsible for the internal market and industry. Skjærseth (2016, p.513) found this to mean that GHG mitigation was given significantly lower priority in DG Energy than in DG Environment.

Nonetheless, various EUMS were voicing their support for more ambitious long-term climate policies. To illustrate, in early 2003, UK Prime Minister Blair promised to reduce UK carbon dioxide emissions by 60% by 2050 (Eikeland, 2012, p. 29). Swedish Prime Minister Persson supported this, and together a joint letter was addressed to the Greek presidency, urging all EUMS to take on similar long-term commitments and to deliver concrete outputs (Eikeland, 2012, p. 29). Conversely, a split became apparent towards the end of 2003

among EUMS. Italy (holding the Council Presidency) and Spain tried to insert a text identifying the Kyoto Protocol as a problem into a Council Communication (Eikeland, 2012, p. 29). However, this attempt was met with resistance from France, Denmark, Sweden and the Commission and thus proved unsuccessful. In fact, at the 2004 European Council summit, EU heads of state reaffirmed their commitment to the Kyoto targets. Italy was politically isolated in its continued push for competitiveness safeguards (Eikeland, 2012, p. 30).

The adoption of the second package of liberalisation measures in 2003 strengthened the legal framework for the internal energy market. The package consisted of the second Gas and Electricity Directive and a Regulation on cross-border trade in electricity (Primova, 2015, p. 28). At this stage, the link between the EU internal energy market and environmental policy was not evident nor recognised during the policy process. Primova (2015, p.29) has found the main drivers behind the internal energy market initiatives to be the internal market programme, EU competition rules and consumer and regulatory issues. However, the author points to the initiatives mentioned above as a positive advancement towards a more competitive and better-regulated energy market which indirectly contributed to the EU's climate objectives by facilitating access to renewables.

Ultimately, the aforementioned Green Paper led to the adoption of Directive 2004/67/EC. However, this was prompted by major blackouts in the European electricity system in the summer of 2003 (Eikeland, 2012, p. 28). At this time, the EU imported over 40% of its natural gas consumption and forecasted that this level of dependence could rise to 70% in 2020 (EUR-Lex, 2009). The Directive established a common framework where EUMS could define general policies of security of supply so long as these were transparent, non-discriminatory, solidarity-based and consistent with the requirements of a single market in gas (Official Journal of the European Union, 2004). Moreover, in 2006, a Directive to safeguard security of supply and infrastructure investments in electricity was adopted (Official Journal of the European Union, 2005). This sought to ensure the effective operation of the internal electricity market, an adequate level of interconnection between EUMS, a sufficient level of generation capacity and a balance between supply and demand.

The importance of climate mitigation was made clear with the set-up of the EU Emissions Trading System (EU ETS) in 2005, which had been adopted unanimously by the 15 EUMS in 2003. The ETS is the EU's cornerstone climate policy instrument and the primary tool for reducing GHG emissions cost-effectively (European Commission, n.d.-b). Still, it is important to note that while its adoption was unanimous, the years leading up to its first trial period (2005) included intense negotiations between EUMS on what the ETS would look like. However, this would be too detailed to elaborate further, given the scope of this thesis and will thus not be included. Also, given that the ETS specifically concerns decarbonisation and climate, the thesis does not view it as essential to answer the research questions.

Struggles emerged in placing climate policy at the same level as energy policy. In 2005, concerns about climate policy costs reached the EU's top level, the European Council (Skjærseth, 2016, p. 513). This revealed that cost-effectiveness and competitiveness were still determining factors when trying to adopt climate-related policies. Indeed, in 2005 the Council concluded that the EU must consider cost-effective ways to implement EU decisions on climate change and the potential costs of inaction. Additionally, in preparation for the 2005 European Council, where medium/long-term emission reduction strategies and targets were to be discussed, the Council asked the Commission to prepare a cost-benefit

analysis taking account of both environmental and competitiveness considerations (European Council, 2004, p. 9). On that note, the Commission also established a High-Level Group on energy, environment and competitiveness to discuss the relationship between policies relating to these areas. In the same year, a Commission Communication revealed that the EU could benefit from fully exploiting synergies between energy security and air pollution (Skjærseth, 2016, p. 513). While no specific plans were made to this end, one crucial hurdle disappeared: during its 2005 Council presidency, the UK shifted from resisting to supporting EU-level energy policies. Moreover, a consensus among EUMS emerged on a common approach to address climate change and security of supply challenges (Skjærseth, 2016, p. 514).

3.4 Increased Attention for Energy Security and Initiation of Energy Policy Packages (2005-2009)

Security of supply acquired great salience for the EU due to the 2004 and 2007 eastern enlargements and their concerns about over-reliance on Russia (Buchan, 2015, p. 345). As such, the enlargements acted catalysts for policy on security of supply.

In addition, Dupont & Oberthür (2015) highlight that the challenges arising from decarbonisation are only amplified within the context of crisis particularly the several instances of political tension with Russia, and changing geopolitics (Dupont & Oberthür, 2015, p. 1). In many ways, the gas disputes between Russia and Ukraine interrupted the climate mitigation process. To illustrate, in 2004, a commercial and diplomatic gas dispute between Russia and Belarus began. While the dispute did not affect the EU directly, it did raise concerns about the reliability of Gazprom's supplies to Europe. These concern relate to Belarus being an important energy transit country, delivering gas to Poland and Germany (Bruce, 2005, p. 18). Russia was considered a reliable energy supplier until the early 2000s when EU-Russia energy relations shifted towards securitization (Khrushcheva & Maltby, 2015, p. 202). For the newer EUMS, energy cut-offs were not unfamiliar. To exemplify: before becoming EUMS, Estonia, Lithuania, and Latvia had faced interruptions of energy supplies during the winter of 1992-1993 (Khrushcheva, 2011, p. 218).

After 30 years of stable imports of Russian gas to the EU, in March 2005, a gas dispute between Ukraine and Russia disrupted gas supplies to the EU. The dispute lasted until January 2006. Consequently, the dispute led to a shortfall in gas supplies of approximate numbers to the following countries: Hungary (40%), Austria, Slovakia and Romania (33%), France (25-30%) and Poland (14%) (Maltby, 2013, p. 438).

In combination, the disputes led EU energy policy milestone with the Commission's Green Paper: a European strategy for sustainable, competitive and secure energy. In this, a common European energy policy was proposed to enable Europe to face the energy supply challenges of the future and the effects these will have on growth and the environment (European Commission, 2006). The paper stressed the importance of effective action in six priority areas, namely (1) competitiveness and the internal energy market; (2) diversification of the energy mix; (3) solidarity; (4) sustainable development; (5) innovation and technology and (6) external policy. Furthermore, the Commission notes that "Europe has entered into a new energy era", in addition to the European energy policy being a long-term challenge (European Commission, 2006). Notably, in the paper, the Commission asked EUMS to do everything possible to implement a European energy policy

built on the same three core objectives of this thesis: sustainability, competitiveness and security of supply (EUR-Lex, 2006).

The stronger will for coordinating energy policies was made clear in the October 2005 EU Summit as EUMS leaders formally committed to working towards a definition of an EU energy policy. The UK, previously one of the strongest sceptics of transferring energy-related political power to the EU level, pushed for such a discussion during its 2005 presidency (Youngs, 2011, p. 43). However, the Council still underlined the sovereignty of EUMS in choosing their primary energy sources and energy mix (Skjærseth, 2016, p. 514).

In 2007, Germany announced that climate and energy policies would be key priorities during the German Presidency during the first part of that year. This was supported by France and the UK. Indeed, 2007 brought a turning point for EU climate and energy policy. Until this, energy-related action was concentrated to the Commission. This changed in March 2007 with EU heads of state and governments' endorsement of the first EU "energy action plan" (Langsdorf, 2011, p. 6).

Consequently, the Commission strategy "An Energy Policy for Europe" marks the beginning of a more integrated European energy policy. The Commission's strategy included a strategic review of the European energy situation and introduced a complete set of European Energy Policy measures (European Commission, 2007). Again, the plan highlighted the three major challenges for European energy policy: competitiveness, sustainability and security of supply. Council conclusions set quantifiable targets to reach the goals set by this strategy. The so-called 20-20-20 goals agreed to: reduce GHG emissions by at least 20% compared to 1990 levels; increase the share of renewable energy sources in the final energy consumption by 20%; and 20% increase in energy efficiency (Langsdorf, 2011, p. 6).

However, the period was still characterised by differences between EUMS on which energy-related issues should take priority. The Central and East European Countries that joined the EU between 2004 and 2007 were more concerned about security of supply, whereas the remaining EU-15 favoured a more stringent climate policy (Skjærseth, 2016, p. 515). To illustrate, in 2007, Poland vetoed the negotiations on the new Partnership and Cooperation agreement between the EU and Russia because Russia refused to ratify the Energy Charter Treaty and to sign the Transit Protocol (Khrushcheva, 2011, p. 218). Subsequently, the former Commissioner for Trade, Peter Mandelson stated the following:

> […] the incoherence of European policy towards Russia over much of the last decade has been, frankly alarming. No other country reveals our differences as much as Russia does. (Mandelson, 2007).

Poland had long opposed the EU's dependency on Russian energy imports and explained this based on the importance of security of supply. Still, it is noteworthy to explain that Poland's desire for collective EU security of supply was often based on national interests (Khrushcheva, 2011, p. 219). An example of this is the German-Russian Nord Stream underwater pipeline project. Poland heavily criticised this due to questions of environmental security in the Baltic Sea and lack of control from the transit states over energy flow. The Polish argument as that it would increase the risk of Russian energy cuts and potential complications to the development of a common EU energy policy. Still, experts point to negativity to this project also being due to the Polish desire for Russia to prioritise the traditional overland pipeline, meant to cross through Polish territory and consequently would allow Poland to gain transit fees from Russia (Khrushcheva, 2011, p. 219).

Despite differences, the energy field gained growing political importance in 2007. This was reflected in the energy introduction as an individual chapter in the 2007 Lisbon Treaty, also known as the Treaty on the Functioning of the European Union (TFEU). With Article 194 TFEU, energy policy competencies were brought into EU primary law, stating that the EU shall aim to:

> Ensure the functioning of the energy market; ensure security of the energy supply in the Union; promote energy efficiency and energy saving and the development of new and renewable forms of energy and; promote the interconnection of energy networks. (Official Journal of the European Union, 2008)

This step marked a new period of EUMS willingness to transfer powers in the energy sector to the EU level. Christou (2021, p.363) classifies the year 2007 as the most significant turning point in the evolution of EU energy policy, including in terms of the specification of security of supply. Nonetheless, the TFEU emphasises that EU measures must not interfere with the sovereign authority of EUMS to decide how they exploit their energy resources, their choice between different energy sources, or the general structure of their energy supply (Official Journal of the European Union, 2008). Clearly, there is a certain ambiguity regarding external action on energy, meaning that, in practice, a large degree of energy policy competencies remain at the EUMS level.

According to Buchan (2015, p.360), the energy-addition can mainly be explained by two factors. Firstly, the EU perceived (and still perceives) itself as the international leader in the fight against climate change and was committed to decarbonisation, renewable energy and energy efficiency thus making it necessary to transform the energy system and move towards a low-carbon economy. Secondly, the Eastern enlargement drew political attention to the issue of security of supply. Langsdorf (2011, p.6) also points to security of supply as the most innovative point at that time. Regardless, the differences of opinion between the EU institutions and EUMS did not fade (Osicka & Cernoch, 2022, p. 3).

Between 2007 and 2009, a series of energy policies were proposed, negotiated and adopted. These represented a leap in EU energy integration, also known as the third liberalisation package. This development marked a more significant progress towards decarbonisation with its climate policy dimension (Primova, 2015, p. 29). Among other factors, the package included increased regulatory powers of the EU in the energy policy field. Placing climate mitigation as a top EU energy policy goal divided EUMS. The goals did not appeal to newer EUMS, such as Hungary, Slovakia and Poland. These were concerned about the high share of coal in their energy mix and the fear of regulatory measures affecting their economic growth. On the other hand, key EUMS such as the UK, Germany and France were very much in favour of this goal (Eikeland, 2012, p. 72).

Primova (2015, p.32) argues that while the EU's climate objectives gained relevance during the policy-making process of the third liberalisation package, there was a lack of functional overlap between them (Primova, 2015, p. 36). The author explains this through a low level of political commitment relating to decarbonisation in the EU during the policy process. While the third legislative package outlined the EU's general objective of achieving a more secure, competitive and sustainable energy supply by stimulating energy efficiency and investments in renewables, there were no other relevant reference to climate policy objectives in the statements relating to the internal energy market by the Council of Energy Ministers (Primova, 2015, p. 36). Nonetheless, later, in 2009, the EU linked energy and climate policies by adopting the Climate and Energy Package for 2020 to achieve the previously mentioned 20-20-20 targets. The package included two cross-sector instruments: a significant revision of the ETS and a binding effort-sharing decision of GHG

emission reductions in the so-called non-ETS sectors at the EUMS level (von Homeyer et al., 2021, p. 961).

Simultaneously, the 2008 Renewable Energy Directive directly constrained EUMS opportunities to freely decide their national energy supply structure through binding targets to source a specific share of energy from renewables (Eikeland, 2012, p. 1). According to Skjærseth (2021, p.31), EU action on climate policies was central to new energy policies aimed at improving energy security by stimulating EU-indigenous renewable energy and energy efficiency as a means to reduce the need for imported fossil fuels.

3.5 Renewed Attention for Security of Supply (2009-2018)

The perception of Russia as a reliable energy partner largely endured until the most severe gas supply disruptions in 2009 (Maltby, 2013, p. 438). Unlike the 2006 disruption, the Commission labelled this crisis as unprecedented. During the 20-day crisis, the Czech Republic, Poland, Hungary, Romania and Bulgaria suffered reduced gas supply by 5-30% (Maltby, 2013, p. 438). In an interview, a Commission employee told Maltby that:

> A new dynamic due to the [2006 and 2009] crises… an opportunity for the Commission to develop, recommend and lobby a new energy policy for the EU. Something recommended in the 1990s and before, but without the necessary political will of the Member States, the Council, to take action. (Maltby, 2013, p. 438)

The 2009 crisis created another window of opportunity for the Commission to impress the need to develop common rules for improving energy security on the reluctant EUMS (Misik, 2022, p. 2). However, these rules concerned the internal energy market and focused on improving the mutual interconnections between Member States. Still, the Commission also made an effort regarding external energy relations to make intergovernmental agreements between individual Member States and their suppliers (mainly Russia) more transparent. Nevertheless, this effort was unsuccessful, as many EUMS circumvented the EU rules by switching to other legal frameworks (Misik, 2022, p. 2).

Since the 2009 crisis led to severe supply disruptions amongst newer MS, this also spurred the adoption of new measures to improve energy security and reinforce crisis response mechanisms. For instance, Regulation 994/2010 was adopted in 2010 and established provisions aimed at safeguarding the security of gas supply by ensuring the proper and continuous functioning of the internal market in natural gas (Official Journal of the European Union, 2010). Moreover, the Regulation provided transparent mechanisms, in a spirit of solidarity, for coordinating planning for and response to an emergency at Member State, regional and Union levels. The Regulation repealed and replaced the previously mentioned Directive 2004/67/EC. The lesson learnt from implementing the 2004 Directive showed a necessity for harmonising national measures to ensure an EU-wide minimum level of preparedness at the EUMS level (Rodríguez-Gómez, Zaccarelli, & Bolado-Lavín, 2016, p. 461). It was felt that if all EUMS complied with minimum standards, it would enhance solidarity in a crisis.

Clearly, the crises of 2006 and 2009 changed the view of Russia as a reliable supplier of energy resources and placed the issue of energy dependence on the EU's agenda. The two crises demonstrated the EU's vulnerability and high levels of dependence on energy imports from Russia (Khrushcheva, 2011, p. 218). The importance of energy security was only amplified with the 2013/2014 crisis in Ukraine and the 2015 Euromaidan protest

(Austvik, 2019, p. 141). Krushchva (2011, p.218) points to an essential explanatory factor on the diverging energy security priorities amongst EUMS based on three factors: different attitudes towards Russia, different levels of dependence on Russian energy imports and different histories with Russia.

Development also occurred in the environment and competitiveness aspects. Published in 2010, Europe 2020 is the Commission's strategy for smart, sustainable and inclusive growth. The strategy was to develop the EU as a knowledge-based, greener economy, growing fast and sustainably while creating high levels of employment and social progress. The strategy was designed as the successor to the Lisbon Strategy. Nevertheless, due to the significant contribution to GHG emissions, the EU's energy production had major implications for its internal energy policy. Moreover, the EU found it very difficult to adjust the ETS to the reality of Europe's prolonged economic downturn (Buchan, 2015, p. 360). All EUMS favoured a GHG reduction target for 2030, except for Poland (Skjærseth, 2016, p. 519). Poland, the largest coal producer in the EU, emphasised the challenges of transforming policies that promote EU-level agreement into gains at the national level. Four years later, in October 2014, the European Council agreed on the EU's 2030 climate and energy policy framework. With this came a binding EU target of at least a 40% domestic reduction in GHG emissions by 2030 compared to 1990 levels and a 27% target for renewable energy sources (European Council, 2014).

Later in 2014, the political narrative of energy security was particularly strengthened. The political unrest in Ukraine with the Russian annexation of Crimea and violence in the eastern part of Ukraine resulted in a deterioration of EU-Russia relations during this time (Khrushcheva & Maltby, 2015, p. 213). For instance, in May 2014, the Commission published the European Energy Security Strategy with an unprecedently geopolitical tone and its specific aim of pushing back against Russian influence (Far & Youngs, 2015, p. 13). At that point in time, energy supplies from Russia accounted for 39% of EU natural gas imports or 27% of EU gas consumption; (European Commission, 2014, p. 2). Thus, the paper proposed numerous policies: completion of the internal energy market, increased storage capacity, and strengthened solidarity mechanisms to provide concrete protection, especially for the half-dozen states still entirely dependent on Russia for energy imports (European Commission, 2014).

At the same time, several gas pipeline projects had evolved. One of these was the previously mentioned Nord Stream 1, which started pumping gas in 2011 (Far & Youngs, 2015, p. 13). In 2013, Russia exported 71% of its gas to Europe, with the most significant volumes to Germany and Italy (European Commission, 2014, p. 2).

In 2015 the Energy Union Strategy was adopted. This was a framework strategy for "a resilient energy union with a forward-looking climate change policy" (European Commission, 2015b). The Council affirmed the EU's commitment to build an Energy Union on the Commission's framework strategy. In this, the Commission noted five interrelated and mutually reinforcing priority dimensions: energy security, solidarity and trust; a fully integrated European energy market; energy efficiency contributing to moderation of demand; decarbonising the economy; research, innovation and competitiveness (European Council, 2015). The strategy also included a target for all EUMS of a minimum of 10% electricity interconnection by 2020. The Commission incorporated this in hopes to increase security of supply, more affordable prices in the internal market, and to ensure sustainable development and decarbonisation of energy mixes (European Commission, 2015a, pp. 2-3). The strategy was drafted against profound changes to the global energy context. The

EU's dependency on Russian energy and the Russian annexation of Crimea have been cited as strong reasons for the importance of this policy (Erbach, 2015, p. 4; Far & Youngs, 2015, p. 11). Another factor was the instability in the Middle East and North Africa which underscored the EU's challenge of maintaining reliable external energy suppliers.

Far and Youngs (2015, p.14) state that the Energy Union Strategy meant an EU realisation that the geopolitical context required a less technical approach but rather a deeper reflection on the relationship between energy and foreign policy actions. Moreover, the authors argue that the Energy Union was designed to give EU foreign and security policy broader scope for manoeuvre by reducing dependence on Russia (Far & Youngs, 2015, p. 37). On the EUMS level, Germany supported specific governance to achieve the 2030 climate and energy targets and even called for more coordination on national energy policies (Erbach, 2015, p. 5). Conversely, the UK and the Czech Republic wanted a non-legislative approach. Poland supported the collective purchasing of gas, but Germany and other Western European countries found this incompatible with the liberalisation of gas markets in Europe.

A new regulation related to security of supply was adopted in 2017. The new regulation repealed the 2010 measure to safeguard security of gas supply (Official Journal of the European Union, 2017). Among other factors, the regulation enabled a solidarity mechanism to come into effect during an extreme gas crisis. It will help ensure that so-called 'protected customers' like households and hospitals continue to have access to gas, even in the worst crisis.

Moreover, in 2018 the Commission revised the Renewable Energy Directive (RED) and set a European target of 32% renewable energy. It also established rules to remove barriers, stimulate investments and drive cost reductions in renewable energy technologies, and empowers citizens, consumers and businesses to participate in the clean energy transformation. The RED became legally binding in 2021.

3.6 European Green Deal and European Climate Law (2019-2021)

The underlying legislation of the Energy Union Strategy came into force in May 2019 through the 'Clean Energy for All Europeans' package and consisted of eight new laws. The new legislation aimed to benefit consumers, the environment, and the economy (European Commission, n.d.-a). For instance, the package includes a governance system for the energy union and required each EUMS to establish an integrated 10-year national energy and climate plan (NECP) for 2021-30. The NECPs outline how EU countries will achieve their respective targets on all five dimensions of the energy union, including a longer-term view towards 2050 (European Commission, n.d.-a). The negotiations on this centred first on the internal energy market, then on renewables, energy efficiency and governance. According to Skjærseth (2021, p.34), the negotiations led to more ambitious EU-level targets than previously proposed by the Commission and agreed among EU leaders, with the European Parliament having been the driving force for this.

The ambitious net-zero emissions target of the EGD was initially proposed in 2018 through the Commission's long-term vision, "A Clean Planet for All". However, the agreement failed due to opposition from Poland, Hungary, the Czech Republic and Estonia (Skjærseth, 2021, p. 36). However, in December 2019, the Commission presented the EGD, which committed the EU to climate neutrality by 2050. The EGD is a roadmap to make the EU's economy sustainable by 2050 and covers all sectors of the economy. According to Commission

President Ursula von der Leyen and Executive Vice-President Frans Timmermans, the EGD is the EU's new growth strategy that sets out how to cut emissions, restore and protect the environment, and improve the quality of life of EU citizens (European Commission, 2019). In this regard, Skjærseth (2021, p.36) points to the challenge of the Commission to rally the support of all EUMS, with varying preferences, to successfully implement 'hard' EGD measures that involve legislative changes. Skjærseth (2021, p.26) points to the EGD as having emerged from climate- and related energy policies dating back to the early 1990s. Moreover, the author argues that the EGD illustrates the EU's development from narrow, separate policies to broader, coordinated packages to achieve ambitious climate targets (Skjærseth, 2021, p. 26).

A year later, in December 2020, EU leaders agreed to set an intermediate step towards the 2050 goal to reduce net GHG emissions by at least 55% by 2030, compared to 1990 levels. This is also known as Fit for 55 (European Council, 2023c). Fit for 55 is a set of proposals to revise and update EU legislation to provide a coherent and balanced framework for reaching the EU's climate targets. The package mentions the objectives of competitiveness and climate mitigation but does not refer to enhancing security of supply.

Subsequently, in June 2021, the goals of the EGD were incorporated into legally binding obligations for the EUMS with the Council's adoption of the European Climate law (European Council, 2023). The climate law created a framework for EU and EUMS action to reduce emissions and ultimately reach climate neutrality by 2050. With it, the EUMS are legally obligated to reach the 2030 and 2050 climate goals. Likewise, in June 2021, the Council approved conclusions endorsing the Commission's new "EU strategy on adaptation to climate change", which is a strategy that outlines the long-term vision for the EU to become a climate-resilient society, fully adapted to the unavoidable impacts of climate change by 2050 (European Council, 2023).

4 Building Resilience: the War in Ukraine and REPowerEU

2022 marked the beginning of significant geopolitical changes for the EU. Russia's invasion of Ukraine has brought a fast-changing situation shifting the EU's energy policy priorities. This is despite the various legislative advancements, plans and strategies made by the EU in the energy sector throughout the years. The EU's energy policy shift is reflected in the REPowerEU plan, the Commission's response to the hardships and global energy disruption caused by the invasion. This chapter will investigate the timeline of February 2022 until April 2023 to answer the second research question of this thesis: how does the Russian invasion of Ukraine and the subsequent launch of the REPowerEU plan affect the EU's energy policies?

The Russian invasion of Ukraine on 24 February 2022 rendered the need to phase out Russian fossil fuels indisputable. The invasion has caused severe disruptions to the world's energy system and led to a severe humanitarian crisis in Ukraine. World leaders have been forced to acknowledge that purchasing energy from Russia also fuel the so-called Russian war machine (European Commission, 2022j; Lonergan, Gabrielli, & Sansavini, 2022, p. 1). The invasion has brought many aspects related to the energy sector to light: high energy prices, heightened concerns for security of supply and the complete reveal of the EU's over-dependence on oil, gas and coal imports from Russia (European Commission, 2022j). On 18 May 2022, the REPowerEU plan was adopted, a Commission Communication calling for joint European Action for more affordable, secure and sustainable energy following Russia's invasion of Ukraine. A Communication sets the policy direction the Commission intends to take and often announces forthcoming legislative proposals. Nonetheless, a Communication is not a legal instrument, and as such, it is non-binding. As the EU's legislative initiator, the Commission proposes laws and policies but can also respond to invitations to do so from, e.g. the European Council (European Commission, n.d.-d). This was the case for the REPowerEU plan, highlighting the consensus among EUMS for a joint EU response to Russia's invasion (European Council, 2022a).

In 2020 and 2021, Russia was the leading supplier of oil, natural gas and coal to the EU. According to Eurostat, in 2021, Russia accounted for 45% of all EU coal imports, 36% of all natural gas imports, and 25% of all petroleum oil imports (Eurostat, 2023d). Clearly, phasing out Russian energy is an enormous task. Hence, the REPowerEU plan encompasses all aspects of this task, namely saving energy, producing clean energy and diversifying energy supplies. Taken as a whole, the EU's need for greater security of supply has added a new impetus to the objectives of the EGD.

Chapter 4 will investigate how the broad spectre of tools used by the EU to put the words of REPowerEU into action-oriented measures. This will allow me to examine how the Russian war in Ukraine has affected the EU's energy policies between February 2022 and April 2023. Throughout the chapter, I will highlight EU measures as they relate to the EU energy policy triangle.

To answer the research question, the chapter is divided into five sections. First, I will dedicate a contextual section to the EU's initial response to the war. Secondly, the EU's sanctions against Russia will be explored as they relate to EU energy policy. This allows me to better explain the EU's efforts to diversify its energy supplies and suppliers since the sanctions comprise the primary legislative basis of these efforts. Following this, the diversification efforts have predominantly led to an altered (strengthened) relationship with other third-countries energy suppliers, making it intriguing to investigate these changed partnerships in more detail. Then I will elaborate on the main legislative developments which have resulted from REPowerEU within the set timeframe. Lastly, the EU's initiatives to promote renewable energy will be reviewed as they relate to REPowerEU and, specifically, climate policy changes prompted by REPowerEU.

It is important to note that the process of ending the EU's reliance on Russian fossil fuels is still underway and will continue to be impacted by new EU policies and sanction packages. Since the war is ongoing, this chapter constitutes an initial examination of its implications. Moreover, the thesis will mainly be able to investigate the extent to which short-term diversification efforts of fossil fuels have been successful, as this has been the 2022 priority. Regarding the acceleration of renewable energy, policy developments based on REPowerEU will not be measured to the same extent as the former. This is because renewable energy is a long-term and multi-sided process which does not fall within the scope of this thesis.

4.1 Initial EU Response to the Invasion of Ukraine and REPowerEU

Despite uncertainty over its energy supply, the EU immediately took a firm stance against Russia's war in Ukraine. On 1 March 2022, the EP called for the EU's energy dependence on Russia to be significantly reduced (Boehm & Wilson, 2023, p. 2). Furthermore, on 7 April 2022, the EP called for an 'immediate full embargo' on imports of oil, coal, nuclear fuel and gas from Russia, as well as the Nord Stream 1 and 2 pipelines to be abandoned entirely (European Parliament, 2022). The EP also called for a plan to continue ensuring the EU's security of energy supply in the short term.

Also, in early March 2022, EU leaders reached a consensus to phase out Europe's dependency on Russian gas, oil and coal as soon as possible (European Council, 2022c, p. 5). Moreover, the March European Council meeting called for the diversification of energy supplies, increasing gas storage, accelerating the deployment of renewable energies, completing the necessary gas and electricity interconnections, and enhancing energy efficiency (European Council, 2022a). To accomplish this goal, the Commission was asked to present a detailed REPowerEU plan. In April of the same year, the importance of such a plan became all the more apparent as Russia halted gas exports to Poland and Bulgaria, once again showing "the unreliability of Russia as a gas supplier" (The Guardian, 2022; von der Leyen, 2022). This cumulated in the Commission's adoption of the REPowerEU plan on 18 May 2022. REPowerEU is a plan to rapidly reduce the EU's dependence on Russian fossil fuels by fast-forwarding the clean transition and joining forces to achieve a more resilient energy system and a true Energy Union (European Commission, 2022j). The plan builds upon the previously mentioned Fit for 55 policies but also forwards new actions to (i) save energy; (ii) diversify supplies; (iii) quickly substitute fossil fuels by accelerating Europe's clean energy transition, and (iiii) smartly combine investments and reforms

(European Commission, 2022j). I argue that with this plan, the EU is trying to accomplish all objectives of the energy policy triangle.

While the invasion of Ukraine was the catalyst for the plan, the Commission also justifies REPowerEU according to the three objectives of the energy policy triangle. The Commission underscores that the invasion has created a double urgency to transform Europe's energy system to end the EU's dependence on Russian fossil fuels and tackle the climate crisis. Moreover, the Commission underlines that Russia uses the EU's dependency as an economic and political weapon costing European taxpayers nearly €100 billion annually (European Commission, 2022k).

Solidarity and unity are essential justifications for REPowerEU. With this plan, the Commission wants to ensure that phasing out dependency on Russian fossil fuels is achievable and affordable for all EUMS. The importance of acting as a Union is highlighted: "By acting as a Union, Europe can phase out its dependency on Russian fossil fuels faster" (European Commission, 2022k).

4.2 Effects of Sanctions Against Russia on the EU Energy Sector

To identify the implications of the invasion on the EU's energy policies, it is necessary to first explore the EU sanctions against Russia. The sanctions are highly relevant as they affect all EU energy policy triangle objectives. Many of the sanctions include provisions that have led to significant changes in the EU's energy sector, which will be elaborated throughout the chapter. At the time of writing this thesis (May 2023), the EU has adopted ten sanction packages, and there are ongoing discussions of an eleventh (Euractiv, 2023b). Nevertheless, the essential sanction packages for this thesis are the fifth, sixth and eighth packages.

With the adoption of the fifth sanction package in April 2022 came an import ban on all forms of Russian coal (European Commission, 2023i). As mentioned in Chapter 3, oil surpassed coal in 1965 as the most important fuel supply, but while consumption of hard/black coal had steadily decreased since 1990, it did not cease to be important to the EU. While many EUMS have stopped producing hard coal in recent years, EU consumption has decreased slower than production (Eurostat, 2023a). To address this gap, the EU increased coal imports from Russia. Notably, Poland and Germany are the biggest consumers collectively accounting for approximately two-thirds of total EU hard coal consumption in 2021 (Eurostat, 2023a).

From an EU perspective, the ban's impact has been remarkable, with imports of Russian coal decreasing from 44% in the fourth quarter (Q4) of 2021 to zero in Q4 2022 (Eurostat, 2023d). The fifth sanctions package was of high significance with a highly noticeable outcome. Notwithstanding, it should be mentioned that in the same period, there were increased imports of coal from Columbia by nine percentage points (pp) and South Africa by 17pp. It is also worrisome from the perspective of the EU's climate mitigation objective that Germany began importing large amounts of coal to substitute its decrease in natural gas imports (Euractiv, 2023a). This is also the result of Germany having ordered the closure of its nuclear power plants for 2022 prior to the invasion. In fact, in Q3 2022, more than a third (36.3%) of German electricity production came from coal-fired power plants, which in Q3 2021 was 31.9% (German Federal Statistical Office, 2022). This alludes to a demotion by the EU of the climate mitigation objective.

In June 2022, the sixth package agreed upon substantial oil import restrictions. An embargo on crude and refined oil was adopted to phase out Russian oil imports in an orderly fashion. This embargo covers 90% of Russian oil imports to the EU (Boehm & Wilson, 2023, p. 3). The crude oil ban took effect in December 2022, whereas the ban on refined petroleum products took effect in February 2023. Nonetheless, the package included the possibility of temporary exemption for EUMS with a particular pipeline dependency until the Council decides against it (European Commission, 2023i). For instance, the Druzhba pipeline is exempted until the end of 2023. The pipeline extends from the eastern part of Russia to points in Ukraine, Belarus, Poland, Hungary, Slovakia, the Czech Republic, Austria and Germany. This derogation has been deemed necessary for the two landlocked EUMS, Slovakia and Hungary, to have access to crude oil until they can obtain alternative supplies (Boehm & Wilson, 2023, p. 3). Other EUMS along the same pipeline, such as Germany, has chosen to no longer import Russian oil. Bulgaria and Croatia have also been given a temporary derogation for crude oil transported by tanker. Due to its specific geographical exposure, Bulgaria was given a temporary derogation until the end of 2024. Furthermore, Croatia is allowed to import Russian vacuum gas oil until the end of 2023, as this was identified as essential for the functioning of its refinery (European Commission, 2023i).

Lastly, the eighth package was presented in October 2022 and marked the beginning of implementing the G7 oil price cap (European Commission, 2023i). At the time of adoption, the EU's ban on importing Russian seaborne crude oil was entirely in place. This is also important for the EU's competitiveness objective as the price cap implementation allows European operators to carry out and support the transport of Russian oil to non-EU countries, provided its price remains under a pre-set 'cap'. The cap also contributes to reduce Russia's revenues while keeping global energy markets stable through continued supplies (European Commission, 2023i). The cap will also help address inflation and keep energy fees steady at a time of concern for high costs, particularly elevated fuel prices. The package took effect on 5 December 2022 for crude oil imports and 5 February 2023 for refined petroleum products (European Council, 2023b). According to Boehm & Wilson (2023, p.3) of the EP Research Service, neither the oil nor the coal embargo has led to great difficulties in securing adequate energy supplies for the EU this far. Moreover, the two authors argue that this shows the limited potential of Russian blackmail over these energy sources. It is natural gas imports that make up the most significant issue.

EU sanctions do not cover natural gas. This is due to the EU's dependence on Russia as a gas supplier, given that the pre-existing pipeline networks primarily exist to transport natural gas from Russia to the EU (Boehm & Wilson, 2023, p. 3). Still, gas supplies from Russia to the EU decreased drastically in 2022 due to intense diversification efforts by REPowerEU.

4.3 Diversification of Energy Sources and Suppliers

As made evident by Chapter 3, reducing dependency on Russia for imported fossil fuels has long been a topic of debate in the EU but with limited actual success. However, the invasion of Ukraine has propelled diversification away from Russia, finally aligning with the EU's security of supply objective. I argue that the most substantial short-term implication on the EU's energy policy that has emerged from the invasion and REPowerEU is its diversification of energy suppliers. The aforementioned sanction packages have been the main drivers of this, essentially making diversification away from Russia required by law.

Even so, diversification of fossil fuels imports does not only mean in terms of suppliers but also energy sources. REPowerEU bases the phase-out of Russian fossil fuels on two pillars: diversifying gas supplies through increased imports of LNG and pipeline imports from non-Russian suppliers. Additionally, energy efficiency and increasing the share of renewables are highlighted as important means to reduce EU dependence on fossil fuels at the level of homes, buildings, industry and the power system (European Commission, 2022j). The plan also accentuates the need to address infrastructure bottlenecks. As mentioned, this coincides with the objectives of the energy policy triangle.

Both objectives to diversify energy sources and suppliers are highlighted in the EU External Energy Strategy, developed in tandem with REPowerEU to facilitate energy diversification. The strategy is an update of the 2014 European Energy Security Strategy. It highlights the inability of the measures taken in 2009 and 2014 to improve energy security: "Europe is still too dependent on a supplier who is willing to use energy as a weapon" (European Commission, 2022b). On this basis, the new strategy seeks to reinforce engagement with other third-country suppliers and to strengthen climate and energy diplomacy.

The strategy can be classified as the EU's means to achieve its REPowerEU goal to phase out Russian fossil fuels. To do so, four objectives are outlined. Of relevance to this thesis are the objectives to (i) strengthen EU energy security, resilience and open strategic autonomy by diversifying the EU's energy supply and boosting energy savings and efficiency; and (ii) accelerate the global green and just energy transition to ensure sustainable, secure and affordable energy for the EU and the world (European Commission, 2022b). These objectives of the strategy underscore my previous argument that the EU is currently trying to achieve all three objectives simultaneously. Section 5.6 will examine the latter objective and the energy-saving and efficiency aspects.

Usually, diversification is both a lengthy and costly process. However, due to the invasion of Ukraine, the EU has worked tirelessly towards this priority with already visible results. According to Eurostat, the overall EU imports of Russian energy fell by more than 10pp between the Q1 and Q3 of 2022, from 25.5% to 15.1% (Eurostat, 2022). This is attributed to the sanctions outlined above, which have directly or indirectly, affected the trade of energy products. To further investigate diversification, this section is divided into sub-sections according to the diversification of sources and suppliers. The Commission argues that REPowerEU can make the EU independent from Russian fossil fuels well before 2030, starting with the diversification of natural gas (European Commission, 2022j).

4.3.1 Diversification of Energy Sources and Enhanced Energy Interconnection

Since many EUMS are historically dependent on fossil fuel supplies from Russia, this has led to a sizeable Russian-controlled oil and gas pipeline infrastructure serving EU markets (Boehm & Wilson, 2023, p. 2). This makes diversification particularly difficult since it requires new or additional infrastructure. Natural gas is a particular vulnerability for the EU. Unlike coal and oil, natural gas is much more challenging to transport and store. In fact, the largest share of natural gas from Russia came to the EU via pipelines, such as Nord Stream 1. Nevertheless, the EU's efforts to diversify away from natural gas imports from Russia have already cumulated in visible results. Since the invasion, gas imports from Russia to the EU have been reduced significantly. In Q1 2022, Russia provided 31.3% of the EU's natural gas, which shrunk to 18.8% in Q4 2022 (Eurostat, 2023c).

To phase out imports of Russian fossil fuels as fast as possible, the EU has sought to reduce its dependency on pipeline-based imports, seemingly with relative success. In Q3 2022, Russian gas via pipeline only covered 11% of total EU gas imports (European Commission, 2023g, p. 10). One substitution for pipeline gas has been imports of liquified natural gas (LNG). In fact, the invasion of Ukraine and REPowerEU has made the EU the largest LNG importer in the world (European Council, 2022b). Put together, the EU has a significant overall LNG import capacity, enough to account for approximately 40% of total gas demand (European Council, 2022b). Despite this, the EU's ability to import LNG, particularly by ship, is unevenly distributed among EUMS.

REPowerEU has pushed EUMS to develop new or expand existing LNG infrastructure. To exemplify, the Dutch Eems Energy Terminal became operational in September 2022, having been built in a record time of six months (EEms Energy Terminal, 2023). The floating LNG terminal is a crucial step to ensure new sources of supply for the Netherlands, but the terminal can also serve Central European EUMS such as Czechia (European Commission, 2023g). Moreover, the Commission (2023a, p.20) expects new LNG regasification terminals in Germany, France, Italy, Greece, Poland and Finland by the end of 2023. However, many of these are also expected to be interim solutions only meant to phase out Russian pipeline gas imports faster. In this regard, a possible issue is the uneven ability of EUMS to develop such infrastructure.

REPowerEU also emphasises the need to ensure connections and solidarity between EUMS in the event of supply interruption (European Commission, 2023h). The EU has taken several initiatives to establish an interconnected EU energy system, and in Q3 2022, many significant infrastructural projects were completed. Fortunately for the EU, given the pressing need for diversification. However, these were not merely responses to the ongoing conflict but rather the result of long-term planning in the works long before the Russian invasion of Ukraine. To exemplify, in July 2022, the gas interconnector between Greece and Bulgaria was completed, connecting the Greek transmission network to the Trans-Adriatic Pipeline (European Commission, 2023g). The pipeline became operational in October of the same year. Moreover, in August 2022, the gas interconnector between Poland and Slovakia was inaugurated, marking a cornerstone of the North-South gas infrastructure corridor. Gas flows on this pipeline began already in November 2022. Lastly, in September, the Baltic pipeline was inaugurated, a route that carries gas from Norway through Denmark to Poland and its neighbouring countries (European Commission, 2023g). The latter is significant as it enhances the diversification of gas supply for Central-Eastern Europe and the Baltic States. Both the Polish-Slovak interconnector and the Baltic pipeline have been Projects of Common Interest (PCI) since 2013 (European Commission, 2023g). While long in the making, I argue that these projects represent the EU's focus on the economic competitiveness objective to ensure the functioning of the internal energy market and interconnection.

I argue that the EU has focused on furthering the economic competitiveness objective due to REPowerEU through new investments in LNG terminals and gas interconnectors. Moreover, the abovementioned REPowerEU-related efforts have been instrumental to the EU achieving the new possibility of reverse flows between EUMS, which has significantly strengthened the EU's objective to ensure security of supply. The importance of diversification of supplies is also made evident through the substantial achievement that every EUMS can now receive gas from at least two sources (European Commission, 2022m). This also strengthens the EU's security of supply.

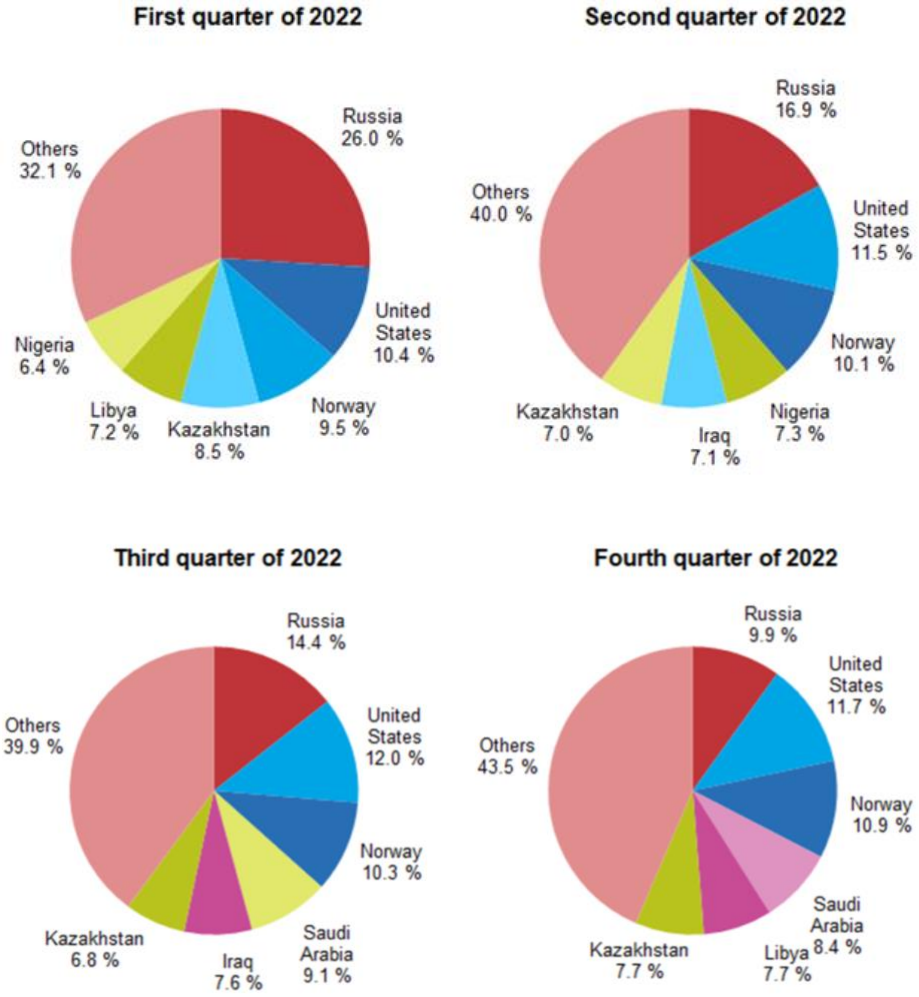
On that note, in September 2022, Nord Stream 1 and 2 suffered damages that are widely attributed to acts of hostility directed towards infrastructure (European Commission, 2023g). While Nord Stream 1 stopped being operational in August 2022 and Nord Stream 2 never actually became operational, it is not realistic that the two will be put into service again due to the time needed for reparation and the geopolitical context (European Commission, 2023g). Prior to the invasion, Nord Stream 1 was a vital infrastructure for gas deliveries from Russia to the EU, specifically to Germany. Indeed one of the most impressive successes of the actions made in the past year is Germany's independence from imported Russian gas, which had been the country's leading supplier. If not for the Russian invasion of Ukraine, Nord Stream 2 would naturally have become operational and supplied gas to Germany for many years. Also, based on the analysis of changes over time in chapter 3, I argue that this diversification would not have occurred if not for the invasion. Nor would diversification occur within such a short timeline. Indeed the German efforts to rid itself of Russian energy imports made since February 2022 have been remarkable. However, I argue that this has occurred at the expense of the EU's climate mitigation objectives. This will be discussed in chapter 5.

4.3.2 Diversification of Energy Suppliers and Strengthened Relationships with Other Third-Countries

Due to the REPowerEU goal to phase out Russian fossil fuels, EUMS have looked elsewhere for their energy. Naturally, the EU's sanctions against Russia have been important instigators of this rapid change, leading to significant changes in cooperation with other third-countries suppliers. This sub-section will further examine the efforts to diversify suppliers of petroleum oil and natural gas since these are the EU's most important fossil fuels.

In Q1 2022, Russia was the largest provider of petroleum oils, with a share of 26% (Eurostat, 2023c). As the year progressed and sanctions were adopted, this share decreased to 9.9% in Q4, but a notable increase in the shares of imported oils from other third-country suppliers. The figure below illustrates these changes:

Figure 2 EU imports of petroleum oil by partner (share (%) of trade in value)

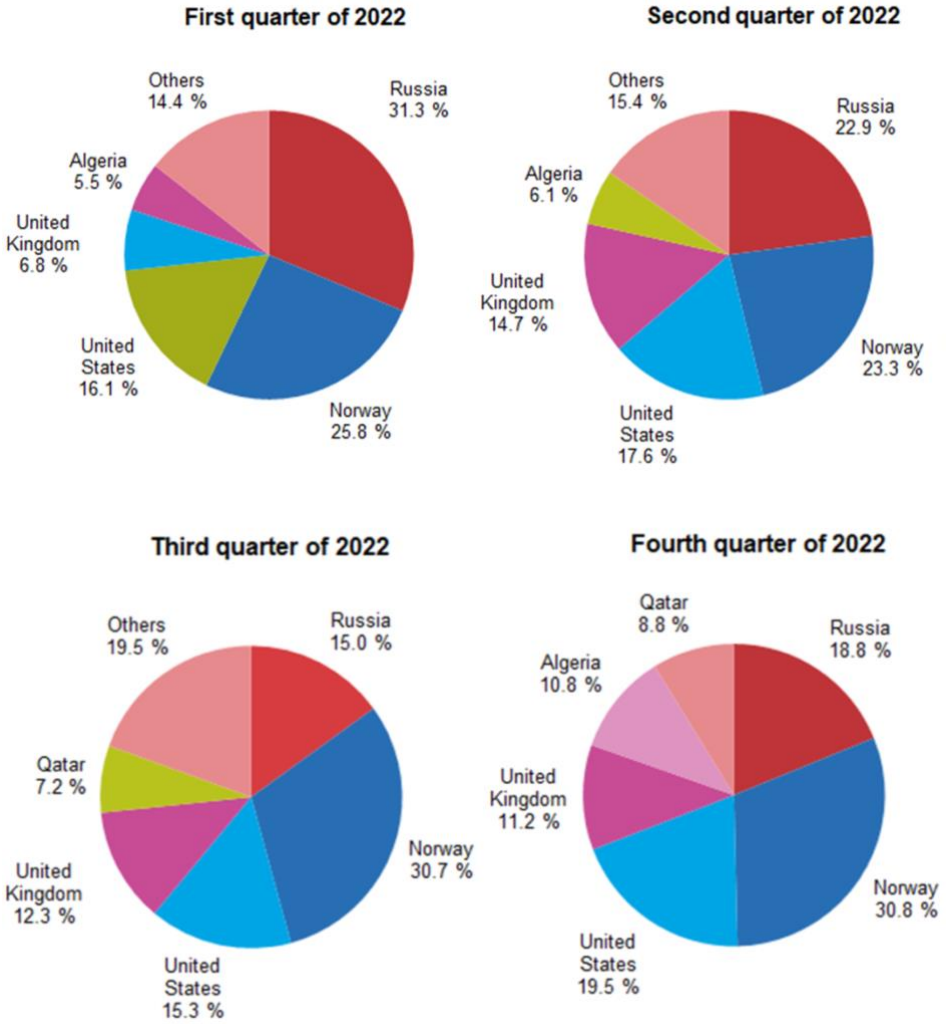


Source: (Eurostat, 2023d)

The figure illustrates increased shares of imported oils from several third-country suppliers. It is interesting to note that of the EU's top six suppliers identified by Figure 2, only the U.S. and Norway meet the international democratic standards as classified by Freedom House (Freedom House, 2023, p. 22). Importantly, this has also been noted in the past in a 2020 report by the EP Research Service (Russell, 2020, p. 7). In this case, I argue that while the phase-out of Russian petroleum imports is apparent, these efforts are not as impressive given that the substitutes consist of countries regarded as 'not free'. This somewhat diminishes the security of supply objective of the EU. Especially considering that the suppliers considered 'not free' make up more of the petroleum imports than the free suppliers. It should be noted here that it would be interesting to know which countries fall under the category 'others'.

Diversified imports of natural gas have posed a greater infrastructural challenge for the EU. REPowerEU highlights that Qatar, the U.S., Egypt and West Africa are essential suppliers of LNG, whereas Azerbaijan, Algeria and Norway are crucial partners in diversifying pipe sources. Efforts to diversify natural gas suppliers have already cumulated in visible results. The changes in third-country shares of natural gas to the EU are illustrated in the figure below:

Figure 3 EU imports of natural gas by partner (share (%) of trade in value)



Source: (Eurostat, 2023c)

In Q1, Norway was the second largest supplier of natural gas to the EU with 25.8%, followed by the U.S. with 16.1% (Eurostat, 2023c). By comparing Q1 and Q4, the finding is that Russia's share has dropped significantly while the shares of Qatar, Algeria and the U.K. all increased. It is also clear that the U.S. and Norwegian shares increased steadily as the year progressed. Interestingly, there was an increase in Russian shares between Q3 and Q4. This increase was driven by Germany and Italy, who went on a "last-minute shopping spree" before the oil import ban kicked in (Myllyvirta, 2022). This underlines the importance of the EU's sanction prohibiting oil imports from Russia.

The figure shows that the U.S. plays an increasingly important role in the EU's gas supply. This is due to the previously mentioned substitution of Russian natural gas imports via pipeline by LNG. By looking at isolated numbers of LNG imports, it becomes evident that between January and September 2022, the most prominent providers to the EU were the U.S. with 44%, Russia with 17%, and Qatar with 13% (European Commission, n.d.-c). Clearly, Russia still provides a large amount of the EU's imported fossil fuels which contradicts the goals of REPowerEU regarding the phase-out of Russian fossil fuels. Still, I argue that while problematic from a security of supply perspective, LNG is easier to phase out than pipeline imports of natural gas, given the aforementioned infrastructural aspect. Also, the overall trend, as illustrated by Figure 2, still indicates a general decrease in

imports of Russian fossil fuels. Nonetheless, I argue that this decrease is conditional on obtaining sufficient amounts of LNG. Even so, the substitution does not positively affect the EU's climate mitigation objective.

The invasion of Ukraine and REPowerEU has altered relationships between the EU and other third-country energy suppliers. According to Figures 2 and 3, the EU's two closest energy partners (apart from Russia) are now the U.S. and Norway. Thus, a strengthened EU-U.S. and EU-Norway relationship has formed as an implication of the war and REPowerEU. Upon further investigation, the EU has not simply sought to buy more energy from these two countries. The EU has actively sought to deepen cooperation and strengthen the bond between the two countries as a tool to increase its energy sector resilience that aim to contribute to all three objectives of the EU energy policy triangle. The EU external energy strategy highlighted the importance of long-lasting international parentship. This makes it interesting to further investigate these strengthened relationships.

Beginning with the former, building on a long-standing cooperation under the EU-US Energy Council established in 2009, the two have partnered to overcome challenges posed by Russia's invasion. In March 2022, the EU and U.S. declared the desire to increase EU LNG imports from the U.S. by 15 billion cubic meters (bcm) in 2022, compared to the year earlier, a goal that was reached in August 2022, four months in advance of the target (European Commission, n.d.-c). In parallel, an EU-US Task Force on Energy Security was established. Both parties present a close partnership as an opportunity to accelerate the clean energy transition and curtail Russia's energy revenues (European Commission, 2022h). The Task Force (TF) aims to help reduce the EU's reliance on Russian energy by reducing overall natural gas demand and diversifying EU natural gas supplies in alignment with climate objectives (European Commission, n.d.-e). Issues relating to LNG were listed as urgent and thus points of priority. For instance, under the TF, the U.S. commits to sustaining a regulatory environment that facilitates quick reviews and approval of requests to export additional LNG capacities needed to meet the emergency EU's emergency energy security objective and the REPowerEU targets (European Commission, 2022g). The TF also highlights the mutual determination to end EU dependency on Russian fossil fuels by 2027.

In November, the participants committed to explore deeper cooperation by pursuing a series of targeted sub-dialogues related to energy efficiency solutions, reducing gas and electricity use and solutions to high energy bills (European Commission, 2022h). Moreover, marking the first anniversary of the Task Force, in April 2023, a progress report was published, presenting accomplishments and next steps. A particularly substantial accomplishment has been facilitating engagement with the U.S. LNG industry on the EU Energy Platform and its upcoming implementation to attract U.S. LNG to Europe (EU-U.S. Task Force on Energy Security, 2023). Among the following priorities for 2023 is ensuring U.S. LNG deliveries to Europe of 50bcm in 2023 (EU-U.S. Task Force on Energy Security, 2023). This is a vital priority given the challenging supply situation and the need to ensure storage filling ahead of the winter of 2023-2024.

In March 2023, a joint statement declared that the EU and the U.S. will continue advancing energy security and sustainability in Europe by diversifying energy sources, lowering energy consumption and reducing Europe's fossil fuel dependency (European Commission, 2023f). Notably, both parties committed to address the climate crisis, accelerate the global clean energy economy and building resilient, secure and diversified clean energy supply chains. In this regard, it is vital to highlight the reference to all three objectives of the energy policy triangle.

Similarly, Norway has also proved an indispensable partner for the EU. Indeed Norway has supplied Europe with oil and gas since the early 1970s, gradually becoming a major exporter to the continent second only to Russia prior to the invasion (Jevnaker, Lunde, & Skjærseth, 2015, p. 225). While Norway has been a key partner to the EU for a long time, the war in Ukraine has accentuated the strong bond between the two parties. Norway is closely linked with the EU through membership in the European Economic Area (EEA) and is considered the most integrated third country (Official Norwegian Report, 2012). Norway is also a natural partner, given its proximity to the EU.

In 2022 two major press statements were released on enhancing EU-Norwegian energy and climate cooperation (European Commission, 2022c, 2022f). These acknowledged the urgency to increase energy independence and reduce GHG emissions by 2030. The June 2022 joint statement underlined the strong EU-Norway relationship as partners, neighbours and allies. Importantly, this was highlighted as a means to improve "Europe's resilience to the negative consequences of the Russian invasion of Ukraine and of climate change" (European Commission, 2022f). Moreover, both parties agreed to enhance existing energy cooperation to secure both short and long-term gas supplies from Norway, address the issue of high energy prices as well as develop long-term cooperation on offshore renewable energy, carbon capture and storage, hydrogen and energy research and development (European Commission, 2022f). The ultimate goal of these efforts is to develop an even deeper, long-term energy partnership. Again, it is important to note the reference to all three objectives of the energy policy triangle.

Furthermore, the invasion and REPowerEU have also strengthened the relationship between the EU and Norway in climate policies. In April 2023, the EU and Norway established a Green Alliance to strengthen joint climate action environmental protection efforts and cooperation on the clean energy and industrial transition (European Commission, 2023e). Such an alliance is a very ambitious and high-level climate and energy partnership. The Green Alliance is the second of its kind (the EU also has one with Japan) and the very first of its kind with a European country (von der Leyen, 2023). Commission President von der Leyen noted that the alliance symbolises the deep bond and friendship between the two parties, a friendship demonstrated by the exceptional partnership formed during last year's energy crisis (von der Leyen, 2023).

4.4 Natural Gas Policy Developments Based on REPowerEU

In addition to the priority of phasing out the EU's imports of Russian fossil fuels, the Commission has made proposals to put words into action as regards solidarity, interconnection and security of supply for the winter months, as presented in the REPowerEU plan. These policies are mainly targeted at ensuring the functioning of the internal energy market and security of energy supply at affordable prices ahead of the 2022/23 winter season and beyond, thus aligning with two of the energy policy triangle objectives: competitiveness and security of supply. Given the EU's high dependency on Russian natural gas, policy development relating to gas has been prioritised. The policy developments to be outlined have been adopted in concert with the abovementioned sanctions.

In June 2022, a Gas Storage Regulation was adopted aimed to ensure that gas storage capacities in the EU are filled ahead of the winter season and can be shared between EUMS in a spirit of solidarity, despite the disruptions in the gas market (Council of the European

Union, 2022a). The regulation provides that underground gas storage on EUMS' territory must be filled to at least 80% of capacity before the winter of 2022/2023 and to 90% before the following winter periods (Official Journal of the European Union, 2022c). Overall, the EU will attempt collectively to fill 85% of the total underground gas storage capacity in the EU in 2022. According to the Council, this was an essential step in strengthening the security of the EU's energy supply in the context of the war in Ukraine (Council of the European Union, 2022a). Adding to this, the French Minister for the Energy Transition, Agnès Pannier-Runacher, who chaired the Energy Council at the time, stated that this regulation allows the EU to "reinforce Europe's energy resilience and actual solidarity among member states." (Council of the European Union, 2022a).

Given the imminent risk of gas disruptions, in July 2022, a new legislative tool was proposed, the Council regulation on Coordinated Demand Reduction Measures for Gas. The Regulation was adopted based on the previously mentioned 2017 Regulation. However, this did not adequately address disruptions of a major gas supplier lasting more than 30 days and thus allowed for the risk of uncoordinated action by EUMS. In turn, this could endanger security of supply in neighbouring EUMS and may burden the Union's industry and consumers (Official Journal of the European Union, 2022a). The legislative tool was proposed on the backdrop of almost half the EUMS having been affected by reduced gas deliveries to minimise risk and costs and "strengthen European energy resilience" (European Commission, 2022m). The regulation was adopted in August 2022 and set a voluntary target for EUMS to reduce gas use in Europe by 15%, compared to their average consumption in the past five years between 1 August 2022 and 31 March 2023 (European Commission, 2022m). This was to make savings ahead of the winter to prepare for possible disruptions of gas supplies from Russia.

Nonetheless, certain exemptions and possibilities for derogations were specified by the Council to reflect the particular situations of some EUMS and to ensure that the gas reductions are effective in increasing security of supply (Council of the European Union, 2022b). For instance, derogations can be given to EUMS that are not interconnected to other EUMS or EUMS that do not have synchronised electricity grids with the European electricity system and are more reliant on gas for electricity production. Moreover, suppose an EUMS has limited connections with other EUMS and can prove that they utilise their export capacities and domestic LNG infrastructure to re-direct gas to other EUMS. In that case, these may restrict their reduction target to comply with their demand reduction obligations can limit their reduction target to adapt demand reduction obligations in the case of limited interconnections to other EUMS and if they can prove their export capacities and domestic LNG infrastructure are used to re-direct gas to other EUMS (Council of the European Union, 2022b). However, since voluntary demand reductions were not seen to as sufficient to ensure security of supply and market functioning, the regulation also allows the Commission to declare (after consulting EUMS) a Union alert on security of supply and to impose a mandatory gas demand reduction on all EUMS (Official Journal of the European Union, 2022a).

In March 2023, the voluntary gas demand reduction target was extended for one year until the end of March 2024 (European Council, 2023a). Still, it is highlighted that the new regulation is an exceptional and extraordinary measure and is only valid for a limited time.

In November 2022, an implementing Regulation was adopted, setting out the intermediate gas storage filling targets that EUMS should meet in 2023 to reach the 90% gas storage

target by 1 November 2023 (European Commission, 2022d). The importance of this is that an implementing regulation is directly applicable and does not need to be transposed into national law. The regulation defines intermediate targets for the 1st of February, May, July and September 2023 for EUMS with underground storage connected to their market area (European Commission, 2022d). The targets were made based on proposals by EUMS and the filling rates of the previous five years, in addition to the Commission's assessment of the security of supply situation in the EU as a whole and individual EUMS. In March 2023, the Commission published a report on the implementation of the regulation, which confirmed that an EU-wide 94.9% storage level had been achieved by 1 November 2022 and that the average level (83.4%) was still high at the end of 2022 (European Commission, 2022d).

During the autumn of 2022, the EU experienced unprecedented high gas prices. Thus, the Commission proposed measures to address this, all the while ensuring security of supply for the winter. Regulation 2022/2576 on enhancing solidarity through better coordination of gas purchases, reliable price benchmarks and exchanges of gas across borders were adopted on 19 December 2022 (Official Journal of the European Union, 2022b). This regulation is a temporary emergency measure aimed at limiting episodes of excessive gas prices that do not reflect world market prices while ensuring security of energy supply and the stability of financial markets (Council of the European Union, 2022c).

Significant non-legislative developments have also occurred as an implication of the invasion and REPowerEU. For instance, the Commission set up the EU Energy Platform to better coordinate EU action and negotiations with external suppliers to prevent EUMS from outbidding each other (European Commission, 2023c). Initiated in April 2022 with a mandate from the European Council in response to diversification needs from Russian gas. According to the Commission, the Platform was vital in the EU's diversification efforts, facilitating the signature of the Memoranda of Understanding with the main gas-exporting partner countries and enhancing international outreach to support the REPowerEU Plan (European Commission, 2023c). In 2023, the Platform will be focused on organising demand aggregation and joint purchasing of gas for the coming winter's (2023-2024) gas storage filling season and to ensure the required close cooperation between the Commission, EUMS and industry. In April 2023, the Commission launched its first call for companies to jointly buy gas (European Commission, 2023d).

4.5 Promotion of Renewable Energy and Energy Efficiency

The invasion of Ukraine and REPowerEU also underlines the need to increase the share of domestically produced renewable energy to enhance supply security (European Commission, 2023h). Accelerating the transition to renewable energy and improving energy efficiency are highlighted as means to expedite the phase-out of Russian fossil fuels. The two are also emphasised as providing the best insurance against price shocks in the medium term, with a particular focus on cross-border and regional needs (European Commission, 2022j). The importance of accelerating renewable energy in the EU becomes particularly obvious in light of EU spending on gas imports in 2022 compared to 2021. In Q3 2022, the EU spent an estimated €101 billion, the highest in the last decade, compared to €29 billion in Q3 2021, principally owing to higher import prices (European Commission, 2023g). This section will elaborate on policy developments and recommendations made accelerate the deployment of domestic renewable energy sources as a means to reduce

the EU's dependence on external suppliers. The International Renewable Energy Agency has also recommended that the clean energy transition offers the only long-term pathway to greater security of supply (Boehm & Wilson, 2023, p. 8)

Just as REPowerEU, on 18 May 2022, the Commission published a recommendation on speeding up permit-granting procedures for renewable energy projects and facilitating Power Purchase Agreements (European Commission, 2022a). Usually, renewable energy projects require authorisation to ensure their ability to perform their intended activity. So-called permit-granting procedures ensure projects are safe and secure. However, these procedures are complex and have an excessive duration, constituting a significant barrier to the swift deployment of necessary renewable energy to achieve the goals outlined in REPowerEU (European Commission, 2022a). Without going into too much detail, the recommendation encourages EUMS to establish clearly defined, accelerated and as short as possible deadlines for all the steps required to grant permits to build and operate renewable energy projects.

In tandem, as a part of REPowerEU, the Commission proposed a series of targeted amendments to existing energy/climate legislation under Fit for 55 policies in the EGD. These include the previously mentioned Renewable Energy Directive (RED) as well as the Energy Performance of Buildings Directive, and the Energy Efficiency Directive (European Commission, 2022i, 2023h). The aforementioned EU external energy strategy also aims to promote the EU's clean energy industries across the globe. To recall, the EGD seeks to make the EU a competitive and climate-neutral Union. Taken as a whole, the abovementioned factors underscore my argument that the EU is addressing all three energy policy objectives to enhance the resilience of its energy sector.

The RED has long been an essential legislative framework to increase renewables. Since its introduction in 2009, the EU's share of renewables in energy consumption has increased from 12.5% in 2010 to 21.8% in 2021, with Sweden and Finland having the highest share (European Commission, 2023h). Also, in 2021 the Commission proposed a revision of RED with an increased EU-wide target of at least 40% (up from 32%) renewable energy sources in the EU's overall energy mix by 2030 (European Council, 2023c). Because of the invasion and REPowerEU, the Commission has proposed to increase this by another 5% to 45% renewable energy by 2030 (European Commission, 2023h). This increase was underscored as vital to step up EU energy independence from Russia. While the Commission and EP endorse the proposed increase, it has sparked much debate among EUMS. Only recently, on 30 March 2023, did the EP and Council reach a provisional agreement to set a binding renewable energy target of a minimum of 42.5% but aiming for 45% by 2030 (European Commission, 2023h).

Scholars who have commented argue that both the short and the long-term answer has to be a massive rollout of renewable technologies (Fouquet, 2022, p. 1). However, I argue that the call for such a massive shift in such a short time frame is somewhat naïve. Nonetheless, I agree with the author's latter argument that REPowerEU could and should provide a solid background to organise a better and more rapid long-term shift to renewables in EUMS. Of course, a caveat as to what constitutes a 'short-term' must be noted.

The Commission has also proposed several new targets within the additional actions related to renewable energy and energy efficiency set out by REPowerEU. Energy savings is highlighted as the fastest and cheapest measure to undertake the energy crisis while reducing bills, and this addresses the competitiveness objective of the energy policy

triangle. Moreover, the Commission proposed an enhancement of long-term energy efficiency measures, with an increase in the binding target from 9% to 13% under Fit for 55 (European Commission, 2022k). Moreover, to enhance security of supply, the Commission published the 'EU Save Energy Communication' detailing short-term behavioural measures to cut gas and oil demand by 5%. In March 2023, the Commission also published a public consultation and intention to set a 2040 climate target by the first quarter of 2024 (European Commission, 2023b).

However, ambitious targets need to be met by progress on the ground and in this regard, the picture is more mixed. Despite the emphasis on renewable energy as a means to phase out Russian fossil fuel imports, since the beginning of 2022, only an estimated 20 gigawatt (GW) of renewable energy capacity have been added (European Commission, 2023g). While this is the equivalent of more than 4 bcm of natural gas, it is necessary to put this number into perspective: in the first half of 2022, the EU imported over 65bcm of LNG (European Council, 2022b). On the EUMS level, some initiatives demonstrate a slight uptake in renewable energy. For instance, Germany's share of renewable energy sources in its electricity production only rose from 43% in Q3 2021 to 44.4% in Q3 2022 (German Federal Statistical Office, 2022). However, as mentioned, renewable energy is mainly regarded as a long-term solution for the EU's energy issues. Therefore, investigating the results of the EU's efforts to scale up renewable energy is somewhat counterproductive.

5 Discussion

This chapter aims to discuss the findings of chapters 3 and 4. While the objective of my thesis is two-fold and contains two research questions, it is interesting to discuss these in light of one another, especially under the common perspective of resilience in the energy sector. To recall, the factors that define a resilient energy system are closely linked to the objectives of the energy policy triangle: an energy system is resilient when it is secure and diversified, sustainable, climate mitigating and integrated. Moreover, it acts to reduce vulnerabilities through indigenous sources and renewable energy, yet can still absorb external disturbances.

Chapter 3 analysed the development of EU energy and climate policies from 1952-2021. Furthermore, I categorised the energy policy developments according to the energy policy triangle to illustrate what has been highest on the EU agenda in different periods of time. Based on the analysis, I further expand this to include the main arguments of my analysis that answer why the EU has not been able to build a resilient energy sector. This is illustrated in Table 3 below:

Table 3 Categorisation of periods in EU energy policy development according to EU energy policy triangle with observations

Period	Focus	Observations
1950-1986	Security of supply, climate mitigation	Crisis, EUMS guard energy autonomy
1987-2000	Climate mitigation, competitiveness	EUMS guard energy autonomy
2000-2005	Competitiveness, climate mitigation	Crisis, EUMS support climate policies
2004-2009	Security of supply, competitiveness	Crisis, greater EUMS will for energy integration
2009-2018	Security of supply, competitiveness	Crisis, diverging EUMS energy security priorities
2019-2021	Climate mitigation, competitiveness	EU-wide agreement on climate ambitions

Source: Author's compilation

There are multiple explanations for why the EU has been unable to build a resilient energy sector, but chapter 3 has revealed three patterns of explanation. The first finding is that the EUMS have played a decisive role in EU energy policy development. The analysis reveals clear indications that the preferences of key EUMS have either allowed or denied EU-wide energy governance. In this regard, the priorities of more prominent and/or older EUMS, such as Germany, the UK, the Netherlands and France, have been essential. Moreover, I find that the EU has been more willing to develop common policies regarding the climate mitigation and competitiveness objectives, but have been more reluctant to adopt measures that would affect the EUMS ability to decide their energy mix. The second finding is that energy policy development has often occurred during or after crises; four of six sections in chapter 3 find energy policy developments in the wake of a crisis. This will be further elaborated below. Lastly, chapter 3 reveals that the Commission has been

instrumental in furthering EU energy policy despite limited legal competence and EUMS resistance. EUMS reluctance to give up energy autonomy has long meant the Commission has limited legal competence. Nonetheless, the institution persisted and has been indispensable in furthering the objectives of the EU energy policy triangle and keeping the idea of a common energy policy afloat. This is evident through their numerous non-binding publications, often related to guidelines or frameworks for the energy sector.

The first period of EU energy development was particularly characterised by an EUMS reluctance to relinquish autonomy to the EU. While the crises in the 1970s placed security of energy supply on the agenda, this only produced non-binding guidelines for national energy policy development. Climate mitigation is ranked second for 1950-1987 due to local air pollution issues, but this, too, was characterised by national interest and only determined that EUMS should retain autonomy to set national environmental standards and adopt climate policies.

Until 1987, there is no evidence from chapter 3 that points to developments increasing EU energy resilience. However, in the period 1987-2000, EUMS expressed a wish to better coordinate climate policies in the context of the environmental protection addition to the 1987 Single European Act, the release of the IPCC in 1990 and the public issue of acid rain. To this end, prominent EUMS, including Germany, the UK and the Netherlands, successfully advocated for EU-level environmental harmonisation, such as air emissions and environmental quality objectives. While the 1996/1998 liberalisation directives contributed to a more integrated EU energy market, thus increasing the EU's energy resilience, 1987-2000 was still largely characterised by EUMS scepticism towards an internal energy market. This is evident since the liberalisation measures took nearly ten years to adopt. As such, the competitiveness objective is placed second to the climate mitigation perspective. InMS concerns for national competitiveness in this period led to the adoption of EU energy policies that allowed for flexibility, voluntary agreements and framework directives hence failing to harmonise national procedures. Moreover, the legal basis for the Commission remained restricted to the internal market and environmental regulations, as neither the 1992 Treaty of Maastricht nor the 1999 Treaty of Amsterdam made any advancements towards a separate energy chapter. Hence, just like the first period, the second period of EU energy development was also defined by the EUMS desire to guard their energy autonomy.

In 2000-2005, the EU was yet again faced with its lacking energy resilience as concerns arose regarding declining oil and gas reserves as the result of international geopolitical events. A disconnect between the Commission and EUMS further characterises this period. This is evident through the Commission's 2000 green paper, which highlighted the need for a coordinated EU energy policy and occurred on the backdrop of geopolitical events. Consultations indicated strong support for building resilience by keeping strategic stocks of oil and gas and finding new import routes to strengthen security of supply. In the end, the Commission's policy proposals that addressed these were rejected by EUMS. Nor did the 2001 Treaty of Nice bring any additions of energy. The EUMS were also divided on long-term climate commitments. France, Sweden and Denmark prevailed, which led to a reaffirmed commitment to the Kyoto Protocol targets by EUMS. The EU's energy resilience was further strengthened with the adoption of the second liberalisation measures in 2003 and the adoption of the EU ETS. Notably, the 2005 consensus among EU leaders to address climate change and energy security challenges opened up to the EU's ability to create energy resilience—however, no evidence from chapter 3 points to the adoption of any substantial measures to do so.

The lack of a resilient energy system was made explicit due to the EU's inability to absorb the disturbances of the 2005-2006 and 2009 gas crises. Nevertheless, it placed the importance of security of supply and diversifying away from Russian imports high on the EU's agenda in 2005-2009. However, chapter 3 calls attention to the failure to consolidate EUMS energy priorities, ultimately leading to a missed window of opportunity to increase EU energy resilience. This can be seen by the addition of the energy chapter in the 2007 TFEU. While the addition ensured an EU-level energy competence, it still underlined the EUMS right to determine the conditions for exploiting its energy resources, its choice of energy sources and the structure of its energy supply. I argue that this has contributed to EUMS ignoring the importance of diversification away from Russia and can be seen through the example of Germany becoming dependent on Russian energy imports through the contested pipeline Nord Stream 1.

Notwithstanding, the TFEU led to developments that strengthened the EU's energy resilience. After this, the EU adopted the third package of liberalisation measures and constrained EUMS opportunities to decide their national energy supply structure through the 2008 RED and linked energy and climate policies through the 2009 Climate and Energy Package. These measures increased EU resilience by seeking renewable and indigenous energy while mitigating the climate and integrating the internal energy market. Other than renewables contributing to diversification, there is no evidence indicating policy changes in this period adequately addressed security of supply.

The security of supply objective yet again characterised 2009-2018 as the EU's view of Russia as an unreliable supplier was again strengthened due to critical geopolitical events. This led to security of supply being placed high on the EU agenda and finally resulted in a resilience-based EU measure to address security of supply. In 2010 the EU adopted a Regulation to safeguard security of gas supply by ensuring the continuous functioning of the internal market of natural gas in times of crisis. This was an important step to build resilience, given that a regulation is a binding legislative act that must be applied across the EU. Just as before, the time period still showed diverging security of supply priorities among EUMS. For instance, despite the controversy surrounding Nord Stream 1, in 2011, Germany authorised the building of Nord Stream 2. Italy also imported large amounts of Russian gas in this period. Clearly, for these two EUMS, a choice was made to prioritise cheaper gas rather than security of supply. Since this occurred after the 2009 gas crisis, I argue that this exemplified the neglect to take the geopolitical concerns and avoiding dependence aspects of security of supply into account. On the other hand, the 2015 Energy Union Strategy underlined all factors outlined in the resilience definition provided by O'Brien and explicitly aimed to increase EU energy resilience. Unlike in earlier periods, the 2015 strategy was designed to give the EU a broader scope to reduce its dependence on Russia. Moreover, the 2017 regulation regarding security of supply enabled a solidarity mechanism to come into effect in the event of a gas crisis. In 2018, the RED was revised and set an EU-wide target of 32% renewable energy in the total EU energy mix.

The underlying legislation of the Energy Union Strategy came into force in May 2019 through the 'Clean Energy for All Europeans' package. Despite this, the effects of the 2022 Russian invasion of Ukraine have illustrated that these efforts were unsuccessful in building a resilient energy sector. I explain this as the strategy mainly concerned long-term planning towards 2050. While the NECPs were to cover EUMS energy and climate plans between 2021-2030 according to the goals of the Energy Union Strategy, this again covers a 10-year period. As such, no evidence points to an incentive to work towards short-term solutions for diversifying away from Russian fossil fuel imports. That is until Russia invaded

Ukraine in 2022. Furthermore, the 2019 EGD and 2021 climate law make no reference to enhancing security of supply.

As mentioned, an overall finding is that important energy developments often have occurred in response to or on the backdrop of crises. Based on this, I argue that the EU's long pursuit of an ambitious approach to climate governance has been triggered by crises such as the 2006/2009 gas crises and the 2014 Ukraine crisis. The gas and the 2014 Ukraine crises emphasised the importance of security of supply and the EU's dependency on Russian energy imports but produced limited results. In addition to mitigating climate change and furthering decarbonisation, climate policies have also been pursued to promote competitiveness and economic growth in the EU. Moreover, it might be argued that the EU has pursued climate policies as a means to decrease dependency by promoting the uptake of renewables and energy efficiency. Despite this, I argue that there has been blatant neglect by the EU to adequately address security of supply concerns throughout its energy policy development. Ultimately, this was evident by the EU's excessive dependence on Russian energy on 24 February 2022. As such, REPowerEU is another EU energy policy development that has occurred due to a crisis. I argue that the Russian invasion has made it clear that the prosperity and security of the EU hinge on a stable energy supply.

Based on the discussion above, I argue that the substantial measures analysed in chapter 4 would not have been implemented if they had not been prompted by the Russian invasion of Ukraine and the subsequent launch of REPowerEU. The chapter 4 analysis has also made it evident that the EU is pursuing all three objectives of the energy policy triangle to build a resilient energy sector. The EU's current pursuit of energy resilience becomes particularly evident when comparing the energy policy developments of chapter 3 to the measures analysed in chapter 4.

Taken as a whole, I argue that all the actions taken due to REPowerEU are significant merely on the basis that it is a non-binding document. Moreover, by comparing the two analyses, the willingness of EUMS to jointly pursue essential EU-level energy policy objectives is made apparent. As such, REPowerEU has clearly indicates the vital role of cooperation and solidarity in responding to the crisis. This is especially significant in light of chapter 3, which illustrates the extent to which energy policies in relation to Russia, has divided EUMS in the past.

Furthermore, the discussion above reveal that the hostile geopolitical context has shifted the EU's energy policy direction. While REPowerEU addresses all three energy policy objectives, chapter 4 illustrates that the pursuit of security of supply and affordability currently dominates the EU's agenda, or at least has dominated between 24 February 2022 and April 2023. As such, the EU has primarily pursued measures to tackle issues related to the pursuit of security of supply and affordability. This is a shift from the previous time period, 2019-2021, which focused on climate mitigation and competitiveness due to the main objectives of the EGD being decarbonisation and affordability. In light of chapter 3, interesting parallels can be drawn. Section 3.4 found that the gas disputes of the 2000s interrupted the EU’s climate mitigation process.

Similar to that of section 3.4, the chapter 4 analysis alludes to a current imbalance in the EU energy policy triangle, with climate mitigation drawing the shortest straw. The German increase in coal consumption is a concrete example of this imbalance, making it obvious that the security of supply and affordability/competitiveness objectives currently prevail over climate mitigation. The expected new LNG regasification terminals also highlight another potential contradiction with the EGD and carbon neutrality target. The EU is

building and/or upgrading gas infrastructure to support the needed diversification, thus increasing the security of supply objective. On the other hand, creating costly infrastructure that might very well end up as additional future stranded assets creates another clear imbalance in the energy policy triangle in regards to the goal of carbon neutrality. Nevertheless, I argue that while such investments would be better invested in electrification, renewable deployment and storage, the EU's inability to build a resilient energy system has led to this being a so-called 'necessary evil' simply due to there being no other short-term options.

To address this challenge, the EU is actively promoting energy-saving and efficiency measures as powerful tools to reduce its dependency on Russian energy imports and maintain alignment with the objectives of the EGD. Given the significance of the latter for the EU, there is a strong emphasis on increasing the adoption of renewable energy in EUMS to bolster energy resilience through domestic production and advance the goal of carbon neutrality by 2050. Alongside the outlined policy developments for natural gas, it is evident that the EU is enhancing its internal energy market by leveraging interconnection, domestically produced energy and solidarity to bolster its energy resilience. My thesis demonstrates that today's connection between energy and climate cannot be dismissed.

While the EU's efforts of diversifying to phase out Russian fossil fuels within the timeframe of my thesis are remarkable, notable concerns follow the diversification. For instance, diversifying its energy suppliers by switching to other 'not free' autocratic/human rights violators to break away from the dependency on Russian fossil fuel imports is somewhat questionable from a purely strategic standpoint but also a moral one. This is especially interesting in light of REPowerEU being catalysed by the perspective of showing the EU's solidarity with Ukraine. Nonetheless, this can be counter-argued in the same way as above, that the EU is focused on efforts to strengthen its relationship with friendly partners such as the U.S. and Norway, but due to the need for diversification, the turn to other 'not free' countries is a necessary short-term evil.

6 Conclusion

The objective of this thesis was twofold. The first objective was to provide a thorough historical analysis of the EU's energy policy development to better understand why the EU has been unable to create resilience in its energy sector. This question arose due to Russia's invasion of Ukraine on 24 February 2022 and the significant shifts in the EU's energy sector in light of this significant geopolitical occurrence. Therefore, the second objective of the thesis was to analyse the effect of the EU's policy response, the REPowerEU plan, specifically in light of the aim to build a resilient energy sector.

My thesis contributes to the existing literature on EU energy policy by employing the EU's own energy objectives of economic competitiveness, sustainable climate mitigation and security of energy supply as an analytical framework. Through this approach, I have shed light on why the EU has been unable to create a resilient energy sector and the effects of the REPowerEU plan. Moreover, considering the recent occurrence of the Russian invasion of Ukraine, my analysis examining the impact of REPowerEU on EU energy policies stands out as a pioneering analysis in the area.

To this end, I analysed and discussed the development of EU energy policies from 1950-2023 using the energy policy triangle as an analytical framework. To do so, I posed two research questions. To answer the two research questions, I conducted a qualitative analysis of more than 150 documents consisting of primary, secondary, and tertiary sources.

The first question was, "Why has the EU not been able to build a resilient energy sector?" and analysed the historical development of EU energy policy development through the analytical lens of the energy policy triangle. Based on my analysis, the answer to this question is that there has been a reluctance among EUMS to relinquish sovereignty which left the Commission with limited legal competence to further energy policy development.

The main finding of my analysis underscores findings in the existing literature; that the interest of EUMS has determined the course of energy development. A clear pattern is the EUMS reluctance to transfer sovereignty to the EU level due to the energy sector's importance to the national economy and competitiveness. Prominent EUMS, such as Germany, the UK, the Netherlands and France have largely determined the direction of EU energy development. The Commission has been instrumental in advancing energy and climate policies. However, only when EUMS have actively participated will an EU-level energy policy materialise. Unlike existing literature, my analysis has also illustrated the focus of the different stages of EU energy development.

As the analytical framework suggests, the EU has struggled to pursue all three energy objectives successfully in a simultaneous manner. While development was slow, the EU has long pursued policies to achieve the goal of an internal energy market and to mitigate climate change. The analysis finds that security of supply has been an EU-wide concern since its 1952 inception. In addition, the East European accessions, geopolitical events and gas crises often placed the security of energy supply high on the EU's agenda. However, achieving EU-level policies that effectively address these concerns proved difficult. This is primarily the consequence of differing EUMS interests, contrasting energy mixes and the Commission's inability to consolidate these. However, this is not surprising given the

limited legal energy competencies granted to the Commission by EUMS. Therefore, I attribute the inability of adequate EU policy measures related to the security of supply objective to an EUMS neglect.

The second research question was "How does the Russian war in Ukraine and the subsequent launch of the REPowerEU plan affect the EU's energy policies?" and analysed the short-term effects of the war and actions taken based on the REPowerEU aim to phase out Russian fossil fuels. Based on my analysis, the answer to the second research question is that the Russian invasion of Ukraine and the subsequent launch of the REPowerEU plan has pushed the EU to build a resilient energy sector by developing policies that fulfil the three energy objectives. To underscore this, I have used the energy policy triangle to analyse and illustrate how the EU is currently pursuing this through the phase-out of Russian fossil fuels.

The main finding is that the EU has employed a diverse range of tools in response to the invasion of Ukraine and to implement measures outlined in REPowerEU. This includes adopting energy-related sanctions, diversifying energy sources and suppliers, strengthening relations with friendly third-country partners, adopting natural gas policy to ensure EUMS interconnection and solidarity, and promoting the uptake of renewable energy. As a whole, my analysis reveals a greater willingness for EU-wide energy policy and the importance of the Commission in furthering this. Unlike previous crises, the EU is currently making great strides to sufficiently address the security of supply issues that the Russian invasion of Ukraine has brought to light. Notably, a finding is the achievement of joint EU action based on solidarity and unity. This is a particularly significant accomplishment in light of the first analysis, which highlighted the EUMS tendency to promote national interests.

Regarding the objective of building resilience, the two analyses illustrate important factors as reviewed in the chapter 5 discussion. According to my previous definition of a resilient energy system, provided by O'Brien (2009) and the analysis presented in chapter 4, the EU's energy system was not resilient when Russia invaded Ukraine on 24 February 2022. The reason why the EU's energy systems were not resilient at that time was revealed by the chapter 3 analysis. For instance, the EU could not sufficiently act to reduce obvious vulnerabilities related to being dependent on a hostile energy supplier, nor could the EU adequately absorb the disturbances to its system caused by the gas disputes of 2005-2006 and 2009. More importantly, throughout its energy policy development, the EU has failed to provide the triple win of security, sustainability and climate mitigation. While the EU should be applauded for its ambitious climate goals throughout energy policy and focus on increasing the building and uptake of renewable sources, these do not account for its inability to reduce its dependency on imports of Russian fossil fuels. This is made evident from the finding that all 27 EUMS have been net importers of energy since 2013.

On the other hand, O'Brien's definition underscores my argument that the EU is seeking to turn the Russian invasion of Ukraine into a window of opportunity to build a resilient energy sector. My analysis of actions taken based on the REPowerEU aim to phase out Russian fossil fuels demonstrates this. Within the time frame of my thesis, the EU has diversified energy sources and suppliers, achieved better EUMS gas interconnection and increased the target of renewable energy. Nonetheless, the analysis has also made it clear the EU is currently mainly pursuing two of three energy policy objectives; an integrated and competitive internal energy market and security of energy supply. Thus, while great strides are being made to build a resilient energy, developments are happening at the cost of

climate mitigation objectives set forth by the EGD and Climate Law. Moreover, I argue that the EU's increased fossil fuel imports from new 'not free' countries is disconcerting from both a strategic and a moral standpoint. The analysis has also revealed that the EU's focus on security of energy supply has negatively impacted the climate mitigation objective of the EU through increased consumption of coal and the building of new and potential new stranded assets.

Looking ahead, I anticipate that the period from 24 February 2022 to April 2023 will be regarded as a critical juncture defining the course of EU energy policy development. Russia's invasion of Ukraine and the subsequent launch of the REPowerEU plan significantly impacted the EU's objective of ensuring security of energy supply. In light of the previous discussion, I envisage that the long-term success of the EU's efforts to ensure security of supply will be determined by how well the EU is able to merge energy policies and ambitious climate policies. This will be interesting to follow in the coming years as it requires that the EU builds a suitable economic model that upholds the competitiveness of the internal energy market that both benefits EUMS and drives the green transition. Therefore, I envision the next stage of policy development to encompass all three energy objectives: economic competitiveness, sustainable climate mitigation, and security of energy supply. This will be reflected by the EU, specifically the Commission's, attempt to consolidate these. Nonetheless, I also expect that this process will require time and foresee that diverging EUMS preferences will likely emerge despite the common agreement to phase out Russian fossil fuel imports.

Naturally, it will be interesting to keep paying close attention to how the EU's energy policies continue to develop in the months and years to come. It would be particularly intriguing to revisit the topic of EU energy resilience when the war in Ukraine comes to a conclusion. In the future, it would be valuable to expand upon the topic and research questions presented in this thesis, particularly as the long-term effects of the war on the EU's energy policies become more apparent.

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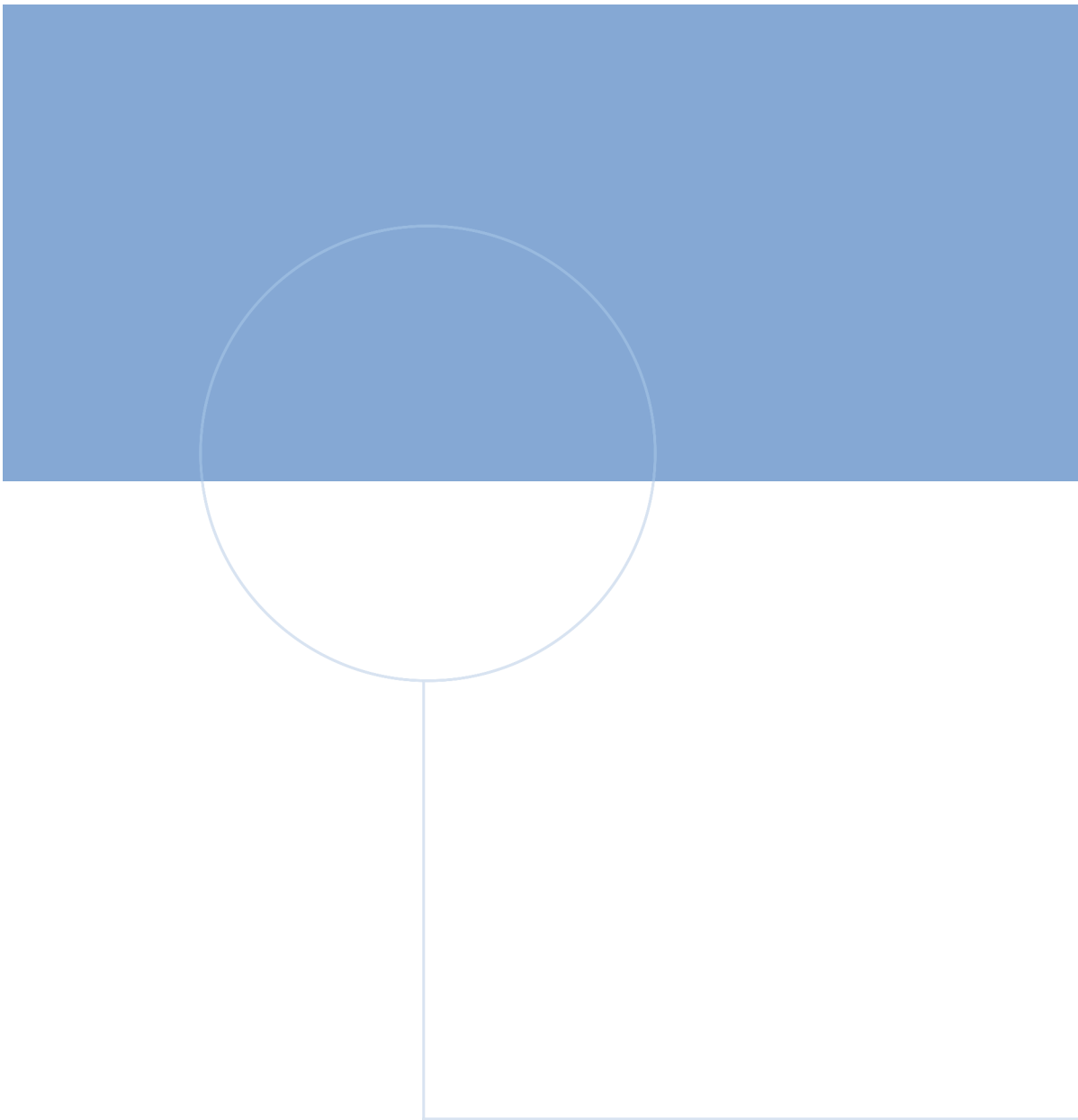

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