CENTRE for BRITAIN & EUROPE

UNIVERSITY OF SURREY

UK, EU and Third Party Energy Security Issues

2024 and Beyond

Prepared by

Professor Amelia Hadfield and Dr Mustafa Demir
Centre for Britain and Europe
Department of Politics
University of Surrey

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Table of Contents

>> Introduction <<

In the wake of Russia's invasion of Ukraine in 2022, the European Union (EU) has found itself at a critical juncture in redefining both its energy security and foreign policy. The drastic reduction in Russian gas imports from 41% in August 2021 to a mere 8% by September 2022 underscores this pivotal shift in material terms. However, the EU has also carved out REPowerEU, an ambitious, all-in approach that aligns its energy security firmly within the remit of its foreign and security policy. Is the EU still in the foothills of navigating the complexities of today's European energy landscape, or is it attempting an innovative form of 'multi-level' foreign policy? To explore the consequences of these developments, this Centre for Britain and Europe (CBE) Briefing Paper delves into the multifaceted strategies employed by the EU.

Professor Amelia Hadfield
Amelia joined the Department of Politics as Head in 2019. Since then, she has researched, taught, and engaged actively in her core specialisms of European and British foreign and security policy. Her expertise includes post-Brexit implications for UK and Europe, European security and defence, as well as European energy governance, and foreign policy more broadly. Amelia is the founding director of the Centre for Britain and Europe (CBE) and obtained prestigious Jean Monnet Centre of Excellence funding which supports a wide range of CBE activities. Amelia is also the Associate Vice President of External Engagement at the University of Surrey.

Dr Mustafa Demir
Mustafa is a Research Fellow in International Politics. Over the years, his academic pursuits have spanned a diverse range of topics, encompassing the influence of democratization on political economy and international relations, the intricate interplay of geopolitical and economic factors, energy and energy security, in shaping foreign policy choices. In addition to these areas of expertise, Mustafa has cultivated a keen interest in exploring the intricate relationship between religion and politics. His recent scholarly endeavours have centred around the nexus between populism, with a specific emphasis on religious and civilisationist populism, and authoritarianism. He has also turned his scholarly gaze toward the emerging international alliances among populist authoritarian actors, a phenomenon he aptly terms the 'populist international.' These captivating subjects have informed and enriched his recent publications, adding to the depth and breadth of his academic contributions.

Part I:

EU On Manoeuvres? Navigating the Geopolitical Energy Chessboard

REPowerEU: A Tripartite Strategy to Secure EU Energy Supplies

The first major policy response by the EU to the Russian invasion of Ukraine was its REPowerEU plan set up in May 2022. With its three-pronged strategy of saving energy, producing clean energy, and diversifying energy supplies, the REPowerEU represents an integrated approach aligning technological that aligns technological solutions with geopolitical considerations. Critics would argue that there is little new to the first two goals of energy efficiency and carbon-free energy production, as they essentially align with the overarching goals of the European Green Deal. What is new, however, is the EU's determination to diversify energy supplies, radically redrawing its own energy security composition in terms of both non-fossil fuel use overall, and a gradual shut-off of Russian gas, upending its relations with Russia at a stroke. EU foreign affairs chair Josep Borrell could not have been clearer in his insistence that REPowerEU would have significant energy security and foreign policy impacts, in blog in early March 2022 :

> *We will not abandon the defence of human rights and freedom because we are dependent on Russian gas…This tremendous conflict can only end positively with a return by Russia to basic international norms and principles… We have mobilised our energy capacities and we have to continue doing so, pooling the capacities of the member states and the EU institutions. We have to increase renewables and build green hydrogen production capacities.*

This stance was echoed on the Commission's website in May 2023:

> *When Russia invaded Ukraine, it became even more clear that the EU needed alternative ways to ensure its energy supply. While it is true that some Member States historically imported more Russian gas than others, the consequences of possible disruptions would be jointly suffered by all. This is why it is imperative that all Member States are in this together, ready to share gas with their neighbours in case of need.*

Borrell's pugnacious language notwithstanding, other international actors including the IMF concur, arguing that the EU's post-invasion energy security represents "a coordinated effort by governments to reduce energy demand, augment supply, maintain open internal energy markets, and protect vulnerable consumers."

Nearly two years after the invasion, two questions present themselves at this point. Why did the EU feel the need to bundle these three goals together within the policy umbrella of REPowerEU, and how has the policy fared in both energy security and foreign policy terms in its first eighteen months?

A Trinity of REPower EU Goals

In tackling the first question, from the EU's perspective, the trinity of REPowerEU goals align around the overall goal of decarbonising the EU's energy ecosystem. Ambitious energy efficiency and

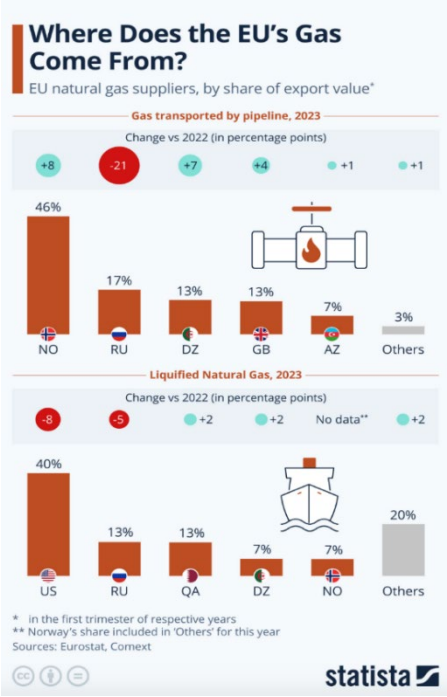
savings commitments fosters demand-side reductions, while the production of clean, increasingly carbon-free energy supports supply-side reductions.

Weaning the entire European energy ecosystem off fossil fuels is effectively the end-goal for Europe; decoupling energy producers, industry, business and consumers from oil and gas use in a way that finally aligns with the earliest principles of the EU's climate change commitments, while simultaneously reducing both its material vulnerability on, and political sensitivity to Russia. In this way, reduced vulnerability equates to enhanced self-sufficiency. This aligns nicely not only with foreign and security goals premised on increasing the strategic autonomy of the EU in key areas, including energy security, but less overall dependence on key strategic partners, including Russia. To be clear, REPowerEU accelerates the EU's role in global environmental stewardship by achieving climate neutrality at home in tandem with COP commitments, and a long overdue strategic response to its historic dependence on external – and principally Russian – oil and gas imports. Those two goals alone represent a considerable policy win for the EU. A third win may also be achievable, namely a more coordinated structure of collective energy security amongst the EU Member States, increasingly (and possibly permanently) managed by the European Commission itself. This goal however, rests entirely upon the sustainability of the first two goals in both energy and foreign policy terms.

New Partners, New Challenges?

The initial sanctions against Russia driving down imports have arguably begun this process, with a significant net drop in oil and gas purchase, transit and use from Russian sources. However, diversifying the entire EU network, whilst aiming for an eventual sum-total fossil fuel turn-off presents a mammoth challenge; various reports suggesting that the shift could not happen before 2050. Diversification may therefore take on two meanings. First, in terms of preferred suppliers, favouring Norway, Qatar, and North and sub-Saharan African suppliers over Russia. Second, in terms of sequencing: reducing oil supplies as a first step, whilst continuing to rely on natural gas, and reducing pipeline gas in favour of LNG supplies, to minimize potential disruption to various energy infrastructure.

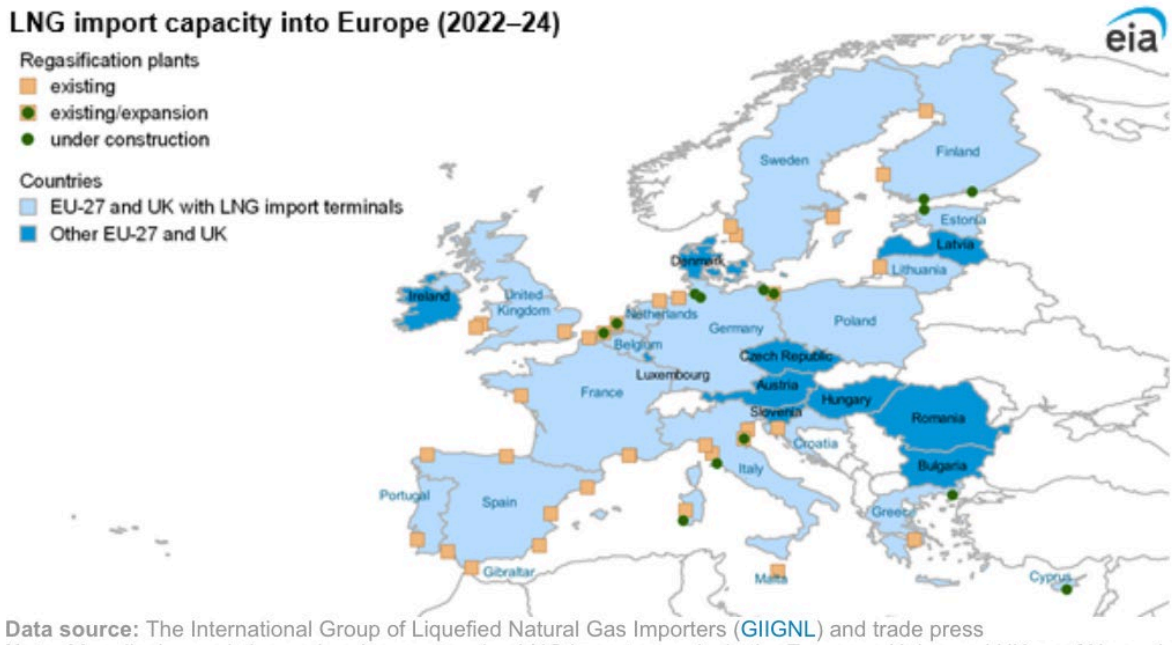
Figure 1. *The origin of EU's gas*



From this perspective, natural gas, despite its environmental impacts, operates within REPowerEU (and related policies) as a key transition fuel, underwriting the EU's energy supplier, energy type, and energy transport method preferences. The consequence however is that the EU – at least in the medium term - is ever more firmly embedded in the highly competitive global gas market, with its own inbuilt vulnerabilities on LNG terminals, shipping, and supply chain issues. In this arena, key players including the USA, Qatar, and Russia together account for around 70% of LNG supplies (see Figure1). This is a responsive, if not always predictable market.

In the past two years, this market has responded favourably to the EU's goal of diversifying away from Russian gas, with countries like Norway having ramped up exports, and Qatar, Algeria, and Egypt emerging as significant LNG suppliers to the EU, as well as the United States, still driven by its extensive domestic shale gas production. The challenge for the EU beyond merely securing alternative energy sources is establishing a strong and competitive presence in a market largely controlled by these long-dominant suppliers, not just as a buyer, but an investor, and indeed as a transit location to other natural gas customers.

Figure 2. *Liquefied Natural Gas (LNG) import into Europe, 2022-24*



Data source: The International Group of Liquefied Natural Gas Importers (GIIGNL) and trade press
Note: Map displays existing and under construction LNG import capacity in the European Union and UK as of November 2022. Capacity under construction is expected to come online in 2023–24. LNG = liquefied natural gas.

Dividends and Challenges for REPowerEU

The first dividends of REPowerEU appear positive. It is difficult to disagree with the overall principle of shifting from protracted dependency on a few, volatile energy suppliers to a structure of energy self-sufficiency. As illustrated, this requires a delicate balance of suppliers, energy type, and modes of transport on the one hand, but which also ensures no new dependencies are permitted that could have negative implications for foreign policy. If the former undermines the latter, then the entire self-sufficiency philosophy driving REPowerEU falls apart.

Nailing down this dividend therefore is key. The first and best example thus far has been the approach to collective energy security amongst the EU Member States via the new EU Energy Platform. The platform facilitates the aggregation of gas demand required across the EU and enables the coordinated purchasing of natural gas at a European level in a coordinated fashion. Something of a latter-day replica to the European Coal and Steel Community, the EU Energy Platform is designed to increase the EU's bargaining power in the global energy market as a single entity - rather than the myriad, frequently competing Member State-level demands – thereby consolidating the EU as an international energy 'actor', coordinating its negotiations with international exporters, and reducing the sum total of regional dependence on any single supply source. The prospective energy security benefits of the EU Energy Platform are clear - coordinated energy purchases externally, and the gradual establishment of a "secure energy zone" domestically for Europe. Equally, the platform currently only operates as a matchmaking mechanism rather than a direct purchasing platform (Barnes, 2023), so requires further development to be fully collective in this respect.

Whether the benefits of the EU Energy Platform can translate into material, and sustainable diplomatic wins for the EU is the crucial question, one which goes to the heart of the rationale to tie in energy security with foreign and security policy. Arguably, for both effective diversification of medium-term natural gas suppliers, and the securing of dependable alternative energy sources, strong diplomatic efforts are essential. Indeed, the entire endeavour of integrating the EU's highly complex – and largely unintegrated - energy market, *and* its security needs within one of the least integrated EU frameworks - namely foreign policy – is a significant challenge, institutionally and practically. This process has demanding requirements across the entire EU, both internally and externally. The latter involves skilful diplomacy to establish and maintain robust partnerships and ensure safe and developing transport routes for energy supplies. Such an approach in turn. underscores the need for a cohesive strategy where both foreign policy and energy security are not merely aligned, but visibly symbiotic, the one reinforcing the other on the basis of self-sufficiency.

Keeping REPowerEU On Course

In a CER report, Elisabetta Cornago analyses how the energy price spike of 2021-22, triggered by Russia's invasion of Ukraine, catalysed changes in the EU's approach to energy policy, aligning it more closely with its climate objectives. While this shift has led to a considerable increase in renewables within the EU's energy mix, it has also produced an unhappy tension between the EU's 'medium to long-term climate goals' and its immediate need to find alternatives to Russian pipeline gas.

While consensus remains across the EU that transitioning to renewable energy could in time lead to energy self-sufficiency, the feasibility of accomplishing this in the medium term is challenging due to the significant time and financial commitments involved. As a result, diversifying EU energy sources presents a more practical medium-term strategy. This in turn may require the EU to reframing its climate goals as a medium-term solution for both its green ambitions and its energy security. To mitigate these interdependent challenges, the EU may opt to compartmentalize these aims, viewing them as separate but interconnected facets of the EU's broader energy strategy. Within this framework, the diversification of energy suppliers is likely to remain a priority in its diplomatic efforts, and in the medium term integrated into a cohesive EU foreign policy.

The REPowerEU initiative, with its focus on decreasing dependency on Russian gas, has the potential to significantly mitigate energy dependence in both the short and long term. Nonetheless, the broader issue of dependency persists as an ongoing challenge, even with a full transition to renewable energy sources. As one of the largest global economies, the EU will continue to rely on

critical raw materials essential for its economic framework, potentially creating new diplomatic and foreign policy constraints due to these dependencies.

This evolving situation has been recognized by the EU's leading diplomats, Josep Borrell and Wopke Hoekstra, in a recent op-ed reflecting on COP28 meeting. Borrell and Hoekstra highlighted that:

> The green transition will shake up the global balance of power. For the EU, this process implies both benefits and risks. On one hand, it will reduce our dependence on fossil fuels – a dependence that, as Russia's war against Ukraine has demonstrated, carries high political and economic costs. On the other hand, it could create new dependencies, such as on producers of critical raw materials. Avoiding that outcome – and bolstering our security – requires us to ensure diversity of supply. To that end, we must strengthen our ties with Africa, Latin America, and South Asia, developing tailor-made partnerships that allow for value-addition and job creation in our partner countries.

Borrell and Hoekstra, in discussing the EU's initiatives to combat climate change, also emphasize the significant steps the European Union is undertaking. Through the European Green Deal, the EU aims to cut its greenhouse gas emissions by at least 55% by 2030, ensure that over 42.5% of its energy comes from renewable sources, and improve energy efficiency by at least 11.7%, with the ultimate goal of achieving climate neutrality by 2050.

However, they also caution that these efforts alone might not suffice. They acknowledge, "Unless our mitigation and adaptation efforts are equal to the climate crisis, these trends will accelerate and spread, with truly catastrophic results." This indicates that the EU's commitment to a 100% transition to clean energy and achieving climate neutrality by 2050 may not be sufficient to ensure both its security and that of the globe, especially if other major economies continue to rely heavily on fossil fuels. Additionally, the socio-political and economic consequences of climate change, such as mass migration and the costs of adaptation, could have a significant impact on the EU.

Reforming the EU's Electricity Market

Due to the structure of the EU's electricity market, the price of power remains based on the cost of the fossil fuels. Electricity market reform remains the EU's long-term response to the energy crisis instigated in 2022, in order to avoid price shocks in the future.

In a recent CER report on European Electricity Market Reform, Sir Philip Lowe highlights the perennial challenges faced by energy policy-makers in balancing the 'energy trilemma' : security of supply, sustainability (decarbonisation), and affordability in the EU energy market. The report notes the impact of geopolitical tensions on energy imports, aging infrastructure, and the need to diversify energy sources to reduce dependence on a single supplier on achieving these objectives. Loewe suggests that balancing the need for affordable energy prices for consumers and businesses while simultaneously investing in sustainable energy solutions poses a significant challenge. This means rising energy costs, market volatility, and the cost of transitioning to cleaner energy sources can impact affordability, especially for vulnerable consumers. Promoting stable energy prices through reforms including long-term contracts for energy and deepening European energy integration are the most likely steps forward for the EU; this in turn of course demands urgent, collective action in creating a fully functioning market for carbon-free electricity in Europe.

Considering these challenges, it is imperative for the EU to develop a more robust multilateral diplomatic strategy. This strategy should focus on mapping out the geographies of risk and opportunities associated with climate change to mitigate its impact effectively. Such a diplomatic approach would not only address the immediate challenges but also position the EU as a leader in global efforts to combat the broader effects of climate change.

REPowerEU architects need to think carefully about the high stakes of pursuing the policy to its logical conclusion, amending some of its goals, and the risks of abandoning it in the face of increasing challenges. Coordinating and strengthening EU Member States' energy requirements is a good start, but the entire process needs to be institutionalised at EU level and systematised within the global energy markets. Would additional – possibly supranational – powers agreed amongst the Member States and endowed to an appropriate EU institution (as with trade) assist in this goal? Granting the Commission such powers begins with the goal of self-sufficiency, but could spur the necessary completion of EU energy markets and integration with external affairs. An additional dividend would be to further refine EU energy diplomacy, as a clearer component of its overall foreign and security policy. Not merely gas purchasing, but the strategic interaction with markets and suppliers to tackle the terrain of energy geography: including pipelines, LNG terminals, shipping routes, as a well as increasing the supply chain of renewable energy sources, and their accompanying technologies.

From the fossil fuel perspective, states involved in large-scale pipeline construction are an obvious start, particularly for the EU's ring of neighbouring states to the east and south. Azerbaijan has supplied increasing amounts of natural gas to the EU (particularly southern and south-eastern Europe) via the Trans-Anatolian Natural Gas Pipeline (TANAP) and the Trans-Adriatic Pipeline (TAP) (Rusi, 2022). The Southern Gas Corridor, transportation of natural gas from the Caspian Sea region via Azerbaijan, Georgia, Turkey, Greece, Albania and Italy, became fully operational in late 2020. The EU's strategic diplomatic reengagement with these regions would likely involve reconfiguring its relationship with Turkey, considering its pivotal geographical position as a potential energy transit route. Linking Iraqi Kurdish gas to the initiatives like the TANAP, which traverses Turkey, may be an option that presents itself in the medium-term (Demir 2019; 2020). Successfully undertaking such endeavours requires a robust diplomatic framework, capable of navigating the intricate interplay of energy security, foreign policy, and regional geopolitics.

North Africa is also emerging as a vital alternative in the EU's diversification strategy. As of January 2023, the continent represented 20% of Europe's gas imports, with the Medgaz pipeline, a 210km subsea connection between Beni Saf in Algeria and Almería in Spain playing a leading role. Avoiding third or transit countries, the Medgaz route bolsters supply security to Southern Europe. Following the Russian invasion of Ukraine, Egypt and Israel have also stepped up as significant energy partners for the EU. In June 2022 for example, the EU and Egypt reached an agreement to transport natural gas from itself, Israel, and other Eastern Mediterranean sources to Europe via Egypt's LNG export facilities (EUComission). As a result of this agreement, Egypt has now directed 80% of its gas exports towards the EU (Reuters, 2023). The recent conflict in the Middle East has adversely affected gas production and export volumes in the region (Reuters, 2023b); equally, the overall potential of the area's natural gas resources, as well as the profound need for more visible support from the EU as a whole may induce the EU into considering an active role in regional post-conflict reconstruction.

Numerous African countries are gaining prominence as major gas producers, thereby enhancing their role in Europe's energy landscape, with Senegal, Nigeria, and Angola representing potential sources. Senegal itself, along with Mozambique and Tanzania have recently uncovered large natural gas reserves, which is likely to spark increased investments in their gas infrastructure (EIIR). The

Greater Tortue Ahmeyim (GTA) LNG Project near the coasts of Senegal and Mauritania exemplifies Africa's potential as an energy provider for the EU. This gas field is believed to contain about 15 trillion cubic feet (approximately 425 billion cubic meters) of gas, a volume five times greater than Germany's total gas consumption in 2019 (Aljazeera, 2022).

Knocking REPowerEU Off Course

Externally, REPowerEU's primary challenges encompass many of its opportunities, from both an energy security and energy diplomacy perspective. Two other challenges however need to be borne in mind.

The **first** is the need to re-establish relations with Russia, both during and after the conclusion of hostilities with Ukraine. Here, divisions across EU Member states in terms of attitudes towards Russia, the role and scope of sanctions, and the challenges of drawing down their use of Russian oil and gas, have begun to affect the domestic composition underwriting REPowerEU. Divisions that produce actual opposition to a given EU approach, or policy, are paradoxically a key part of EU integration and a method of identifying the limits to a given approach. Some of these visions will be predicated on how to deal with reintegrating Russia into some sort of relationship with the EU: both politically, and then from an energy perspective. Could a post-hostility reset support, the EU's permanent drawdown of Russian fossil fuel imports, prompt Russia to sell its wares to markets elsewhere, or even permit increased amounts of natural gas to begin flowing back to the EU?

Whilst most EU member states back the EU's ambitious climate change goals, their material implementation, and the consequential commercial and political knock-on effects may be the difference between REPowerEU becoming a short-term approach to the invasion of Ukraine, or a permanent feature in a new drive for EU self-sufficiency. The **second** is the role of Ukraine as a strategic energy actor within the EU and the European energy ecosystem. Integrating Ukraine into the EU's energy framework, considering its status as a key transit state with extensive pipelines, would significantly reshape the European energy landscape. This integration would not only diversify energy routes but also solidify Ukraine's strategic role in European energy security. However, this move is intertwined with the complex issue of Ukraine's potential EU accession, a process fraught with geopolitical nuances, especially in the context of restoring relations with Russia. Navigating this delicate balance will be crucial for the EU, as it seeks to strengthen its energy independence while managing intricate diplomatic relations.

In conclusion, REPowerEU faces multifaceted external challenges. Establishing relations with Russia post-conflict, addressing divisions among EU Member States, and considering Ukraine's role in the European energy ecosystem are pivotal. The initiative's future lies in balancing these complex dynamics, ultimately determining whether REPowerEU remains a temporary response to current crises or evolves into a lasting pillar of EU energy strategy and self-sufficiency.

Recently, France and Germany initiated a strategy to "artificially reduce power prices," aiming to protect the competitiveness of their industries. This approach, however, has caused concern among other EU member states, as it potentially deepens inequalities within the bloc. Such a move could pose a significant challenge to the REPowerEU initiative and, as some suggest, might even undermine the EU's single market. This strategy could expose vulnerabilities in the Union, making it susceptible to external rivals. This sentiment and the perception of the French and German governments' actions by smaller EU members were succinctly articulated by Timo Tatar, Under-Secretary for Energy at Estonia's Climate Ministry with the following words:

"Unilateral subsidies in some single member states will create unhealthy competition within the EU, whereas our joint efforts should be to increase the competitive position of the whole EU compared to other world economies."

The EU's Green Deal

The European Green Deal is a set of policy initiatives to tackle with the climate change announce by the EU in 2019. As part of this ambitious Green Deal, the European Union has set a goal to cut greenhouse gas emissions by 55% by 2030, relative to 1990 levels and became climate neutral by 2050. Additionally, the European Commission has established a goal of reducing net greenhouse gas emissions by 90% by the year 2040, as promised by Wopke Hoekstra, the EU's Commissioner for Climate Action, during his election campaign in October 2023.

However, environmental groups have expressed disappointment that the EU has not yet set a more ambitious "a legally binding target" for reducing emissions by 2040, in line with the goals of the Paris Agreement, which would help to achieve the long-term goal of a decarbonized economy by 2050. On the other hand, European industries assert that they support the EU's climate goals, but caution that decarbonization policies must also safeguard their competitiveness in comparison to companies outside of Europe.

According to a recent report from the EU's Science Advisory Board, to achieve this target, the current pace of emissions reduction needs to effectively double. While the scientific rationale behind this objective is straightforward, the real challenge lies in navigating the political landscape to enact and enforce the necessary regulations. However, law-making and regulation implementation are inherently political undertakings. This becomes particularly evident when considering the varying stances within the EU's political spectrum.

A central aspect of the Green Deal is the promotion of environmentally responsible farming practices. To make food systems more sustainable, the Commission published the Farm to Fork Strategy under the Green Deal in 2020, aiming to decrease the environmental and carbon footprint of food production and consumption. Given that current food systems account for nearly one-third of global greenhouse gas emissions, this strategy is a crucial element of the European Green Deal. However, the recent report of Advisory has expressed concerns over the insufficient efforts and lack of legislative proposals to support the implementation of this strategy. These development underscores the complex interplay between scientific imperatives and political decision-making, highlighting the potential challenges in uniformly applying the Green Deal's objectives across diverse political ideologies within the EU.

From the standpoint of Spring 2024, the European Commission's current term is nearing its end, and the incoming Commission will need to begin swift work on various laws that will help the EU achieve climate neutrality by the middle of the century, including increasing the carbon pricing system and speeding up the elimination of fossil fuels.

Upcoming European Elections: The Populist Radical Right and the Future of Green Europe

The European Union (EU) is gearing up for its upcoming elections, set to take place from June 6-9. These elections, which will see 705 Members of the European Parliament (MEPs) elected across 26 member states for a term spanning 2024 to 2029, are shaping up to be a potential turning point for the EU. This is particularly due to the rising influence of far-right populist parties within the bloc.

The significance of these elections is amplified when considering the enhanced role of the European Parliament post the Lisbon Treaty of 2009. This treaty elevated the Parliament's authority, granting it equal legislative power alongside the Council and enabling it to shape Europe's political direction. As such, the 2024 elections are more than a routine democratic exercise: they carry substantial weight in defining the future trajectory of the EU. The possibility of a shift in the parliamentary majority towards extremist right-wing parties looms large, threatening the EU's core liberal values, including its commitment to liberal democracy, human rights, and free-market principles. The ramifications of such a shift could be profound, potentially leading to significant changes in the EU's governance, economic policies, and overall approach.

The intersection of politics and policymaking is notably visible in the EU's legislative processes. Differing political views within the EU often lead to varied stances on key issues. For instance, a leaked draft of the 2024 EU election manifesto from the European People's Party, currently the largest party in the European Parliament, indicates a possible strategic departure. The draft suggests a movement away from strict regulations, including a reversal of the EU's ambitious plan to phase out combustion engines. This indicates the complex political landscape the EU navigates, especially in areas like environmental policy and regulation, where diverse political ideologies directly impact the decision-making process.

One important aspect of the political landscape is the potential influence of the far-right's ties to authoritarian regimes, such as Russia. Some observers view this as a "love in the air" relationship between Putin and Europe's far-right political parties (Polyakova 2014, 36). While some others argue that the invasion of Ukraine has reversed this trend, others have highlighted the concerning trend of backdoor diplomacy and the projection of "sharp power" by Russia through these parties within democratic systems. This intricate interplay between internal and external political forces is a crucial element in shaping the EU's foreign policy decisions. Certain analysts have observed that prominent far-right leaders, such as Orbán, Wilders, Fico, Le Pen, the AfD, and the Austrian Freedom Party, have advocated for closer ties with Russia under Vladimir Putin's leadership. If their sway in Brussels grows, this could have negative consequences for Kyiv.

As the EU prepares for these crucial elections, the outcomes are set to influence not just internal EU policies but also its role and stance on the global stage, particularly in promoting a Green Europe. The direction that the EU takes post these elections will be critical in determining its ability to maintain and advance its foundational principles in an increasingly complex and polarized global environment.

Part II:

UK's Energy Profile

In the 21st century, energy dependency is a matter of degree. With very few exceptions, no country is completely self-sufficient in meeting their energy needs. Most of these energy-producing countries have economies dependent on energy, which means that they are still reliant not on energy itself, but on energy markets. Therefore, it can be argued that energy-related dependencies heavily influence and occupy the foreign relations of modern countries/economies, as energy is essential to power and connect human societies.

In contemporary discussions, the emphasis is on the type of energy and reducing, if not completely eradicating, the contribution of fossil fuels to global warming and climate crises through the emission of harmful gases. In this regard, the UK is enhancing its capabilities. Notably, the government's statistical release in December 2023 revealed a significant drop (31%) in fossil fuel electricity generation, which was surpassed by stronger renewable generation and increased net imports from France. Statistics also indicated a 7% increase in renewable electricity generation, amounting to 44.5% of all electricity generation. As a result, renewables outpaced fossil fuels in electricity production.

UK as an Energy Producer and Consumer

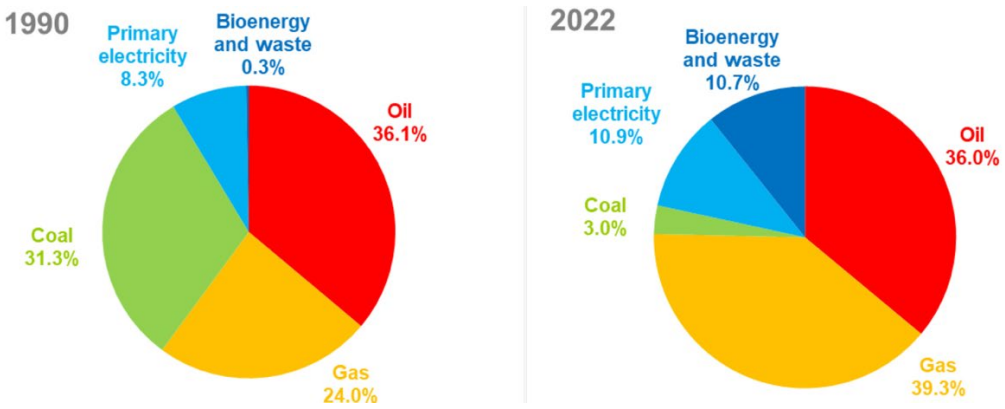
The statistical release on 21 December 2023 revealed a decline of 8% in overall energy production compared to the same time frame in the previous year. Specifically, oil production experienced a drop of 10%, marking a new low for a quarter, while gas production fell by 13%. However, there was a notable rise of 17% in energy production from renewable sources, including wind solar and hydro.

In 2021, the UK's domestic oil production accounted for about 72% of its oil consumption. This corresponds to around 26% of the country's overall energy consumption (as shown in Chart A below, which is taken from the *UK Energy in Brief* and displays the UK's energy mix over the past 30 years). The UK obtains roughly 50% of its natural gas from within its own borders, with the North Sea providing an estimated 50%. This equates to approximately 20% of the country's overall energy usage (as illustrated in Chart A below).

However, it is important to note that North Sea gas reserves are expected to be depleted by 2030. Currently, these reserves supply about 25% of the UK's domestic gas needs, equivalent to 10% of its total energy consumption. The UK must plan to replace this 10% energy gap, potentially through increased renewable energy usage or finding new suppliers. Given the projection that gas will remain a key transitional fuel until at least 2050, the UK needs to identify alternative sources to compensate for the anticipated 25% shortfall in domestic gas production by 2030.

In terms of consumption, the chart shows a substantial decrease in coal usage and a significant increase in natural gas and bioenergy & waste utilization. The increase in primary electricity generated by renewables, which is 2.6% and represents 10.9% of the total, provides insight into the progress towards and feasibility of achieving the zero-carbon economy target in the near future.

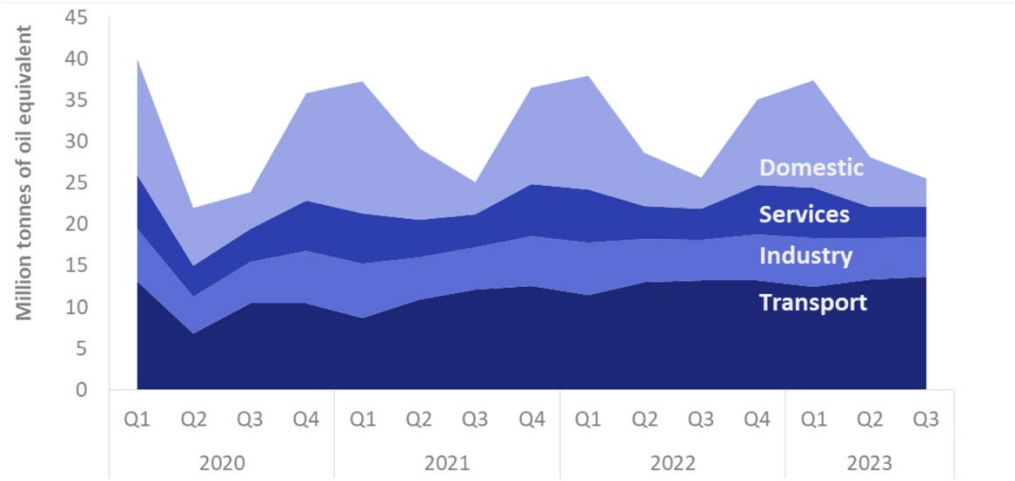
Figure 3. *Overall Energy, Inland Energy Consumption, 1990 And 2022*



(Note:Primary electricity includes nuclear, wind, solar, hydro and net imports. Source: UK Energy in Brief 2023)

According to the government's Statistical Release on 21 December 2023, energy consumption (excluding non-energy use) in the third quarter of 2023 decreased by 0.4% compared to the same period in the previous year. The release highlights that while transport consumption increased by 3.3%, domestic consumption decreased by 6.3%, and service sector consumption and industrial sector energy consumption both fell by 5.1% and 2.3%, respectively. The decline in consumption levels can be partly attributed to the impact of higher energy and other prices, resulting in domestic and industrial consumption levels being the lowest recorded for the third quarter of the year in this century.

Figure 4. *Final Energy Consumption by user*



Navigating the Transition in the UK's Energy Policy Amid Economic and Environmental Considerations

As we have also revealed before, natural gas is viewed as a transitional fuel to achieve a net-zero carbon economy. Hence, it would be advantageous to evaluate the UK's energy outlook in the near

and medium term by considering the changes in efficiency and gas import levels, as well as the dependability of sources.

When compared to other EU economies such as Germany and France, the UK appears to be more independent. According to statistics, the UK's domestic energy consumption per household is 15-19% lower than that of Germany and France, respectively. Additionally, there has been a significant improvement in energy efficiency over the past two decades. Specifically, the technical efficiency of the UK's domestic sector has increased by 33%, resulting in households using one-third less energy to produce the same level of output as in 2000.

The United Kingdom has been importing approximately half of its gas consumption. In light of the conflict in Ukraine, there has been a significant increase in gas imports from non-EU countries, while fuel exports to EU nations have increased sharply.

Since mid-to-late 2021, the easing of Covid-related restrictions has led to a surge in fuel demand, which has been compounded by the Russian invasion of Ukraine and the subsequent increase in prices. Like other European economies, the UK has had to find alternative suppliers for fuel due to sanctions on Russian imports.

The decision to lower the Carbon Price suggests a continued reliance on fossil fuels in the near future. This situation has caused alarm among analysts, who fear that the low cost of polluting will hinder investment in renewable energy. This concern was emphasized by Adam Berman, the deputy policy director at Energy UK, who recently urged that:

> *"A low carbon price sends absolutely the wrong signal about the UK's commitment to net zero…. We need a strong, stable, and predictable carbon price signal to ensure that investment heads in the right direction."*

Further complicating the landscape of the UK's energy policy is the Labour Party's significant reduction in its green spending pledge. Sir Keir Starmer, the leader of the Labour Party, announced a reduction in the party's green spending commitment from £28 billion to £4.7 billion. Despite the substantial decrease, Starmer defends the adjustment as a pragmatic response to changing conditions, underscoring the need for flexibility in policy planning. This decision is particularly salient given the Labour Party's potential to influence the UK's policy direction in the coming decade, as suggested by the latest YouGov/Times voting intention poll.

These developments—both the lowering of the Carbon Price and the Labour Party's adjustment of its green spending pledge—signify a critical juncture for the UK's energy policy. They reflect a balancing act between economic considerations and environmental commitments. As the UK navigates these policy adjustments, the nation's path toward reducing its reliance on fossil fuels and enhancing its investment in renewable energy remains under scrutiny. The decisions made today will undoubtedly shape the UK's energy landscape. Given these developments, it is clear that natural gas, particularly in its liquefied form (LNG), will maintain a significant role in the UK's energy mix for the foreseeable future.

Part III:

UK-EU Relations

In June 2016, the United Kingdom held a referendum and decided to leave the European Union. In January 2020, the UK officially left the EU, and a transition period lasting until December 31, 2020, was established to allow for the adjustment to the new relationship between the UK and the EU. This period culminated in the agreement of the Trade and Cooperation Agreement (TCA) between the UK and EU on Christmas Eve 2020.

Initially sceptical about the European Union, there is now a growing sense of scepticism towards Brexit itself (Katwala, 2023). The stalemate during the exit process and some economic consequences have played an important role in this. More people now believe that leaving the EU would have a negative impact on the influence that Britain is able to exercise in the world (Curtice and Montagu, 2020). A recent study by British Future on Public Perspective on UK-EU (2023) relations shows that support for closer relations with the EU has significantly increased after Brexit. This does not mean that the UK will return to the EU, but it suggests that the UK will need to develop closer, special relations with the EU. This closer relationship will likely benefit and require the UK's energy profile as depicted above.

Trade and Cooperation Agreement (TCA): A New Foundation for the Post-Brexit UK-EU Relationship

The UK-EU Trade and Cooperation Agreement (TCA) is a comprehensive accord that addresses a wide range of topics such as trade in goods and services, investment, fisheries, *energy*, transport, and law enforcement. Furthermore, the TCA encompasses provisions related to fair competition, conflict resolution, and governance mechanisms. The report also examines the challenges in fulfilling commitments and outlines the process for dispute resolution and the review clause, underscoring the importance of joint assessments. It serves as a new foundation for the post-Brexit bilateral relationship between the UK and the EU, enabling ongoing trade and collaboration in several domains. Additionally, the TCA defines regulations and processes for dispute resolution and maintaining a balanced competitive environment.

The UKICE 2023 report offers a comprehensive analysis of the TCA, focusing on key provisions and potential areas for review. It explores the possibility of enhancing cooperation in areas such as cyber security, competition policy, intellectual property, and energy, while also addressing the challenges associated with fulfilling commitments. The review of the TCA could lead to changes in various areas, including energy security. However, any changes would depend on the political will of both parties and the outcome of negotiations.

Post-Brexit Gas Trading between the UK and EU

The United Kingdom has emerged as a critical participant in the European Union's gas market, thanks to its substantial contributions and its proximity to the region. In the year 2023, the UK's net pipeline imports to the EU totalled over 15 billion cubic meters (bcm), accounting for roughly 15% of the EU's overall gas imports for that year (see Figure 1). To put this into perspective, the quantity of natural

gas imported from the UK even surpassed that received from Azerbaijan via the Trans-Anatolian Natural Gas Pipeline (TANAP, see Figure 5), making the UK an influential actor on the EU's energy landscape.

After Brexit, the trade of natural gas between the UK and the EU is subject to several new regulations and frameworks, as the UK is no longer part of the EU's Internal Energy Market. Key aspects of these post-Brexit regulations include. TCA sets out the general framework for trade, including natural gas. While it avoids tariffs and quotas on goods, it does not provide for the same level of market integration that existed when the UK was an EU member.

Under the TCA, tariffs and quotas on natural gas trade are generally avoided. However, if either party diverges significantly from agreed standards or causes unfair competition, tariffs could be imposed. TCA's provisions regarding ***energy cooperation between the UK and EU*** notes that both sides are committed to optimizing the use of shared infrastructure such as gas and electricity interconnectors, and that discussions are ongoing regarding deepening cooperation, including new pipelines and an early warning mechanism. However, as UK in a Changing Europe, reasons, TCA commitment to improve the efficiency of energy transfers as a priority has not yet been fulfilled, which may increase UK energy costs and hinder infrastructure investment. TCA provisions on energy cooperation expire on June 30, 2026, both parties have good reasons to extend or even expand these provisions due to the increased importance of energy cooperation considering the Ukraine war and rising global energy prices.

>> Trading Gas with the EU <<

A policy paper titled Trading Gas with the EU was published by the government in December 2020. The paper examines the consequences of the UK's exit from the EU on gas trading. This paper discusses how the UK leaving the EU affects gas trade. It points out that while there will be changes in customs processes for pipelines and LNG (Liquefied Natural Gas) imports and exports between the UK and EU, the basic trading methods will not change. UK gas traders, including major operators like National Grid and Premier Transmission Limited, will continue to use the PRISMA[1] gas capacity trading platform to allocate capacity at interconnection points. The paper emphasizes the need for regulatory approval from EU countries to keep using existing trade processes. The UK does not plan to change its trading rules or approval processes. Belgium and the Netherlands have laws to keep using their current trading system with the UK. Ireland also sees no need for changes. The paper advises UK interconnector operators to work closely with EU regulators, especially in Ireland, the Netherlands, and Belgium, to meet any new requirements. UK regulators, Ofgem and the Northern Ireland Utility Regulator, will support these operators in this transition.

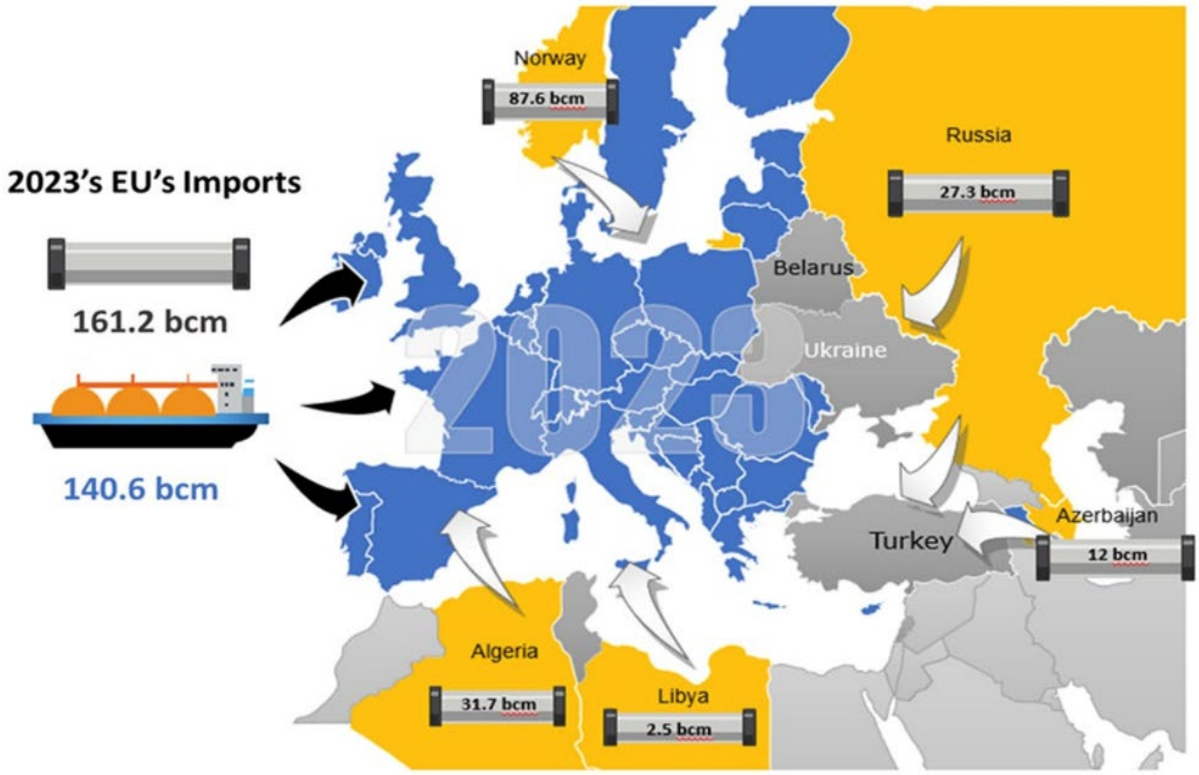
However, with the UK approaching general elections, the political landscape could see a shift. Labour Party leader Sir Keir Starmer, in a conversation with the Financial Times, expressed his intention to negotiate and 'rewrite' a "much better" Brexit deal with the EU if Labour comes to power. He made it clear that there will no attempt to return to the EU. However, Starmer criticized the current TCA as 'too thin,' suggesting the possibility of significant changes in the trade regulations and rules between the EU and the UK, especially considering the TCA is due for review in 2025. The report, provided by

UK in a Changing Europe in September 2023, offers a comprehensive analysis of the TCA, focusing on key provisions and potential areas for review. The review of the TCA could lead to changes in various areas, including energy security. However, any changes would depend on the political will of both parties and the outcome of negotiations. This potential shift indicates an evolving dynamic in UK-EU relations, with future changes possibly aligning with Labour's perspective on Brexit and international trade.

Part IV:

Third Party Energy Members: US, Middle East, North Africa, and China

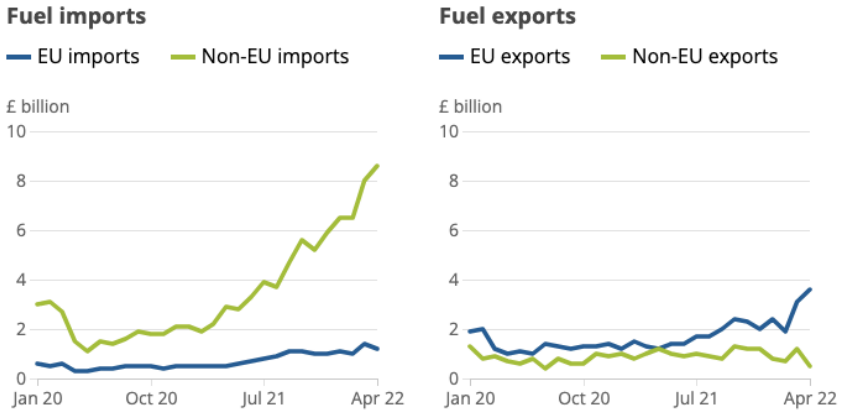
***Figure 5**. EU's piped gas and LNG imports in 2023*



Source: EOA, 2023

Currently the UK is importing around 50% of its gas consumption from countries such as Norway, the US, Denmark, and Belgium with only 3 percent originating from Russia. In 2021, Russia contributed 24.1% of the UK's refined oil imports, but it fell to the sixth-largest import source for refined oil in April 2022 because of the conflict in Ukraine. The UK has emerged as an important fuel and energy exporter to the EU, as shown in Figure 5 above. In March 2022, the UK exceeded £3 billion in exports for the first time since records began in 1997, with £3.1 billion in fuel exports to the EU. In April 2022, exports of fuels to the EU increased further to £3.6 billion and in 2023 around 15% of the EU's gas import was from the UK. These figures shows that given its global outreach and unique geopolitical position, the UK could play a crucial role in the EU's efforts to diversify its energy sources and contribute significantly to its energy security.

Figure 6. *Imports and Exports of Fuels from EU and non-EU countries, Jan 2020-April 2022*

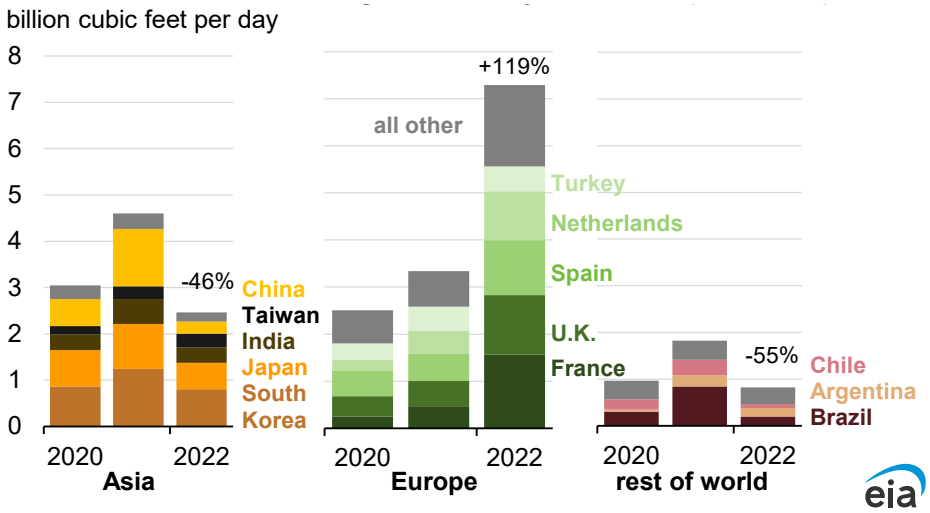


Source: Office for National Statistics – UK trade statistics, current prices, seasonally adjusted

The UK, with its North Sea gas reserves – currently contributing about 25% to its total domestic energy consumption (10% of domestic gas consumption) – faces a challenge as these reserves are expected to be depleted by 2030. To address this and the need to replace oil, which accounts for around 36% of total energy consumption, the UK is looking at alternatives. As it transitions to a zero-carbon economy, increasing reliance on renewable energy and identifying new gas suppliers becomes crucial. Gas, expected to be a key transitional fuel until at least 2050, requires the UK to find alternative domestic sources to meet this shortfall.

US LNG Exports to Europe and the UK's Role/Potential as an Energy Hub

Figure 7. *Annual US LNG Exports by destination (2020-2022)*



The data shows a notable shift in the sources of gas imports, with LNG becoming a growing substitute for Russian gas (see Figures 1 and 5). In 2023, the US accounted for approximately 40% of the EU's LNG imports, as depicted in Figure 1 of the report. A substantial portion of these imports was routed through the UK, which could strengthen the country's influence in its relations with the EU.

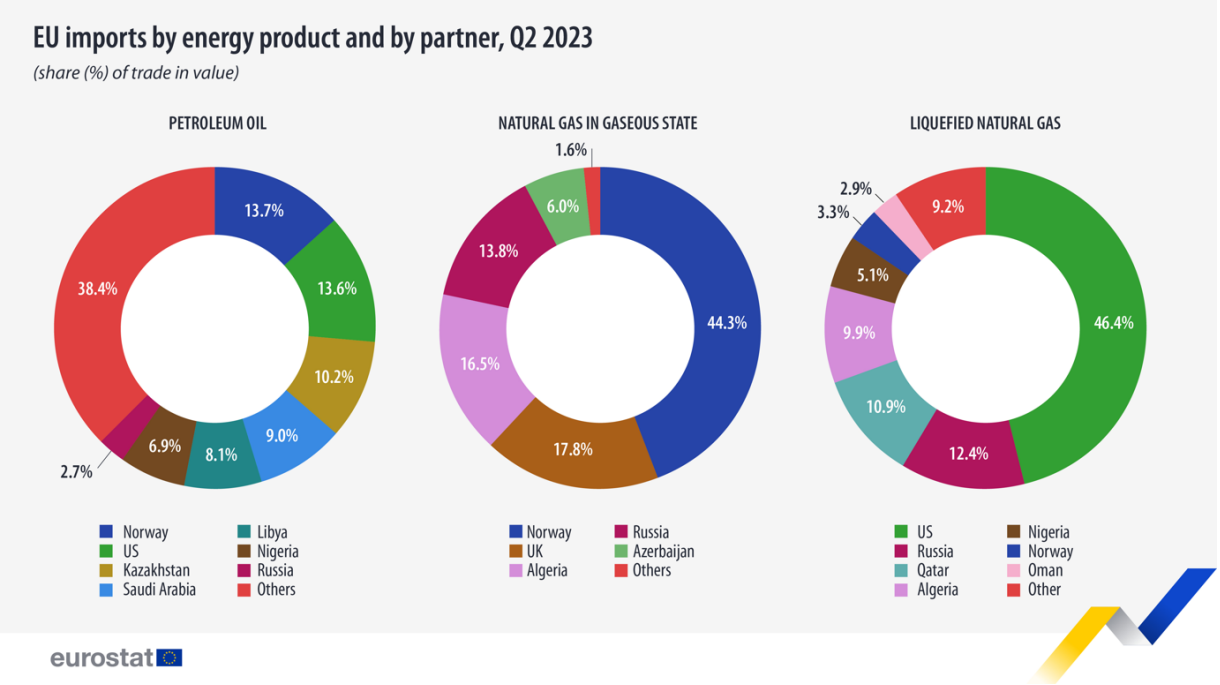
Data from the Department of Energy Security reveals that in 2022, the United Kingdom imported a record amount of 25.6 billion cubic meters of liquefied natural gas (LNG), representing a remarkable 74% increase from the previous year. The United States emerged as the primary supplier of LNG to the UK in 2022, unseating Qatar's 13-year reign as the largest LNG importer. Due to increased global demand, the UK sourced cargoes from further away, and its extensive regasification infrastructure (see Figure 8 below for a simplified map), enabled it to act as a vital conduit for rising natural gas exports to Europe while simultaneously meeting its domestic gas demands. Additionally, the UK's three LNG import terminals with a combined capacity of 48 billion cubic meters per year contribute to the country's position as an energy hub.

Figure 8. *The European LNG Infrastructure*

UK as an Energy Hub

Additionally, the following Figure 9 presents the EU's energy imports for the second quarter of 2023. The data, highlighting that 17% of total imports were sourced from the UK, supports the growing significance of the UK as a key energy hub for the EU.

Figure 9. *EU Imports by Energy Products and by Partner, Q2 2023 (share % of trade in value)*



However, although the UK has been working to enhance its energy security, there is an important aspect that needs to be acknowledged. When considering other European countries, the UK has a lower potential for natural gas storage capacity compared to them. Due to this, the country's market may be more prone to gas shortages, especially when contrasted with other European nations that are increasing their gas storage capacities.

East Mediterranean Gas

In this context, the East Mediterranean region's gas reserves, located in the territorial waters of countries such as Israel, Cyprus, and Egypt, present a significant opportunity. This region, particularly the Leviathan and Tamar fields near Israel, Aphrodite near Cyprus, and Zohr near Egypt, is believed to have substantial natural gas reserves.

Energy Intelligence reports that the Eastern Mediterranean region holds significant gas reserves that could aid in diversifying Europe's gas supply. Israel has identified and tapped into roughly 1 trillion cubic meters (about 35.3 trillion cubic feet) of natural gas. Meanwhile, Cyprus's contingent gas resources are estimated to be between 200 and 400 billion cubic meters. Egypt also possesses considerable gas quantities.

Considering that the EU's gas consumption in 2023 was around 360 billion cubic feet (bcf), harnessing these untapped resources in the Eastern Mediterranean could significantly bolster the EU's efforts to transition to a zero-carbon economy. The potential of these gas reserves, coupled with the region's production capabilities, offers a viable solution for the EU's energy diversification and security needs, playing a crucial role in its sustainable energy transition.

The potential of the East Mediterranean as a gas supplier to the West, including the UK, hinges on overcoming complex geopolitical, economic, and infrastructural challenges. The UK, leveraging its diplomatic influence and collaborating with EU countries, could engage with this region. This involvement might help stabilize regional conflicts and foster investment in infrastructure to extract and transport gas westward. Pipeline projects, such as the EastMed pipeline, intended to connect these gas fields to Greece and Italy, are under consideration. Yet, these projects are fraught with political, economic, and environmental challenges.

Egypt's strategic location, coupled with its well-established liquefied natural gas (LNG) facilities, makes it a major player in the export of East Mediterranean gas. In June 2022, the European Union reached an agreement with Israel and Egypt regarding the supply of liquefied natural gas (LNG) to Europe. The agreement allows Egypt to maintain a significant volume of LNG deliveries to the EU. In 2022, 80% of Egypt's LNG exports were directed towards Europe, where countries sought alternatives to Russian pipeline gas in the wake of Moscow's invasion of Ukraine. During the 2022/2023 heating season, it is estimated that Egypt exported approximately 4.5 billion cubic meters of liquefied natural gas (LNG) to Europe. There has been a possibility for Israel and Cyprus to route their gas exports to Egypt's LNG plants for liquefaction, followed by shipment.

However, the feasibility of increasing the EU's receipt of LNG from Egypt in the short to medium term is currently under question. According to the Oxford Institute of Energy Studies (OIES), challenges such as tight gas balances and diminished imports from Israel make this prospect challenging to realize. The situation underscores the complexities involved in global energy markets and the intricate balance required in ensuring energy security, particularly in the context of the EU's evolving energy needs and geopolitical shifts. Exploiting the energy resources of the Middle East necessitates regional collaboration. Yet, this endeavour is complicated by geopolitical tensions, especially those arising from territorial disputes. These challenges need to be navigated carefully to unlock the region's energy potential.

Revitalizing the Middle Eastern energy market has the dual benefit of aiding the EU's efforts to diversify its energy sources and fostering peace in the region. Economic progress and the mutual advantages derived from energy cooperation could help alleviate conflicts. This approach may pave the way for establishing the region as a zone of peace.

Countries in the Middle East are strategically positioned, with many either possessing energy production capabilities or serving as key transit points for energy transport. This unique position underscores the region's potential role as a significant player in the global energy market, offering opportunities for both energy exports and facilitating the transit of energy resources.

China to Watch

The lack of a clear strategy by the West to counter China's diplomatic and economic activities in the energy domain is a significant concern. Moreover, contrary to Western perceptions, China is gaining popularity in the Global South, where it is offering an alternative model of economic partnership and infrastructure development in exchange for long-term contracts to access energy resources. China's approach to securing energy resources presents potential challenges to the EU's diversification plans, as its focus on energy security and willingness to invest in countries marginalized by the West could conflict with the EU's efforts to secure stable and diverse energy sources through mechanisms like AggregateEU.

China's extensive investments, particularly in Africa, in sectors like mining and energy, have led some critics to describe its approach as a form of neo-imperialism. By tying these resource-rich, often marginalized, states to its market, China aims to overcome the limitations of the existing global system and ensure a continuous supply of energy and raw materials for its burgeoning needs via investing in "pariah states" [Iran, Sudan] (states marginalized by international sanctions) and trying to tie them via its state-owned companies to its market to overcome the disadvantages of the existing system (Probsting, 2012).

This context is crucial when considering the untapped gas reserves in the East Mediterranean. If Western countries hesitate to invest in this region due to geopolitical and territorial disputes, China is unlikely to show the same reluctance. As one of the largest global energy consumers, China consistently seeks to diversify its energy sources. The East Mediterranean's gas reserves are a potential new source that aligns well with China's energy diversification strategy. Furthermore, China's Belt and Road Initiative, which aims to establish a vast network of trade routes and infrastructure projects across continents, could see the East Mediterranean's energy resources as a strategic asset, thereby enhancing energy connectivity and trade. China's 'expeditionary Capital' in the region well supports this.

Globally, China has demonstrated keen interest in investing in energy infrastructure, including the development of ports, pipelines, and LNG facilities. In the East Mediterranean, this translates to potential investments in projects related to the extraction, processing, and transportation of natural gas. Such investments not only align with China's energy diversification strategy but also with its broader economic and geopolitical goals.

China's engagement in the East Mediterranean aligns seamlessly with its broader ambitions to shape global energy dynamics and expand its geopolitical influence through strategic partnerships and investments. This approach underscores China's intent to become a dominant player in international energy markets, leveraging its economic and diplomatic strengths.

For Western nations, a cautious or hesitant approach to the region could have significant implications. If China realizes this scenario, it could lead to a situation where crucial ports and LNG facilities in the East Mediterranean are under Chinese control. This shift would not only represent a strategic gain for China in terms of energy resource management but also a notable geopolitical maneuver, potentially altering the balance of influence in global trade with Turkey as its 'Middle Corridor' and Greece as its 'gateway to the West in the Eastern Mediterranean' (Bastian, 2022).

Such a development would emphasize the necessity for Western countries to actively engage in the region, both to maintain a balanced geopolitical landscape and to ensure diverse and secure access

to vital energy resources. The potential control of key energy infrastructure by China would underscore the strategic importance of the East Mediterranean in global energy politics and the need for a proactive and strategic response from Western nations.

Part V:

Conclusion

As the electricity market operates, the cost of power is currently determined by the price of fossil fuels. However, as the world moves towards a carbon-free economy, gas, particularly Liquefied Natural Gas (LNG) has emerged as a critical transitional fuel in Europe and the UK. LNG has gained prominence as a source of energy, primarily due to the EU's determination to diminish reliance on Russian gas.

UK's domestic moves to decrease the Carbon Price and Labour's decision to slash the party's green spending pledge indicate that the United Kingdom will continue to rely heavily on fossil fuels, particularly gas, in the foreseeable future. The UK's post-Brexit energy security depends on maintaining and enhancing its ties with the EU. To secure energy resources and embrace its new global role, the UK's diplomatic efforts are more critical than ever.

The European Union has experienced a significant influence from the United States in its energy market in recent years, particularly in 2022 and 2023, where the US supplied nearly half of the EU's liquefied natural gas (LNG) imports. During this period, the US became the primary LNG import source for the UK as well, fulfilling around half of the country's LNG requirements. While the UK has become a net gas importer to the EU, in the year 2023, the UK's net pipeline imports to the EU totalled over 15 billion cubic meters (bcm), accounting for roughly 15% of the EU's overall gas imports for that year. To put this into perspective, the quantity of natural gas imported from the UK even surpassed that received from Azerbaijan via the Trans-Anatolian Natural Gas Pipeline (TANAP), making the UK an influential actor on the EU's energy landscape.

The UK has played a significant role in facilitating the transfer of LNG to the EU, further establishing itself as a central energy hub. In 2022, the UK imported a record amount of LNG, and net pipeline imports from the UK to the EU amounted to over 15 billion cubic meters (bcm), representing about 15% of the EU's total gas imports for the year 2023. Given the UK's evolving stature as an indispensable energy hub, particularly for regasifying and transporting LNG to Europe, it is imperative for UK policymakers to integrate this strategic advantage into the broader framework of UK-EU energy relations.

The EU-UK Trade and Cooperation Agreement (TCA), concluded at the end of 2020, set the framework for the post-Brexit relationship between the European Union and the United Kingdom. The agreement acknowledges the importance of continued electricity and gas interconnectivity between the EU and the UK. It provides mechanisms for the trading and transmission of electricity and gas across borders, which is crucial for the stability of energy supplies in both the EU and the UK.

TCA provisions on energy cooperation expire on June 30, 2026, both parties have good reasons to extend or even expand these provisions due to the increased importance of energy cooperation considering the Ukraine war and rising global energy prices.

As we navigate through 2024, it is imperative for policymakers, industry leaders, and regulatory bodies to commence preparations for the pivotal renegotiation of the TCA's energy provisions in 2025. This preparation phase is not merely a procedural necessity but a strategic opportunity to refine and enhance the framework governing EU-UK energy cooperation. In doing so, a comprehensive review of the existing provisions is required to identify areas that are outdated, require improvement, or need to be expanded considering new developments in the energy sector.

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CENTRE for BRITAIN & EUROPE

UNIVERSITY OF SURREY

Centre for Britain and Europe
Department of Politics
Austin Pearce (AP)
University of Surrey
Guildford, Surrey
GU2 7XH

www.surrey.ac.uk/cbe

cbe@surrey.ac.uk