

AB Enerji Politikasında Beklentiler ve Kabiliyetler

İlker Girit
İstanbul Üniversitesi
16.05.2017



İlk Adım

- ◆ “The European Union's **prosperity** and **security** hinges on a **stable** and **abundant** supply of energy.” – *European Commission*
 - ◆ *II. World War*
 - ◆ *European Coal and Steel Community, 1951*
 - ◆ *EURATOM, 1957*

Enerji Ulusal Bir Konu

- ◆ “... capacities and responsibilities at the EU level have been limited and the **EU has tended to follow the International Energy Agency, an OECD institution, ...”**
- ◆ “Energy security issues have long been seen through the **national lens of EU member states**,” ” – *European Commission, 2016*

Enerjiye Erişim

- ◆ “**The citizens** in most Member States **have not had to experience any** lasting disruption of their energy supply.”
- ◆ 1970s Energy Crisis
- ◆ “For most citizens, energy is available "on tap", it is **ubiquitous** and **un-intrusive**,...”

İlk Büyük Kriz

- ◆ “In the winters of 2006 and 2009, temporary disruptions of gas supplies strongly hit EU citizens in some of the eastern Member States.”
- ◆ “wake up call”

Enerji Politikasını Güçlendirme

- ◆ **“... energy security were not** as pronounced within the EU as they are today.”
- ◆ **“Since then, a lot has been done in order to strengthen the EU's energy security...”**

Rusya Etkisi

- ◆ Politically motivated **Russian gas cuts** to the **Baltics** occurred in 1990s
- ◆ In the 2000s Russian politicisation of the energy trade grew in significance.
- ◆ **Between 2000 and 2006** Russia cut off energy exports on about **40 occasions**

CIS MAP



W

Avrupa Güvenlik Stratejisi

- ◆ European Security Strategy (ESS) that was adopted by the **European Council in 2003**
- ◆ **Security threats:**
 - ◆ Terrorism
 - ◆ Proliferation of Weapons of Mass Destruction
 - ◆ Regional Conflicts, State Failure
 - ◆ Organised Crime.

Genişleme

- ◆ In **2004** countries from **Central and Eastern Europe (CEE)** **joined the EU.**
- ◆ “...energy security was already a pressing issue...,” (*Sedelmeier, U.*)
- ◆ **“stick and carrot approach”**

Rusya İle Ortaklık

- ◆ Reliability of Russian gas supplies
- ◆ Need to create a **united European stance in the energy partnership** with Russia
- ◆ *European Strategy for Sustainability, Competitive and Secure Energy (2006)*

İlk ‘Tutarlı’ Dış Enerji Politikası

- ◆ “coherent external energy policy”
 - ◆ competitiveness of the internal energy market,
 - ◆ climate friendly diversification of the energy mix,
 - ◆ solidarity driven crisis management capacities,
 - ◆ sustainable development and technological innovation

Ukrayna Krizi

- ◆ “galvanised EU members into considering alternative energy supply sources,”
- ◆ Review of the ESS in 2008
 - ◆ energy security,
 - ◆ cyber security
 - ◆ climate change

Ukrayna Krizi

- ◆ **Gazprom and Naftohaz**
- ◆ **pricing and usage of gas**
- ◆ **full-blown geopolitical crisis**
- ◆ **Russia completely stopped gas exports 2009**

Ukrayna Krizi

- ◆ Brotherhood pipeline
- ◆ **around 80 % of Russia's natural daily gas exports to Europe**
- ◆ **denied** EU-28 states access to the source of **30 %** of their collective gas imports
- ◆ **depletion of 20 % of reserve gas supplies**

Ukrayna Krizi

- ◆ **Bulgaria and Slovakia** in particular **had no alternative gas supply**
- ◆ **state of emergency**, (*Reuters, 2009*).
- ◆ **Moldova, Serbia, Bosnia and the former Yugoslav Republic of Macedonia**

Lizbon

- ◆ Reliability of Russia as a gas supplier and of Ukraine as a transit country
- ◆ Lisbon Treaty, 2009

Avrupa Enerji Birliđi

- ◆ In 2011, the EU Council set 2014 as date to achieve the **single market in energy**
- ◆ **The 2030 Climate and Energy Framework (CEF)**
- ◆ **The European Energy Security Strategy (EESS).**

Avrupa Enerji Birliği

◆ 2030 Climate and Energy Framework

- ◆ greenhouse gas emissions have to be cut by at least 40% compared to 1990 levels,
- ◆ renewable energies should have a share of at least 27%
- ◆ there has to be an improvement in energy efficiency of at least 27%.

Avrupa Enerji Birliği

- ◆ **European Energy Security Strategy**
 - ◆ **Internally**, proposes a more unified energy market
 - ◆ **Externally**, proposes diversification of fuels, supplies and transit routes.

Avrupa Enerji Birliği

- ◆ **European Energy Security Strategy**
 - ◆ Immediate actions
 - ◆ Strengthening emergency and solidarity mechanisms
 - ◆ Moderating energy demand
 - ◆ Building a well-functioning and fully integrated internal market
 - ◆ Increasing energy production
 - ◆ Further developing energy technologies
 - ◆ Diversifying external supplies and related infrastructure
 - ◆ Improving coordination of national energy policies and speaking with one voice in external energy policy

Avrupa Enerji Birliđi

- ◆ The Energy Union 'is based on the three **long-established objectives of EU energy policy**:
 - ◆ security of supply,
 - ◆ sustainability
 - ◆ competitiveness' that were already highlighted in the Treaty of Lisbon

Avrupa Enerji Birliği

- ◆ **Funding** of strategically important **infrastructure**:
 - ◆ **European Investment Bank (EIB)**
 - ◆ Establishment of new ones such as the proposed **European Fund for Strategic Investments (EFSI)**

Avrupa Enerji Birliği

- ◆ **Energy Diplomacy Action Plan**
- ◆ **more funds and aid budgets for infrastructure and access to affordable and sustainable energy**
- ◆ **acknowledges interests and problems of energy exporting countries**

Avrupa Enerji Birliđi

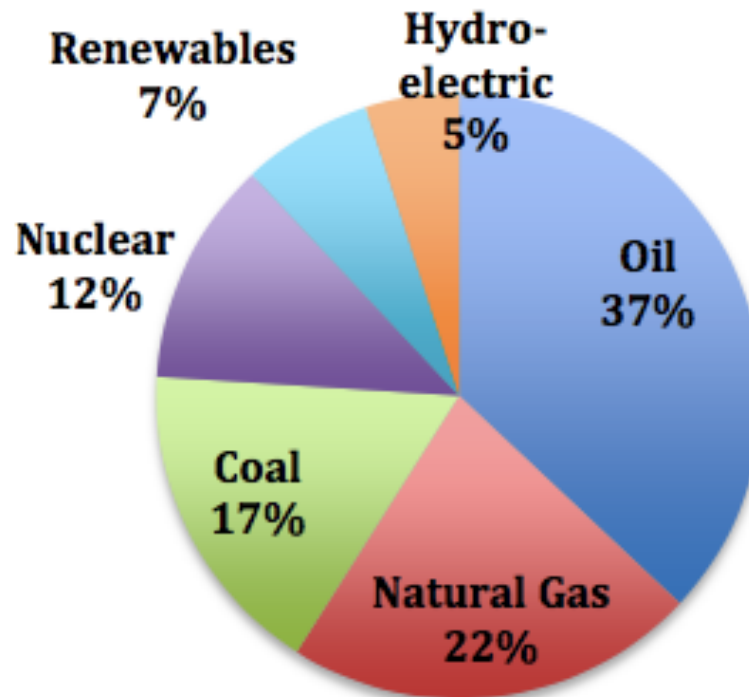
- ◆ **EU Energy Diplomacy Action Plan** - four pillars:
 - ◆ Strengthen strategic guidance through high-level engagement,
 - ◆ Establish and further develop energy cooperation and dialogues,
 - ◆ Support efforts to enhance the global energy architecture and multilateral initiatives,
 - ◆ Strengthen common messages and energy diplomacy capacities.

Avrupa Enerji Birliği

- ◆ **Diversification of sources, suppliers and routes'**
 - ◆ Southern Gas Corridor
 - ◆ Southern Caucasus and Central Asia
 - ◆ Eastern Mediterranean region
 - ◆ Southern Neighbourhood
 - ◆ **diplomatic outreach** to producer countries, including Russia

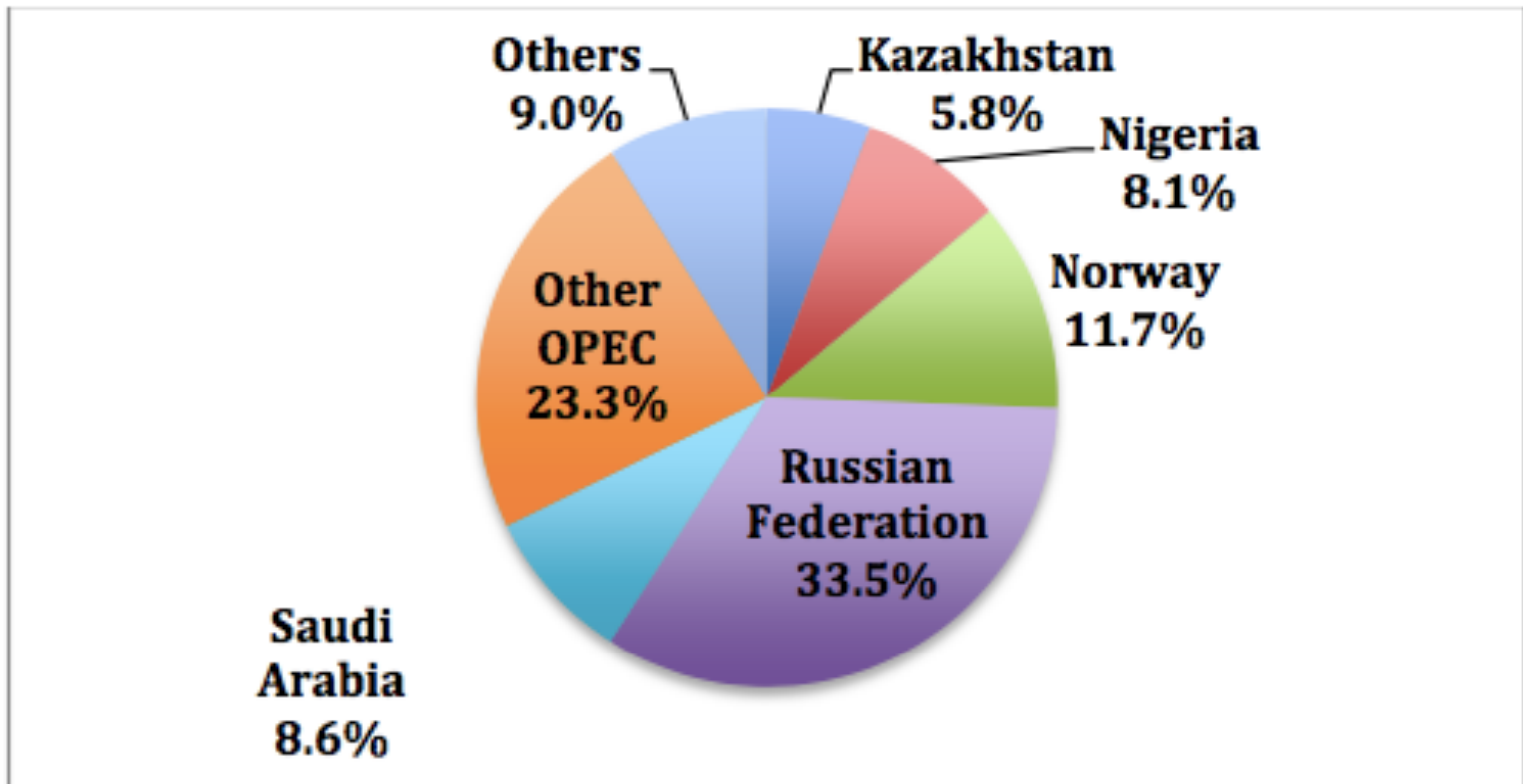
Enerji Arzı

Figure 3.1 EU energy sources % of total usage



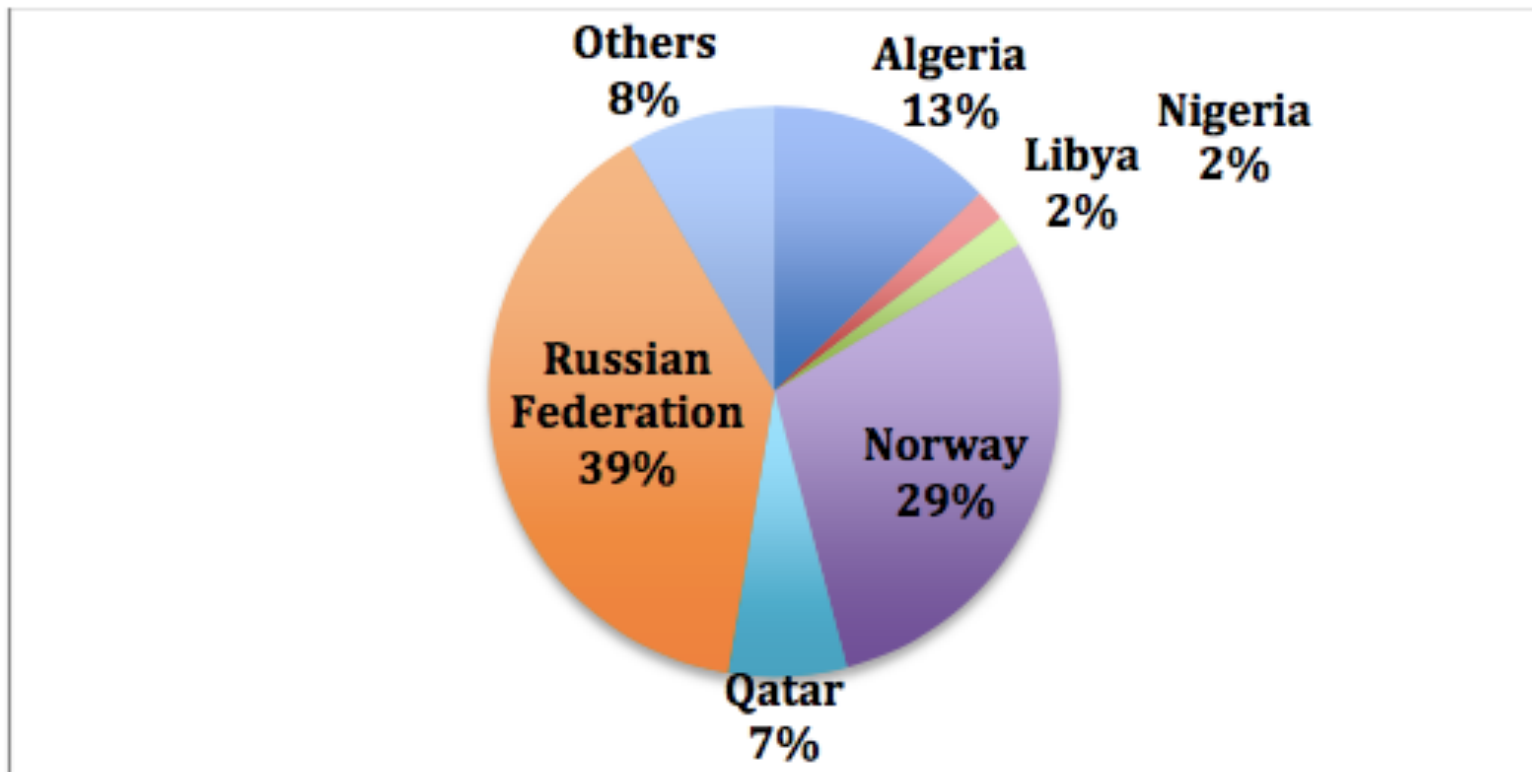
Enerji Arzı - Petrol

Figure 3.2 Supplier countries: % of total EU crude oil imports, 2013



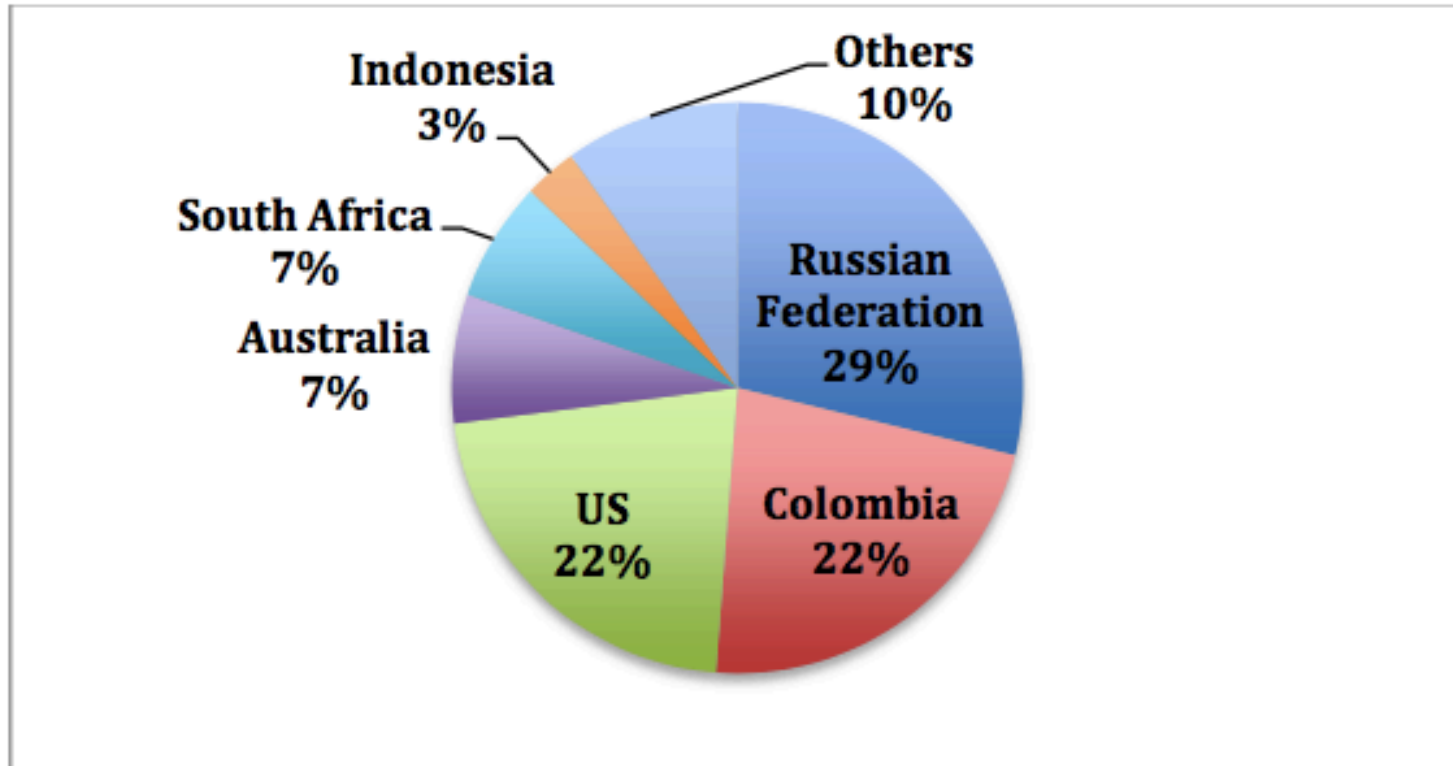
Enerji Arzı - Gaz

Figure 3.3 Supplier countries: % of total EU natural gas imports, 2013



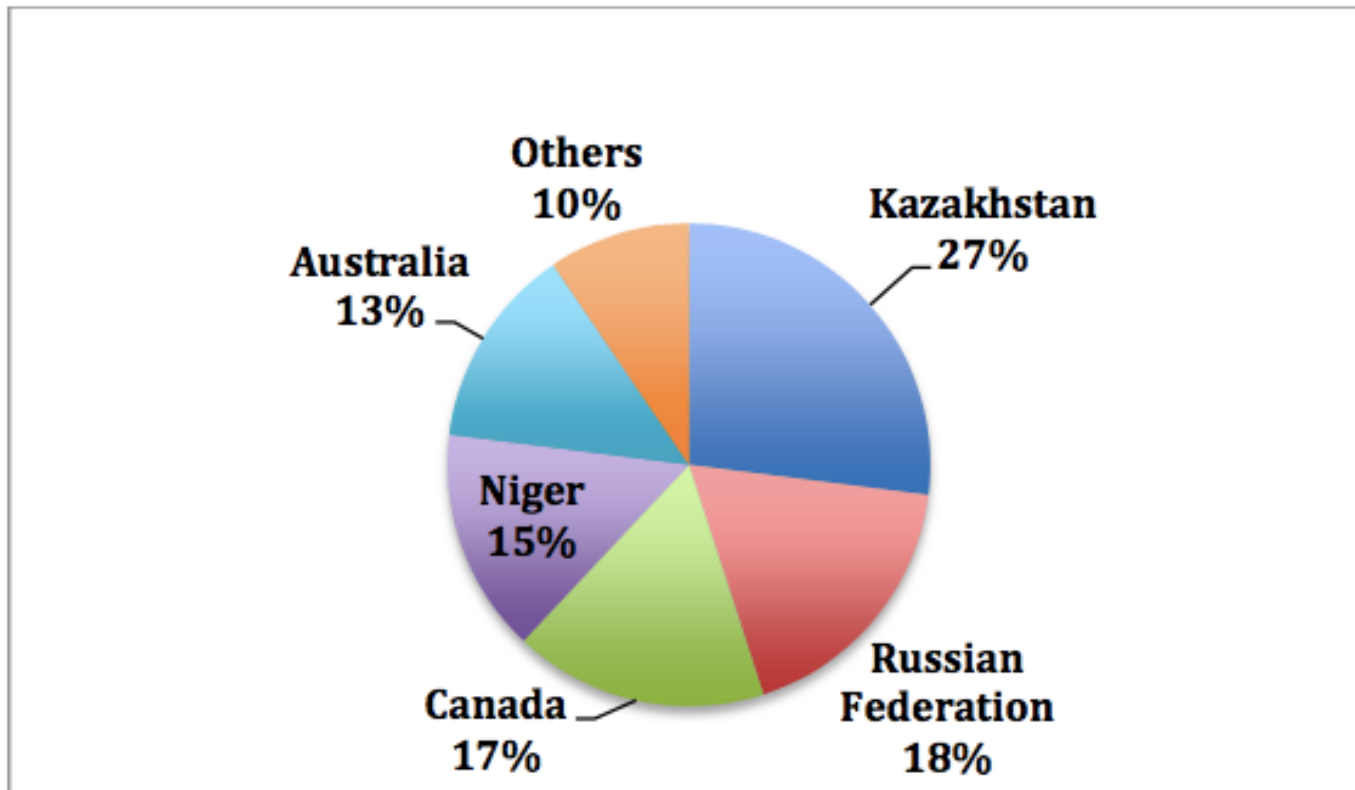
Enerji Arzı -

Figure 3.4: Supplier countries: % of Total EU solid fuels imports (mainly Coal), 2013



Enerji Arzı - Uranyum

Figure 3.5: Supplier countries: % of total EU uranium imports



Enerji Çeşitliliği

Figure 3.6 Individual energy mixes of EU countries, 2014

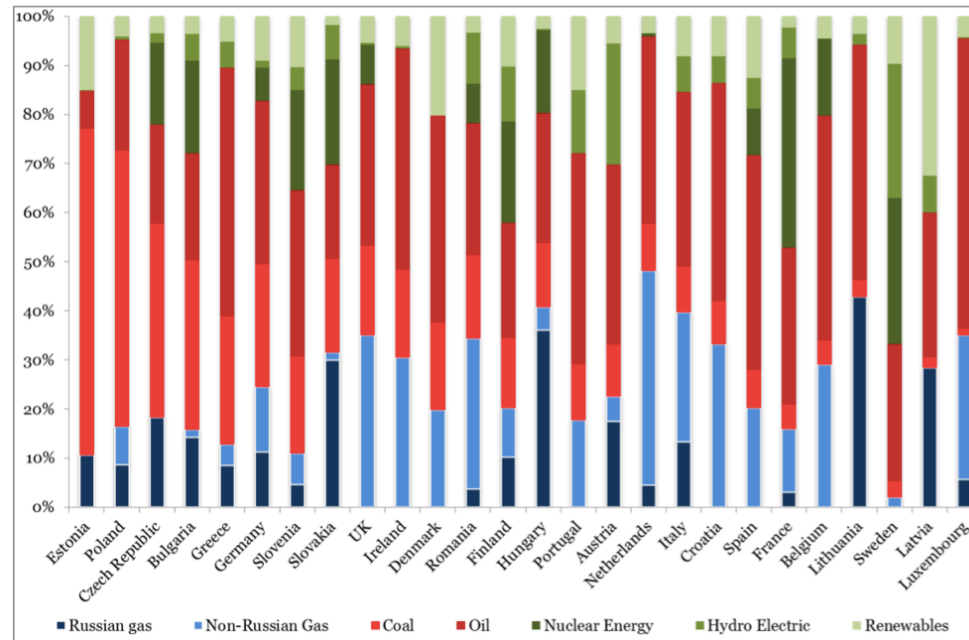
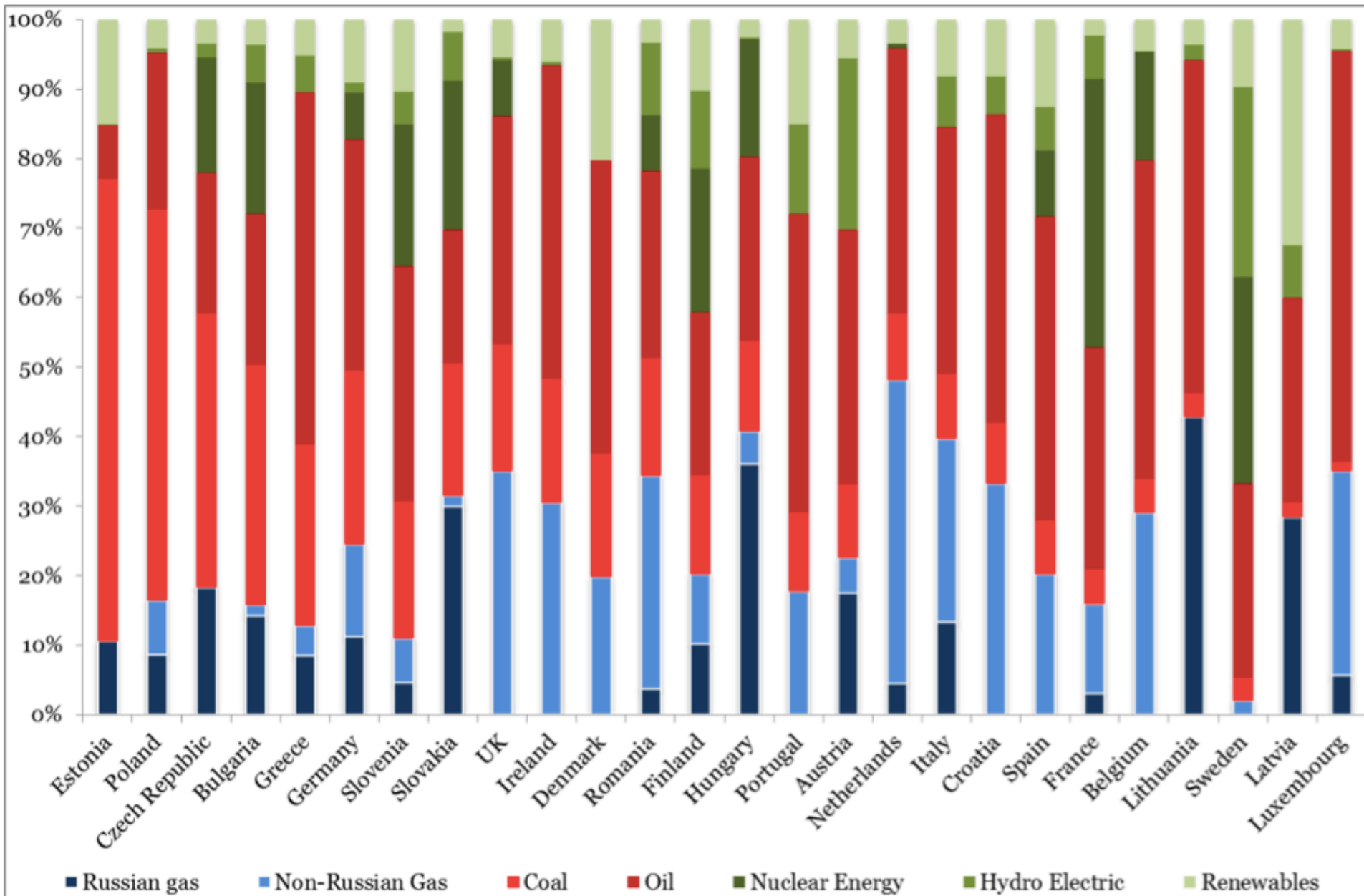


Figure 3.6 Individual energy mixes of EU countries, 2014



Kabiliyetler

- ◆ Oil Stocks
- ◆ Member States are obliged to build up and maintain minimum reserves of crude oil and petroleum products
- ◆ Current stocks: 120 days of consumption

Kabiliyetler

- ◆ Investments in **back-up infrastructure** are now obligatory
- ◆ Cross border interconnections
- ◆ **Emergency Preparedness Plans and Emergency Response**
- ◆ **Protection of critical infrastructure**
- ◆ **Solidarity mechanisms**

Kabiliyetler

- ◆ Energy savings
- ◆ **Building sector**, responsible for about **40%**
- ◆ Improvements in heating and cooling
- ◆ **need to be discussed at European and/or regional level**
- ◆ **Accelerating the construction of key interconnectors**

Kabiliyetler

- ◆ “... **no immediate threat for the EU.**”
- ◆ Interdependence between the **EU, US, and Russia** in relation to oil
 - ◆ Availability of oil stocks
 - ◆ The ability to trade and transport oil globally

Kabiliyetler

- ◆ Need to be **closely monitored**
 - ◆ The dependence of the EU's refinery industry on Russian crude oil
 - ◆ The increased concentration in the Russian oil industry
 - ◆ The increased ownership of EU refinery capacity by Russian oil companies
 - ◆ Refined products consumed in transport

AB Enerji Politikasında Beklentiler ve Kabiliyetler

İlker Girit
İstanbul Üniversitesi
16.05.2017

