

Towards the Energy Union – The Year of Delivery

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Overview

1. Security of Gas Supply
2. Politics and Industry
3. Towards an Effective Energy Diplomacy?
4. Conclusions

Security of Gas Supply

- Initial Focus of the Tusk Proposal
 - Diversification away from Russia
 - Natural Gas in Focus – „Securitization of Gas Supply“
 - Natural Gas and the „Geopolitical Burden“
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- Juncker Commission: Agendas of the EU-28
 - Discussion currently boils down to Nord Stream 2 debate

Politics and Industry

- Two „Realities“ – Markets and Politics
 - Large Infrastructure Projects must be driven by industry
 - Lack of Consensus in Gas Politics
 - Competing Paradigms – State or Market as Main Driver?
 - EU Third Market Package – Implementation
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- Uncertain Future for Gas Demand
 - Multiple Challenges for Gas Infrastructure in Europe

Towards an Effective Energy Diplomacy?

- Inconsistencies in the Internal Market
- ... internal gas (market) governance and SOS regulation

- Solidarity at Regional Level?
- Cost- and Benefit Sharing
- Cross-Regional Issues and Corridors



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Conclusions

- External Dimension still underdeveloped
 - Focus on Russia, but...
 - Energy Community ...
 - ... and beyond?
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- Awareness of challenges and risks in the wider region!
 - Lack of forums and tools!



Thank You for Your Attention!

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