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THE EURO-RUSSIAN ENERGY DIVORCE

How Ukraine and Climate Broke *Ostpolitik*

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Russia's February 2022 invasion of Ukraine has led to a seismic shift in the global energy landscape. In the lead-up to the conflict, energy was a focal point—especially the highly politicized Nord Stream 2 (NS2) natural-gas pipeline project, which German regulators were examining for final certification at the time of the invasion. The pipeline would have doubled the capacity for direct Russian natural-gas exports to Germany and reduced Ukraine's role as a transit corridor for Russian energy to Europe. As Russian troops amassed along Ukraine's borders, German chancellor Olaf Scholz came under increasing international pressure to cancel the controversial project. As a result of this pressure, Scholz halted the project on 22 February 2022, signaling an end to the *Ostpolitik* (Eastern policy) principles that had guided Western Europe's relationship with Moscow for over fifty years.

Since the early 1970s, the relationship between Moscow and European capitals was supported through creating liberal linkages between trade and politics, particularly in energy. Liberalism's basic tenet—that peace flourishes through free trade—governed a contentious relationship through the depths of the Cold War, the collapse of the Soviet Union, and even Russia's annexation of Crimea in 2014.[1] This system became increasingly strained, particularly over the past eight years, because of two factors. First, Russia is a nondemocratic state that has grown authoritarian, especially since President Vladimir V. Putin's fourth term began in 2018. A plethora of literature exists discussing the relationship between economic interdependence and conflict, but evidence shows that autocracies

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and democracies are prone to conflict with each other.[2] This article does not delve into that debate in detail but instead focuses on the second factor that led to the collapse of the European security architecture: the relationship between energy and climate.

Rapid technological change in energy, the hastening of the climate crisis, and climate's place on the political agenda inserted a destabilizing element that promised to upset the balance of power in Europe. In the period 2014–22 Europe's goal of climate neutrality became tangible for the first time—a reality that eventually would render Russia's primary role as hydrocarbons supplier to the continent obsolete by 2050. This posed an existential security threat to Moscow, as oil and gas exports account for about half of Russia's total exports and approximately 40 percent of its budget revenue. Further, Russia's status on the European continent is centered on using economic statecraft to achieve political goals.

First, this article will provide an overview of the origins of the contemporary Russo-European relationship on the basis of energy. Next, it will review Europe's energy and climate policies, as well as technological changes in the energy sector that opened up opportunities for Europe to diversify its energy supply both geographically and substantively. The period 2014–22 is crucial to understanding the outcome of the current conflict, because Russia's 2014 invasion of Crimea did not prompt a significant change in the Russo-European energy relationship. In fact, despite a U.S. political agenda to decrease European energy dependence on Russia, energy interdependence between Russia and Europe's largest economies deepened during that period. The final section of the article discusses the implications of Russia's invasion of Ukraine on global energy flows and alliance politics.

THE ORIGINS OF *OSTPOLITIK*

The foundations of contemporary Russo-European energy interdependence were laid in the 1960s, when the Soviets discovered huge oil and gas reserves in western Siberia, and Austria—a neutral country—saw an opportunity to capitalize on its status and Europe's declining indigenous energy production. In June 1968, Austria's state-owned monopoly oil and gas company, the OMV Group, signed a contract to import Soviet gas.[3] Although Austria was crucial as a vanguard actor in setting up the symbiotic energy relationship between Russia and the West, it was Willy Brandt (born Herbert Ernst Karl Frahm)—foreign minister and later chancellor of the Federal Republic of Germany (FRG) (i.e., West Germany)—who launched *Ostpolitik,* the policy that would define European energy relations with Russia, and by extension provide the basis for European security, over the next fifty years. Through *Ostpolitik,* Brandt sought a new approach to the Soviet Union and to normalizing relations with the German Democratic Republic (i.e.,

East Germany) that was centered on creating interdependence through trade, primarily in gas. On 1 February 1970, the Soviet Union signed a historic gas-export contract with the FRG that defined *Ostpolitik* and was hailed as the model that could solve all economic and political issues between Russia and Europe.[4] This contract established the Russo-German energy relationship; today, Germany remains the largest importer of Russian gas in Europe and is Russia's most important trade partner, and the two countries' political relationship is the most important in Europe.[5]

The energy relationship between Europe and Russia expanded throughout the 1970s and '80s. The Soviets needed finance, technology, and hard currency, and Europe needed a cheap and reliable source of energy to build its industrial base. The 1973 oil shock pushed European states to think about diversification, but when oil prices collapsed in the late 1970s anxiety over energy security also decreased. Throughout the 1960s and '70s, many viewed natural gas as environmentally friendly; thus, as concerns over the environment became part of mainstream politics, natural gas seemed to be a conscientious choice.

The Russo-European gas bridge survived German reunification, the collapse of the Soviet Union, and creation of the single market in Europe. Between 1995 and 2005, the Russian state-controlled gas monopoly, Gazprom, went from dropping gas off at the West German border to becoming a firmly established presence in the European gas structure, through its partnership with German oil and gas conglomerate Wintershall.[6] This partnership cultivated a close relationship between German and Russian industry managers that lasted for over two generations, with former German chancellor Gerhard F. K. Schröder taking senior board positions at Russian energy company Rosneft (until resigning in May 2022) and Nord Stream after leaving office.[7]

Throughout the post-Soviet period, numerous price disputes, allegations of corruption, and two highly publicized gas cutoffs in 2006 and 2009 have defined Russia's energy relations with Ukraine. Even though Ukraine remains a key transit corridor for Russian gas to European markets, it was the 2006 and 2009 disputes, paired with a deterioration of relations with Russia relating to the conflict between Russia and Georgia in 2008, that brought energy security to the forefront of the European policy agenda.

In 2009, Gazprom halted all gas supplies to Europe traveling through Ukrainian pipelines after Moscow accused Ukrainian operators of stealing gas for which European consumers already had paid.[8] Gas supplies were halted for thirteen days in January 2009, ultimately resulting in the deaths of eleven people because of lack of heat during extreme temperatures.[9] After this crisis, the European Commission (EC) accelerated several policy initiatives, most notably the third energy package (TEP), which came into force in September 2009. The main aim

of the TEP was to break up Gazprom's monopoly position in the European gas market, forcing the separation of the gas company's generation and sale operations from its transmission and distribution.[10] In practice, the TEP was the first attempt to make an internal European Union (EU) energy market that, if realized, would decrease greatly Gazprom's position as price maker and monopoly supplier to the weaker and more energy-poor states in the EU.[11]

Nevertheless, after 2009 Gazprom continued to expand its energy sales to Europe, most notably through the inauguration of its Nord Stream (NS1) pipeline. In 2011, German chancellor Angela D. Merkel, Russian president Dmitry A. Medvedev, French prime minister François C. A. Fillon, and Dutch prime minister Mark Rutte inaugurated the pipeline at a ceremony, thereby directly linking Russia with its most profitable consumer—Germany.[12]

As Russia's political relations with Ukraine increasingly grew strained, Gazprom's strategy changed to constructing pipelines to Europe that would circumvent Ukraine. Almost as soon as NS1 was operational, Gazprom started exploring the construction of an expansion project that would double the annual capacity of NS1. Dubbed NS2, this pipeline eventually would emerge as a symbolic centerpiece for any country's political stance on Russia. Throughout 2012 and 2013 the project proceeded through various stages of development—until Russia annexed Crimea and sent military support to two separatist regions in eastern Ukraine.

In response to the annexation, the West implemented a moderate sanctions regime against Russia that was tailored carefully to avoid sanctioning Russian energy, because it was deemed too crucial to European allies. Thus, despite a serious deterioration of relations between Russia and the West, Western European states still expanded what they considered pragmatic energy cooperation. In June 2015, Gazprom signed an agreement to build NS2 with Royal Dutch Shell, German company E.ON, Austria's OMV, and French company Engie.[13] Poland—which long had campaigned against further cooperation with Russia, arguing that it was a security threat—blocked the creation of a joint venture in the EU, thereby forcing Gazprom and its partners to create a joint-financing agreement with a Swiss Gazprom subsidiary.

As the project progressed, the United States attempted to halt it and criticized its European allies for cultivating deeper dependence on Russian energy. On taking office in 2020, U.S. president Joseph R. Biden sought to repair relations with Europe that had deteriorated under President Donald J. Trump, and he reached a deal with German chancellor Merkel that would allow the project to proceed. As part of the deal, Berlin pledged to impose sanctions on Moscow if it weaponized energy, and Germany set up a billion-dollar fund to help promote Ukraine's transition to clean energy.[14] Construction on NS2 was completed in September 2021—just as Russia began amassing troops along the Ukrainian border.

THE RISE OF THE CLIMATE AGENDA

In 2014, the EC published a policy framework setting its "20/20/20" target, aiming for a 20 percent reduction in greenhouse gas emissions, 20 percent share of energy usage from renewable sources, and a 20 percent increase in energy efficiency by 2020.[15] It also laid out an ambitious target for reducing greenhouse gas emissions by 40 percent by 2030, in line with the EU goal of achieving climate neutrality by 2050.[16] Addressing climate change became an increasingly salient political priority after the 2015 Paris Agreement established a new globally and legally binding climate regime from 2020 onward. The EU and all its member states ratified the agreement and pledged to reduce EU emissions by at least 55 percent by 2030.[17] A 2018 EC study estimated that EU energy-import dependence would decline from 55 percent to 20 percent by 2050, and that while natural gas would remain critical until 2030 its importation would fall by 60–92 percent by 2050.[18]

Balancing the policy priorities of achieving climate neutrality on one hand with the energy security of the entire bloc on the other was challenging, especially as natural gas was envisaged as a "bridge fuel" to a low-carbon future. Before transitioning fully to an economy focused on renewables (primarily wind and solar energy), natural gas was the cleanest and cheapest substitute for coal. Much of the EU transition planning was built around the idea that natural gas would act as a cleaner fuel while waiting for actual clean-energy technology to develop at sufficient scale. While this technology was in development, however, the EU needed natural gas in *greater* quantities—particularly in the residential and industrial sectors. In 2014, natural-gas consumption in Europe was expected to rise until 2050, and although the EC emphasized the need to diversify gas suppliers, it also acknowledged the need to strengthen "our relationship with existing suppliers."[19] Although the use of liquefied natural gas (LNG) would help Europe in its quest to find alternative gas suppliers, traditional pipeline gas from Russia would remain a keystone of the European energy mix for several decades to come. However, even Germany—whose reluctance to abandon *Ostpolitik* would become one of the defining aspects of the European response to the 2022 Ukraine conflict—foresaw an eventual abandonment of natural gas. Germany's 2016 long-term climate strategy plans for a complete abandonment of natural-gas usage as the main component of its decarbonization strategy by 2050.[20]

Russian energy experts were aware of these trends, and they knew that maintaining their country's energy exports at their pre-2020 levels would be all but impossible. The export of Russian oil was expected to decline sharply after 2020, and while experts estimated that natural-gas prospects were more positive until 2040, natural gas's use was expected to decline also. As a result, Russia's average gross domestic product (GDP) was estimated to fall by 0.9–1.7 percent annually

until 2040.[21] A common theme in Russian interpretations of the EU energy transition is that climate change is a method by which the EU politicizes energy cooperation and ignores economic efficiency.[22] Because the EU promotes energy transition by arguing that it also reduces dependence on Russia, Russian policy makers have perceived the energy transition to be a cloak for anti-Russian sentiment in the one area that had managed to survive through the Cold War and the collapse of the Soviet Union.[23] The nature of this discourse precluded any Russian engagement with the EU's long-term planning process, and thus supported only short-term solutions to the impending decline in cooperation.

Changes to energy technology also played a role in accelerating the clean-energy transition. LNG, a more flexible alternative to pipeline gas, became more widely available and opened up new diversification possibilities. After the annexation of Crimea, the EU focused on supply diversification through the southern gas corridor, and even "possibly the USA."[24] On taking office in 2016, President Trump sought to boost U.S. domestic oil and gas production by expanding U.S. LNG exports. In 2018, Trump met with EC president Jean-Claude Juncker and later tweeted that the EU would "be buying vast amounts of LNG!"[25] Despite Trump's enthusiasm, however, U.S. LNG did not take off as a serious alternative to Russian pipeline supplies, because it was more expensive, it required the construction of import infrastructure, and it was experiencing a domestic production crisis. Nevertheless, the advent of LNG changed the European gas market, expanding the role of spot and hybrid markets.

In 2020, President Biden came to office with addressing climate change as one of the four pillars of his administration. He rejoined the Paris Agreement as his first act in office and promised to increase cooperation with Europe in the renewable energy sector.[26] The German elections in September 2021 brought to power a coalition including Green and Liberal leaders that was much more hawkish toward Russia and supportive of Ukraine and eastern Europe than Germany had been previously. These events brought climate change to the top of the Western policy agenda.

UKRAINE BREAKS *OSTPOLITIK*

The war in Ukraine has accelerated dramatically the break in Russo-European energy interdependence. Because of the depth of long-standing energy relations, from infrastructure to complex business-ownership arrangements and corruption, this divorce never was going to be easy, either for Russia or for Europe. Russia more or less refused to engage in long-term planning about what a carbon-neutral Europe might do to its own position on the continent, and while Europe had a strong climate vision it did not have a straightforward or clear energy path for arriving there. Furthermore, Europe did not engage in strategic planning about its

long-term foreign policy toward Russia, which necessarily would change after the clean-energy transition rendered the principles of *Ostpolitik* obsolete.

Since February 2022, the West has instituted several rounds of sanctions, which, unlike the post-Crimea sanctions, target Russian energy directly. On 8 March 2022, President Biden signed an executive order banning the import of Russian oil, natural gas, and coal to the United States—a largely symbolic move, since Russia provided only about 3 percent of total crude imports to the United States in 2021.[27] Even prior to Russia's invasion of Ukraine, the United States began working with European leaders to try to find solutions for the inevitable energy crisis that would subsume Europe in the case of an interruption in energy supplies from Russia—a very real possibility, given that more than a third of Russian gas imports transited through Ukraine in 2019.

On 8 April 2022, as part of the fifth round of EU sanctions on Russia, the EU approved an embargo on Russian coal that would enter into effect on 10 August 2022.[28] While this was significant because it was the first time the EU sanctioned Russian imports to Europe, coal plays a relatively minor role in Europe's energy mix and is easy to replace from other suppliers. As the war continued into the spring of 2022, pressure mounted to increase the impact of the sanctions regime. However, given the disparities in energy endowments, geography, and energy strategies of its member states, the EU struggled to gain the required consensus necessary to implement a full embargo on Russian oil imports.

On 18 May 2022, the EC published REPowerEU, its comprehensive strategy to gain full independence from Russian fossil fuels by 2027—accelerating the transition by over twenty years.[29] Although energy experts have expressed skepticism concerning the viability of the plan, the document calls for a two-thirds reduction in consumption of Russian gas by the end of 2022.[30] Planners envision that additional LNG imports from the United States, increased intra-EU energy cooperation, and a reduction in demand will cover this shortfall.

On 2 June 2022, the EC adopted a partial oil embargo on Russian oil as part of its sixth round of sanctions, to enter into force at the end of 2022.[31] This amendment bans the import of Russian oil via maritime routes, with important exceptions carved out for Bulgaria and an exemption for Russian pipeline oil deliveries to the Czech Republic, Slovakia, and Hungary—the last being the key dissenter to the sanctions package. This is significant, as EU member states paid $108 billion to Russia for oil supplies in 2021, when oil demand was down owing to the pandemic.[32] As a result, EU member states have embarked on a quest to secure non-Russian supplies of oil from a variety of alternative suppliers—sharply driving up oil prices to near-record levels.[33]

IMPLICATIONS

In the space of a few short months, Russia's invasion of Ukraine fundamentally transformed the basis of the Euro-Russian relationship and global energy flows. The clean-energy transition already was poised to disrupt this relationship over the next few decades, but the process accelerated significantly between 2014 and 2022 owing to technological advancements and increasingly existential climate realities. Europe's energy plans, laid out ambitiously in REPowerEU, will alter Russia's place in Europe permanently. The quick disintegration of this relationship, one that was created on the basis of hard-nosed economic advantage for Western Europe and shrewd economic statecraft for Russia, is sending shock waves through the international system. Now, Russia's belligerence on the European continent has hastened what it feared most: the loss of the cash-cow hydrocarbons market, and of the regime's related political capital in Europe.

One of the most significant implications of the Ukraine war is the renewed sense of purpose in the transatlantic alliance in security and energy. In December 2021, the United States gleefully promoted the voyage of a flotilla of U.S. LNG tankers to gas-starved Europe.[34] The EU-U.S. Energy Council then met in February 2022 and reaffirmed the importance of EU-U.S. cooperation to ensure the energy security of the EU and its neighborhood, in particular Ukraine.[35] During the first four months of 2022, the United States exported 74 percent of its LNG to Europe, while U.S. LNG exports to Asia declined by 51 percent.[36] In March 2022, President Biden traveled to Europe to promote a transatlantic pact to reduce European reliance on Russian energy, and at the Group of Seven summit in June 2022 leaders met to discuss increasing collaboration on a variety of clean-energy technologies.[37]

While transatlantic cooperation is key to Europe's transition away from Russian energy, there are still significant challenges to European energy security. Europe is not the only consumer of LNG; global supply is tight, and much spare capacity is committed to Asian markets already through long-term contracts. In addition, access to LNG-import infrastructure is not distributed evenly throughout the European continent, making it very difficult to supply the most dependent states with extra volumes of LNG. Nevertheless, Russia's forced exit from the European energy market has fostered a transatlantic energy relationship that will remain strong through the clean-energy transition and will support closer cooperation on a host of issues.

The quick scramble to secure non-Russian energy supplies has thrown the world into a global energy shock even more severe than the 1973 oil crisis, because it is hitting all the world's major sources of energy simultaneously: oil, gas, and coal. The impact of this shock is being felt most severely in Europe, where natural-gas stores are low and energy officials are only beginning to implement conservation measures. The International Energy Agency predicts energy shortages in Europe

during the 2022–23 season—a shortfall that U.S. supplies cannot ameliorate.[38] As a consequence, European leaders now are backsliding on climate goals in favor of using any readily available non-Russian source of energy, even coal.

The global economic downturn—including a European inflation rate of 8.1 percent in May 2022 and exploding consumer-energy prices—is beginning to splinter the unusual European unity that characterized the first few months of the war.[39] The EU barely was able to pass the modified oil embargo; Hungary and Slovakia refused to pass the package without exemptions, and even Germany had major reservations. Leaders at the Group of Seven summit said they would "explore" price caps on Russian oil and gas but were unable to reach an agreement even within that limited forum.[40] European states always have had profound disagreements on energy issues, and although the war in Ukraine has pushed the entire continent away from Russian hydrocarbons, major differences remain.

Beyond energy, food prices are soaring owing to war-related disruptions. These higher consumer prices are impacting domestic politics in Europe already. A failure to address the energy crisis could lead to a resurgence of right-wing populism in Europe, even from leaders who were considered toxic given their proximity to Putin. Marine Le Pen received more than 40 percent of the vote in the second round of the French presidential elections, and Putin's closest ally in Europe, Hungary's Viktor Orbán, won his fourth consecutive two-thirds majority in parliament. Major populist electoral gains could break the fragile consensus on Russia, weakening the efficacy of energy sanctions on Russia and policy toward Ukraine. Recent polls show that Ukraine fatigue may be setting in—a trend that economic hardship will exacerbate.[41] Disagreements over a desired end state to the war and future relationship with Russia also are emerging. Poland seems unwilling to entertain peace until Russia is punished, but France, Italy, and Germany are beginning to discuss peace settlements to bring an end to the conflict ahead of winter.[42]

Outside Europe, a realignment of trade and relations between Russia and China is one of the most profound consequences of the war. As the European market has shunned Russian hydrocarbons, Russia has reoriented its sales strategy—at discounted prices—toward China. Since the invasion of Ukraine, Russia has become China's top oil supplier, with crude imports rising 55 percent from 2021 levels.[43] This too was an inevitable trend that the sanctions regime accelerated. After Crimea sanctions locked Moscow out of much Western financing, Moscow began pursuing Chinese financing for exploration and extraction projects in Siberia and the Arctic, eventually rendering energy the most extensive area of Sino-Russian cooperation. However, because Moscow knew it could not achieve European prices in Asian markets, moving toward China always was viewed as a second-best option. Moreover, China was not the same type of consumer as European buyers;

Russia achieved significant political concessions associated with its energy trade in Europe, but China is insulated from this type of foreign policy.

The full implications of Russia's war in Ukraine are, as yet, unknown. But the redrawing of global energy flows and a reevaluation of contemporary European security architecture are inevitable. Russia is a pariah in Western energy markets, and the war has forced Europe into a brutal reckoning with its energy dependence on that country. Even if European unity does not hold in the long term, the glory days of Russian energy domination in Europe are over, as European states turn to cleaner energy technology and nuclear energy is poised for a renaissance. This undoubtedly will diminish Russia's place on the European continent and force its attentions eastward, where it must engage within a much more challenging environment.

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