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NATO and the EU – Who Has The Main Role In Ensuring Energy Security in Europe?

Instances of (de)securitization of energy security on part of NATO and the EU and their Overlap in the protection of critical (energy) infrastructure.

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Resumo

A segurança energética está há muito tempo na lista de prioridades da União Europeia, mas desde o início dos anos 2000, depois que os antigos países do bloco oriental aderiram à OTAN, ela também voltou seu olhar para este tema. Após a anexação russa da Crimeia no início de 2014, houve uma grande mudança nos ambientes geopolíticos e de segurança na Europa, e a segurança energética subiu nas listas da UE e da OTAN, mas ambas reagiram de maneira diferente a ela. Após o início da guerra na Ucrânia em 24 de fevereiro de 2022, a UE e a OTAN passaram a funcionar em um novo ambiente de (in)segurança no que diz respeito à energia, que lembrava 2014. Usando a Teoria da Securitização e o conceito de Sobreposição Institucional, este trabalho pretende encontrar a resposta à questão de qual é o papel da UE e da NATO na garantia da segurança energética no novo quadro de segurança na Europa, e que Organização Internacional tem mais responsabilidade para o fazer? Após uma análise minuciosa das declarações, documentos e comunicados de imprensa de ambas as OIs, concluiu-se que a UE tem mais responsabilidade na garantia da segurança energética no Velho Continente, principalmente porque ficou provado que a União securitiza a segurança do abastecimento muito mais do que a Aliança entre os anos desencadeadores de 2014 e 2022.

Palavras-chave: Segurança Energética, OTAN, UE, Securitização, Sobreposição, Guerra na Ucrânia

Abstract

Energy security has been on the priority list of the European Union for a long time, but since the early 2000s, after the former eastern bloc countries joined NATO, the Alliance too has turned its gaze towards this topic. After the Russian annexation of Crimea at the beginning of 2014, there was a major shift in the geopolitical and security environments in Europe, and energy security climbed high on the lists of the EU and NATO, but both reacted differently towards it. After the beginning of the war in Ukraine on February 24, 2022, the EU and NATO started functioning in a new (in)security environment when it came to energy, which was reminiscent of 2014. Using Securitization Theory and the concept of Institutional Overlap, this work set out to find the answer to the question of what is the role of the EU and NATO in ensuring energy security in the new security framework in Europe, and which International Organization bears more responsibility to do so? After a thorough analysis of statements, documents, and press releases from both IOs, it was concluded that the EU carries more responsibility for ensuring the energy security on the Old Continent, mainly because it was proven that the Union securitizes security of supply much more than the Alliance between the trigger years of 2014 and 2022.

Key words: Energy Security, NATO, EU, Securitization, Overlap, War in Ukraine

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Glossary

EU-European Union

IO-International Organization

NATO-North Atlantic Treaty Organization

EC-European Commission

SOS- Security of Supply

SC-Strategic Concept

EDA-European Defense Agency

NAC-North Atlantic Council

Introduction

Energy security, or security of supply, has been on the European Union's (EU) agenda for many years, which shouldn't come as a surprise since the International Organization (IO) is founded on the basis of an economic union, whose major goals are promoting human rights, free trade, and the rule of law, while acting rather as a civil actor, and not as a military one. But since the ascension of the former Eastern bloc countries into the North Atlantic Treaty Organization (NATO) in the mid-2000s, the Alliance, too has turned its gaze towards providing energy security in Europe.

After the Russian annexation of Crimea at the beginning of 2014, there was a major shift in the geopolitical and security environments in Europe, and energy security climbed high on the lists of the EU and NATO, but both reacted differently towards it. After the beginning of the war in Ukraine on February 24, 2022, the EU and NATO started functioning in a new (in)security environment when it came to energy, which was reminiscent of 2014, but the escalation of tensions, coming from the partial interruption of energy supplies from the Russian Federation to the EU and the explosions of the Nordstream 1 and 2 pipelines, was much higher than eight years before.

From this, many questions were raised about the current state and future of energy security in Europe, but in this work, I will attempt to find the answers to three separate, and at the same time, interconnected questions: First, what is the role of the EU and NATO in ensuring energy security in the new security framework in Europe, and who bears more responsibility to do so? Second, to what extent do both IOs securitize (or, in some instances, desecuritize) energy security? And third, to what degree, if at all, do the EU and NATO show institutional overlap in their approach to energy security? The first research question I consider the main one, and the second and third questions will be the tools to reach an answer to it and complement it.

I will focus on events around 2014 and 2022, which I selected as "trigger years", because they directly had to do with the provision of energy supplies to the Old Continent and marked significant changes on the energy security map of Europe, prompting political, social, and economic reactions from the two IOs, which had major repercussions and consequences. In the case of the first trigger year, I will focus on it specifically, as well as on the following year, 2015, since there is a contrast between them regarding securitization and desecuritization on the part of both NATO and the European Union. In the case of the second trigger year, 2022, and having in mind the intensity of events, I will also stretch the research to one year after and

one year before, respectively, 2021 and 2023. Considering recent developments and that the scope of the work cannot reach the end of 2023, I will extend the research to the date of July 11, the date on which NATO published its Vilnius Summit Communiqué.

To reach the answers to the research questions, the theoretical framework of this dissertation will be the Securitization theory, introduced by the Copenhagen School. In the first part of the analysis, I will identify cases of securitization, and, in some cases, desecuritization of energy security on the part of NATO and the EU, concentrating on official documentation, press releases, speeches, articles, reports, etc. that were launched around the trigger years mentioned above. It is important to note that in this dissertation, securitization and desecuritization of energy security, or security of supply, covers a wide range of discourses on the topic, including energy itself, critical energy infrastructure, energy insecurity and the overall concept of putting energy security high on the “emergency” priority risk of the two International Organizations.

As a second layer of research, I will use the concept of institutional overlap and look for evidence of it between the two organizations in the protection of critical (energy) infrastructure, which will contribute to the main task of the paper.

Chapter 1. Methodology and Research Design

For methodology, I will use a qualitative case-study approach, with case studies being the European Union and NATO. The method I will use is document analysis, both from primary and secondary sources, such as official documents, statements, press releases, media publications, speeches, and academic articles. The reasoning behind this choice is the fact that, at the time of writing this dissertation (August, 2023), there were no sufficient academic articles on the topic chosen, namely, the securitization of energy security by NATO from 2014 to 2023. Principally, I will mainly rely on EU official statements and documents, although not exclusively published by the European Commission (REPowerEU, Energy Security Strategy, Energy Union, etc.) , as well as on speeches, press releases, and documents emanating from NATO officials and from the Atlantic Council (NATO Strategic Compass 2022, NATO Summits). Both will be examined in chronological order.

I opted for a case-study approach, which is “a research strategy based on the in-depth empirical investigation of one, or a small number, of phenomena in order to explore the configuration of each case and to elucidate features of a larger class of (similar) phenomena by

developing and evaluating theoretical explanations” (Ragin, 2000, p. 64–87, as cited by Vennesson, 2008, p. 226). According to Vennesson, there are four types (descriptive, interpretative, hypothesis-generating, and theory evaluating) of case studies, of which I chose the interpretative one. This type of case study “uses theoretical frameworks to provide an explanation of particular cases, which can also lead as well to an evaluation and refinement of theories” (Vennesson, 2008, p. 227, 228). In my case, I use the securitization theory and the institutional overlap concept in the EU-NATO case’s approach to energy security to answer the principal question of what their role in ensuring energy security in Europe is.

According to Bowen (2009), document analysis is “a systematic procedure for reviewing or evaluating documents—both printed and electronic material. Like any other analytical method in qualitative research, document analysis requires that data be examined and interpreted in order to elicit meaning, gain understanding, and develop empirical knowledge” (Cobrin and Strauss, 2008; Rapley, 2007, as cited by Bowen, 2009, p. 27). It involves “skimming (superficial examination), reading (thorough examination), and interpretation” (p. 32). I subscribe to Bowen’s claim that “documents that may be used for systematic evaluation of a study take a variety of forms”, which, according to him, “includes newspapers, advertisements, agendas, books, journals, press releases, organizational and institutional reports, survey data, and various public records” (p. 27). This type of analysis is especially applicable to qualitative case studies, like this one, as a research method (Stake, 1995; Yin, 1994, as cited by Bowen, 2009, p. 28–29).

The analytic procedure, which I followed, “entails finding, selecting, appraising, and synthesizing data contained in documents. Document analysis yields data - excerpts, quotations, or entire passages - that are then organized in major themes, categories, and case examples specifically through content analysis” (Labuschagne, 2003, as cited by Bowen, 2009, p. 28). However, according to Karppinen and Moe (2012), “document analysis as a distinctive research method remains, if not under-developed, at least under-communicated in much of communication policy research” (Karppinen and Moe, 2011, p. 2).

1.1 State of the art

Previous works (Natorski and Surrallés (2008), Falkevik (2016), Ababakr (2022), Iriani (2022)) have used securitization as a tool for their analysis of security of supply and its approach to the topic on the part of the European Union. Natorski and Surrallés (2008) explore the debate

about energy security in EU political circles between 2005 and 2007. Falkevik (2016) has only done so to the extent of finding out if the European Commission acted as a securitizing agent in promoting further integration, and the scope of the analysis is mainly focused on the Energy Union. Ababakr (2022), on the other hand, evaluates the significance of securitization of the energy relationship between Russia and EU countries as well as the impact of this securitization on the regional security system involving the EU and Russia (Ababakr, 2022). Iriani (2022) examines the EU as a securitization actor of energy within the field of transition to renewable energy (Iriani, 2022).

Ercolani (2012) touches on NATO's securitization of the issue, but the reach of his research covers only the period between the IO's Strategic Concepts (SCs) in 1999 and 2010 and talks more about the meaning of the word "security" in the philosophical sense than actually narrowing down cases of securitization of energy security by NATO. Mileski (2012), too, investigates the matter, but with an agenda to justify the Alliance's involvement with energy security. Bojanic (2015) touches very lightly on NATO's role in energy security and its alleged securitization of it, but only in the context of his work. For this research, the works mentioned are heavily outdated, which further adds to the reality that academic literature has seemingly turned a blind eye to the military Alliance's securitization of security of supply.

Özcan (2013) and Szulecki (2020) talk about the more general sphere of securitization of energy security. Özcan (2013) contributes to that broad field, using the lenses of securitization to look at energy security in a very universal, theoretical sense (Özcan, 2013), while Szulecki (2020) attempts to find the answer to why governmental actors try to use securitization and strive to acquire special methods for countering purported risks in the energy sector, as well as why some of these efforts succeed while others encounter opposition (Szulecki, 2020). Still, as Balzacq et al. (2016) notice, "there has not been any systematic analysis of energy security through the lenses of securitization theory" (Balzacq et. al., 2016, p. 511), which makes this dissertation an attempt to contribute to that part of academic literature.

This work does not aim to justify the securitization actors and considers that by default the audience accepts the securitization of energy security, which makes the "securitization successful", as explained by Buzan et al. (1998, p. 31).

1.2 Energy security

First and foremost, a definition of the term “energy security” must be given in order to proceed. According to Lynne Chester, this term has silently slipped into the energy lexicon and assumed a relatively prominent position. She makes an attempt to redress the gap of sporadic references about the term in literature, which describe it as “abstract, elusive and inherently difficult, and blurred” (Chester, 2010, p. 887). Her findings lead to the argument that the concept of energy security is inherently not very clear because it is polemic in nature, staying behind the notion that it may be described through multiple dimensions and that it takes on different specificities depending on the country (or continent), timeframe, or energy source to which it is applied (Chester, 2010, p. 893). Or, in other words, it depends on who you ask. Proskuryakova (2021) claims that new energy technologies should be taken into consideration when talking about energy security. Another group of scholars (Kruyt et al., 2015) attempts to grasp the concept of energy security (which they limit and equal to the Security of Supply (SOS)) in much wider terms, drawing from different resources of information and narrowing it, in a broad aspect, to four elements, which are included in the widely accepted definitions. The first and most dominant one is the availability of energy to an economy; the second one is the accessibility to resources; which leads to the third one, the geopolitical implication; and the last one, which exists in most interpretations, is the element of cost. In the end, they consider it impossible to unambiguously assess SOS based on a single indicator (Kruyt et al., 2015, p. 2167, 2177).

Chavelier (2006), using the standard definition of security of supply, which is “a flow of energy supply to meet demand in a manner and at a price level that does not disrupt the course of the economy in an environmentally sustainable manner” gives us a much clearer, but, as he admits, too vast, idea of the concept, which he boils down to three dimensions: space, social, and military. The first one indicates that disruptions in energy supply may have local, national, and international causes and implications. The social dimension reflects the fact that security of supply has a cost, and when there is a price shock, it is much more difficult for the poor to afford their energy supply; in the military dimension, he claims that energy supply is crucial for military forces, which are heavily dependent on oil products for their national and international activities (Chevalier, 2006, p. 2, 3, 4). De Paoli (2011) even suggests that “there is no commonly shared definition of security of energy supply” (De Paoli, 2011, p. 6).

Dyer and Trombetta (2013) state that “the term energy security is itself a broadening of the security agenda”. But, continuing that thought, once a narrow definition of security is challenged, the number of issues that can be included in the agenda becomes infinite, as well as the entities that call for protection. The problem then transforms into how to recognize legitimate threats and, according to the same source, in turn, how and to what extent states are supposed to provide security in a globalized environment (Dyer and Trombetta, 2013, p. 6). An explanation of this phenomenon is arguably given by Cherp and Jewell (2014). They say that the presence of different meanings of energy security does not necessarily mean the existence of different concepts of energy security. The differences stress rather than negate the need for conceptual clarity, which can support rational policy analysis, international comparison, and learning. The claim that energy security in this respect is not much different from “justice” or “minority rights”, which despite their different meanings are nevertheless subject to vigorous concept debates and policy comparisons (Cherp, Jewell, 2014, p. 416).

Having in mind all of the above, we can conclude that scholars and academia overall cannot come to an agreement on what exactly “energy security” must mean. This work is not intended to clarify or criticize existing literature on the topic. For this reason, the definition that I will give to the term during this dissertation is the widely accepted notion of an uninterrupted energy supply (Bajracharya et al. 2022, p. 13)

Chapter 2. Theoretical framework

In this work, I will present three theoretical approaches to energy security: Neorealism, Liberalism, and Securitization. I will briefly grasp how the first two frame the concept and then proceed to dive into Securitization theory since it is the one that I will apply for the rest of the work.

2.1 Neorealism

According to neorealist scholars, national interests should drive energy policy, and bilateral agreements should take precedence over international agreements. Most of the time, it is interpreted as strengthening state control over natural resources, particularly in resource-rich countries. Securing sufficient energy imports is extremely important because energy supplies are very competitive. Multinational energy agreements, comparable to those currently in place

in the European Union, contain limits, such as quotas and other barriers to energy distribution, and may thus grow less appealing in the future (Proskuryakova, 2021, p. 205). Transferring neorealism theory into the energy security field means that energy policy actors are interested not only in their own positions and gains but also in their opponents' earnings. For energy security, neorealism predicts that the great powers will capture important positions with the technology, knowledge, or resources they possess to dominate the global energy system (Kilinç-Pala, P. B., 2021, p. 789). From a neorealist standpoint, "go it alone" strategies are thus employed, thereby circumventing the arduous nature of concerted action within the EU (Elving, A., 2014, p. 10). For example, Ciută (2010) suggests the argument that the concept of energy presents a security issue, the reason being that it is a cause or an instrument of war or conflict. From this logic of energy security, he underlines that two strands converge: the first one is the idea of energy as an instrument, or in other words, what states fight with; the second one comes from the literature of energy wars, in which energy is the primary reason for hot conflicts. The central and most important principle of this security logic is survival: "not only surviving war but also a generalized quasi-Darwinian logic of survival that produces wars over energy that are fought with "energy weapons"" (Ciută, 2010, p. 129, 130). Casier (2011), too, gives his own opinion about the summarization of the neorealist's approach to energy. According to him, energy relations are seen as a crucial moment in the struggle for power between states. Energy equals more power and more weight in the international system. The author states that, the struggle for power appears, at least in most cases, in the realm of transmission, where States seek to control pipelines or minimize their dependence on them. Hydrocarbons have become an important capability in the relative distribution of power in the international system. Energy means advantages and influence, and it leads to the projection of national interest (Casier, 2011, p. 494).

Although extremely extensive and not missing a large number of strong points, the Neorealist approach to energy security is not enough for me to choose it for this study. As leverage for this decision, I draw from the three criticisms of the theory presented by Dannreuther (2010). The author highlights the following: First of all, there is an over-emphasis on the strictly military dimensions of power; second, the approach tends to be too state-centric; "in terms of international energy politics, this involves a criticism that too much attention is accorded to states and inter-state competition and too little attention to the autonomous role of transnational actors (such as transnational oil and mining companies) and the local actors (local and sub-national communities affected by or seeking to gain control of mining activities). These critics argue that it is this more complex and nuanced interaction between the

transnational/national/local which is often left out of realist-inspired accounts” (Dannreuther, 2010, p. 4). And the third and final criticism is that the theory tends to be too deterministic, in a sense that inevitable conflict over scarce resources is taken “as a given in this account” (Dannreuther, 2010, p. 5). Interdependence in the energy sector cannot be ignored as well. In a sense, the conclusions of the approach could sometimes even be a bit “overrated” (Casier, 2011, p. 506).

2.2 Liberalism

The basic ideas of a liberal theory framework are founded on interstate collaboration and conflict. From the perspective of liberalism, the reciprocal relations of the global economy meant that the energy security of one actor relies on that of all other actors. This approach tends to expand the special focus on states so that it encompasses international energy organizations, energy markets, as well as national and international corporations (Kilinç-Pala, P. B. 2021, p. 781). From the point of view of liberal economic analyses, energy is basically the same as any other good bought or sold on markets. And so, energy markets should have no different conditions than other types of commodity markets. The liberal point of view towards energy security and international energy relations shows an ontological link with more extensive liberal international thought (Stoddard, 2013). “This entails faith in the functioning of markets and the potential for institutional international cooperation to achieve mutually beneficial solutions between both economic actors and states” (Stoddard, 2013, p. 445). According to Hay (2009), “Liberalism requires faith in free markets to deliver not just economic outcomes but security outcomes as well” (Hay, 2009, p. 149). He argues that in the case of energy, prosperity and security of supply will be brought about through liberalism. To support his argument, he gives the example of the liberal Australian policy, which is linked to its liberalized economic and, thus, energy markets, which brought low prices and a sense of safety to consumers (Hay, 2009). Another example of this is the case of energy security in the EU. There is the assumption that states will act together, multilaterally, to achieve their national aims of security of supply (Elving, A., 2014, p. 12). McGowan (2008) claims that market liberalization, for example, has had a big positive effect on developing EU-level policies for the security sector. He attempts to show how liberalization has become an important principle of the EU’s internal policy as well as its energy diplomacy. Further, he says that “the pursuit of market opening has been seen as important for ensuring the security of energy supplies”, (McGowan, 2008, p. 102), but in that

case “the EU’s limited bargaining power is further constrained by the revival of sovereignty and security concerns inside and outside the EU”, (p. 90), so in that case, a strategy relying on liberalization could not be as effective as it seems (McGowan, 2008).

Having all of this in mind, liberal theory will not be the one that I work with during this dissertation. The idea of multilateral interdependence, the free energy market, self-regulating prices, and the strategies of liberalization of the market overall do have a strong basis and good points, but for my work, the counterarguments towards liberal interdependence theory, presented mainly by the field of Neo-realism (although, as we already saw, the theory, being far from flawless, is not going to be the one I use), outweigh the positives, at least for the following dissertation. They state that sooner or later, an imbalance between one of the sides (the sides being importing and exporting countries) will appear, which will bring instability, in all of its aspects, to one of the sides (Kiliç-Pala, P. B. 2021, p. 782). As of the time of writing, seeing the current situation between the EU and Russia, I cannot ignore how accurate this criticism is in that case and how it strongly diminishes the use of the liberal approach toward energy security for me.

2.3 Securitization

Now I will delve more deeply into Securitization theory since it is the one I am going to apply to my work. I will start by giving the definition of the theory in its broadest aspect and then proceed to illustrate how it fits in regards to energy security.

The notion of securitization was first articulated in a working paper, “Security and Speech Act: Analyzing the Politics of a Word”, by Ole Wæver in 1989, which he then further developed in “Securitization and Desecuritization” (1995) and in collaboration with Barry Buzan and Jaap de Wilde in “Security: A New Framework for Analysis” (1998). In these books, the scholars of the Copenhagen School first define the security issue as a problem presented as an existential threat to an object to be determined. They subsequently widened the theory into the Security Studies, publishing several books and articles that broadly furthered the conceptual understanding of securitization (Özcan, 2013, p. 8).

According to Buzan et al. (1998), “the exact definition and criteria of securitization are constituted by the intersubjective establishment of an existential threat with a saliency sufficient to have a substantial political effect. A discourse that takes the form of presenting something as an existential threat to a referent object does not by itself create securitization; this is a securitizing move, but the issue is securitized only if and when the audience accepts it in that

manner. The securitizing threat has to be argued and gain enough resonance for a platform to be made from which it is possible to legitimize emergency measures or steps that would not have been possible had the discourse not taken the form of existential threats, point of no return, and necessity. If no signs of such acceptance exist, it can be talked only about securitization move, not of an object actually being securitized” (Buzan et al., 1998, p.25). A successful act of securitization, therefore, has “three components (steps): existential threats, emergency action, and the effect on interunit relations by breaking free of rules. The distinguishing feature of securitization is a specific rhetorical structure (survival, priority of action, “because if the problem is not handled now, it will be too late, and we will not exist to remedy our failure”)” (Buzan et al., 1998, p. 25– 26). For Balzacq (2010), securitization addresses the following interdependent questions: What counts as a security problem? Why do certain challenges become security issues while others do not? How are threat images realized in policies? Are the realms of security and politics compatible or mutually exclusive? Moreover, he provisionally defines securitization as a “set of interrelated practices and processes of their production, diffusion, and reception or translation that bring threats into being” (Balzacq et al. 2010, p.13).

In sum, the key idea underlying securitization is that an issue is given sufficient saliency to win the assent of the audience, which enables those who are authorized to handle the issue to use whatever means they deem most appropriate. In other words, securitization combines the politics of threat design with that of threat management. Consequently, the core concepts of the theory are arguably the securitizing actor (i.e., the agent who presents an issue as a threat through a securitizing move), the referent subject (i.e., the entity that is threatening), the referent object (i.e., the entity that is threatened), the audience (the agreement of which is necessary to confer an intersubjective status to threat), and “the context and the adoption of distinctive policies (“exceptional” or not)” (Balzacq et al., 2016, p. 495).

Having this in mind, it must be noted that Waeber (Buzan et al., 1998, as cited by Taureck, 2006) is very critical of framing issues in terms of security. For him, “security should be seen as a negative, as a failure to deal with issues of normal politics” (Buzan et al., 1998, p. 29, as cited by Taureck, 2006). Because of this, he favors a strategy of desecuritization where securitization is reversed and issues are moved out of “the threat-defense sequence and into the ordinary public sphere”, where they can be dealt with in accordance with the rules of the (democratic) political system (Buzan et al. 1998, as cited by Taureck R. 2006, p. 2). For him, there isn’t a lot of work focused on de-securitizing politics, which, in his opinion, would do more than the securitization of problems (Waeber, 1995, p. 8). Desecuritization is the “ideal”

in the abstract sense, when talking about security, although securitization can and should be chosen in specific situations, like war, for example (Buzan et al. 1998, p. 29).

In terms of energy securitization, the most important element, according to Özcan (2013), is the increasing demand and dependence of the actors on limited energy resources. In order to ascertain the process of energy securitization, it is essential to consider the period of energy supply, which is divided into three main elements: “production”, “transportation”, and “consumption”. Therefore, the uneven supply of energy and demand for energy products create a situation of dependency among “producers”, “consumers”, and “transit” countries (p. 13). The process of energy securitization is connected to the political behaviors of states towards markets that are not balanced, which, according to the author, could be considered an existential threat to the referent object regarding the energy policies of the producer, consumer, and transit countries.

Despite that, according to Özcan, energy should be considered a topic linked to all other security sectors (military, environmental, societal, economic, and political) (Özcan, 2013, p. 13). Christou and Adamides (2013) respond to that idea. They state that the widened security agenda is limited to the five original sectors, while energy-either as a referent object or as a potential sixth sector-remains unclear, while at the same time they argue that there is a case of underexploration of energy securitization in the literature (Christou and Adamides, 2013, p. 509). Continuing on the “underexploration” wave, Szulecki (2016) states that “using securitization to the study of energy is not as straightforward as it may seem”, and while the concept is not new, there aren’t that many studies that try to apply it consistently in the sector. Although he gives his fair share to the topic by presenting two different models of the empirical study of energy securitization (Szulecki, 2016, p. 2). Doubling down on the notion of applying Securitization Theory to energy policy, in another of his works (Szulecki, 2020), offers three different gains from it: explanatory, descriptive, and normative. Firstly, using the theory allows us to see beyond the taken-for-grantedness of the policy world and explain why different actors construct energy security in such different ways. Second, the Theory helps us map how material vulnerabilities are represented by different actors. Thirdly, securitization opens up new fields of inquiry and ought to be a stepping stone for a broader research program in critical energy studies. (Szulecki, 2020, p. 8). Wilson (2019) argues that energy securitization, a process where governments frame energy as an existential threat to state interests, is variable and contingent. It appears in states where energy issues are implicated in economic, regime, and/or geopolitical security concerns and leads governments to adopt nationalistic policy frameworks that result in international conflicts over energy (Wilson, 2019, p. 114).

Securitization theory, like any other theory, is not immune to criticism. C.A.S.E. Collective (2006) gives us a good base in the sense of a critical approach to it. They present the idea of the “security trap”, which stems from the widening of the security agenda when justified by a concern to free people from fear and threat. In their view, talking about this phenomenon refers to the international dimension of the consequences of widening and to the fact that these consequences might conflict with the underlying intention. It has to do with the fact that “one cannot necessarily establish a feeling of security, understood as a feeling of freedom, threat, simply by securitizing more issues or by securitizing them more” (Collective, C.A.S.E., 2006, p. 460). The authors highlight three types of security traps.

The first is that the more one politicizes securitization, the more this entity forecloses its political options by giving preference to coercive approaches (governmental security agencies). In a sense, just the word “security” might contribute to this effect.

The second one is that the more an entity tries to securitize a social phenomenon in order to ensure “security”, the more one creates a feeling of insecurity, e.g., when the police patrol the streets in order to prevent terrorist attacks. As a logical consequence, “the politics of maximal security are also the politics of maximal anxiety” (p. 461).

The third one stems from the irony that even the most meticulous scholars, who are trying to avoid the first two traps, may unintentionally participate in the securitization of new issues, thus widening the field of securitized objects (Collective, C.A.S.E., 2006, p. 461).

Floyd (2011) challenges the moral aspect of securitization. She also argues that the Copenhagen School’s version of securitization needs a move away from its original theory and that the new one must equal securitization and the securitization move, as well as the security practice itself. In her theory, she suggests three criteria that, if properly fulfilled at the same time, would “render a securitization morally right” (p. 428):

First, according to her, an existential threat, or, in other words, a threat that poses a danger to the survival of an actor or an order, regardless of whether someone realizes it or not, must be in play; Second, “the referent object of security must be morally legitimate, which is the case only when the referent object is conducive to human well-being, defined as the satisfaction of human needs”; Third: the security response must correspond to the posing threat, for which case two conditions have to be met: the first is that the security response must correspond with the capabilities of the aggressor; and second, the actor who is making the securitization has to be sincere in their intentions (Floyd, 2011, p. 427, 428).

Vuori (2008) criticizes the theory and the scholars who apply it as having too much of a “democratic bias”. His argument is that securitization theory has been used mainly in

democratic societies and systems, and in this sense, security issues turn into a type of “special politics”, which legitimizes the use of “special procedures” through the need for survival (Vuori, 2008, p. 65). The author suggests that further categories of securitization have to be introduced in order to utilize the theory for a range of political purposes and, at the same time, expand its field in non-democratic societies as well (he uses the case of the People’s Republic of China). His method of achieving that is through illocutionary logic, and not only through the leading idea of securitization, which is a social process achieved through mere “speech acts” (Vuori, 2008, p. 64).

Another criticism of this theory comes from Lupovici (2014) and it consists of what can be described as securitization success. The meaning itself, according to the author, is elusive. Lupovici argues that if this is a bit more clear, it will expand the scope of issues that could be securitized, and a comparison of the success of securitization moves will be made through the method of how long the target audience accepts the framing (Lupovici, 2014, p. 391).

Having in mind all of the above, I will use the original Securitization Theory as an analytical tool in the following work. Admitting that it still has room for improvement and being aware of the inherent limitations of any theoretical approach, Securitization theory is the one that applies best to my own interpretation of the recent energy shifts in Europe. The “holes” in the theory, mentioned above stem mainly from its continuous development, which in itself is a positive factor. As Balzacq (2015) states, “when the essentials of securitization are established, different theories of securitization can engage in fruitful discussions” (Balzacq, 2015, p. 103). Taureck (2006) puts it in very simple yet clear and understandable words: “Securitization theory by itself does not enable the analyst to say what security should be or not be. Securitization theory thus seeks to answer the question: What does security do? In this understanding, securitization theory is nothing but a theoretical tool to facilitate practical security analysis” (Taureck, 2006, p. 4). This is the intention of the following work.

2.4 Conceptual framework

In addition to Securitization theory, I want to add another analytical tool for my analysis, with the idea of adding one more layer of research to my work. In this dissertation, I will identify the instances of Interorganizational overlap between the EU and NATO in regard to energy security in its wider sense and, more specifically, hybrid threats to critical (energy)

infrastructure in Europe. For the sake of this work, institutional and organizational overlap are regarded as close synonyms and, therefore, carry the same weight as terms.

Institutional overlap is a slippery concept on which there is no general consensus in academic literature. Schuette (2022) states that the growing complexity of transnational problems leads to the expansion of already existing institutions domains, which leads to more institutional interactions, and as a result, there are more and more cases of institutional overlap, which occurs mostly in terms of mandate, membership, and the geographic realm of cooperation (Schuette 2022, p. 1, 2). Galbreath and Carmen (2010) explain overlap in terms of “functional convergence” of “norms, interests, and objectives” of regional organizations that previously “provided niche functions” in clearly delineated and separate spheres during the Cold War but then had to adapt to the post-Cold War environment (Galbreath and Gebhard, 2010, p. 1, as cited by Koops, 2017).

The four fields of overlap, that are differentiated by Peters (2003), are membership, policy areas, general functions, and problem areas (Peters, 2003). Hofmann (2009) distinguishes between three institutional dimensions of overlap: membership, mandate, and resources, and for her, through them, overlap can be understood. According to the author (Hofmann, 2011), “the degree of institutional overlap varies along these three dimensions” (p. 103). Membership includes all members that make up the International Organizations; Mandate implies the functions and responsibilities of each institution; and Resources suggests the common resources pooled in each institution (Hoffman, 2011, p. 103). As already stated above, the concept of overlap is not a clear one, and academic literature has different interpretations of it depending on the different case studies or overall research that they are doing. Koops (2017) brings some light into the picture, stating that there is more work to be done on organizational overlap so as to turn it from a “powerful descriptive tool into a useful explanatory and predictive concept” (Koops, 2017 p. 327). Yet, Young (1996) gives us a clearer view of the concept: “organizational overlap describes situations in which institutions partly intersect, in many cases accidentally” (Young, O. 2009, p. 14, as cited by Brosig, 2011). This description of the concept, combined with the three dimensions of overlap (mandate, membership, and resources), presented by Hoffman (2011), will be the one that I use in this dissertation.

Chapter 3. General overview of NATO's and the EU's approach to energy security

In the following part of the dissertation, I will present a brief and general overview of the two IOs' approach to energy security, for the sake of clarity and as a last step before starting the analytical part of the work.

3.1 EU's General Approach Towards Energy Security

Although the purpose of this section is to focus on the European Union's perspective on energy security, or security of supply (which was set out as a concept in Community law by the European Coal and Steel Community in Article 3 in 1951, as noticed by Maltby (2013)), during the 21st century, it has to be noted, as underlined by Kanellakis et al. (2013), that the Single European Act (1986), the Maastricht Treaty (1992), and the Amsterdam Treaty (1997) put the security of supply as a main issue in the field of energy-related matters for the Union. Since the beginning of European integration, security of supply has been the main pillar of energy policy for the EU, and the purpose of policies such as renewable energy, energy efficiency, and internal energy markets is to secure energy. But events of the early 2000s, such as the rapid oil price increase since 2004 and Russia's interruption of gas supplies to Europe in 2006, had a great impact on energy security policy in the Union (Kanellakis et al., 2013, p. 1020–1026).

Security of supply found a place in the European Commission's (EC) 2007 "An energy policy for Europe", and it is presented as one of the main challenges for European energy policy, the other two being sustainability and competitiveness. There, it is stated that a few member states are "largely or completely dependent on one single gas supplier", which is already viewed as a major problem, and suggestions for diversification of the supply of mainly oil and gas are made (European Commission, 2007, p. 3, 11).

As Kanellakis et al. (2013, p. 1021) notice, a legal basis for the field of energy was introduced only in the Lisbon Treaty in 2007 in Article 194, where it is stated that "in a spirit of solidarity between Member States, the policy on energy shall aim to ensure security of energy supply in the Union" (European Union, 2007, Article 194). After the gas price disputes between Russia and Ukraine in 2006 and 2009, which led to gas supply disruptions to the Union (Staff, 2009), in 2010 the EU published the Regulation concerning measures to safeguard the security

of gas supply (Regulation 994/2010). The Regulation¹, “Establishes provisions aimed at safeguarding the security of gas supply by ensuring the proper and continuous functioning of the internal market in natural gas by allowing for exceptional measures to be implemented when the market can no longer deliver the required gas supplies” (Regulation 994/2010, p. 6).

With the idea of enhancing its resilience against energy shocks, the EC published the European Energy Security Strategy in 2014, presenting several short-, middle-, and long-term measures to do so. The measures included varied from diversification of energy supplies (which, as it can be seen since then, was one of the cornerstones of the European energy agenda on par with the development of energy technologies) to moderating energy demand (European Commission, 2014, p. 3, p. 19).

In 2015, the EC published the Energy Union Strategy,² whose goals were to provide “secure, affordable, and clean energy for EU citizens and businesses” (European Commission, 2015, p. 1). This Union Strategy builds on the Energy Security Strategy (European Commission, 2014). Energy security was one of its five dimensions, with the goal of bringing more competitiveness and sustainability to the Union. The completion of the internal energy market and more efficient energy consumption were marked as the main drivers of energy security. It was also underlined that the neighbors of the EU were closely linked to the issue (European Commission, 2015, p. 4).

Energy security was one of the five External Action priorities, presented in the EU’s Global Strategy in 2016³ (European Union, 2016). Gas was once again the main component discussed in the section of the document that promoted diversification of its routes and supplies, and it was added that “through energy diplomacy, we will strengthen relations worldwide with reliable energy-producing and transit countries and support the establishment of infrastructure to allow diversified sources to reach European markets” (European Union, 2016, p. 18, 22).

In 2022, after the Russian invasion of Ukraine, the EC published the REPowerEU Plan. Its main goal is to “rapidly reduce our dependence on Russian fossil fuels by fast-forwarding the clean transition and joining forces to achieve a more resilient energy system and a true Energy Union” (European Commission, 2022a, p. 1). In it, the energy security concerns of the

¹ Last updated in 2022. Available at:
https://eur-lex.europa.eu/legal_content/en/TXT/?uri=CELEX%3A32017R1938

² Annually updated. Last update: October, 2022, Available at:
https://energy.ec.europa.eu/topics/energy-strategy/energy-union_en

³ It was last updated in 2019. Available at:
https://www.eeas.europa.eu/sites/default/files/eu_global_strategy_2019.pdf

Union were put forward, and to tackle the issue, the Union proposed a set of actions that included saving energy, diversification of supplies, different from those coming from the Russian Federation, a combination of investments and reforms, and a transition to clean energy. One of the main goals of the Plan is to strengthen the security of supply for the Union. This, as stated, could be achieved by the development of and investment in more “energy storage” infrastructure (mainly liquified natural gas and oil) in Member States and continuing domestic gas production (European Commission, 2022a, p. 5, 13).

3.2 NATO’s General Approach Towards Energy Security

In the 21st century, we can talk about the role of NATO in the field of energy security only since the mid-2000s, and although it was “not a new issue for the Alliance”, it had to become a “consistent policy” around this time (Legendre, 2010, p. 1). A qualitative step in the advance towards the topic by the Alliance was made in 2010, with the inclusion of energy security in its Strategic Concept (NATO, 2010), where it was emphasized that the Alliance “will develop the capacity to contribute to energy security, including protection of critical energy infrastructure and transit areas and lines, cooperation with partners, and consultations among Allies on the basis of strategic assessments and contingency planning” (NATO, 2010, p. 17). Rühle (2012) highlights a few international events around this time that made NATO’s role in energy security more visible: the counter-piracy operation of the Alliance off the Horn of Africa (between 2008 and 2016), for which it used naval forces to protect oil shipments; and NATO’s operation against pro-Gaddafi forces during the 2011 Arab Spring in Libya, which was directly correlated with the energy security of Europe since some of its key energy suppliers, like Algeria and Egypt, were involved. Although acknowledging that NATO’s approach towards energy security is, in general, an acceptable and natural turn of events, the author underlines the risk of the militarization of the issue on the part of the Alliance (Rühle, 2012, p. 388–391).

During the next two decades, the topic continued to be an inseparable part of the Alliance’s agenda. It promotes the energy diversification and supply of its allies (NATO, 2016a); it enhances strategic awareness of the security implications of energy developments through “consultations on energy security amongst Allies and partner countries”; it supports the protection of critical energy infrastructure through “exercises and exchanges of best

practices with partner countries”; and it ensures energy supply to the military, attempting to enhance energy efficiency and sustainability in the military while maintaining operational effectiveness (NATO, 2022a). Bocse (2020b) adds two more areas covered by NATO in the field of energy security: the arena it provides, on which Allies can exchange information and intelligence; and the maritime security capabilities that it has, which it uses to do surveillance on routes and choke points, crucial for the transportation of oil (Bocse, 2020b, p. 6–7). In the author’s research, she notices that it was the Central and Eastern European Countries that brought their energy security concerns into the Alliance, and with them, as these concerns grew, NATO’s mandate expanded into the energy security sphere in 2009. Although it wasn’t without opposition in the face of France, which claimed that “energy-related issues fall mainly within the competence of national authorities and of the EU’s”, Bocse underlines that energy security has been on the agenda of the North Atlantic Council (NAC), and it has been discussed by the Council for the last few years (Bocse, 2020b, p. 10). Mileski (2012) stresses that NATO must continue working in the area of energy security in order to survive and function in the “international security age” (Mileski, 2012, p. 35).

The creation of the Energy Security Center of Excellence in 2012 and the creation of a research task group, focused on energy security in the era of hybrid warfare as part of the Alliance’s Science and Technology Board in 2020 show the growing engagement toward the issue on the Alliance’s part (NATO Review, 2021). As of recent and after the events in Ukraine, NATO further cemented its approach towards energy in its new 2022 Strategic Concept (NATO 2022b, p. 7). After the sabotage of the Nordstream 1 and Nordstream 2 pipelines in the Baltic Sea in September 2022, NATO took one more step towards its engagement with energy security with its commitment to defend its critical energy infrastructure (NATO, 2022c), and its inclusion of energy security in its Vilnius Summit Communiqué (NATO, 2023e).

In the following chapter, I will proceed with the analysis, whose purpose is to look for instances of securitization (or desecuritization) of energy security, or security of supply, on the part of the EU and NATO, in the trigger years 2014, 2015, 2021, 2022, and 2023.

Chapter 4 Trigger years 2014-2015. The annexation of Crimea.

In this first part of the analysis, I will examine the EU's and NATO's instances of securitization of energy security in the year 2014, during which Russia's annexation of Crimea took place, and the next year of 2015, and make a comparison between the two.

4.1. EU's instances of (de)securitization of Energy Security

The trigger year of 2014 will be the first one that I will use in my analysis of the EU's approach towards energy security because it was marked by the Russian annexation of Crimea, which was viewed as a major geo(political) shock for the EU, and brought questions about how this geopolitical and unprecedented in the 21st century until that point event could be considered in regards to energy security.

The peaceful-turned-violent protests against Ukrainian president Viktor Yanukovich and his decision to refrain from signing the association agreement with the EU started in November 2013 in Ukraine, and became known as the Euromaidan because of its supporters' demands for closer relations with the EU. The protests on the Maidan Square in the Ukrainian capital took the lives of more than 100 people and ended in February 2014, when the Ukrainian parliament voted Yanukovich out of office and established an interim government. Seizing the opportunity presented by the political unrest, pro-Russian forces and proxies of Russia staged a referendum on the Crimean Peninsula on the 16th of March, on which, allegedly, almost 97% of the voters, which were 83,1% of the population of the peninsula, chose to reunify with Russia, and the reunification treaty between the peninsula and the Russian Federation was signed on the 18th of March. Although de facto Russia has control over Crimea, the United Nations did not recognize neither the referendum nor the reunification (Marxsen, 2016, p. 1, 2), (Biersack & O'Lear, 2014 p. 248, 249, 251).

This crisis, which was followed by the annexation of Crimea and the wars sparked by the secessionist movements in two of Eastern Ukraine's regions, Lugansk and Donetsk, served as a catalyst for mainly former-communist bloc EU countries to raise their voice and ask the Union to become more assertive in its stance towards energy policy and to take decisive actions against the Russian energy weapon, which could be used against its members, importers of Russian natural gas (Andrei, 2022, p. 144–145).

The events sent shockwaves through the EU and its policymakers, and one of the first reactions by one of them was from the then-prime minister of Poland, who would later, in December 2014, become head of the European Council, Donald Tusk. On the 21st of April, 2014, just a month after the Russian annexation of Crimea, Tusk published his article titled “A united Europe can end Russia’s energy stranglehold” in the Financial Times (Tusk, 2014).

In the article, he uses the crisis in Ukraine as a pretext to ring the alarm on Europe’s high dependency on Russian energy, which weakens the continent, and claims that the EU must face Russia’s monopolistic position in the gas market. For this, he proposes an energy union based on six principles, among which are developing a mechanism for jointly negotiating energy contracts with Russia, building adequate energy infrastructure, and reaching out to partners outside Europe (Tusk, 2014).

Although assertive, Tusk’s article was not immune to criticism. Rosicki (2014), for example, suggests that the then-premier’s proposal could be viewed as a “preemptive strike” for the European Parliament election campaign in the same year because right-wing circles accused Tusk of his naive policy towards Russia and the absence of real diversification solutions of energy supplies. The author also criticizes the creation of a single energy market, which would increase the bargaining power and energy security of the EU but would distance it from a competitive free market. Also, the author begs the question of why apply this mechanism only to gas and only to the Russian Federation, having in mind that until 2014 the EU was importing more petroleum (80%) than gas (over 60%) from the country (Rosicki, 2014, p. 1, 2, 3).

Szulecki et. al. (2016) too noticed that Tusk’s proposition for this alternative framework for a common European energy policy was not incidental, being in parallel to the then ongoing negotiations over the 2030 framework, and they interpret that move as a possible important attempt to re-shape the EU’s energy and climate agenda (Szulecki et. al. 2016).

Almost every line of Tusk’s piece screams urgency and the requirement for emergency measures, which, as a result, proves to be fertile ground for clear-cut cases of securitization of energy security. To begin with, the piece as a whole is an act of securitization. Tusk calls for the creation of an energy union, prompted by events endangering, in his view, the energy security of Europe, and Europe must act now because “it is time to strengthen the community in the field of energy security”. The word “stranglehold”, used by the Polish premier in the title of the article, is a definite instance of securitization as well, since this stranglehold “makes Europe weak”, and the same goes for the notion of “dependency on Russian resources”, which

demands the six principles presented in the article, revolving around the ending of that dependency (Tusk, 2014, p.1).

The “European Energy Security Strategy” was published just two months after the events in Ukraine, and its publication was seemingly provoked by them (European Commission, 2014). It focuses on the improvement of the energy security of member states, which could be achieved through a more functional internal market and more cooperation between the states. But as a main concern, the strategy underlines the need for more resilience against external energy shocks, which desires diversification of energy suppliers and routes, because the main supplier of energy to the union, as clearly stated a few times, is Russia. The geopolitical tone of the document is striking, and it outright and publicly pushes against Russian influence (Youngs, 2014, p. 3).

To reach its goals, the Commission presents eight pillars on which to work, among which are the moderation of energy demand, the diversification of external supplies and related infrastructure, strengthening emergency and solidarity mechanisms, protection of strategic infrastructure, and immediate actions aimed at increasing the EU’s capacity to overcome a major disruption during the years 2014–2015 (European Commission, 2014, p.3).

The securitization of energy security is a strong constant found in the pillars of the strategy. It is inevitable, having in mind the urgency of its publication and the issues at hand. In the context of the diversification of energy supplies and resilience against energy shocks, which is at the core of the document, the EU securitizes the “need for a hard-headed strategy for energy security, which promotes resilience to these (e.g., energy) shocks and disruptions to energy supplies” (p. 1). An evident case of securitization of security of supply is seen in the designation of Russia as the main energy supplier to the Union, since the EC frames the “energy security of supply issue of the strong dependence from a single external supplier” as “pressing” (p. 1).

On the same note, the document securitizes the energy supply from Russia in three different, separate, and at the same time, interconnected cases: gas, oil, and nuclear power. The strengthening of the Union’s energy security “in terms of gas supplies” and the reduction of the number of Member States that are “exclusively dependent on one single supplier”, supported by the notion of solidarity, underlying that “the immediate focus should be on Member States on the eastern border of the EU,” is a clear indication of the that case (p.1, p.6). The refining sector of the Union, facing “significant challenges” to remain competitive, contributes to the “dependence on Russian crude oil”, which makes maintaining competitive refining capacities “important”, in order to avert “overdependence on imported refined petroleum” (p. 11). In

regards to the nuclear energy field, it is stated that “nuclear safety is an absolute priority”, and at the same time, since “Russia is a key competitor”, investments in new nuclear power plants to be built in the EU using non-EU technology are required, in order to “ensure that these plants are not dependent only on Russia for the supply of nuclear fuel” (p. 16).

A securitization of the protection of strategic infrastructure, which is directly related to energy security, is evident by the statement that “an overriding priority” is to assure that “strategic infrastructures are protected and that the most vulnerable Member States are collectively supported” (p. 4). Physical protection of energy infrastructure, IT security, and a “necessary” wider debate on the protection of strategic energy infrastructure (p. 6) contribute to the securitization act of energy security as well.

The Russian annexation of Crimea propelled the ideas of Jerzy Buzek and Jacques Delors voiced in 2010 (Buzek and Delors, 2010) and Donald Tusk in 2014 (Tusk, 2014) to the top of the European Union’s political priorities, which resulted in the Energy Union Framework Strategy, or the Energy Union, published by the Juncker Commission on the 25th of February 2015, less than a year after the annexation of Crimea (European Commission, 2015). Its goals align with those set forward by the EU in the 1990s and 2000s, including liberalizing the energy sector, creating an EU-wide electricity and gas market, maintaining energy security, and improving the competitiveness of the energy sector. But it also added a new element not seen before in similar political documents: it aspires to put energy consumers (households and energy-consuming businesses) at the center. This was something novel in energy policy because consumers were no longer seen as passive actors that should be guaranteed low prices (Pellerin-Carlin, 2017).

The prevalent objectives of the Energy Union were to make the energy sector more climate-friendly and decrease its reliance on external energy suppliers, and although it sounded assertive on its publication, skepticism towards its implementation and sustainability was brought to the table because of the possible lack of coordination among national energy mixes and policies, which could prevent “the integration of national energy markets” (Siddi, 2016, p. 131, 133).

Although hailed as an opportunity forged out of a crisis to shape the EU’s energy policy in a coherent way (Szulecki and Westphal, 2018, p. 198), and generally seen as a document that tackles the main energy problems of the EU, like diversification of energy supplies to counter possible future disruptions (Andrei, 2022, p. 148), presumably underlying the EU’s assertiveness on energy, it must be noted, for the sake of this analysis, that there are more cases of desecuritization of energy security found in the “European Energy Union Strategy”, than of

securitization. Especially related to desecuritizing energy security related to the Russian Federation. As established above, desecuritization deals with transferring problems out of the sphere of threat and back to normal politics.

Although it states that it builds on the Energy Security Strategy (European Commission, 2015, p. 1), a much softer tone towards security of supply is evident in many cases. The key drivers for energy security are boiled down to “the completion of the internal energy market and more efficient energy consumption” (p. 1). And in spite of the fact that diversification of supply is underlined as important in “ensuring energy security of supply” (p. 5), the focus seems to move away from the imminent Russian energy resource dependency towards “global climate challenges” (p. 5) and towards the reduction of oil consumption. The harsh tone directed at the Russian Federation seen in Donald Tusk’s article and in the European Energy Security Strategy seems to be almost totally absent, with Russia, on par with Algeria, Turkey, Azerbaijan, and Turkmenistan, being mentioned only once, although it is evident that allusions to it are made, since it is stated that “energy security is closely linked with its neighbors” as well (European Commission, 2015 p.4). This factor, closely linked to the energy security of the Union, is a clear instance of desecuritization of the topic.

A decline in emergency is noticeable in the discourse about (critical) energy infrastructure as well. If, in the Energy Security Strategy, the issue of protecting it was framed as “overriding” (European Commission, 2014, p. 4), not only physically, but digitally as well (p. 6), in the 2015 document of the Energy Union, it is “aging and not adjusted to the increased productions from renewables” (European Commission, 2015, p. 4), while, again as in the case of diversification, it is moved towards building and developing existing Liquefied Natural Gas (LNG) infrastructure on the continent, which seems to suggest that the defense of it is downgraded to say the least, or totally omitted from the document, which is a noticeable desecuritization of the matter related to security of supply.

Another evidence of the easing of tensions and continued decoupling from the Commission’s 2014 Energy Security Strategy (European Commission, 2014) presents itself as the novel dimension of the EU energy agenda: the Research and Innovation approach, whose main goals are to promote more integrated research between Member-States and the Union itself in order to put the EU at “the forefront of smart grid, smart home technology, clean transport, as well as renewable technologies and storage solutions” (p. 16). It's portrayed in such a way that its lack of emergency actions in regards to energy security almost indicates that the Crimean crisis has never happened, especially since Crimea is not even mentioned once in the entire document (even though hints to it are made, depicted as “political challenges over the

last months” (p. 4)), signaling yet another instance of desecuritization of security of supply and going back to normal politics.

4.2 NATO’s instances of (de)securitization of Energy Security

Three factors account for NATO’s interest in energy security, as stated by Bagdonas and Orglerova (2016): energy has an impact on a wider range of international relations; energy infrastructure continues to be a prime target for aggression; and energy is essential for a variety of military activities because it makes it possible to carry out military missions and operations around the world successfully. NATO aims to increase strategic awareness of energy developments with security consequences, strengthen its capability to support the protection of vital energy infrastructure, and work to increase the armed forces’ energy efficiency (Bagdonas and Orglerova, 2016, p.2).

As underlined by Bocse (2020b), the 2014 Ukraine crisis contributed to a general understanding that restricting access to energy can be used as a weapon in future conflicts and increased interest in figuring out how the Alliance could handle such threats in the future. In NATO circles, the crisis was described as a hybrid war using a combination of military and non-military weapons some of which targeted the security of the Ukrainian energy supply (Bocse, 2020b, p.11).

The first voice that put the issue on the table and thus securitized it on the part of NATO after the beginning of the crisis was the then-NATO Secretary General Anders Fogh Rasmussen. In the statement that he made at the “Brussels Forum” on the 21st of March 2014, he clearly stated that “We must make energy diversification a strategic transatlantic priority and reduce Europe’s dependency on Russian energy” (NATO, 2014a), where energy diversification, as already established in this work, has the same weight as energy security. The tone of the Secretary General was the same in his speech at the Atlantic Council in Washington, the United States, underlying the situation in which Europe had “burned its way into a position of dependence”, regarding the energy supplies from the Russian Federation, and the condition of ending that dependency, whose underlying reasoning is the possible lack of safe and sustainable security of supply, “is now of utmost strategic importance” (NATO, 2014b).

At the time, it was thought that the Alliance’s role in energy security would remain “modest”, but it was considered “an essential part of the Alliance’s modern toolkit” (Grubliauskas, 2014, p.1). Simply put, the interconnectedness of energy challenges with other

security developments made it impossible for NATO to ignore them since the Alliance could not afford to have a “blind spot” (Grubliauskas, 2014, p.1).

But the events that took place in Crimea in March 2014 led to the NATO Wales summit as well as the Declaration that was published at it, which highlighted measures that can contribute to the increase of the energy security of NATO members (Bocse, 2020b, p. 8). By this action alone, NATO asserted its position on energy security, and the modesty of its role in regarding the topic was beginning to fade.

In the declaration, it is underlined that with the intention of continued dialogue and cooperation with the European Union, the consultations between them “have broadened to address issues of common concern, including security challenges like cyber defense, the proliferation of weapons of mass destruction, counter-terrorism, and energy security” (NATO, 2014c, paragraph 104). The act of mentioning energy security in the same sentence as cyber defense, counter-terrorism, and proliferation of weapons of mass destruction, through which all of these security issues are put on the same scale, speaks of the successful securitization of it by the Alliance.

But the heads of state only doubled down and continued to securitize the “critical importance” of the “stable energy supply, the diversification of routes, suppliers, and energy resources”, as well as the “interconnectivity of energy networks”, after which the Organization describes what steps it will take to ensure the supply of energy to NATO countries, which include, most notably, the “protection of critical energy infrastructure” (NATO, 2014c, paragraph 109), which is a securitization act of energy security by itself. Additionally, the Alliance includes “key environmental and resource constraints,” among which the “increase of energy needs” is able to “significantly affect NATO planning and operations” (NATO, 2014c, paragraph 110).

The securitizing narrative of energy security evident in the declaration was reinforced by the speech of Secretary General Rasmussen at Carnegie Europe, which took place just a few days after its publication. He securitized security of supply in the tone of “NATO’s core task” of defending its allies, more specifically, their pipelines and “other means of energy supply” (NATO, 2014d).

In the year 2015 it was noticed that, in stark contrast with the year 2014, NATO and its officials hardly mention energy security during that year (NATO, 2015), which, it could be argued, is an act of desecrutization of the issue on the part of the Alliance. While still present as a topic in the 2015 annual report (NATO, 2016b, p. 42) of the Secretary General, which, even though published in the beginning of 2016, still serves the purpose of this research, nothing

new is added to the agenda, and, having in mind that during the same year energy security was visually absent from the documents and speeches published by NATO officials, it is important to mention that the excluding of the issue, so seemingly pressing and so revitalized for the Alliance in 2014, is an act of desecuritization, compared to the opposite in 2014. It is relevant to observe the fact that the same occurred with the desecuritization of security of supply on the part of the European Union with its Energy Union framework, which, all on its own, raises the question of the reasons for doing so, which can be used as a future topic of research.

Chapter 5 Trigger year 2021. The Global Energy Crisis.

The next year, which is subject to examination in the current analysis, 2021, was marked by a major, worldwide energy crisis that did not pass the European Union and its energy concerns, nor, in the same context, went unnoticed by the North Atlantic Treaty Organization.

5.1 EU's instances of (de)securitization of Energy Security

In 2021, a confluence of the post-COVID recovery, depleting fossil fuel energy supplies, in EU storage facilities, the first disruptions of Russian natural gas exports to the EU and severe weather conditions caused an increase in global energy demand. Failure to replenish fossil fuel energy reserves led to inevitable energy shortages. Energy demand rose to extremely high levels, and renewables could not compensate for the shortage, therefore triggering the energy crisis of energy supply crunch. The crisis partially showed that there is more to work on regarding renewables because they were not ready to meet the ever-growing demand for energy by households and corporates (Peterson and Ercan, 2021, p. 85). Europe felt the gas hike in the second half of 2021, explaining it by an unprecedented increase in gas prices on the global market, extreme climate conditions, among which summer heatwaves, which push up energy demand for cooling, increased demand for natural gas, that lead to its prices getting higher, and a spike in consumption of gas in Asia due to its recovery and scarcity of nuclear and hydropower electricity generation, partially because of climate conditions (European Council, Council of the European Union, 2023, p.1). Other factors, such as low natural gas stockpiles, low overseas shipments, and sluggish maintenance work that put nuclear generators and other plants offline, also contributed to the crisis in Europe (Peterson and Ercan, 2021, p.86).

The energy crisis, according to Blank (2022), demonstrated how Europe failed to adequately deal with the issues created by increasing dependence on Russian gas, and as a consequence, the Russian influence impeded the European integration project and destabilized European, and more specifically, Balkan, security of supply. It also highlighted European overdependence on natural gas (Blank, 2022, p.58). Calls were made for governments and energy companies to apply an integrated perspective to natural gas stability and supply security, with a focus on how it influences multiple demand sectors since, unlike coal, natural gas is a fossil fuel that plays a central role in decarbonizing energy markets and, at the same time, balances renewable energy (Gilbert et al. 2022, p. 6, 7).

In response to the crisis, on the 13th of October during the same year, the European Commission proposed a “Toolbox” (European Commission, 2021) with which to address the high energy prices, providing immediate measures to protect customers and businesses (Andrei, 2022, p.151). Although the policies presented in it were sensible, the fact that they were left to individual member-states meant that some nations might free-ride on the labor of others (Calnan, 2021). This document was the major response to the energy crisis of 2021 by the EU, and for this reason, it is encompassed by the analysis conducted in the current dissertation.

During the breakdown of the document, it was noticed that the European Union did not securitize energy security or security of supply. Weighty validation of this conclusion presents itself right at the beginning of the document, stating that “while energy supply is not at immediate risk (...), security of supply, gas storage levels, and the proper functioning of the gas market need a particular monitoring ahead of the winter season” (European Commission, 2021, p.1). Regarding security of supply, the document inclines more towards market monitoring and enforcement levers, available to the Commission, in order to “anticipate risks” regarding the issue since, during the high price period of the crisis, this action was described as “more important than ever” (European Commission, 2021, p.1). As for gas supplies, which experienced the highest price rise during the crisis, the Commission underlines its intentions to ensure security and competitiveness in the international market, thus strengthening its own energy security, and to that end, it even reveals its plans to revise its gas security of supply regulation. Still, all of the above, viewed through the lenses of securitization theory, is kept within the sphere of normal politics, and there is no evidence of securitization of energy security. It could be argued that “clean energy transition” may be the object of securitization in that document, since it is on the main political agenda of the union and is described as “the best insurance against price shocks”, while at the same time the need to “speed up” the development process of that policy is reinforced (European Commission, 2021, p. 20). Therefore, it can be

said that the European Union did not securitize energy security during the 2021 global energy crisis, and an argument could be made that it continued its trend of desecuritization of security of supply that started in 2015, as it was established above. Although its approach towards renewables did fall under the scope of securitization during 2021, which could be examined as a topic in future studies.

5.2 NATO's instances of (de)securitization of Energy Security

On the other hand, the discourse on energy security coming from the North Atlantic Alliance sounds much more different than that of the EU. A few months after the crisis made its presence noticeable enough, in March, Secretary General Jens Stoltenberg securitized diversification of energy supplies and security of energy supply in the context of the Nord Stream 2 pipeline, stressing that even though the Alliance is focused on securing energy, they do not have a certain position on the pipeline project (NATO, 2021a). In May, NATO Deputy Secretary General Mircea Geoană put energy security, telecom, 5G, and democratic resilience in the same basket of “vulnerable points” for the Alliance (NATO, 2021b), which, in contrast to 2015, shows that NATO goes back to securitizing energy yet again.

This is further cemented by the NATO Brussels Summit Communiqué, published in June. In it, it comes as no surprise that the NATO heads of state and governments frame energy security as playing an “important role” in the common security of the Alliance (NATO, paragraph 59, 2021c). The diversification of energy routes and resources, a stable and reliable energy supply, the integration of sustainable energy sources, and the interconnectivity of energy networks were characterized as of “critical importance”, and all of them contribute to the resilience of the Alliance against “political and economic” pressures. Excluding the clear securitization of energy security, it can be additionally reasoned that in that Communiqué, NATO hints at the then-evident energy crisis that is sweeping the entire world, with a specific impact on Europe. On the same day, the Alliance once again securitized energy security, framing it as being “challenged”, for which measures will be taken (NATO, 2021c, paragraph 8). These frequencies of escalating securitization of security of supply in 2021 by the Alliance could be explained by the consequences of the COVID pandemic that NATO was still dealing with, because even though the Alliance’s energy security was not hindered by the pandemic in the short term, from mid- to long-term it was (Juutilainen and Grikinyte, 2020, p.3). And despite the fact that it was considered that COVID-19’s impact on gas and energy security was minor,

it was further believed that NATO's energy security needed to be more diversified, especially regarding natural gas imports and gas transmission infrastructure in Europe (Juutilainen and Grikinyte, 2020, p.3).

Chapter 6. Trigger years 2022-2023. The War in Ukraine.

The following part of the analysis will focus on the year 2022, and more specifically, it will examine the period from February 24th, the beginning of Russia's invasion of Ukraine, which continued into 2023. As of writing this dissertation, the military, social, economic, and humanitarian crises caused by the conflict are still ongoing, so the events examined in the analysis will cover the period from the beginning of the invasion until NATO's publication of the Vilnius Summit Communiqué on July 11, 2023.

6.1 EU's instances of (de)securitization of Energy Security

The greatest predicament the EU has faced since World War II began in 2022 when Russia invaded Ukraine and the world's worst energy crisis began to disrupt physical and ontological security, posing an unprecedented number of dangers, risks, and uncertainties. Energy security became more geopolitically charged than ever, and stories of energy as a weapon, as a battle, and as "blood money" were peeking from every corner (Andrei, 2022, p.148). The invasion was virtually immediately condemned by western leaders as a "blatant violation of international law", and they stated their support and solidarity for Ukraine (CNBC, 2022, p.1). Moreover, on March 2nd of the same year, the United Nations overwhelmingly adopted a resolution demanding an immediate ceasefire and Russian withdrawal from Ukrainian territory, asking for a "peaceful resolution of the conflict through political dialogue, negotiations, mediation, and other peaceful means" (UN press, 2022). Having in mind the war in Georgia in 2008, the annexation of Crimea in 2014, the long conflict in the Donbass for almost eight years, and Russia's buildup of troops in 2021, including in Belarus, the military invasion itself should not have come as a surprise, but it did for many (Dijkstra, et al., 2022). And especially so for the European Union. The invasion sent shockwaves through the continent, and it distressingly unveiled the continent's dependence on the Russian Federation, a geopolitical competitor.

With the objective of weaning Europe off of Russian fossil fuels, the geopolitical energy supply crisis caused by the war gave rise to complicated and growing new political programs that would not have been used outside of an emergency scenario. The emergency also brought to light two unwelcome truths: despite Europe's energy systems undergoing sustainable transitions, the majority of its energy consumption still relied on fossil fuels, and despite a number of gas disputes between Russia and Ukraine and the above-mentioned annexation of Crimea by Russia in 2014, the EU continued to be heavily dependent on Russian natural resources. The reality of the situation regarding the EU's heavy political adversity additionally stemmed from the fact that the ongoing crisis comes after the COVID pandemic and the energy price hikes in 2021, which additionally contributed to the cost-of-living fears in the Union (Kuzemko et. al., 2022).

There were voices that argued that the conflict and the uncertainty around natural gas will have a significant impact on how the European energy transition develops in the future, using the crisis as an opportunity for further decarbonization and reduction of energy vulnerability (Osička and Černoč, 2022). But on the other hand, member-states of the Union, among which Germany, Austria, the Czech Republic, and the Netherlands, started to re-evaluate their energy policies and opt for the coal-fired electricity generation option in order to improve their energy security, claiming these were just short-term emergency measures, even though they directly contradicted their climate goals (Mišík and Nosko, 2023, p. 2). As of the date of writing this work, the European Union has applied eleven packages of sanctions towards the Russian Federation. In response, Russia has cut or reduced gas supplies to Poland, Bulgaria, Finland, Latvia, and the Netherlands (Kuzemko et. al., 2022). These actions turned security of supply to the Union into a crucial issue (Mišík, 2022), with no single solution.

After the 24th of February, which was followed by four packages of sanctions from the Union directed towards Russia, the European Commission presented its first major political document on the 24th of March, exactly a month after the invasion: The Strategic Compass. The document itself was expected earlier than that, but the critical events that occurred demanded that it be rewritten and published after a reevaluation of current events. Hailed as a “geopolitical awakening” (European External Action Service, 2022 p.1) for Europe, the Compass's purpose was to guide it towards becoming a stronger and more capable security provider in the new geopolitical environment. It prioritizes four means of action to reach that goal: the ability to act rapidly and robustly; enhancing its ability to anticipate threats; investing in capabilities and innovative technologies, as well as reducing technological and industrial dependencies; and strengthening cooperation with partners to respond to common threats and challenges

(European External Action Service, 2022, p. 12, 13, 15). The document was not exempt from criticism, however. Emerging from the evidence that the Compass was rewritten during a time of military conflict in Europe, Tulun (2022) underlines that the document appears to have been approved hastily for some reason at a time when a major crisis erupted on the continent and the security situation was completely flipped upside down (Tulun, 2022, p. 3). Additionally, according to Blockmans et. al. (2022), the Compass lacks strategic foresight and might downgrade the EU's actor status to regional and not global. Furthermore, the authors of the paper argue that the document not only lacks references to big ideas but also looks more like "a list of concrete administrative, legal, and operational action items" that would be used to strengthen the Union's ability to act, secure, invest, and partner in the field of security and defense (Blockmans, Crosson, and Paikin, 2022, p.1, 3).

Energy is one of the main topics in the document. In the spirit of its seemingly more confident geopolitical posture, the EU claims it is ready to cut its heavy reliance on Russian energy imports, and right from the beginning, energy is put in the scope of "threats to our strategic interests that we have been aware of but not always acted upon". In addition to that, it is stated that Russia has been using energy as a "political weapon". Just a few lines under, energy flows are yet again put in the framework of "hybrid tactics and intermediate dynamics of competition", and compared to "planes, soldiers, and tanks" (European External Action Service, 2022, p.5). The securitization of energy security and the risks around it are evident without a doubt, putting, yet again, and not like during 2021, energy and diversification from Russian fossil fuels on the "threat" list of policies of the Union. Understandably, the Russian invasion of Ukraine narrative is a constant throughout the entire document, and the "economic and energy coercion, as well as the aggressive nuclear rhetoric", which the Russian Federation directed at Ukraine, is yet another red alarm the EU rings as an alert towards security of supply and its vulnerability (p. 17). Securitization of energy security is highlighted once more in the Union's desire to enhance its "resilience and ability to counter hybrid threats and foreign information manipulation and interference". Additionally, the subject is yet again put on the same scale as "instrumentalization of irregular migration and lawfare", which target Europe's energy (p. 34). Furthermore, risks to security of supply will be mitigated, and protection of "technologies that are critical to security of defense" are to be invested in (p. 48). It is more than clear that the war in Ukraine made the EU securitize energy security in a matter of just a month, if not less, which could be seen as a "step-up" in comparison with 2021, where although there was an energy crisis, the Union had a softer tone towards the issue and, mostly, did not put it outside the boundaries of normal politics. The Union's reaction to the events on its Eastern

Borders looked a lot like its previous one in 2014 with the Russian annexation of Crimea, but this time it had the political will to “learn the right lessons from the crisis” (p. 5).

After the European Council’s agreement to cut down on Europe’s dependency on Russian energy imports on the 24th and 25th of March (European Council, 2022a), the Commission was tasked with coming up with a comprehensive REPowerEU plan to reach that goal, and it delivered exactly this less than two months later, on the 18th of May. The REPowerEU plan aimed to fast-forward the clean energy transition and reach a more robust energy system, which will bring about a “true Energy Union”, with its main goal being reducing the Union’s dependence on Russian fossil fuels before 2030 (European Commission, 2022a, p.1). The main cornerstones of the strategy are saving energy, diversifying supplies, accelerating the clean energy transition in order to substitute fossil fuels, and combining investments and reforms (European Commission, 2022a p.1).

Although revered as ambitious and as being the “vehicle” and “framework” (European Commission, 2022b) for investment in clean tech, it was immediately argued that the 210 billion euro Plan could not hold up to one of his short-term promises: replacing the Russian gas supplies by two-thirds by the end of 2022-2023 winter because it was “impossible” (Lambert et al., 2022, p.1) to secure enough additional gas, having in mind the then industrial capacities of the main gas exporting countries, their contractual engagements, and their growth strategies (Lambert et al., 2022, p.7, 8). Vezzoni (2023), points out that the implementation of the policy could lead to paradoxical outcomes. The REPowerEU aims to increase energy production from nuclear and fossil fuels, resulting in the reactivation of coal plants and investments in new LNG terminals and gas pipelines. Although, as the author argues, diversifying energy sources may seem beneficial, it is possible to lead to closer relations with warmongering and illiberal states “like Israel, Qatar, Azerbaijan or Egypt” (p. 1). On top of that, a rapid energy transition could heighten Europe’s reliance on mining and processing raw materials in other countries, especially China, which in turn could dampen the post-pandemic recovery of the continent. Vezzoni underlines the evident contradiction between the EU institutions’ declared strategy to promote green growth and the immediate and long-term effects of these policies (Vezzoni, 2022, p. 1).

The Commission makes the sharp sense of emergency regarding its security of supply exceptionally evident in the document, bringing to light its “heightened energy security concerns”, (European Commission, 2022a, p.1) caused by the high energy prices provoked by the conflict. In order to assure security of supply to its Member States, the Commission advises that immediate measures are required, such as domestic natural gas production (p.5), additional

storage, which is presented as “key for enhancing security of supply”, with which there will be an “increased level of preparedness and response to risks in the security of gas supply”, and additional investments to “ensure security of supply” of the Member States that are almost fully dependent on pipeline oil from Russia (p. 13). The tone of exigency rises even higher with the warning of the possible risk of “severe supply disruptions”, raising the red flag that “without further action in the coming months, storages will not be sufficiently filled for next winter”, bringing the act of securitization of the subject right on the table (p.19). The diversification of energy supplies, so central and securitized in the European Energy Security Strategy from 2014 and desecuritized in the Energy Union from 2015, assumes paramount importance and is resecuritized in the REPowerEU document since “the time to reduce Europe’s energy dependence is now” (p.20). There are two urgent reasons to reduce Europe’s energy dependence on Russia: the first is the climate crisis, and the second is the fact that by buying fossil fuels from it, the EU feeds the “political and economic weapon” of Russia. The moment of urgency and the reemergence of the terms political and economic “weapon” contribute to the further securitization of Europe’s will to diversify from Russian fossil fuels, which directly compromise not only the security of supply of the Union but the physical existence of the state of Ukraine as well (European Commission, 2022a, p. 20).

In the following months, energy security did not step down from the spotlight of European policy, and its securitization on the part of the Union was becoming a frequent phenomenon because of the rising (geo)political tensions. On the 24th of May, not long after Russia cut electricity and gas supplies to Finland, and only natural gas exports to Bulgaria and Poland, the Commission and the United States condemned this act of the Russian Federation as “energy blackmail”, and asserted their commitment to strengthening Europe’s energy security (European Commission, 2022c). They did that in the context of the joint Task Force on Energy Security, announced on January 11, 2023, by President of the European Commission and the Secretary General of NATO (European Commission, 2023b). In the beginning of the next month, energy security, food security, and defense security were ranked together, too, all being of “strategic importance” to the Union (European Commission, 2022d). Later, energy security was described as “threatened”, and put at “clear risk” in the short term, and therefore, coordination between Member States to preserve it was “more important than ever” in order to enhance it (European Commission 2022e). In the spirit of ending reliance on Russian energy, the US President and the Head of the Commission doubled down on highlighting “Russian energy coercion”, which “threatened global energy security”, while at the same time underscoring the US’s role in helping the Old Continent diversify its energy imports with LNG

(European Commission, 2022f). In July, yet again, with regard to Russia's use of energy as a weapon and blackmailing Europe, Head Commissioner Von der Leyen stressed that Member States have to address their energy security at "European level", and be prepared for the potential full cut-off of Russian gas, which, according to her, was "a likely scenario" (European Commission 2022g).

On the 27th of September, the international community was taken aback by a never-before-seen act of sabotage: the explosions of the Nord Stream 1 and Nord Stream 2 pipelines, connecting Russia to Germany and running under the Baltic Sea near Sweden and Denmark (Dutta and Ovaska, 2022). The President of the European Commission von der Leyen was quick to respond to the event, calling the leaks of the pipelines "sabotage" and promising the "strongest possible response" against deliberate action against European energy infrastructure (Liboreiro, J., 2022). High Representative Josep Borell joined the statements of the Union as well, claiming he was "concerned" about the damage caused to the pipelines while at the same time making it clear that these incidents "are not a coincidence and affect us all". Borell immediately stated that further actions will be taken to increase the EU's energy security, and that all deliberate attempts, which this one clearly was, to disrupt European energy infrastructure will be "met with a robust and united response" (European Council, 2022b).

Although the Ukrainian side immediately blamed Russia for the sabotage, Western allies stopped short of doing the same thing; moreover, the Russians shrugged the accusation off as "absurd and stupid" (Rfe/RI, 2022). The incident had an impact on both the political and energy security of the European Union. The Nord Stream natural gas pipelines, which were regarded as Europe's "main artery" of energy, were crucial to the continent's overall security of supply. Even though Nord Stream 1 barely maintained gas transmissions for more than half a year, the Russian side cut off these transmissions on the 30th of August under the pretext of maintenance, which threatened European security of supply even more, and the attacks on the pipelines demonstrated the vulnerability of the Union (Yin and Zhong, 2023, p. 5).

The sabotage of the pipelines found its place in the Extraordinary Energy Council on the 30th of September in Brussels, which was planned a couple of weeks before with the goal of approving measures to lower the soaring gas and energy prices on the continent (Lopatka, Abnett, 2022). There, it was stated that policy measures for the protection of European energy infrastructure will be taken and that a "stress test" of their physical protection will be considered. All of these measures were put forward in the light of the EU's security of supply, which was at "risk", due to the high energy prices caused by the Ukrainian crisis (European Commission, 2022h). On that note, and continuing to highlight the "Russian energy weapon",

Commission President Ursula von der Leyen presented a five point plan for resilient critical infrastructure. Stressing that “pipelines and underwater cables connect European citizens and companies to the world”, as well as that “they are the lifelines of data and energy”, the Commission president urgently addresses how “vulnerable” the energy infrastructure of the Union actually is (European Commission, 2022i). This was reiterated by the Commission soon after, when it was said that the sabotage of the pipelines and “other recent incidents” made it obvious that the resilience of the European critical infrastructure was “under threat” (European Commission 2022j). During the next year, energy security continued to be a principal objective for the Union, although (or rather, because) Russia continued using energy as “a political and economic weapon” (European Commission, 2023a). This description of Russia’s role in energy and its use against the European Union is one of the main reasons, along with its invasion of Ukraine, which are tightly interrelated, for the Union to heavily securitize security of supply after the 24th of February, 2022. As the energy, economic, political, and military crises are still ongoing, the European Union continues with its attempts to ensure its energy security generally with the policies it had already presented in 2022, among which are curbing energy consumption, accelerating production of renewables and domestic energy production, expanding its LNG capacity, strengthening its strategic autonomy in the energy field, and trying to diversify its gas supply diversification (Widuto, 2023, p.1). Throughout the analysis, it was noticed that the Union securitizes energy security mostly in the context of its now-ending overdependence on one single supplier, which, as a phenomenon, could prove fertile territory for more extensive research, since the process of the “derusification” (Khakova, 2022, p.1) of European energy is still ongoing and sharp turns could yet be taken.

6.2 NATO’s instances of (de)securitization of Energy Security

The North Atlantic Treaty Organization had a similar reaction to that of the EU on the conflict, condemning in “the strongest possible terms Russia’s brutal and unprovoked war of aggression against Ukraine” and accenting its “unprecedented levels of support, helping to uphold its fundamental right to self-defense” (NATO, 2022d). Painting Russia’s invasion of Ukraine as “the gravest threat to Euro-Atlantic security in decades”, Secretary General Stoltenberg called on Russia to put an end to the “senseless war” and “withdraw its forces from Ukraine” (NATO, 2022e). More evidence that proves the extremely high level of emergency

on the part of the Alliance comes from the reality that NATO activated its defense plans, resulting in the deployment of elements of the NATO Response Force (NATO, 2022e). Although tensions were high, NATO foreign ministers agreed to remain committed to the stability of diplomatic ties with Russia, in order to avoid an unintended escalation, misunderstanding, or miscalculation. This decision was reached after the ministers got to a conclusion that Russia's relationship with NATO had fundamentally changed, having in mind "the new normal" regarding the Alliance's security, coming from the crisis (NATO, 2022f). NATO's stance was further reiterated at its extraordinary summit in Brussels on March 24th, with the heads of state stressing that "Russia's attack on Ukraine threatens global security, and its assault on international norms makes the world less safe". It was said that the Alliance will cooperate with the rest of the international community "to hold accountable those responsible for violations of humanitarian and international law, including war crimes". The conflict was depicted as representing a "challenge to the values and norms that have brought security and prosperity to all on the European continent" (NATO, 2022g). Naturally, the Ukrainian crisis was a top priority for discussion at the extraordinary meeting of NATO defense ministers as well, where they claimed more support for the country, including "heavy weapons and long-range systems" (NATO, 2022h).

The first major and long-awaited document released by NATO after the 24th of February 2022 was its new Strategic Concept, approved in June at the Madrid Summit (NATO, 2022b). The SC focuses on four tasks: deterrence and defense; crisis prevention and management; and cooperative security, while at the same time placing the national and collective resilience of the Allies at the center of its core tasks (p. 1). It, for the first time, designates the Russian Federation as "the most significant and direct threat to Allies' security and to peace and stability in the Euro-Atlantic area", and it rings the bell on The People's Republic of China's ambitions "and coercive policies" that challenge the Alliance's interests (p. 4, 5). While the Concept covered a wide range of policies and regions, according to Solovian and Poita (2022), the document did not pay sufficient attention to the Black Sea region, and a lack of strategic vision for NATO's Black Sea policy was apparent. Additionally, according to the authors, the Concept does not explain how to restrain the policy of militarization of the region on the part of Russia (Solovian and Polita, 2022, p. 1). Also, it was noticed that NATO's Eastern flank takes almost total precedence over its Southern flank. The Concept focuses principally more on deterrence and defense on the Eastern flank, and there is almost no word about crisis management and cooperative security on the Southern one (Tardy, 2022, p. 15).

As already mentioned above, energy and energy security found their place in NATO's 2022 Strategic concept. It is essential to note that, similar to European rhetoric, manipulation of energy supplies and employment of economic coercion by "authoritarian actors" and "strategic competitors" were also used by NATO in the document (NATO, 2022b, p.3). Furthermore, the Alliance says it will invest "in our ability to prepare for, deter, and defense against coercive use of political, economic, energy, information, and other hybrid tactics". The securitization of energy security is intensified to such an extent that if energy is threatened, it is stated that it could lead to the implementation of Article 5 of the Alliance, which boils down collective defense if any of the NATO allies is subject to an armed attack (NATO, 2019). In the context of working on identifying and mitigating "strategic vulnerabilities and dependencies", including critical infrastructure in a more challenging environment, in its SC, NATO pledged to enhance its "energy security and invest in a stable and reliable energy supply, suppliers, and sources", which is a clear indication of the members' efforts to diversify from Russian fossil fuel supplies (p. 7).

The Madrid summit, at which the Concept was accepted, issued a Declaration, whose goals, views, and policies were generally in the same spirit as those of the Concept. Solidarity between members of the Alliance and a firm decision to help the Ukrainians were reinforced many times during the Summit and in the Declaration, but problems such as political fatigue regarding support for Ukraine due to high domestic energy and food prices and problematic logistics with weapon deliveries were virtually ignored, and calls for NATO's long-term strategy to be better policed emerged (Ignatius, 2022). Being in the spirit of the Concept, the declaration securitized energy security and energy supplies, stating that the Alliance will strengthen their energy security, and that it will "ensure reliable energy supplies to our military forces" (NATO, 2022i, paragraph 10). It should be underlined that in this Declaration, contrary to the European Union, NATO did not mention energy security in relation to the civilian population. Secretary General Stoltenberg also emphasized the "pressure on energy supplies and the soaring cost of living" in connection with the Alliance's support for the Ukrainians coming from "Russia's war" (NATO, 2022j, p.1).

This statement came nine days before the sabotage of the Nordstream 1 and Nordstream 2 pipelines, which apparently came as a big and unpleasant surprise for the Alliance. NATO described the explosions of the pipelines as of "deep concern", and declared that, as Allies, they commit to "prepare for, deter, and defend against the coercive use of energy and other hybrid tactics by state and non-state actors". Regarding any deliberate attacks on one of the Allies' critical infrastructure, the Allies pledged that such an attack "would be met with a united

and determined response” (NATO, 2022k). Measures for protecting critical energy infrastructure were taken immediately, with NATO sending planes and ships to the North and Baltic seas to monitor this critical energy infrastructure, and statements were made that “NATO Allies are now supporting each other to prevent anything similar to happen to any other energy infrastructure” (NATO, 2022l). The vulnerability of the critical infrastructure of the Alliance and arguably the proof that NATO was virtually absolutely unprepared for it, as it had to “reassess the risks” to its energy infrastructure, was repeated more than once during the months following the explosions, although, security measures like doubling NATO’s naval presence in the North and Baltic seas, as well as increasing surveillance and sharing of information between Allies, were taken (NATO, 2022m, 2022n, 2022o).

In 2023, energy security was immediately described as a “challenge” for the Alliance by the Secretary General, being put right beside cyber defense and emerging technologies (NATO, 2023a), and NATO restated its commitment to “step up to better deter and respond to threats to critical infrastructure” (NATO, 2023b). In relation to the statement that the war in Ukraine and its consequences would be “global”, energy security was once again securitized by Deputy Secretary General Mircea Geoișă where he also stressed that “the way that we respond to the aggression will be the way in which the future of the world will look like” (NATO, 2023c). Not long before the Vilnius Summit, it was also stressed that “energy security is not a stand-alone issue, but a variety of considerations that span across NATO’s three core tasks” (NATO, 2023d).

The main topics discussed at the NATO Vilnius Summit, which was held on the 11th and 12th of July, were deterrence and defense, Ukraine’s future membership of NATO, and deepening relations with partners in the Indo-Pacific (Gotkowska and Graca, 2023, p. 1). It was also noticed that the Alliance is partly returning to the defense planning processes and structures that were in place during the Cold War but abandoned by the Alliance in the 1990s. The agreement made on the eve of the summit between Turkey, Sweden, and the NATO Secretary General, on the basis of which Turkey pledged to ratify Sweden’s accession protocol as soon as possible, was significant in the context of boosting deterrence and defense in the Baltic Sea area (p. 3). Although authorities in Ukraine were somewhat disappointed by the results of the summit, a step toward raising the profile of political relations between Ukraine and NATO was taken when they decided to transform the existing NATO-Ukraine Commission into a NATO-Ukraine Council, which would serve as a crisis consultation mechanism between the Alliance and the country (Gotkowska and Graca, 2023, p. 3). And despite the assumption that the Summit was acclaimed as a success, coming from Turkey’s green light on Sweden joining

NATO and the support for Ukraine that the Alliance agreed on, it was noticed that the unsuccessful attempt of Ukraine to integrate itself more with NATO took too much precedence over the successful policies during the Summit (McGee, 2023).

Energy security was introduced in the document, and it was described as playing “an important role” in the Alliance's community (NATO, 2023e, paragraph 68). In addition to ensuring “secure, resilient, and sustainable” energy inflow for NATO’s military, as only stated in their Madrid Summit declaration from 2022, it was emphasized that NATO’s capacity to support national authorities in protecting critical infrastructure will be developed even further. Reflecting the essence of the need for Allies to diversify their energy supplies “in line with their needs and conditions” away from Russia, which “intentionally exacerbated the energy crisis”, the Communiqué also develops this line of thought, which was also absent from the 2022 Madrid Declaration, which is on its own evidence of further and more intensified securitization of security of supply on the part of the Alliance (NATO, 2023e, paragraph 68). Continuing on that note, the Heads of State and government also repeated their commitment to protecting critical “also undersea” infrastructure, which is portrayed as being under threat and is “real and developing”. It was said, yet again, that “any deliberate attack against Allies’ critical infrastructure will be met with a united and determined response”, which further securitizes the issue (NATO, 2023e, paragraph 65).

Chapter 7. Institutional Overlap between NATO and the EU on ensuring Energy Security in Europe through the protection of critical (energy) infrastructure

In the following chapter of this dissertation, I will look for cases of institutional overlap between NATO and the EU in their approach to energy security. For the sake of the study, and as already mentioned previously in that work, energy security includes critical energy infrastructure mainly on the Old Continent. As already established, I will use Young’s (2009) description of organizational overlap, which is “situations in which institutions partly intersect, in many cases accidentally” (Young, O. 2009, p. 14, as cited by Brosig, 2011). This description will be complemented by Hoffman’s (2009) description of overlap, which includes mandate, resources, and membership.

EU Member States prioritize protecting critical energy infrastructure since a disruption or the destruction of a part of it might have adverse effects on a number of key infrastructure

sectors in an economy. Critical energy infrastructure is a subject both of national and EU legislation (Melchiorre, 2018, p.35).

For example, the European Union claims that “the primary and ultimate responsibility for protecting European critical infrastructures falls on the Member States and the owners/operators of such infrastructures” (Council of the European Union, 2008).

NATO is dedicated to assisting the Allies in safeguarding their national infrastructures because governments view the problem as important to their national security. For this, the Alliance organizes trainings and exercises, which are helpful in boosting awareness and information exchange both among the Allies and its partner nations (Melchiorre, 2018, p. 35). In connection with the Nordstream 1 and Nordstream 2 sabotages, NATO reaffirmed its stance that “the protection of critical undersea infrastructure on Allies’ territory remains a national responsibility, as well as a collective commitment”, stating that it is ready to support its Allies by request (NATO, 2023e, paragraph 65). The EU’s focus on protecting critical infrastructure plays a central role in countering hybrid threats (Pillai, 2023, p. 8). Protecting critical infrastructure was even one of the key areas in the European Strategic Compass that needed improvement. The five-point plan of Commission President Ursula von der Leyen, too, advocated for the enhancement of preparedness, especially in the energy sector (p. 8). But the main problem with the EU’s engagement in protecting critical (energy) infrastructure is hindered by the lack of trust between its members (Pillai, 2023, p. 8). Evidently, there is no clear division of labor or mandate, although, while both IOs transfer the responsibility for the protection of critical energy infrastructure to their members, they both want to increase resilience against coercive action against energy infrastructure by both state and non-state actors.

Cases of organizational overlap were also noted in the official positions of NATO and the EU on the defense of critical energy infrastructure. On NATO’s website, in the section “Topic: Energy security”, (NATO, 2022a), we read “Protecting energy infrastructure is primarily a national responsibility. However, since NATO forces are dependent on civilian energy infrastructure, it is important that Allies strengthen their infrastructure to account for NATO’s resilience baseline requirements”, and also that “Since infrastructure networks extend beyond borders, attacks on complex energy infrastructure by hostile states, terrorists, or other malign actors can have repercussions across regions” (NATO, 2022a).

At the same time, in the Fact Sheet of the third working group from the Consultation Forum for Sustainable Energy in the Defense and Security Sector (Phase III) (EDA, 2020), implemented by the European Defense Agency, which deals with the protection of Critical

Energy Infrastructure, it is stated that “Although national authorities are predominantly responsible for the protection of critical infrastructure, related disruptions can have a negative impact across national borders, thus requiring an EU dimension” (EDA, 2020, p.1). It is apparent that NATO and the EU want to engage to some extent with the defense of critical (energy) infrastructure of their Members on the Old Continent while at the same time using almost the exact same rhetoric, which contributes to their overlap in the area since there is no exact specification on who has the mandate to do so, with the exception of delegating this responsibility to the national governments, which contributes to the perplexity of whose responsibility actually is it. Likewise, in order for the Alliance to increase its awareness and that of Allied countries on the topic, it organizes “specific events, such as workshops, table-top exercises, and briefings by external experts” (NATO, 2022a). The third phase of the EDA’s project also organizes workshops in order to “enable more in-depth consideration of project development and upscaling in defense”, as well as “plenary conferences, table-top exercises, and joint defense-energy meetings” (EDA, 2023). It is noticeable that the two organizations not only overlap on their stance on the protection of critical energy infrastructure but also on the ways to get there.

Coming from the evidence above, which indicates that a clear division of labor and mandate on defense of critical energy infrastructure on the part of NATO and the EU is not present, it could be argued that progress towards this division was made with the creation of the EU-NATO Task Force on resilience of critical energy infrastructure, on which the two IOs released a Final Assessment Report at the end of June 2023 (European Commission, 2023b). Right in the beginning of the document, it is stated that “NATO and the EU will continue to work towards making critical infrastructure, technology, and supply chains more resilient in the face of continuously evolving threats and risks, based on parallel and coordinated assessments, and to take action to mitigate potential vulnerabilities” (p. 1). Within the context of the Nordstream pipelines sabotage, it is said that “the seabed is a field of growing strategic importance due to increasing reliance on undersea infrastructure and the particular challenges in protecting it from hybrid threats and physical damage” (p. 4, 5).

With the promise of that “the two organizations will continue to cooperate in a complementary and mutually reinforcing manner to build resilience and be prepared to manage disruptions from any source”, the staffs of the EU and NATO identify some key recommendations with the goal of building more cooperation between them, from which, for the purpose of this study, the most important are the following: “ensuring swift engagement between high level EU and NATO officials in the case of an identified major hazard to critical

infrastructure or a significant change in the security context”; “making full use of synergies between respective processes deriving from EU and NATO critical infrastructure policies and programs”; “promoting engagement among Allies, Member States and the private sector, including on security by design for critical infrastructure”; and “identifying synergies and potential areas of cooperation in security research activities related to critical infrastructures” (European Commission, 2023b, p. 8, 9). These specific recommendations were highlighted in the research because they show the clear will of the IOs to work more closely together and synergize better, which, if implemented correctly, could lead to a clear separation of roles regarding the protection of critical energy infrastructure in Europe, which, to this point, is not seen. Still, this report shows commitment and is a step towards reaching the seemingly unreachable goal for NATO and the EU, which could increase Europe’s energy security and the well-being of its citizens.

Chapter 8. Conclusions

This work set out to find an answer to three research questions: what is the role of the EU and NATO in ensuring energy security in the new security framework in Europe, and who bears more responsibility to do so? To what extent do both IOs securitize (or, in some instances, desecuritize) energy security? And third, to what degree, if at all, do the EU and NATO show institutional overlap in their approach to energy security in Europe?

After the in-depth analysis of both IOs's approaches, the following can be concluded: in the year 2014, which was marked by the Russian annexation of Crimea, the European Union did securitize energy security, or security of supply, to an extensive degree with its Energy Security Strategy, a document coming directly from the European Commission, and from the then-prime-minister of Poland, later-turned President of the European Council Donald Tusk’s interview for The Financial Times, which further securitizes energy security from the EU on a political level. The same could not be said about the year 2015. During the research, it was observed that the EU, with its "Energy Union", desecuritized energy security and puts it back in the sphere of normal politics, taking out the emergency element regarding the topic from the previous year. It is peculiar to note that the North Atlantic Treaty Organization’s approach to or security of supply, in its securitization and desecuritization of it, is very similar to the European Union’s one, in that it heavily securitized energy in 2014, but in 2015 it is virtually

absent from NATO discourse. A question of why that could be procured in future research on the same or similar topic.

During the 2021 global energy price hike, the EU continued its desecuritization of energy security in its "Toolbox", the major document from that year with which the Union responded to the crisis. Although it could be argued that the Union did securitize renewables, this leaves the circle of research for this work and could be explored elsewhere. On the other hand, it was recognized that NATO did come back to securitizing security of supply again in 2021, but more in the context of the then-intact Nordstream 2 pipeline from the Russian Federation to Germany.

The period from February 24, 2022, until July 11, 2023, was the one in which securitization of security of supply by both organizations was most acute and recurring. In its Strategic Compass and its REPower plan, the European Union put energy security among its top priorities, resulting from the crisis coming from Ukraine, the interruption of Russian gas exports to the EU and the new geopolitical (in)security environment. The sabotage of the Nordstream pipelines further pushed the Union in that direction, bringing the protection of critical energy infrastructure to the centre of political and security talk, while at the same time, "Russian energy weapon" was one of the most used lines of discourse coming from the political elite of Brussels, found in their speeches, press releases, social media publications, and documents published by them.

NATO's approach to energy security was extraordinarily similar to that of the European Union. With their Strategic Concept and Madrid Summit declaration in 2022, the Heads of Government and State showed no intention of desecuritizing security of supply, making it clear that this particular line is kept. NATO's principal stakeholders also promised more protection of critical energy infrastructure in Europe after the sabotages of the pipelines, implying that this type of infrastructure was too vulnerable and needed more safeguarding. For this reason, NATO's naval presence was even doubled in the North and Baltic Seas. The year 2023 did not bring any changes to NATO's stance on the topic, which was confirmed by their Vilnius summit, in which they continued to securitize energy security, and, as of the time of writing this dissertation, it seems that this trend by both organizations is only intensifying.

This leads to the next part of the conclusion. During the research, it was identified that NATO and the EU do in fact partially overlap in their engagement in ensuring the protection of critical (energy) infrastructure in Europe. This arises from their similar roles regarding the issue, their similar approaches, and even their similar discourse on it. Adding to the vagueness of who can provide more security is the fact that both IOs claim that the responsibility for protection of critical infrastructure should be held by national governments, which could lead to doubts

on why the political will of both institutions towards securing these infrastructures is so strong? Steps towards the division of labour and a clearer division of mandate are evident, though. They come from the EU-NATO Task Force on Resilience of Critical Infrastructure, which, at least theoretically, sets clearer boundaries and makes suggestions on how the two organizations can proceed in reaching their goal on critical infrastructure. If followed, these recommendations may solve the problem of “too many cooks in the kitchen” and could facilitate national governments and the institutions themselves in separating who has which responsibility for the infrastructure’s defense.

NATO and the EU both talk about how the security of the continent must be strengthened, but they present similar approaches to doing so. It could be argued that the Alliance tries to ensure energy flow for its military capabilities and secure civil energy infrastructure for the same reason, while the Union tries to ensure security of supply and diversification of energy resources mainly because of its citizens, and the market. This was summarized after the analysis of the multiple securitization instances of energy security by the IOs and the evident case of institutional overlap between both organizations in their energy security approach in Europe. This brings us back to the question of which organization bears more responsibility for the Old Continent’s energy security, on which the scales tip more towards the European Union.

The reasoning for this answer to the main research question is the fact that, as already established, the European Union securitizes security of supply much more than NATO does, which shows how central a priority this topic is for the Union. Moreover, the Union’s efforts to diversify energy supply to the Continent, especially during the last two years, are more evidence that it is taking more measures than the Alliance to ensure security of supply. Supposedly, this could also be explained by the lack of an absolute membership overlap between the two organizations; it must not be forgotten that the United States, and to a lesser extent Canada, too, have a say in NATO’s priorities, and these two countries do not feel immediately threatened by energy supply cuts. All of the above is a result of the new (in)security environment in which the European Union finds itself, and these circumstances fundamentally forced it to pull energy security out of the sphere of normal politics and take more responsibility for the Continent’s energy flows.

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