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New Dynamics of Great-Power Energy Politics in South-Eastern Europe: The EU versus the US and Russia?*

ANDRÁS DEÁK, JOHN SZABO, AND CSABA WEINER**

Abstract

South-Eastern European (SEE) countries are typically keen to maintain the status quo in their energy systems, generally characterized by underinvestment, high coal share and utility affordability needs. Their energy mixes have historically been determined by external factors, currently mainly related to decarbonization pressure. This article assesses how the EU's ongoing decarbonization-driven withdrawal from supporting natural gas projects shapes fuel choices in nine selected SEE countries and may have geopolitical consequences. It is based on more than 70 interviews with stakeholders from these countries, EU institutions, and international organizations. In exploring and theorizing the geopolitical ramifications of the energy transition in SEE, it applies a novel approach, which draws on theories of power and the concept of an assemblage, which we link to theories on entanglement and disentanglement. We find that the EU's climate policy significantly changes local infrastructural assemblages and the EU's disentanglement from natural gas goes against Russian and US efforts. By wielding its power to support such an energy transition, the EU has shifted the bipolar system 'EU/US vis-à-vis Russia' defined along a single geopolitical ruleset (supply security), to a tripolar disposition 'EU-Russia-USA' defined along two rulesets (supply security and climate policy). In addition, China has become involved. States will thus have to take crucial energy policy decisions in a new geopolitical context.

Keywords: energy transition; South-Eastern Europe; assemblage; natural gas; geopolitics; EU; Russia

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1. Introduction

Energy policy in South-Eastern Europe (SEE) is deeply interwoven with geopolitical considerations. Historically, countries in the region took decisions linked to natural gas and nuclear projects that either aligned them with the ‘West’ (i.e. the EU and the USA) or Russia. EU and US interests typically converged around their support for the diversification of natural gas import routes, the development of interconnections, and a general openness to back the uptake of non-Russian natural gas. This is now changing with the energy transition, as the EU is suspending its support for fossil fuel projects. Coal offers the most evident case for this, a sector in which the EU has undertaken a ‘coal defunding’ (Rogelja, 2020), also leading China to step in and back a number of projects and expand its political involvement in the region. A withdrawal of European support for natural gas is, however, not so clear cut, since in many SEE countries, gas is discussed as the only means of substituting coal and meeting climate targets. There is a reluctance from the EU to back new gas projects, and those that it decides to support are subject to unprecedented scrutiny. Such a shift in its approach to energy policy carries geopolitical ramifications, since it reconfigures the relations between SEE, the EU, the US, Russia, and, to a lesser extent, China in the region.

With this piece, we contribute to the ongoing academic and policy discussion focused on the energy transition. This paper begins by asking the question, what are the implications of the EU’s decision to withdraw support for natural gas projects in SEE? In answering this, we contribute to the scholarship that explores the geopolitical ramifications of the energy transition. This field is generally in its infancy, particularly in the analysis of the impact of the phase-out of natural gas. We begin to explore and theorize these dynamics in the case of SEE and by applying a novel approach, which draws on theories of power and the concept of assemblage, which we link to theories on entanglement and disentanglement (see below). This piece shows how external influences shape the fuel choices of countries that are reliant on external resources to execute an energy transition, but it does not stop there, since these changes recursively have implications that shape the relations between the external powers involved in the region. Simply put, the EU’s decision to withdraw support for fossil fuel use in SEE not only has local repercussions, but shapes the EU’s relations with Russia, the US, and China. Considering such implications is essential to execute a swift and successful energy transition while minimizing confrontation.

This article assesses how the EU’s withdrawal from gas shapes local fuel choices and shows how the EU’s environmental sustainability-driven policy is creating a new geopolitical formation. The SEE case illustrates how countries are driven to undertake a transition and how this transition changes political affairs in the region. In this study, the SEE region comprises nine countries, including three EU members (Bulgaria, Romania, and Greece) and six Energy Community contracting parties (Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia). It draws on more than 70 interviews with stakeholders from these countries, EU institutions, and international organizations.

The structure of the article is as follows: Section 2 introduces our theory of the EU’s gas withdrawal, followed by Section 3 which provides an overview of our research design.

Section 4 discusses how the attitudes towards natural gas from the EU, Russia, and the US shifted in SEE. Section 5 considers the implications of these changing attitudes on the SEE energy and geopolitical landscape, and Section 6 analyzes the EU's natural gas withdrawal and responses. Section 7 discusses the paper's findings and elaborates on its contributions to the literature. Finally, conclusions are presented at the end of the article.

2. Theory: changing energy assemblages in SEE

Theories focused on the EU's external influence predominantly deal with how non-EU parties accept its rules and norms to gain access to its market (Hadjiyianni, 2021). Scholars have often characterized the EU as a 'regulatory power', which has been especially pronounced in energy affairs. Andersen, Goldthau and Sitter (2017, p. 18) suggest that '[d]espite an occasionally strategic use of its energy policy toolkit, the external power the EU has exerted so far is regulatory power', through which it – as the actor holding power – imposes conditionality on its partners. In contrast to this 'softer' form of power, we propose that the EU also wields a 'harder' form of power, which includes a coercive capacity, the ability, whether latent or open, to enforce its will. Goldthau and Sitter (2020) as well as Prontera and Quitzow (2021) have begun to explore this dimension of the EU's capacities, which goes beyond its reliance on the attractiveness of its markets and the imposition of regulations, extending into geopolitical power. This form of economic power, for example the EU's climate policy-driven energy investment decisions, has geopolitical ramifications.

Eyl-Mazzega and Mathieu (2020) note that the EU is leading the global energy transition, but it still has to develop a political-legal and economic toolkit for influencing the actions of other states. We posit that it has begun to build and use this toolkit, which is based on its ability to wield economic power through its external trade and investment decisions (Woolcock, 2016). The EU has begun to undertake a 'natural gas withdrawal', most notably its act of limiting investment in natural gas projects, which will increase the reliance of neighbouring countries on the fuel. Our point of departure to theorize how the EU wields its power is rooted in a Dahlian (1957) conception of power which emphasizes actors' 'power over' others, i.e. their ability to use 'a resource to shape the actions or conditions of action of others' (Barnett & Duvall, 2005, p. 45). Balmaceda (2021) says that in the field of energy this interpretation has entrenched an understanding of power as something closely linked to states wielding energy as a 'weapon', through the suspension of supplies, for instance. To overcome this, she explores another face of power, namely, the 'power to' (also see Dowding, 1996), which emphasizes "what capacities and practices" various actors are "socially empowered to undertake" (Balmaceda, 2021, p. 13).

Balmaceda (2021) uses this approach to demonstrate the roles of actors throughout the value chain and their ability to wield power in energy affairs, which she conceptualizes by identifying a number of relevant physical and institutional nodes. These nodes may include the regulatory institutions of the EU, which underpin the bloc's ability to play the role of a regulatory power (Andersen, Goldthau, & Sitter, 2017). The addition we make

to this is to suggest that the EU has gone beyond being a mere regulatory node in energy affairs as the energy transition unfolds. We propose that this is not necessarily geopolitical in its intention, in contrast to the approach applied by Goldthau & Sitter (2020), but rather in its impact. The EU has developed and exercised a 'power to' shape the energy transitions of countries in the SEE region through its economic power, which it wields by providing financing for countries to develop their energy systems. The EU exercised its 'power to' when it withdrew support for fossil fuel projects. It shaped the agenda, which led these states to take actions that excluded the interests and limited the involvement of other actors, while altering socio-political and socio-economic relations in support of the transition (Clegg, 1989; Pansardi, 2012).

As the body responsible for developing the EU's climate and energy agenda (Barnes, 2011), the European Commission's actions carry the most weight in the EU's external energy affairs. The Commission's push to support an energy transition manifests directly through its support for renewable energy projects or energy efficiency measures, but also by influencing the funding made available to SEE countries from other sources as well. Multilateral development banks, including the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD), were instrumental in stimulating a wave of sectoral investment (Steffen & Schmidt, 2019) closely guided by the policies developed and introduced by the Commission (Xinyue & Gallagher, 2021). By withdrawing its support for fossil fuel projects, the Commission also reduced the availability of private credit, constraining those that rely on external donors and credit markets to finance fossil fuel projects. It used its 'capability to shape and determine the structures, rules, and institutions within which other states operate' (Keukeleire, 2003, p. 47). This first materialized with the EU's 'coal defunding' initiative (Pavličević, 2019; Rogelja, 2020) and is now taking form in its 'natural gas withdrawal' as well.

The EU takes actions in the context of a web of power relations, where *inter alia* local, Russian, US, and Chinese actors are involved in shaping the geopolitics of the SEE region. This limits the EU's 'power to', given the 'reluctant compliance' of SEE states (Proedrou, 2018) and the EU's clash with the geopolitical objectives of other external powers wielding both 'power over' and 'power to' in the region. To theorize these dynamics, this paper draws on the concept of 'assemblage' (Deleuze & Guattari, 1987; DeLanda, 2006; Müller, 2015). This posits that infrastructure is not merely a feat of engineering, but emphasizes that it is also social construction that is embedded in socio-economic relations. The assemblage approach explores the complexity and fragility of infrastructure development, highlighting how the specificities of development depend on the relations within which it is embedded. It refutes the notion that infrastructures materialize due to single countries pursuing their own geostrategic interests, but rather from a sequence of interactions. This is consistent with the inability of the EU to definitively shape events in neighbouring states: it can only be one – albeit one of the most prominent – forces shaping outcomes. Assemblages work like 'machines' that have a purpose (Deleuze & Guattari, 1988), where the interaction between various parts and heterogeneous actors permanently cause interferences, making outcomes uncertain. Given the complexity of energy infrastructures, using the concept of an assemblage can help capture the relations that shape them (Han & Weber, 2020; Rogelja, 2020).

Our paper theorizes that as the EU withdrew its support for fossil fuel projects, it altered the assemblage of infrastructures in the region. This follows assemblage theory's presumption that as relations shift, assemblages evolve (Dittmer, 2014). To better unpack how this change is unfolding, we draw on the two concepts of 'disentanglement' and 'entanglement'. This was originally introduced by actor-network theory (ANT) (Callon, 1999), but was later applied within the assemblage framework (Appel, 2012). The two terms do not reflect a binary oppositionality, but capture how relations are woven into and withdrawn from local political and social contexts. The involvement of actors reconfigures assemblages, but in doing so they themselves become entangled or disentangled in prevalent relations. When actors are involved with infrastructures, they are woven into the complex social fabric in which the infrastructure is embedded. They cannot intervene without socio-political ramifications, which, however, not only shape their local presence and agency, but also their relation to other external actors that are involved. Simply put, we hypothesize that the EU's climate policy cannot take effect without manifold political implications, including an impact on international politics.

We posit that the EU's support for investments in renewable energy sources and energy efficiency both entangles and disentangles. It entangles the EU in the social relations of SEE countries through its involvement in financing these projects and reconfiguring the existing assemblage by shaping the dominant political agenda, which alters practices and drives the emergence of new relations between actors. This is paired with a disentanglement, since it is a political intervention that curtails the use of fossil fuels and affects the web of relations in which respective infrastructures are embedded. It disentangles the involvement of those that have been supportive – and possess or allocate lesser power to enact their objectives – of fossil fuels. This dynamic increases the EU's involvement in the region's energy sector and, more generally, political affairs, while decreasing the potential for involvement by Russia or the US (see e.g. Sharples, 2016). This has been met with resistance by these powers, as well as from the locals with whom these were entangled.

3. Methodology

Our research was prompted by the changing policy narratives and academic literature discussing energy relations in SEE. Until the mid-2010s, local energy discourses focused on energy security and diversification, but these issues have been downplayed by a new focus on climate change and analyses preoccupied with the energy transition. We identify the 'EU natural gas withdrawal' as an area where accentuated discursive shifts are taking shape, and which have wide-ranging implications. Accordingly, we explore how natural gas has been represented in energy transition-related discourses in SEE. We identified themes emerging between 2016 and 2021 in nine countries: Albania, Bosnia and Herzegovina, Bulgaria, Greece, Kosovo, Montenegro, North Macedonia, Romania, and Serbia. Two streams of research informed our work. Csaba Weiner's three-year-long research project on supply security in Eastern Europe provided the foundation for the article, since it assessed the motivations for energy diversification in the region, with a focus on natural

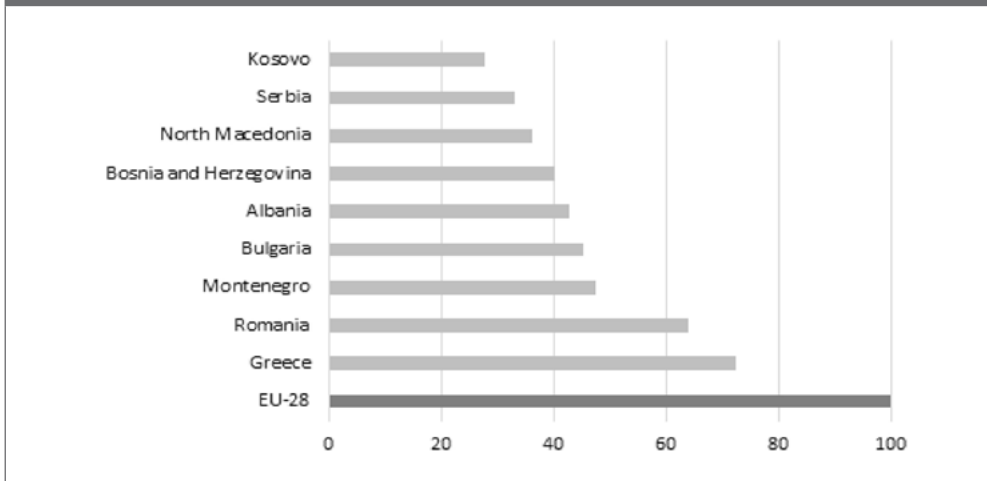
gas.¹ Weiner's project, concluded in 2019, addressed, inter alia, the role of geopolitical considerations in energy consumption patterns and analyzed both the local contexts and the external pushes shaping the national energy systems. It provided this paper with a solid foundation as to how regional actors think about energy supply and how this ties to geopolitics.

The second aspect of our work focused on how things began to change as the energy transition accelerated. We first scrutinized key energy policy documents, such as the available National Energy and Climate Plans (NECPs) and long-term energy strategies. Drawing on these, András Deák and John Szabo identified relevant interviewees and conducted more than 70 semi-structured interviews with stakeholders from SEE countries, EU institutions, and international organizations between November 2020 and September 2021.² They selected evenly from the regional countries, and sought to include the perspectives of government representatives, corporate actors (fossil fuel and renewable energy), regulators, finance institutions, experts, and NGOs. In addition, they conducted interviews with EU policy officers and European donor organizations, including the European Commission, the Energy Community Secretariat, the EBRD etc. They began the interviews with general questions aiming to map the energy transition, and building upon this they posed natural gas-specific questions that were tailored to the expertise of the given interviewee. We then coded and analyzed the data we had gathered to find common themes, which we triangulated with studies, reports, the academic literature, policy documents, and news pieces.

4. SEE's energy scene

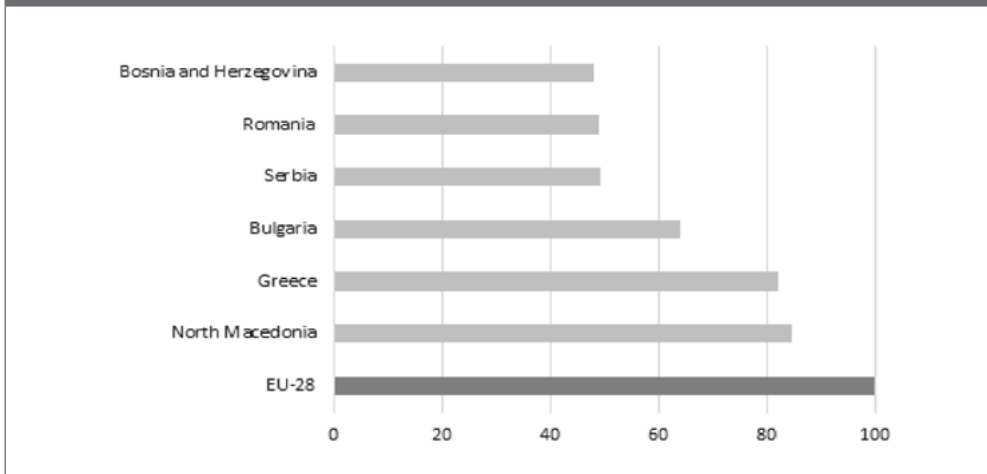
SEE comprises of a variegated group of countries with quite different energy systems based on differing infrastructure assemblages, but they share three key commonalities: low energy prices, a reliance on typically old coal infrastructure, and a reluctance to change the status quo. Energy prices are significantly below Western European levels (Figures 1 and 2), which have been a historical mainstay and are at the core of the region's politics. Maintaining low energy prices is a top priority on most political agendas, especially since Bulgaria's case highlighted how the proposition to increase household prices can lead to the downfall of a government. Household electricity prices were less than half of the EU-28 average in the Western Balkans and Bulgaria – Kosovo was the lowest at 28.1 % of the EU-28 average price and Greece the highest at 77.0 % in 2019 (Eurostat, 2021b). Few interviewees expected this to change, even though they generally agreed that it would have to in order to incentivize investment in energy efficiency and reduce wasteful energy consumption. They tended to agree that while energy prices would have to reflect costs, the move away from the current system should be undertaken in a gradual manner that is paired with a social policy that supports the least well-off. Ultimately, what this means for the energy system is that any substantial investment has to come either from the government's budget or external donors, given the inability of companies to finance investments from price increases.

Figure 1: Electricity prices (including all taxes and levies) for medium-sized household consumers (with an annual consumption of between 2,500 and 5,000 kWh) in SEE, 2019 (EUR, EU-28 = 100)



Source: Eurostat (2021c).

Figure 2: Gas prices (including all taxes and levies) for medium-sized household consumers (with an annual consumption of between 20 GJ and 200 GJ) in SEE, 2019 (EUR, EU-28 = 100)



Source: Eurostat (2021d).

Hardly any investment has been channelled into the energy sector since the fall of communism, when one excludes the foreign-controlled oil sector and natural gas transmission assets. For instance, the most ‘modern’ major coal generation unit in the former Yugoslavia was built in 1985, if the Chinese-built Bosnian Stanari power plant is not considered (Europe Beyond Coal Database, n.d.). The situation is only slightly better in Romania and Greece due to relatively newly built gas-fired plants, while Bulgaria relies

heavily on a coal plant modernized and expanded in 2011 and its nuclear power station, the two operational units of which were commissioned in 1987 and 1991. The lack of new investments was primarily due to the sharp decline and slow recovery of energy demand after the fall of communism. This, coupled with access to locally produced inexpensive coal, allowed for energy prices to remain relatively low and also allowed stakeholders to limit their investment in developing the system. Greece is a notable exception, where stakeholders anticipated capacity bottlenecks on the back of rapidly rising demand in the early 2000s – but this did not materialize due to the collapse in energy demand following the economic crises. Nonetheless, generally speaking, SEE mostly relies on old, inefficient, and carbon-intensive energy infrastructure that is in dire need of upgrades.

SEE not only relies on old, but also coal-based infrastructure. The share of coal is still significant in energy consumption, with Bosnia and Herzegovina, Kosovo, and Serbia leading the way, using coal to meet approximately 50 % of energy needs (Eurostat, 2021a). The resource's role amounts to approximately 30 % in North Macedonia, Montenegro, and Bulgaria. It is somewhat lower in Romania and Greece, with figures of around 15 %, while it is the lowest in Albania, where this ratio is only 5 %. Coal has a long-standing and deeply entrenched history in the region, as it is at the core of the energy infrastructure assemblage, a key dimension of which is providing jobs for thousands, frequently employing entire regions. Coal use has largely remained a domestic issue, albeit China's recent involvement has increased the entanglement of a foreign power. A disentanglement from the sector has been slow to unfold, but there is some domestic push to reduce the role of coal and move towards alternative sources of energy. This has been driven by concerns over air pollution, which is notoriously bad in the region during the winter months. Multiple interviewees noted that many voice their concerns seasonally, but little action is taken since the issue is forgotten as the air clears with the end of the heating season.

There is a deep entrenchment of SEE's energy systems. The reliance on coal and an extensive infrastructure that underpins existing energy consumption practices inhibits the ability of the region to change its energy system. This was demonstrated through Romania's failure to develop its offshore natural gas deposits with the involvement of US and European investors (Energy Industry Review, 2020), highlighting the inability of local politics to adapt and form realistic expectations that align with global energy investment trends. Through its decisions, the Romanian government perpetuated the stasis of its energy system, while the window to develop its fields is closing. Interviewees nonetheless suggested that some progress could be made, given the pressure of EU climate policy through carbon prices and other targets. Without these tools, the propensity of SEE countries to change is weak. Serbia offers a case where change is effectively unimaginable, which, in part, is due to the lack of drivers and the entrenchment of the current assemblage. It is not an EU member and therefore does not have an obligation to meet any targets. Its government signed the 2018 Sofia Declaration indicating that it will decarbonize, but the path forward is contingent. Its fossil fuel industry is entangled with Russian interests, impeding substantial change. The EU failed to engage and entangle in a way that offers a sufficiently disruptive force, and is limited to a tiny, albeit growing, renewable energy industry. This may change if Serbia continues the EU accession process and policymakers open the energy chapter of negotiations, but the timeline for this is still in limbo.

It is worthwhile to note that in most cases a change would be necessary to allow for the further uptake of natural gas as well, which currently plays a limited role in SEE. The region consumed around 22 billion cubic metres (bcm) in 2019, while producing 10.5 bcm in that year. However, both gas consumption and production are very concentrated. Romania has the largest demand (11 bcm), which it mostly meets from domestically-sourced flows. This is followed by Greece (9 bcm), and then the substantially smaller Bulgaria and Serbia, which rely on imports. Alongside these relatively natural gas-reliant countries, Albania has small demands that it can meet with local supplies, while at the other extreme are Montenegro and Kosovo where no gas is used (Eurostat, 2021f). This suggests that to grow the role of natural gas, there is a need for the political will to support a natural gas-intensive energy transition, since most countries would like to simply maintain the status quo for as long as possible.

5. SEE's energy transition

The requisites for an energy transition have been absent in most SEE countries until recently: domestic financial resources, a regulatory framework, market dynamics, political incentives, and social drivers are all lacking. The EU's push to support renewables has prompted these countries to explore the further development of hydropower. This source of energy is already a key component of the infrastructure assemblage and is a core element of the portfolios of domestic stakeholders. Hydro already plays a major role in meeting the electricity demand of Albania (100.0% in 2019), Montenegro (56.2%) and Romania (42.0%), which local stakeholders plan to expand to substitute for more polluting sources of energy and to meet rising demand (Eurostat, 2021e). This has its upper limitations, as locals contest small-scale hydro projects, which are especially problematic in Bosnia and Herzegovina, Montenegro, and North Macedonia. Nonetheless, governments' turn to hydropower suggests that they have begun to respond to the EU's push towards a decarbonized energy sector, but they have sought to limit external entanglement by expanding technologies already deeply interwoven into their pre-existing energy infrastructure assemblage. Simultaneously, hydro potential has limitations and is insufficient to cover the incremental demand in electricity, especially if it needs to substitute for coal and oil.

The EU's support for renewables has materialized in a limited number of projects, as investors are cautious of becoming entangled with the local energy scene. Solar and wind energy continue to be relatively underrepresented in these countries, with Greece (14.9%) and Romania (11.4%) registering the highest shares of wind-based electricity generation, and Montenegro following somewhat behind (8.6%). Greece sources 9.1% of its electricity via solar photovoltaics, while, with a considerable gap, Bulgaria (3.3%) and Romania (3.0%) follow behind. Other SEE countries are generally far behind in solar and wind energy penetration rates, with the share of these sources in power generation in Albania, Bosnia and Herzegovina, North Macedonia, and Serbia remaining around 1–2% (Eurostat, 2021e; IRENA, 2021). This is not to say that they have not been active in the field, as governments have become involved with developing renewable-intensive

strategies and designing respective support schemes with the support of EU institutions, as well as German and other development agencies.

The diffusion of these intermittent sources of renewable energy is hampered by the scepticism of local stakeholders over increasing their role without assuring baseload electricity generation as well. Many in the region see solar and wind only as additions to baseload generation or, in more radical cases, their outright prohibition has also been discussed or implemented. Until recently, Bulgaria had effectively banned solar and wind projects, mainly due to the regional 'baseload fixation' which stems from the region's high reliance on electricity in the residential space heating sector. Households in Bulgaria, Kosovo, and Serbia rely on electricity to meet their heating needs in the winter, which necessitates an energy system capable of providing high baseload demand during the grey and frequently windless winter months. Solar and wind are not able to fill the void that coal-based generation provides during this period. Regional capacity scarcity led to serious supply problems in the winter of 2017 (Interview 1). The way in which these energy systems have been set up is what leads many to seek a role for natural gas once a large-scale coal phase-out is launched by governments, but there is little indication that the SEE states will change their energy systems.

The countries in the region – with the most notable exception of Greece – strive to maintain the status quo with regard to their energy systems, but a number of factors will force them to change their energy consumption patterns. EU member states are pressured by climate regulations and EU ETS prices. While Albania and Kosovo face rising energy demand, North Macedonia is confronted with the depletion of local coal mines, and Bosnia and Herzegovina's electricity exports will be impacted by the EU's Carbon Border Adjustment Mechanism (CBAM). Local energy strategies seem to underestimate the power of the EU to prompt an energy transition. For instance, Kosovo plans to meet growing energy demand by investing in local coal output and combustion, despite the lack of financing (Bankwatch, n.d.). According to its draft Energy Strategy, Bulgaria would like to maintain its nuclear-coal combination until 2045 and limit investments in renewables (Ministry of Energy of the Republic of Bulgaria, 2020). The strategies published by governments, however, provide little certainty about how these countries will adapt to the newly emerging context.

One method of adaptation is to attempt to secure external financing for projects that perpetuate the status quo. The EU may have withdrawn its funding for the coal sector, but the US and China both have major interests which can prompt entanglements in the local coal scene. Bulgaria's most prominent lignite plants are in the hands of US investors, while Serbia and Bosnia and Herzegovina constructed new coal thermal stations supported by Chinese investment via the One Belt, One Road initiative (Bankwatch, 2020). Coal is thus intertwined with geopolitics; although, here too, the declining profitability of such projects will lead foreign donors to withdraw support. Natural gas projects are also reliant on external funding, with the completion of cross-border and transit pipelines effectively inconceivable without the involvement of major external donors. Nuclear increasingly entails the involvement of Russian or other foreign infrastructures, the construction of which would entangle Russian interests with local objectives – an outcome that many locals do not want. All this suggests that foreign donors heavily shape SEE energy policy

choices, where decisions tend to follow available financing options as opposed to pursuing specific strategic outcomes.

6. The EU's natural gas withdrawal and responses

The EU's plans to decarbonize suggest that it will reduce natural gas consumption relatively quickly, with its tapering beginning before 2030. According to the 2030 Climate Target Plan, natural gas consumption will decrease by more than 25 % compared to 2015 levels by as soon as 2030 (European Commission, 2020d, p. 10). Natural gas is thus not categorized as a transition fuel, since demand for it will not be allowed to rise to substitute for other, more polluting, fossil fuels. A drop of this magnitude would leave most of the currently existing infrastructure capacities significantly underutilized, even if natural gas continues to play a pronounced role in meeting demand in some segments of the energy mix. Unlike in the case of coal infrastructure or nuclear units, there has been no indication that asset owners will be compensated for their stranded assets, nor do regulators expect that policymakers will take such politically risky action (Interview 2).

The EU will become increasingly restrictive regarding its support for natural gas in its non-decarbonized form. Most EU institutions have prohibited investment in new natural gas projects and even those that still allow natural gas projects are highly selective and cautious as to which ones they support. Both the new 2020 TEN-E Regulation proposal and the Just Transition Fund explicitly exclude fossil fuel investments (European Commission, 2020a, 2020c). The draft Taxonomy Regulations also explicitly avoid including any natural gas projects that are not based on decarbonized gases (European Commission, 2021). The EIB decided not to accept natural gas projects from 2021³, while the EBRD has also been decreasing its support for such undertakings, which it will likely phase out entirely by 2023 (Interview 3). Financing natural gas investments from the EU budget is thus only possible from the European Regional Development Fund (ERDF), but, even in this case, their rationale will be closely scrutinized. Thus, European development banks have signalled their withdrawal from natural gas projects after suspending financing for coal.

The decision to withdraw natural gas project financing is driven by climate policy, and the window is closing for investors to recuperate their investments in these projects. EU policy has begun to discourage investors from supporting new projects, although the results of these policies will materialize only with some delay. Discussions as to what can be supported are still ongoing with the Commission's Directorate-General for Neighbourhood and Enlargement Negotiations (DG NEAR), and the Energy Community is conveying a greater inclination to support local natural gas projects than the Directorate-General for Energy (DG ENER) or the Directorate-General for Climate Action (DG CLIMA), which generally oppose investments in the field. However, debates divide these institutions internally. This became especially pronounced when the EUR 9 billion Economic and Investment Plan for the Western Balkans was negotiated between EU institutions and recipients in late 2020 (Interview 4). Initially, the plan included numerous natural gas projects, but the final guidelines for the Green Agenda for the Western Balkans only

supported these investments in the countries most reliant on coal, and under rigorous scrutiny (European Commission, 2020b). The Commission is withdrawing its support for natural gas projects both within the EU and beyond its borders.

Projects that have already been approved and financed will generally be implemented, allowing for some minor additions to the natural gas grid in the Western Balkans and, possibly, SEE more broadly. The decisions still allow for some leeway, as the examples of Romania and Bulgaria show, which have been able to negotiate short-term derogations. In parallel, the natural gas sector may reinvent itself, which it has undertaken by offering to decarbonize the fuel it provides (ENTSOG, 2019; GIE, 2019; Szabo, 2022), but these potential infrastructure assemblages still face significant technological and economic limitations (Szabo, 2021). Nonetheless, policymakers have already sent a clear signal to the commercial community that new natural gas investments may become stranded assets, having to be retired earlier than their initial economic and technical design suggested. The experience with coal may be indicative: commercial banks withdrew investments from regional projects much earlier than formal coal exits were announced. This suggests that emergent discourses questioning the future of natural gas are the premonitory signs of formalized policy.

SEE national governments and their energy champions will have to respond to this changing policy context. If they opt to maintain the current infrastructure assemblages, governments will have to provide support and financing for their fossil fuel energy systems. This applies to ambitions to rely on natural gas as the transition fuel. Governments would have to actively back the gasification of their countries and develop the local assemblage in a direction that fortifies the sector and its role in the energy system. This has limitations within SEE countries that are EU members, given the restrictions on state aid – the Commission's competition policy in this case becomes increasingly entangled with the trajectory on which local energy systems are developed. Moreover, these are unlikely to be economically viable projects without capacity reserve mechanisms – the introduction of which has been slow. This has led a number of natural gas-dependent member states to publicly oppose proposed regulations, with seven Eastern European countries and Greece pushing to allow for the continued financing of natural gas projects in May 2020 (Euractiv, 2020).

Limitations on the ability of national governments to take action will lead SEE countries to seek closer cooperation with actors from so-called third parties (i.e. non-EU stakeholders). In the case of Bulgaria, for instance, this would likely mean the extension of current infrastructural assemblages with the development of natural gas distribution and power generation based on the gaseous energy carrier, leading to the deeper entanglement of Gazprom. Similar patterns are set to emerge in Serbia, which is not as confined in its actions as EU members, but its Energy Community membership and ongoing EU accession talks confine how it develops its energy system. Countries with minuscule natural gas industries or lacking them altogether, such as Albania, Kosovo, Montenegro, Bosnia and Herzegovina, and North Macedonia, need to establish the sector for the energy carrier to take on a transition fuel role. These steps are difficult because there is a reluctance to disentangle coal interests which are deeply woven into many of these countries' social fabrics.

Natural gas is also generally resisted by dominant local actors that have little experience with the fuel and which challenges their traditional coal and hydro-based business

model. It also entangles foreign interests through SEE's increased reliance on external suppliers – especially Russia – which local politicians are carefully considering whether to accept or not.

Local actors have shown relatively limited interest in introducing natural gas, especially if they would have to finance the development of the sector and respective infrastructure. With the exceptions of Greece and – natural gas rich – Romania, local policymakers have allocated a limited role to natural gas and have only greenlit investments when alternatives were not available. Natural gas is often viewed as a fuel advocated by foreign powers, but one for which there is little local demand. For instance, the natural gas pipeline in Bosnia and Herzegovina connecting Sarajevo with Serbia to provide what would be Russian natural gas has not been used since it was commissioned in 2014 due to the lack of demand (Interview 5). Kosovo is keen to receive foreign support for its first gas interconnection, but local energy planners are only looking to use the fuel to power a 100 MW combined heat and power (CHP) plant (Interview 6). Serbia has also effectively failed to meet its rather humble gasification plans set in its 2016 Energy Strategy (Ministry of Mining and Energy of the Republic of Serbia, 2016). A lack of interest from these countries and the EU's general approach that the region should 'leapfrog' by implementing a coal-to-renewables shift would not require using natural gas as an intermediary. Nonetheless, these countries are still reluctant to opt for this path, given their concerns over baseload power generation.

The reluctance of domestic actors to increase their reliance on natural gas has been met with relatively coherent Russian and US policies, both of which promote natural gas penetration in potential export markets. The major supplier of the region, Gazprom (providing approximately 60% of SEE imports in 2019), expects that demand for the fuel will continue, indicating its scepticism towards the EU's ability to impede investment in related projects. Gazprom expects to maintain its current 200 bcm per annum export levels to Europe until 2030. Stable exports compensate for declining EU production and climate policy, as member states turn to natural gas to substitute for coal and nuclear generation (Gazprom, 2020). Gazprom expects such additional demand to offset the reduced consumption stemming from energy efficiency programmes, which were seen by all interviewees as a crucial pillar of EU and SEE energy policy in the coming decades. Adopted in 2020, the new Russian Energy Strategy up to 2035 is even more direct when it states that demand may lead natural gas to become the fastest growing energy carrier, partly due to higher climate and environmental standards (Russian Government, 2020).

Historically, the US sought to wield influence in European energy affairs by advocating for the curtailment of reliance on Russian piped gas, but was unable to offer competitive alternatives (Gustafson, 2020). This changed with the North American shale gas revolution in the early 2010s and the subsequent launch of liquefied natural gas (LNG) exports which turned the US into a competitor on global markets. Tapping into these resources, combined with its pre-existing ambitions to limit other political influences in SEE, turned the US into a force shaping natural gas affairs. In principle, the US does not have a single strategy for the region beyond the continued push to support the expansion of infrastructure, which would allow for states in the region to access non-Russian piped gas. This grants US exporters the ability to target these markets and increase US LNG sales, supporting

the diversification away from Russian suppliers. Thus, the US' strategic and economic interests are for SEE countries to import natural gas from the US and other LNG suppliers, as opposed to the EU's vision of shifting to domestically produced renewable energy.

Although both Russia and the US may have taken a pro-natural gas stance, neither is willing to provide the funding necessary to develop infrastructure. Russia's support for transit infrastructure primarily aims to provide fuel for EU countries beyond SEE and not to expand local demand. Thus, Russia and the US seek some access to markets, but without the political and economic entanglement that would emerge through the ties they forge with local actors. The rationale for this links to the fact that SEE is a rather marginal market for both parties. Historically, the US and Russia have only invested in strategic projects and their involvement has remained relatively modest compared to the roles they have played in shaping EU natural gas affairs. Financing gas-fired generation capacities, modernizing district heating, or extending distribution are relatively uncommon actions by these external actors, and such ambitions are likely further curtailed with the EU limiting its willingness to support projects from which Russian and US actors could benefit. The US and Russia provided only 1.2 % and 4.6 % of local inward foreign direct investment (IFDI) stock, respectively, in 2017. In contrast, 70.5 % of the total IFDI stock originated from the EU-28 (Adarov et al., 2019, p. 62). Thus, the EU's decision to suspend financial support for natural gas projects may very well entail the end of the sector's growth in SEE.

7. Discussion

The impact of the EU's climate leadership is becoming increasingly pronounced in its neighbourhood, where states seeking to join the EU have received support and developed their political agendas to harmonize their institutions with EU norms and objectives. In addition, the EU has begun to use its power to shape what projects can receive funding. This is becoming an increasingly disruptive force in SEE with broad political ramifications, given the intertwinement of energy and geopolitics in the region. Local energy systems were generally built on locally-sourced coal and imported hydrocarbons. Russia, a prominent supplier of natural gas to the region, became involved by marketing its resources and developing infrastructure, a process through which it became entangled with local politics as well. The socio-political relations linked to the consumption of energy in SEE became entrenched in the past. Pressure to change was minimal and was limited to *how* energy resources were consumed and traded. The EU and the US developed a united front in support of diversified natural gas imports and the introduction of free market mechanisms. The EU used its regulatory power to push SEE countries to adopt market principles aligned with the EU's regulatory framework. The EU's climate action has, however, shifted this focus and severed the alignment between the EU and the US, as the EU has begun to wield its power to shape the energy agenda in the region, which may snowball into a disruptive force.

The EU's decision to lead an energy transition both within its borders and beyond emerged in a historical context, where SEE's traditional, entrenched energy infrastructure

assemblages are aging. Thus, change would have to take place sooner or later, but the specific form and direction of change is what the EU is now shaping. The EU has become a staunch advocate for renewable energy and energy efficiency measures, becoming entangled in local politics. This has not only uprooted coal, but is shaping the role of natural gas as well. After acting as a regulatory node that pushes for the development of interconnections, alternative import routes, and a free market framework, it is emerging as an economic node that shapes the flow of investment into these countries' natural gas sectors. The EU is not only a regulatory power, but an economic one as well. This has materialized through its involvement with climate policy, leading to its natural gas withdrawal. With this, it has begun its disentanglement with the region's natural gas affairs, which it substitutes for a deeper entanglement in the renewable energy scene.

The EU wielding power to shape events in SEE has led to the emergence of objectives that are in opposition to other actors in the space. Russia's prominence as a supplier led it to shape agendas as well as influence formal and informal institutions that favour the consumption of its natural gas. Proedrou (2018, p. 84) suggests that not only has Russia had this power, but it 'retains the potential to influence the evolving rules of the game'. Through its role as a supplier in a number of countries and by controlling transit volumes, it became entangled with socio-political relations. And past engagement by the EU with Russia was directed at *how* natural gas is consumed in the region. It never fundamentally questioned whether natural gas could be consumed at all. This is a major clash in long-term objectives, as Russia may not be seeking to increase entanglement, but certainly looks to continue to export to these markets. It would like to continue to do so without a deeper entanglement, given that the SEE markets are quite small and have a fraught history which underpins the reluctance on both sides to deepen ties there. The EU's entanglement with the region's energy transition also disentangles Russian involvement, given the bleaker prospects of natural gas.

The EU's natural gas withdrawal also severs the alignment that it has maintained with the USA. In the past, the latter promoted energy security and policies that limit Russia's ability to influence SEE political affairs. It undertook this through diplomatic and political channels, while also relying on economic statecraft. Involvement by the US became especially pronounced after it developed LNG export capacities, leading its enterprises to see the Balkans as a market that can buy LNG. However, the US has sought to access these markets while minimizing entanglement. With the EU's shift to decarbonization, EU and US interests have diverged and the EU's power to shape the general investment environment has overshadowed the US' continued support for the uptake of natural gas. Russia and the US differ in terms of how they have related to the EU's policy, but the experiences of both reflect how the entanglement of the EU in SEE has prompted either their disentanglement or led to barriers that hampered the deeper entanglement of other external powers in the region. These dynamics have altered the infrastructure assemblages as the renewable phase-in and coal phase-out have begun. With the latter, a further dynamic is unfolding, as the entanglement of China responds to effectively all investors withdrawing their support for coal projects. While Chinese involvement remains marginal, the general implication of the EU's approach to climate policy is that it is increasingly in opposition to US, Russian, and Chinese objectives and activities in the region.

8. Conclusion

In this article, we explored how the EU's decision to limit investment in SEE natural gas infrastructure affected local and external actors involved in the region. These policies have only begun to be implemented and their disruptive impact is still minimal, but the contours of change are taking shape. This paper offered a point of departure for understanding these dynamics by using a novel toolkit to theorize the transition. It helps us conceptualize how local assemblages change and shows how the EU's actions in the region have geopolitical implications, reconfiguring the alignment between itself, Russia, the USA, and China. By wielding its power to support an energy transition, the EU has shifted the bipolar 'EU/US vis-à-vis Russia' system, defined along a single geopolitical ruleset (supply security), to a tripolar 'EU-Russia-USA' disposition, defined along two rulesets (supply security and climate policy). In addition, China has become involved. What this shows is that the EU's climate policy has geopolitical implications, whether intended or not.

Endnotes:

1. 'Central and East European Energy Security Concepts', János Bolyai Research Scholarship of the Hungarian Academy of Sciences, 2016–2019.
2. Data was gathered as a part of the European Climate Foundation-backed project: 'Natural Gas in Southeast Europe's Energy Transition: The Great Winner or the Neglected Source-Fuel?', 2020–2021.
3. The original date was 2020, but was pushed back at the request of the European Commission (BBC, 2019).

List of cited interviews:

- Interview 1: a senior researcher from Bulgaria (25.11.2020).
 Interview 2: a senior representative of a European regulatory association (22.12.2020).
 Interview 3: a senior representative of a European development bank (18.12.2020).
 Interview 4: representatives of the European Commission (12.01.2021, 03.12.2021).
 Interview 5: a senior researcher from Bosnia and Herzegovina (29.01.2021).
 Interview 6: a senior representative of the Kosovar energy regulatory community (16.12.2020).

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