Energy Diplomacy in the Western Balkans

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Abstract: The Western Balkans is facing a critical juncture in its energy landscape as it navigates multiple historical developments and geopolitical struggles. The European integration process, which entered a new stage in the aftermath of the war in Ukraine, has put energy at the forefront of the accession process. The push towards renewable energy sources over the past decade has failed to make a significant impact in the Western Balkans, leaving the region with an aging energy infrastructure and in need of an energy revolution. In this context, energy diplomacy is taking centre stage, rubbing against long-established structural and geopolitical path dependencies. The newly found integration impetus, corroborated with the newly embedded energy conditionality in the European Union acquis, has the potential to mobilize the necessary material and immaterial resources for the region to successfully manage transition towards a sustainable energy mix while moving away from its dependency on Russian energy. This paper explores the three-pronged process driven by geopolitical, diplomatic, and material factors that is reshaping the energy landscape of the region.

Keywords: energy diplomacy, EU conditionality, green energy transition, geopolitics

Introduction

When consumed, energy is a critical commodity for national economies and a geopolitical toolkit in its own right for the few states that make up the bulk of global energy exports. This dynamic has come to define

Europe's lust for cheap and secure sources of energy and Russia's geopolitical ethos, with ever-increasing geopolitical repercussions since the turn of the millennium. Russia's ability to wage war against its neighbour and its belief that it has the necessary continental leverage to do so with few repercussions were both fuelled by energy. The overarching assumption has failed. The expected energy blackmail has translated into a systemic shift rather than the expected systematic indifference towards the atrocities in Ukraine. What started off as an emergency response in the face of Russia's weaponization of energy has turned into a structural pivot augmented by the already existing climate ambitions. The systemic change currently underway is co-determined by the European ambitions, with effects that will be most acutely felt by those most affected by the current crisis.

Through a mix of structural and economic factors, the Western Balkans has been the most affected by this momentous pivot, with repercussions spilling into the geopolitical realm. This paper analyses the systemic shift that is currently underway by looking at the European Union's energy diplomacy and the dynamics of Russian influence in the light of the war in Ukraine and the renewed push for European integration that has become intimately intertwined with the energy transition.

Energy diplomacy in the Western Balkans – between immediate needs and European integration

Today, the Western Balkans sit at the crossroads of multiple historical developments that are converging to create a new energy reality in this troubled region. Twenty years since the Thessaloniki summit, the European integration process has entered a new phase on the back of the Russian invasion of Ukraine. Energy sits at the forefront of this geopolitical struggle, adding a second layer of urgency to the energy shift towards renewables that is currently underway.

The effects of the current energy crisis have been felt most acutely in the Western Balkans, while the push of the past decade towards renewable sources of energy has failed to come up with any tangible results in the region. With the vast majority of its energy infrastructure older than thirty years, mostly made up of highly polluting coal plants, the region is on the cusp of an energy revolution, whether it wants it or not. The labelling of energy as a key contemporary challenge makes it one of the most important issues in terms of international relations, while its vital role in the basic functioning of modern societies makes it unavoidable in a region known for its adeptness in avoiding problems. We are thus witnessing a three-pronged process, driven by geopolitical, diplomatic, and material factors. The systemic energy shift brought on by Russia's invasion of Ukraine is amplified by the EU's diplomatic push on the energy front for decarbonization, which seem to be finding an unintentionally fertile soil for transformation due to the crumbling energy infrastructure of the region. External and internal factors are coming together in the critical energy realm, fuelling strategic prioritization and resource mobilization.

During the energy crisis that started in 2021, the Western Balkans have proven to be the most vulnerable to price fluctuations (Balkan Green Foundation, 2022) due to both situational and structural factors. North Macedonia and Bosnia and Herzegovina import all of their gas from Russia, while Serbia imports 89% of its gas from Russia. Nonetheless, natural gas is only a modest part of the energy mix in Bosnia and Herzegovina (IEA, 2020), 9% in North Macedonia, and 13% in Serbia (Morina, 2022). Coal constitutes the backbone of the energy mix in the region, providing 40% of Montenegro's energy, a third in Bosnia and Herzegovina, over a quarter in Serbia, and 15% in North Macedonia (Ciuta & Gallop, 2022). The energy mix of the region experienced diachronic development relative to the rest of the continent, with lignite use having grown by almost a quarter since the 1990s (Eurostat, 2023). Half of the coal used for energy generation is imported, with two thirds coming from Russia (**Łoskot-Strachota, 202**3). When it comes to gas, Russia has a near 100% share, with oil slightly behind at over 80% (Łoskot-Strachota, 2023).

Serbia's balancing act and the new reality on the ground

While Serbia's alignment with EU foreign policy has dropped on the back of the non-implementation of sanctions, the country is feeling the pinch in relation to the energy shift prompted by Russia's invasion of

Ukraine. In May 2022, Serbia signed a deal with Moscow that amounts to 2.2 bcm gas per year, with prices 100% tied to oil prices, a concession aimed at preserving price stability (Argus Media, 2022). Despite its favourable relationship with Russia, the country's entire gas supply rests upon TurkStream and Bulgaria's transit country status, after Russia has cut its gas supplies to Bulgaria in response to the country's support for Ukraine (Strzelecki *et al.*, 2022). Greece's LNG terminals to the south, the Greek-Bulgarian interconnector, and the North Macedonian-Greek interconnector make diversification feasible, a situation that will only be strengthened by Romania's plans to exploit its Black Sea gas resources. The biggest unknown in the country's ability to pursue its strategic interests in the energy realm is the degree to which Russian influence will interfere with these goals.

Russia's presence in the energy sector is deeply entrenched in the political landscape, best exemplified by the Russia-leaning Socialist Party of Serbia (SPS), which is a junior partner in Serbia's current ruling coalition. This party is led by Serbia's First Deputy Prime Minister responsible for Foreign Policy and Security and Minister of Foreign Minister Ivica Dačić, while the director of Serbia's state-owned natural gas provider Srbijagas, Dušan Bajatović, another player closely linked to Russia, is also a member of the SPS (Mitrescu & Vuksanovic, 2022, p. 30) and a former member of the National Assembly. Russian influence spans beyond the political scene. The Serbian length of TurkStream (built by Gastrans) has Gazprom as its indirect shareholder through its Swiss-registered South Stream AG (Energy Community, 2019). Gazprom still holds a 51% stake in Banatski Dvor, Serbia's only gas storage facility (Dimitrov, 2022), and a 56.15% stake (Ralev, 2022) in the Serbian multinational oil and gas company Naftna Industrija Srbije (Petroleum Industry of Serbia, NIS), acquired in 2008 (NS Energy, 2009).

In spite of Serbia's preference for energy deals with Moscow, the precarious international context, combined with the European Union's renewed diplomatic offensive in the region and the infrastructure developments to the south, is forcing Serbia to reconsider its position. The latest EU sanction packages are starting to bite, especially with the December 2022 crude oil embargo, which effectively prevents the transfer of Russian oil through Croatian territory, while Gazprom's ownership of NIS is also uncertain in light of the EU sanctions.

Serbia's President declared back in July 2022 that Serbia may have to temporarily "take over" the mainly Russian-owned NIS oil company while the Western sanctions on Russian energy are in force (Stojanović, 2022). Elsewhere, it is becoming obvious that in the wider regional rush for energy diversification, time has no patience: the Bulgaria Greece Interconnector (IGB) was booked for almost 100% in December 2022 (Koralova-Gray, 2023). After three years with little progress on the diplomatic front, North Macedonia and Bulgaria signed an energy deal covering the exports of surplus energy to North Macedonia, building on Bulgaria's energy partnership with Azerbaijan (Jovanovski, 2022), while Joseph Borrell confirmed that Bosnia and Herzegovina has joined the sanctions regime on Russia (Sarajevo Times, 2023).

In this geopolitical and energy transformation, Serbia stands out as the largest energy consumer and the only country to not have aligned with EU sanctions on Russia in the aftermath of its invasion of Ukraine. Serbia's energy diplomacy, aligning with the European Union's overall foreign policy, has often been conflicting. Serbia refused to join the EU Energy Platform, together with Kosovo, which opted out due to a lack of integration with the EU energy infrastructure (EWB, 2022). It simultaneously joined the Open Balkan crisis response group in September 2022, together with North Macedonia and Albania (Ozturk, 2022). Serbian President Aleksandar Vučić declared that "[e]verything available to Serbia will be made available to North Macedonia and Albania as well, and vice versa. The success of this project will determine how much we will be able to strengthen peace and stability in our region" (Ifimes, 2022), highlighting how the lust for energy security acts as a stepping stone for further cooperation. Belgrade began to strengthen energy cooperation with Hungary in May 2022, roughly at the same time as it signed off its new deal with Gazprom. In February 2023, Serbia and Hungary agreed to double their cross-border power transmission capacity by 2028 (Spasić, 2023). Serbia's recent energy initiatives fit into a wider foreign policy *modus operandi,* with the government in Belgrade keen to lower its dependency on Russian energy without putting all its eggs in one basket.

In March, Aleksandar Vučić, President of Serbia, could not "swear" that Serbia will not join sanctions on Russia (Dragojlo, 2023), while Minister of Mining and Energy Dubravka Đedović confirmed back in December

2022 that Serbia can count on getting a third of its annual gas needs from Azerbaijan (The Government of the Republic of Serbia, 2022). Serbia's timid distancing from Russia is shrouded in cautiousness and is deeply tied to its ability to partly diversify away from Russian energy through long-standing and newly found international partners. Only further diversification will shed light on the degree of influence that the dependency on Russian energy has on bilateral relations.

The three historic sources of Russian influence in Serbia (energy, the unresolved Kosovo dispute, and soft power) are affected by the systemic energy shift currently underway and the renewed push for European integration. Serbian national identity is intertwined with its religious one, offering a springboard for Russian influence in the country, given the strong links between Putin's regime and the Serbian Orthodox Church (Corbally, 2020). On the media front, Russian propaganda is rampant, often intersecting with nationally produced narratives. Given that the country has not adhered to any of the sanction packages, including the 6th package restrictions on media, Serbia remains a safe haven for Russian narratives. In February 2023, Kosovo and Serbia tacitly agreed on an EU-backed normalization deal, with a particular focus on EU integration (Ozturk, 2023). If the EU is successful in achieving tangible progress on the Kosovo issue while enabling Serbia to diversify its energy supply via the Greek LNG terminals and Romania when its Black Sea projects go online (Mitrescu and Vuksanovic, 2022, p. 14), the foundation and rationale of Russia's hard power in the country will be severely diminished, a process that will be reflected in Serbia's foreign policy. The changing European power dynamics influencing the country's foreign policy are complemented by China's ever-increasing role providing a back-up option in the UN Security Council, which in case of further frictions between Russia and Europe might well morph into all-out replacement. Chinese soft power is also playing an increasingly important the region, propelled by its Confucius Institutes, vaccine diplomacy, and favourable loans for often dubious infrastructure projects (Colibășanu and Mitrescu, 2021). There is still a long road ahead, which will be littered with instances of Russia flexing its remaining hard and soft power in a bid to slow down the shift. Nevertheless, the winds of change are being felt in Belgrade at an intensity unseen in recent years. While Russian hard power is on the wane, its allure will continue to yield a significant degree of soft power through its religious and cultural ties, propped up by a media environment eager to spread Russian propaganda or the indigenous narratives aligned with it.

Russia's energy leverage

In the wider region, Russia's influence has always been an indicator of its global influence and less of a strategic priority. While the Kosovo issue offered the Kremlin pretend justification for its actions in Georgia and Ukraine, the Western Balkans have long been out of its direct reach. Moscow pulled out its peacekeepers from Kosovo and Bosnia and Herzegovina in 2003, so unlike the EU, it does not have any boots on the ground, which is telling for a country that has constructed its foreign policy around military interventions. In the absence of any credible hard power instruments except for its energy exports, Russia's policy towards the region resembles what Burazer (2017) calls a "spoiler power", understood as an actor focused on undermining Western policies in the region rather than providing a viable alternative (Vuksanovic, 2023, p. 36).

Russian influence in the Balkans is limited in both economic and security terms, particularly compared to the EU. For the Western Balkans, the EU is their main partner for exports (81.0 %) and imports (57.9 %) (Eurostat, 2023). In comparison, except for energy, Russia is a minor partner in exports (2.7 %) and imports (3.9 %) (ERPS, 2022). The Economic and Investment Plan for the Western Balkans of EUR 9 billion in grants and the ultimate aim of mobilising EUR 30 billion in total (European Parliament, 2022) build on the financial support awarded during the COVID-19 pandemic and the Energy Support Package agreed on during the November 2022 Berlin Summit (WBIF, 2022). Even before the war in Ukraine, in 2021 Russia's Sberbank sold its subsidiaries in Southeastern Europe (Reuters, 2021), saying a lot about the Kremlin's ability to economically influence the region. Alongside its soft power and being a counterbalance to Western influence, the Kremlin only retains its energy leverage, which continues to yield a disproportionate influence.

Short-term needs versus the EU's climate ambitions

Short-term developments point towards a continued heavy reliance on coal: out of the six countries, only North Macedonia has specific plans to phase out coal by 2030 (Todorović, 2022), 2020), while both Serbia and North Macedonia are raising coal power generation in response to the crisis (Bytyci & Teofilovski, 2022). The relatively high indigenous lignite production makes coal dependency tempting, in spite of the highly polluting and inefficient thermal plants. The 16 coal plants in the Western Balkans pollute as much as the 250 EU ones combined (Kokkalis & von Cramon, 2019). Up until now, the distant EU membership and the climate conditionality that it would bring have done little to motivate the Western Balkan states to ditch their dirty energy habit. As the EU progresses towards a carbon-free future by the current target date of 2050, the share of the Western Balkans' emissions will only continue to increase, a position that will continue to become all the more awkward as the EU Member States shut down their own, far less polluting coal power plants. The cross-border nature of pollution is already translating into higher prioritization, reflected by the connectivity agenda of the Berlin process and the EU's prioritization of its own climate agenda.

At the Western Balkans Summit in Tirana, which was the first summit that took place in the region (European Council, 2022) in December 2022, the EU launched a EUR 1 billion energy support package for the Western Balkans. Half of the amount is dedicated to mitigating the immediate effects of the energy price spikes. The other half is dedicated to medium-term projects with the conditionality that it must be used to diversify away from Russian gas and towards renewable sources of energy. Conversely, a renewed impetus for integration will only serve to harden the EU's carrot and stick approach, incentivizing the allocation of internal resources towards the energy transition. Once the integration curse is broken by one or more Western Balkan states acceding, supported by advances in the EU's Climate Agenda, it will reinforce issue linkage at a diplomatic level. The Regional Cooperation Council, supported by the EU, has put forward a proposal for deeper energy cooperation (Regional Cooperation Council, 2022), highlighting an institutional synchronicity in energy prioritization and embedding energy diplomacy in the wider integration process. It remains to be seen what role the EU-funded Energy

Commission will play in the medium term, as enlargement diplomacy meets energy realities. As of now, the initiative is heavily involved in Moldova's and Ukraine's energy transition, which will provide a good benchmark for what can be achieved in the Western Balkans.

The recent adoption of the Carbon Border Adjustment Mechanism (CBAM) will further link EU integration with the energy transition, as aspiring Balkan EU members will have to align with the EU acquis. If until now it was up to national governments how hard they wanted to press with EU membership, the process will now be conditioned by an instrument designed by the EU, with the decisions taken in the EU. The Western Balkan states risk facing levies starting from 2026, or they can take advantage of the existing exemptions and carve out some breathing space until 2030 (Taylor, 2023). Either way, after many years of solo dancing, the EU and the Western Balkans are lock-stepped in a conditionality-driven tango. This will have a great impact at the national level: with domestic pricing mechanisms in place, the Western Balkan countries could collect at least EUR 2.8 billion annually, which could be channelled into renewable sources of energy (Ciuta & Gallop, 2022). The renewable energy potential of the region has been widely commented upon, further raising European incentives for investment, which have the potential to turn a vicious cycle of wasteful dirty energy generation into a virtuous investment cycle in renewable energy. Whether it is Serbia's geothermal potential (Cariaga, September 2022), Albania's hydropower (IHA, 2019), or the wind and solar energy potential of Bosnia and Herzegovina (ITA, 2022), the region as a whole is well set to reaping the benefits of the energy transition. A rather aggressive approach on the EU's part, building on the existing momentum and a coordinated diplomatic offensive, is slowly building up towards a situation where the Western Balkan states have a binary choice between EU membership and a pre-accession grey zone in the absence of a credible geopolitical alternative.

The region is experiencing a positive energy encirclement. The Greek LNG terminals are creating connectivity waves northwards with the Greece-Bulgaria and Greece-North Macedonia interconnectors, while construction work on the Serbia-Bulgaria interconnector (IBS) started in February 2023 (Onyango, 203). To the east, the proposed Arad-Morkin pipeline will connect Serbia to the Romanian section of the BRUA pipeline, which takes its name from the Romanian initials of Bulgaria, Romania, Hungary, and Austria, the four countries it transits, connecting later in this decade to Romania's Black Sea gas as well (Patricolo, 2022). Further east, the Azerbaijan-Georgia-Romania energy cable will give the Western Balkans access to Azeri electrical energy, further contributing to the available resources for energy diversifications. Finally, Türkiye's ambitions to become a regional energy hub, recently translated into an energy deal with Bulgaria (Kobeszko *et al,* 2023), will bring the region closer to the Caucasian and Central Asian energy resources.

The Western Balkans sit at the centre of this infrastructure shift, with legitimate expectations that the region can go beyond being a mere consumer. Ever since the 2006 and 2009 Russo-Ukrainian gas spats, the region has been seen as a geographically viable alternative to the transit routes through Ukraine, a tendency best exemplified by TurkStream and the role that the TransBalkan pipeline now plays in bringing in Azeri gas. A clearer geopolitical orientation and the predictability of the business environment brought by the EU integration process might well see the region reap some of the benefits associated with transit fees, which can provide a substantial economic lifeline for the clean energy ambitions of the region.

Conclusion

The Western Balkans are on the cusp of an energy revolution, which for the first time in recent history is a factual reality of internal and external developments rather than an expectation of a certain course of action. With the country energy infrastructure of the region bound to reach a breaking point during the current decade, a structural energy transformation is becoming a prerequisite for the functioning of society rather than a political choice. In this process, the Western Balkans have great qualities – their relatively small size, comprising just 3% of the EU's population, making external investment meant to achieve stability much cheaper than managing a crisis. The EU has mustered up new enlargement strength after a period of relative apathy, best epitomized by enlargement fatigue and failed vaccine diplomacy. The war in Ukraine will long linger in the minds of European strategic elites, with the energy sector as a potent outlier: the West has successfully propped up Ukraine's energy grid, thrice the size of that of the Western Balkans, under constant bombardment by Russian forces, a political and logistic feat that will shape strategic thinking in the West regarding its ability to change the energy fate of the region.

Indigenous political will and material resources will play a co-determining role in this shift, fuelled by the climate conditionality embedded in the EU acquis, which with new instruments at its disposal will amp up the pressure on the Union's carrot and stick approach towards the region. After years of frustrating progress, the EU is slowly building up towards a more sustainable accession process, intertwining it with an energy transition. Once the accession curse is broken, internal discourse will change in the countries that are still waiting, and together with it the strategic prioritization of energy transition as a prerequisite for European ascension. The entire process will be partly directed at and will indirectly affect Russian influence in the region, with energy diplomacy spearheading European alignment.

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