

EUCERS Newsletter

Newsletter of the European Centre for Energy and
Resource Security (EUCERS)

Issue 80, November/December 2018

Introduction

Dear readers and friends of EUCERS,

This newsletter marks the 80th edition of our publication. It is also the last edition of 2018 in which we review our activities in 2018.

We continued our EUCERS/KAS Energy Talks series with an increasing number of participants. Members of EUCERS have spoken all across the planet and published over 30 books and articles, and we published 18 articles in this Newsletter. All these activities would not have been possible without the support of our partners and sponsors, who we would like to thank at this point. In this article, we share our director's speech on "German American Relations and the Nord Stream Pipeline" with you.

For the sixth consecutive year, EUCERS entered the ranks of top-20 Energy and Resource Policy Think Tanks worldwide by the University of Pennsylvania's Global Go To Think Tank Index Report.

We look back at 2018 with the firm belief to have significantly contributed to the knowledge about energy security and that now it is up to you, the decision-makers, to implement and guide policy.

The EUCERS team wishes you a happy and successful new year 2019! Thank you for your interest in EUCERS and for being part of our community.

Thomas Fröhlich
EUCERS Newsletter Editor

In this Month's Edition:

- Introduction
- German American Relations and the Nord Stream Pipeline. By Friedbert Pflüger
- 2018 in Review
- 2018 EUCERS Publications
- 2018 Newsletter Articles
- EUCERS on the Road
- Contact EUCERS
- EUCERS Advisory Board
- Acknowledgements

German American Relations and the Nord Stream Pipeline

By Friedbert Pflüger

The following speech was delivered by the Director of EUCERS, Prof. Dr. Friedbert Pflüger, on 12 December 2018 at the 6th Frankfurt Gas Forum in Frankfurt, Germany.

A few words on current German-American Relations

Politically, it is no secret that current German-American relations are at a low point, at least from the German perspective. At no point since German Chancellor Schröder refused to send troops to Iraq have relations been as strained as they are today.

A recent Pew poll seems to underscore this. 73% of Germans described relations between the US and Germany as bad. Interestingly, some 70% of Americans described relations between the US and Germany as good. So, it seems that Americans and Germans seem to be worlds apart in views of their countries' relationship.

In the energy sphere, relations seem to be even more strained. In July, Donald Trump accused Germany – a NATO ally - of being a "captive of Russia," due to its perceived energy reliance while Chancellor Merkel hit back at Trump by drawing on her own experience growing up in the GDR.

In addition, the US is considering imposing even harsher legislation than it already has on Russia, such as the Defending American Security from Kremlin Aggression Act of 2018 (DASKAA), introduced by 3 Democratic and 3 Republican Senators in August 2018 and led by Sen. Lindsey Graham (R.). If passed, this legislation would completely prevent American entities from purchasing Russian debt securities, sanction Russian state banks and potentially issue secondary sanctions on investing in the country's energy sector, something that would strain the relationship between Washington and Berlin even further.

In light of these developments, it may come as no surprise that the German political establishment, German industry, and the German public increasingly view the US as overstepping its bounds.

This particularly applies to areas in the energy sphere, such as Nord Stream 2, which is considered by many in Germany to be a commercial – and not a political –

project while Washington continues its vehement attempt to politicize the project and claim that the EU will become dangerously dependent on Russian gas.

This brings me to the EU's energy policy – with a particular view on natural gas – since the gas crises and where I believe we stand today.

EU energy policy since the gas crises

The Gas Crises of 2005/06 and 2008/2009 have clearly shown how unreliable the European security of supply was in the face of import shortages. At the same time, these events also set the focus of the European energy policy for now over a decade on the gas supply and gave a strong impulse for the diversification of energy sources, strengthening of infrastructure and the emergence of a European Energy Union.

The Russian-Ukrainian Gas Crises of 2005/2006 and 2008/2009 have demonstrated to the European Union how susceptible it was for supply shortages as well as the power individual suppliers were able to wield when deciding (or even only threatening) to shut off supply – this is indisputable. Therefore, the persisting concerns of Central and Eastern European countries that were in particular affected by the Crises need to be taken very seriously and sincerely addressed.

However, over the past decade, the EU has built additional storage, constructed a multitude of interconnectors as well as 30 LNG-terminals, with many more in the planning and development phase, such as the one in Krk – one of many such EU Projects of Common interest. Each of these incremental developments has strengthened the European gas market. Let us take for example Klaipeda: The completion of Lithuania's floating LNG-terminal in 2014 led to an immediate 20-percent reduction for Russian gas imports – even before any significant volumes of liquefied gas had even reached the Baltic state.

Still, Europe's existing LNG-terminals alone could already – with their more than 200 bcm capacity – cover more than half of our import needs. And according to US-president Trump after his meeting with Commission president Juncker in July, the EU has agreed to further develop this infrastructure to the benefit of US LNG – despite the fact that in 2017 they were at only 27 percent utilization. When also taking into consideration that the terminals were used more for re-loading (from one ship to the other) than for unloading, this makes even less sense.

Today, gas can flow not only from east to west, but in all directions due to significantly improved 'reverse flow' capabilities and can be freely sold within Europe due to the abolition of 'destination clauses. A main driver of these important diversification and development efforts was German Commissioner Günther Oettinger.

Many more EU-financed projects meant to increase competition are in the planning or construction phase such as Projects of Common Interest. In 2017, the Commission made 800 million Euro available for energy infrastructure projects, such as the interconnectors between Estonia and Finland, Bulgaria and Greece or the new Baltic Pipe, which will transport gas from Norway to Poland. Gas infrastructure and gas supply have meanwhile become so developed that no single European country is faced with a monopoly any more. Every gas delivery to Europe – whether it is from Russia, the US, Azerbaijan, Algeria, Qatar or, maybe soon, from Israel or Northern Iraq – strengthens market liquidity, which – unlike 10 years ago – is a classic buyers' market.

Political blackmail by Gazprom, the old fear of Central and Eastern Europe, is hardly imaginable any longer against this backdrop – there is way too much gas on offer and way too many supply alternatives for this to happen.

Natural Gas in the European Energy Mix

Nonetheless, for European energy policy, Nord Stream 2 in particular continues to remain the elephant in the room – despite the fact that, just as Azerbaijani gas through TAP, American LNG or gas from the eastern Mediterranean, it has a business case and should be seen as a sign of success, not only for gas market reforms, but also of the climate protection movement of the last decade.

One could be tempted to believe that the triumphal procession of renewable energy and efficiency measures could make additional import capacity superfluous. The EU Winter Packages 2016 (a 1000-page paper subtitled "Clean Energy for All Europeans") is particularly targeting to reduce the dependency of fossil fuels through efficiency measures and development goals for wind and solar as well as network expansion, cooperation mechanisms and subsidies for industrial consumers who adopt load management strategies. However, as recently as the end of last year, Miguel Arias Canete, EU-Commissioner for Climate and Energy, clarified in a speech that "gas has to play a central role in our decarbonisation efforts and will complement various forms

of renewable energy while pushing more CO₂-intensive fossil fuels out of the market" (24. November 2017). This way of thinking has been more than confirmed by the British dash for gas: In the course of the electricity market liberalization at the beginning of the 90s, the country switched from coal to gas. This process has not only led to savings, gas power plants also became a partner of renewables and have significantly contributed to the fact that between 1990 and 2014 UK CO₂ emissions dropped by a third. As a result, in May 2016 for the first time in history, British coal power plants did not produce any electricity for a whole 12 days.

On the other hand, in Germany, we will fail to achieve our goal for 2020 to reduce CO₂ emissions by 40 percent compared to 1990 – despite the rapid expansion of renewable energies. According to the leading energy think tank in Germany, Agora Energiewende, we will achieve only about a 30 percent reduction. Today, we are at approximately 28 percent in emissions savings – and even this only because of the decommissioning of the inefficient East German industry after the fall of the Berlin wall. If we had managed to keep the pace of those initial years, we would have reached our goal for 2020 already in 1997. The economic stagnation of the years 2008/2009 also benefited our climate balance sheet. Given that CO₂ emissions have been hovering around 900 m tonnes per year since 2009, the goal of 40 percent by 2020 and 55 percent by 2030 remains a mirage. Not to mention the costs of the German energy transition during this period, which amount to 150 billion by 2016 and an estimated 520 billion by 2025. An electrification of heating and transportation (as discussed in Germany) that is largely based on renewables is also not feasible. Network expansion is far from being sufficient to handle the additional demand: on cold winter days, Germany's demand for heating is 300.000 MW, while our electricity network is currently only able to handle about a quarter of that – not to mention the retrofitting costs for home owners.

Therefore, in the short and medium term, Europe will remain reliant on large volumes of domestically produced and imported gas as a fuel that is still fossil but at the same time low in CO₂-emissions – for heating, transportation, maritime shipping as well as for the substitution of coal and nuclear power, which are both currently being phased out in Germany.

But even if, in light of all these developments, European gas demand should remain stable and defy predictions by

Exxon, BP and IHS, the need for imports will certainly rise due to drastically decreasing indigenous extraction. Take the Netherlands alone: due to the risk of earthquakes, production dropped from 81 bcm in 2013 to 47 bcm in 2016 (10 percent of EU consumption) – by 2030, Dutch production is set to reach 0. The output in Great Britain and Norway is similarly set to drop by approximately 25 bcm each, in Germany by 10 bcm. This will leave us with a supply gap of 100 bcm. Our import demand will drastically rise.

Therefore, it is not surprising that there is a business case for further gas exports to Europe:

- For initially 10 bcm Azerbaijani gas through TAP beginning 2020 and 20 bcm later on
- For American LNG through the many LNG already existing import terminals
- For 16 bcm of gas from the Eastern Mediterranean, which is set to reach Europe beginning in 2025 through the world's longest underwater pipeline stretching over 2000 km, for which Israel, Cyprus and Italy signed a memorandum last year.
- Just as for further Russian gas through the expansion of Nord Stream.

Anyone who is closely looking at the condition of the Russian economy will understand very quickly that Russia is at least as dependent on exports to Europe as Europe is dependent on Russian gas. After Nord Stream 2 is finalized, there is no doubt that less gas will flow through Ukraine – and that the transit fees the country received will be reduced. But Kiev will also benefit, just as everyone else in Europe, from the liquid gas market and will be able to continue to import gas not just from Russia – but, as it has done already since 2015 – from the Baltic States, Germany or Austria – and this at significantly lower prices than in the times of the Gazprom monopoly. These savings will benefit consumers and the economy in all of Europe, including Ukraine. Moreover, the loss of transit fees will finally provide Ukraine with an opportunity to diversify its economy while preventing the transit fees from flowing into the pockets of a few oligarchs/vested interests.

Also, Nord Stream 2 allows for yet another selection of suppliers and contributes to lowering wholesale prices. According to a study of the Energy Research Institute of the University of Cologne, the growing competition on the European gas market (mainly between Russian pipeline gas and US LNG) will lead by 2035 to consumer savings between 31 and 84 billion Euros.

Infrastructure leads to diversification and flexibility

The flexibility of the European energy market was not least proven last winter, when an explosion at the Austrian gas hub in Baumgarten led to disruptions on markets from Italy to Great Britain. A British order for LNG was triggered and went to Gazprom's national competitor, Novatek, which had inaugurated its Yamal export terminal just days earlier. But the European gas market corrected the supply disruption so quickly, that only days later Novatek's delivery became unnecessary and ended up being sent to Boston in order to compensate for supply shortages on the US east coast during the particularly cold winter. This is only made possible by the impressive development towards a true European Energy Union and a functioning market under the auspices of the European Commission.

2018 in Review

March

1st EUCERS/KAS Energy Talk 2018: The Current State of Global Climate Policy - Security Challenges

On 7 March 2018 a panel chaired by Professor Dr Friedbert Pflüger, Director of EUCERS, discussed the security implications of global climate policy. The panel consisted of Hans-Hartwig Blomeier, Director of the Konrad Adenauer-Foundation (KAS) in the UK and Ireland, Sharon Turner, Executive Consultant Director for Governance and Law at the European Climate Foundation, Peter Mather, Group Regional President, Europe & Head of Country, UK, at BP, Nick Mabey, the Founder and CEO of E3G – Third Generation Environmentalism, Frank Umbach, Research Director at EUCERS, as well as Dr. Simon Chin-Yee, the 2018 KAS Fellow at EUCERS.

This talk examined the global governance of climate change policies with a focus on the security challenges. The panel approached the subject from different perspectives and backgrounds, including academia, civil society, consultancy and industry. The event, chaired by EUCERS Director Professor Dr Friedbert Pflüger, encompassed the political, economic and social challenges of climate change. With the proliferation of extreme weather events, prolonged droughts and record-breaking temperatures, decision-makers, industry and the public have become increasingly aware of the importance of tackling the global climate challenge. This first Energy Talk also gave an overview of current and future national and global climate strategies.

June

2nd EUCERS/KAS Energy Talk 2018: Africa - Climate Change, Security and Violent Conflict

On 13 June 2018 a panel chaired by Professor Dr Friedbert Pflüger, Director of EUCERS, discussed the impact of the global energy transition and climate change on Africa. The panel consisted of Felix Dane, Director of the Konrad Adenauer-Foundation (KAS) in the UK and Ireland, Harriet Edwards, Senior Policy

& Advocacy Advisor for UNICEF UK, Brendan Bromwich, a PhD Candidate at King's College London, and Dr Moses Ekpolomo, the Director of Energy Industry Research at the ESIRGroup.

This 2nd talk had a regional focus, examining the link between climate change, human security and violent conflict in Africa. Through examining cases of civil unrest in Somalia, conflict in Sudan, or violence in the Niger Delta, this talk questioned the underlying causes of climate-exacerbated conflict, while examining the relation between security and the climate challenge.

September

3rd EUCERS/KAS Energy Talk 2018: The Arctic Melt: Climate Change and the Economic, Military and Environmental Challenges facing the region, 11 September 2018

On 11 September, a panel chaired by our very own Professor Dr Friedbert Pflüger, Director of EUCERS, discussed geopolitical implications from the environmental impact on the Arctic. The panel consisted of Felix Dane, Director of the Konrad Adenauer-Foundation (KAS) in the UK and Ireland, Dr Petra Dolata, an Associate Professor of History at the University of Calgary, Dr Kathrin Stephen, a Scientific Project Leader at the Potsdam Institute for Advanced Sustainability Studies, Olena Borodyna, Risk and Resilience officer at the Overseas Development Institute (ODI), Dr Frank Umbach, the Research Director at EUCERS, and energy consultant Dr Peter Kaznacheev.

The focus of this year's talk series links climate change with global security. This talk examined rising air and water temperatures, loss of sea ice, and the opening up of the Arctic waterways with issues of security. Through looking at the different actors at play in the Arctic – industry, environmentalists, nation states – we looked at why the Arctic has gained in prominence in national, international and circumpolar politics, as well as the changing geopolitical situation in the region. Increasing competition for natural resources combined with the opening of seaways are challenging how countries see the Arctic.

December

4th EUCERS/KAS Energy Talk 2018: The Water-Energy Nexus in Central Asia: Climate Change and Security Risks

On 3 December 2018, the panel comprising of Amanda E. Wooden, Associate Professor of Environmental Studies at Bucknell University, John Roberts, Energy Security Specialist at Methinks Ltd, and our very own Frank Umbach, Research Director at EUCERS, examined the impacts of climate change on security in the region. Stretching from China in the East to the Caspian Sea in the West, the region is made up of the former Soviet republics, Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan.

From disappearing glaciers to extreme weather events, climate change has many faces in Central Asia. The talk looked at the vulnerabilities in the region and examined how society and environment interact.

The talk also assessed the direct and indirect threats to different sectors and communities, looking at how governments prioritise response measures for imminent security risks.

2018 EUCERS PUBLICATIONS

Bocse, Alexandra-Maria, "The Paris agreement: And its impact on the European gas industry." EUCERS Strategy Paper No. 15, London: KAS and EUCERS, 2018.

Necoechea Porras, Pablo D., "Mexico: Redrawing the global energy map through its energy reform. New challenges and opportunities." EUCERS Strategy Paper No. 16, London: KAS and EUCERS, 2018.

Pflüger, Friedbert, "Return to Reason", in: The Security Times, February 2018, p.42. Available online: http://www.the-security-times.com/wp-content/uploads/starchiv/ST_Feb2018_Doppel.pdf

— "Von der Pax Americana zur Pax Sinica? Der Weltmachtanspruch der chinesischen Energie- und Klimapolitik", in: Internationale Politik (IP), March/April 2018, pp. 30-36.

Umbach, Frank, "Global Outlook 2018: The Energy Revolution and its Growing Uncertainties", Geopolitical Intelligence Service (GIS), 30 January 2017, 7 pp. (<https://www.gisreportsonline.com/global-outlook-2018-the-energy-revolution-and-its-growing-uncertainties,energy,2452.html>).

— „Increased Electricity Usage Could Derail EU Energy Targets“, Geopolitical Intelligence Service (GIS), 8 January 2017, 8 pp. (<https://www.gisreportsonline.com/increased-electricity-usage-could-derail-eu-energy-targets,energy,2433.html>)

— "Nordkorea als Nuklermacht. Pjöngjang's Nukleooptionen und internationale Gegenstrategien" („North Korea as a Nuclear Power. Pyongyang's Nuclear Options and international Counter Strategies“), in: Europäische Sicherheit & Technik, January 2018, pp. 14-17.

— „Europäische Energiesicherheit im Wandel. Globale Energiemegatrends und ihre Auswirkungen“, Aktuelle Analysen, Hanns-Seidel-Stiftung, Munich 2017, 50 pp. (die Publikation hatte ich das letzte Mal vergessen anzuführen).

— "Geopolitical Impact of the Oil Price Decline – Winners and Losers“, in: European Security & Defence, February 2018, pp. 10-13.

— "Anforderungen an die deutsche Energiewende und die Energieaußenpolitik Deutschlands" ("Requirements for the German Energiewende and the Energy Foreign Policies of Germany"), in: Europäische Sicherheit und Technik (ES&T) 2/2018, pp. 18-22.

— "Global Outlook 2018: The Energy Revolution and its Growing Uncertainties", Geopolitical Intelligence Service (GIS), 30 January 2017, 7 pp. (<https://www.gisreportsonline.com/global-outlook-2018-the-energy-revolution-and-its-growing-uncertainties,energy,2452.html>); short version in German: "Globaler Ausblick 2018: Die Energierevolution und ihre weitreichenden Folgen“, in: Volksblatt (Liechtenstein), 31 January 2018, p. 10.

— "Energy Cybersecurity: The Need for Effective Resilience“, in: Geopolitical Intelligence Service (GIS), 8 January 2017, <https://www.gisreportsonline.com/energy-cybersecurity-the-need-for-effective-resilience,defense,2492.html>

— "Capacity Markets' Must Remain Technologically-Neutral“, EURACTIV, 3 April 2018 (<https://www.euractiv.com/section/electricity/opinion/capacity-markets-must-remain-technologically-neutral/>).

- “The EU’s Gas Directive and New Energy Security Challenges of the EU“, CEEP-Newsletter, 23 March 2018 (<https://www.ceep.be/gas-directive/>).
- “Internationale Energie- und Rohstoffwirtschaft: Strategische Megatrends und Implikationen für M&A-Strategien” („International Energy and Raw Material Economy: Implications for M&A Strategies“, ProventisPartners, Munich, May 2018, 55 pp.
- “Kommerzielles Projekt oder strategische Desorientierung? Die umstrittene Nord Stream-2 Gaspipeline“ („Commercial Project or Strategic Desorientation? The Controversial Nord Stream 2 Gas Pipeline“), Arbeitspapier Sicherheitspolitik, Nr. 19/2018, Bundesakademie für Sicherheitspolitik (BAKS), Berlin, Juli 2018, 5 pp. available online: https://www.baks.bund.de/sites/baks010/files/arbeitspapier_sicherheitspolitik_2018_19.pdf.
- “Uncertain Strategies for Securing Supplies of Critical Raw Materials”, Geopolitical Intelligence Service (GIS), 19 July 2018, 8 pp. available online: <https://www.gisreportsonline.com/uncertain-strategies-for-securing-supplies-of-critical-raw-materials,energy,2597.html>.
- “The Growing Importance of Raw Material Supplies”, Geopolitical Intelligence Service (GIS), (GIS), 19 June 2018, 9 pp. available online: <https://www.gisreportsonline.com/the-growing-importance-of-raw-material-supplies,economy,2582.html>
- “European Energy Market Requires Clear Rules”, BiznesAlert, 19 June 2018 available online: <http://biznesalert.com/umbach-european-energy-market-requires-clear-rules/>
- “China’s Belt and Road Initiative and the Mediterranean Region: The Energy Dimension”. KAS-Mediterranean Dialogue Series, No. 14, June 2018, 12 pp. available online: http://www.kas.de/wf/doc/kas_52761-1522-2-30.pdf?180608114654.
- “Turkey’s Energy Foreign Policy at a Crossroads“, Geopolitical Intelligence Service (GIS), 11 September 2017 (<https://www.gisreportsonline.com/turkeys-energy-foreign-policy-at-a-crossroads,energy,2658,report.html>).
- „Aufbruch ins Nirwana? Die Beziehungen Deutschlands und der EU mit Iran nach der Aufkündigung des Nuklearabkommens:“ („The German-Iran Relations after the Termination of the Nuclear Agreement: Depart to Nirvana?“), in: Europäische Sicherheit & Technik, September 2018, pp. 13-17.
- “Energy Security in a Digitalized World and its Geostrategic Implications”, Study of the Konrad Adenauer Foundation (KAS)/Regional Project: Energy Security and Climate change Asia-Pacific (RECAP), Hongkong, September 2018, 172 pp. (http://www.kas.de/wf/doc/kas_53447-1522-2-30.pdf?180905080236)
- “Der Fall der Ölpreise und die geopolitischen Auswirkungen” („The Fall of Oil Prices and the Geopolitical Impacts“), in: Österreichische Militärische Zeitschrift (ÖMZ) 5/2018, pp. 604-614.
- „China and Clean Coal“, in: F.Pflüger/C.Logan, ‘The Future of Energy and Climate Security’, EUCERS/King’s College, Strategy Paper No. 17, August 2018, pp. 17-21.

— “GIS-Dossier: How Turkey Scored Big in the Gas Pipeline Game”, Geopolitical Intelligence Service (GIS), 31 October 2018, 13 pp. (summarizing various GIS articles since 2011 on EU-Turkey-Russian Gas Pipeline Competition). Available online: <https://www.gisreportsonline.com/gis-dossier-how-turkey-scored-big-in-the-gas-pipeline-game,energy,2706.html>

— “The Future of Ukraine’s Energy Transit Status”, Geopolitical Intelligence Service (GIS), 11 September 2018, 8 pp. (<https://www.gisreportsonline.com/the-future-of-ukraines-energy-transit-status,energy,2690.html>).

— „European Energy Market Requires Clear Rules“, in: PKEE, “Special Report: Electricity Market Reform: A European Tour“, Warsaw-Brussels, October 2018, pp. 18-19.

— „Implementing the EU’s Electricity Market Design“, EURACTIV, 3 October 2018 available online: <https://www.euractiv.com/section/energy/opinion/implementing-the-eus-electricity-market-design/>

— “Chinas Seidenstraßen-Strategie in Südosteuropa” („China’s Silk-Road Strategy in Southeastern Europe“), Europäische Sicherheit & Technologie (ES&T), October 2018, pp. 41-45.

— “Securing Energy Supply and Maritime Interests: Seeking Convergence” (on ASEAN’s energy and interrelated maritime security policies), S. Rajaratnam School of International Studies (RSIS), Nanyang Technological University (NTU), Singapore, Working Paper No. 316, 1 October 2018, 39 pp. available online: <http://www.rsis.edu.sg/wp-content/uploads/2018/10/WP316.pdf>).

— “Brexit’s Impact on UK Energy Policies”, Geopolitical Intelligence Service (GIS), 5 December 2018, 7 pp. (<https://www.gisreportsonline.com/brexits-impact-on-uk-energy-policies,energy,2741.html>).

— “Die EU-Asien-Beziehungen. Neue strategische Herausforderungen” (“The EU-Asia Relations. New Strategic Challenges“), in: Europäische Sicherheit und Technik (ES&T), Dezember 2018, pp. 32-36.

— “Die Nord Stream-Pipeline 2 und die politischen Kollateralschäden” (“The Nord Stream-Pipeline 2 and the Political Collateral Damages“), Europäische Sicherheit & Technik, November 2018, pp. 26-31.

2018 NEWSLETTER ARTICLES

Issue 71, January 2018

The Dutch Energy Transition: Shifting Topology and Fortunes. By Caroline van Calcar and Daniel Scholten

Polish lignite at a cross-roads. By Maciej Hacaga

Issue 72, February 2018

The Energy Security Paradox: Rethinking Energy (In)security in the United States and China. By Jonna Nyman

U.S. Energy Dominance, Europe and Economic Sanctions. By Gabriel Hengel

Issue 73, March 2018

The offshore oil and gas dispute between Israel and Lebanon. By Clémence Pèlerin

Transition to Low Carbon Emissions Practices in the Brazilian Agriculture. By Angelo Costa Gurgel

Issue 74, April 2018

Parallels of energy transition, security and diversification in Brazil and Oklahoma. By Tatiana Bruce da Silva and Fernanda Delgado

Five megatrends in the energy sector. By Thomas Fröhlich

Issue 75, May 2018

ESG concerns shape allocation decisions. By Danae Kyriakopoulou

Adaptively profiting from energy uncertainties. By Ricardo G. Barcelona

Issue 76, June 2018

Preparing electricity markets for renewable energies. By Marie-Louise Arlt

South America at the heart of the geopolitics of renewable energy: the lithium case. By Fernanda Delgado, Klaus Stier, Casemiro Campos

Issue 77, July 2018

Germany backs small-scale LNG import terminals despite opposition. By Thomas O'Donnell

Low Carbon Cities are not just 'greener', they are also more inclusive, have stronger economies and are engines for employment. By Andrew Sudmant and Andy Gouldson

Issue 78, August/September 2018

Success factors for the low carbon energy transition. By Hanaé Chauvaud de Rochefort

Transaction costs and the disruption of energy innovation. By José Bolanos

Issue 79, October/November 2018

Energy Security in a Digitalized World and its Geostrategic Implications. By Frank Umbach

Bleak perspectives for Poland's strive for coal-based energy independence. By Maciej Hacaga

EUCERS ON THE ROAD

13.12.2018 Brussels, Belgium	Frank gave a presentation on "Energy Challenges in NATO's South" at the annual "NATO Roundtable on Energy Security".
12.12.2018 Frankfurt, Germany	Friedbert gave a speech on "German American Relations and the Nord Stream Pipeline" at the 6th Frankfurt Gas Forum 2018.
06.12.2018 Bonn, Germany	Frank gave a presentation on "Die Energiesicherheit Europas – neue Herausforderungen und strategische Entwicklungen" ("Energy Security of Europe – New Challenges and Strategic Developments") at the 32. Sicherheitspolitische und Wehrtechnische Tagung, organised by Mittler Report Fachverlag.
05.12.2018 Riga, Latvia	Friedbert participated in a panel discussion on "The Energy Union: Which future will it deliver to the Baltic Region?" at the 2nd Baltic Gas Conference 2018.
20.11.2018 Berlin, Germany	Frank spoke at a panel on „Welche Bedeutung wird Gas in den kommenden Jahrzehnten in Europa im Nexus von Energie- resp. globaler Energietransformation - und Geopolitik haben?“ ("Which Importance will have Natural Gas in Europe in the nexus of energy and global energy transformation as well as geopolitics?") with Prof. Dr. Klaus-Dieter Borchardt, Director of the Internal Energy Market in the European Commission's Directorate-General for Energy, at the „High Level Experts' Round Table on Energy and Geopolitics“ of the „Strategic Energy and Security Initiative“ (SESI).
19.11.2018 Munich, Germany	Frank gave a presentation on "Energiesicherheit in einer digitalisierten Welt" ("Energy Security in a Digitalized World") at the Hanns-Seidel-Foundation Akademie für Politik und Zeitgeschehen (https://www.hss.de/news/detail/die-drei-ds-der-energiewende-news4021/).

09.11.2018
Berlin,
Germany

Frank spoke on „Was sind die wichtigen Entwicklungen/Trends, die wir in den kommenden fünf bis fünfzehn Jahren für den Nexus von Geopolitik und Energie, resp. globaler Energietransformation, im Auge behalten müssen?“ ("What are the most important developments/trends of the next 5-15 years for the nexus of Geopolitics and Energy (global energy transformation) at the "High Level Experts' Round Table on Energy and Geopolitics" of the „Strategic Energy and Security Initiative“ (SESI).

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The EUCERS Advisory Board supports the activities of EUCERS King's College London. We would like to thank and present the members of the board.

Professor Michael Rainsborough, Chairman of the Board, Head of War Studies, King's College London

Marco Arcelli, Executive Vice President, Upstream Gas, Enel, Rome

Professor Dr Hüseyin Bağcı, Department Chair of International Relations, Middle East Technical University Inonu Bulvari, Ankara

Andrew Bartlett, Managing Director, Bartlett Energy Advisers

Volker Beckers, Chairman and non-Executive Director of Reactive Technologies Ltd, Vice Chairman (since October 2016) and Member of the Board of Directors (non-Executive Director) of Danske Commodities A/S, Denmark and Chairman, Chair Audit Committee of Albion Community Power Plc

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ACKNOWLEDGEMENTS

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