



Council of the European Union  
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# THINK TANK REVIEW

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SPECIAL ISSUE

## The EU energy policy

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Welcome to this special issue of the Think Tank Review on the EU energy policy, compiled by the Library of the Council of the EU\* ([click to share on Twitter](#)).

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## FROM TTR 39 - OCTOBER 2016

### Centre for European Policy Studies

*Aligning policies for low-carbon systemic innovation in Europe*

by Nicholas Asford and Andrea Renda [@arendat111](#)

27 September 2016

Link to the article in [English](#) (98 p.)

The authors look at EU policies and propose ten steps to align the EU rules with long-term objectives. This endeavour bears important consequences for the EU's better regulation strategy, innovation policy and sectoral policies in many fields.

### NewClimate Institute for Climate Policy and Global Sustainability

*Brown to green: assessing the G20 transition to a low-carbon economy*

by Jan Burck, Niklas Höhne [@niklashoehne](#), Markus Hagemann, Sofia Gonzales-Zuniga, Gerd Leipold, Hannah Schindler, Sam Barnard and Smita Nakhooda

September 2016

Link to the article in [English](#) (32 p.)

This report provides a comprehensive overview and assessment for the G20 countries, whether – and how well – they are doing on the journey to transition to a low carbon economy.

### Egmont – Royal Institute for International Relations

*Putting the Paris Agreement at the centre of Europe's climate and energy map*

by Clémentine d'Oultremont and Quentin Genard [@QuentinGenard](#)

16 September 2016

Link to the article in [English](#) (42 p.)

The Paris Agreement, adopted in December 2015, sent a clear message to the world that the global transition to a low-carbon economy is an inevitability that requires commitment from countries but also from businesses, regions, cities and citizens.

### Oxford Institute for Energy Studies

*Lithuania's strategic use of EU energy policy tools: a transformation of gas dynamics*

by Vija Pakalkaitė

5 September 2016

Link to the article in [English](#) (54 p.)

Lithuania is one of Europe's smallest national gas markets until recently reliant, in common with Latvia and Estonia, on imported Russian pipeline gas for all its natural gas requirements. After its accession to the EU in 2004, Lithuania became directly impacted by the developing body of energy market regulation, most notably the Third Package of 2009. While the country could have sought a derogation from the main requirements of the Package, it chose not to and instead embarked upon the difficult task of implementing supply chain unbundling. The subsequent successful execution of a project to build an LNG import facility completed the country's quest for gas supply diversification.

## **Narodowe Centrum Studiów Strategicznych (National Centre for Strategic Studies)**

*Single gas market energy security in the Visegrad states: models, challenges, perspectives*

by Nataliia Slobodian, Nolan Theisen, Samuel Goda, Michaela Karaskova and Adam Kowalczyk  
September 2016

Link to the article in [English](#) (46 p.) and in [Polish](#) (58 p.)

This paper provides context and analysis of energy security related issues in the Visegrad states, focusing primarily on the Energy Union strategy and EU security of supply regulation in the Visegrad states, infrastructure bottlenecks and infrastructure projects in the region in the context of current geopolitical and regional challenges to the Visegrad states gas supply security.

## **Institut français des relations internationales**

*E-mobility: European energy and transport policies at cross-roads. The challenge of infrastructure deployment*

by Aurélie Faure-Schuyer  
20 September 2016

Link to the article in [English](#) (5 p.)

European clean transport policy envisages the development of charging infrastructures for electric vehicles within a European e-mobility framework. After the downturns of the Volkswagen scandal and the prevailing low European carbon price, the EU is bringing forward car passenger transport electrification. This requires new business models based on interoperability.

## **Notre Europe - Jacques Delors Institute**

*Europe needs crowd-based innovation for a competitive energy transition*

by Thomas Pellerin-Carlin [@ThPellerin](#) and Pierre Serkine  
13 September 2016

Link to the article in [English](#) (4 p.) and in [French](#) (6 p.)

Europe is at a crossroads. It faces a multifaceted crisis with rising distrust in representative democracy, doubts about the purpose of the European project, an urgency to tackle climate change, and a poisonous definition of competitiveness. In this context, the Energy Union Research Innovation and Competitiveness Strategy (EURICS) can kill three birds with one innovative stone: to boost its competitiveness, Europe should become the global provider of low-carbon solutions, an objective best achieved democratically.

## **Jacques Delors Institute - Berlin**

*Starting a new chapter in EU-Algeria energy relations: a proposal for a targeted cooperation*

by Jekaterina Grigorjeva [@jek\\_grigorjeva](#)  
30 September 2016

Link to the article in [English](#) (18 p.)

This paper draws attention to the need for stronger and more targeted energy cooperation between the EU and Algeria. It proposes an EU-supported energy transition in Algeria aimed at switching Algerian domestic consumption to renewable energy. The initiative can be based on the already existing EU instruments, namely the EU-Algeria Energy Business Forum and the reviewed framework of the European Neighbourhood Policy.



## FROM TTR 40 - NOVEMBER 2016

### Foundation for European Progressive Studies

*The future of EU climate change technology and sustainable energy diplomacy*

by Stephen Minas [@StephenMinas](#), Miriam Dalli and Margot Wallström

24 October 2016

Link to the article in [English](#) (55 p.)

This timely collaboration contributes to the necessary debate over how the EU continues to lead on climate change following the adoption of the Paris Agreement. Climate change is a transnational challenge like no other. The EU, which has been a key innovator in multi-level governance, now tackles the climate challenge while being beset by myriad interconnected crises. The EU's capacity to innovate – and to act collectively – will be vital to meeting this urgent challenge in the years ahead.

### Stockholm International Peace Research Institute

*Climate-related security risks: towards an integrated approach*

by Malin Mobjörk [@MalinMobjork](#), Maria-Therese Gustafsson, Hannes Sonnsjö, Sebastian van Baalen, Lisa Maria Dellmuth and Niklas Bremberg [@NiklasBremberg](#)

6 October 2016

Link to the article in [English](#) (88 p.)

The security implications of climate change have attracted increasing attention in policymaking and research circles since the early 2000s. Since climate change has far-reaching implications for human livelihoods and activities, the potential security implications are broad and complex. This report provides an overview of climate-related security risks and policy responses for addressing those risks.

### European Capacity Building Initiative / NewClimate Institute for Climate Policy and Global Sustainability

*Two unconventional options to enhance multilateral climate finance*

by Benito Müller [@OxClimatePolicy](#), Alexandra Kornilova, Ritika Tewari [@RitikaTewari](#), Carsten Warnecke [@CaWarnecke](#) and Anju Sharma

17 October 2016

Link to the article in [English](#) (21 p.)

The brief considers two unconventional sources of finance to overcome the current challenges in multilateral climate finance and enhance predictability and magnitude: a 'share of proceeds' from national and sub-national emission trading schemes; and crowdfunding from corporate air passengers.

### Istituto per gli Studi di Politica Internazionale

*Monitoraggio della sicurezza energetica italiana ed europea*

by Carlo Frappi, Nicolò Rossetto [@nicolorossettoP](#) and Michele Delera

October 2016

Link to the article in [Italian](#) (76 p.)

This paper analyses the energy security situation at Italian and European levels.

## Adam Smith Institute

*Solar power in Britain: the impossible dream*

by Capell Aris

12 October 2016

Link to the article in [English](#) (121 p.)

Supporters of renewable energy argue that wind- and solar-generated electricity can form the basis of a secure, affordable, low carbon energy supply for the UK and EU, despite the inherently variable and intermittent nature of these sources.

## College of Europe

*The EU climate and energy package and E.ON: a two step response to a disruptive policy*

by Alisa Akutsina, David Rinaldi [@Rinaldi\\_David](#) and Thibault Roy

26 October 2016

Link to the article in [English](#) (25 p.)

The paper is structured as follows: Section 1 introduces E.ON (one of the largest European utility companies) in the context of the European energy market; Section 2 presents the relevant EU policy changes and their impact on the industry and on E.ON. In Section 3, the authors outline the company response to the new policy and industry environment. In Section 4 and 5, the authors present their concluding remarks and a set of questions which can help class debates and reflective learning.

## Vrije Universiteit Brussel - Institute for European Studies

*The European Union in crisis: What future for the EU in international climate policy?*

by Sebastian Oberthür

20 October 2016

Link to the article in [English](#) (4 p.)

Despite an apparently ever-growing number of crises in Europe over the past decade, the fundamental rationale of the EU and its member states actively and jointly exerting leadership in international climate and energy policy has not changed. The members of the Union remain bound together by common policies closely linked to the single market. They also have a common interest in fighting climate change and enhancing energy security and reaping the many economic opportunities of the 'new climate economy'. And, with individual member states being vulnerable and lacking clout, they share a strategic interest in jointly shaping evolving international climate and energy governance. The crises therefore do not call for scaling down EU climate leadership ambitions, but for adjusting the leadership strategy.

## FROM TTR 41 - DECEMBER 2016

### Istituto Affari Internazionali

*The new energy resources in the Centre-East Mediterranean: potential current and future geo-strategic consequences*

by Janiki Cingoli [@janikicingoli](#)

November 2016

Link to the article in [English](#) (12 p.)

The discovery of important gas fields off the Israeli, Cypriot and Egyptian coasts could have significant consequences not only in meeting the energy needs of those countries, but also on geopolitical relationships in the region and with Europe.

### Euro-Mediterranean Study Commission

*Geopolitics, gas and grand ambitions: the outlook for petroleum production in the East Mediterranean*

by Diána Szoke

18 November 2016

Link to the article in [English](#) (30 p.)

News of mass migration, terrorism and civil war in the Mediterranean has overshadowed another potentially game-changing development in the region, namely the consequences of major natural gas discoveries. Over the past decade, vast offshore hydrocarbon reserves have been uncovered off the coasts of Israel, Cyprus and Egypt, prompting hopes of a gas bonanza in the so-called Levant Basin. This paper assesses the outlook for petroleum production and exports in the East Mediterranean, by looking at five dimensions of the question: geopolitics, legal issues, economics, environmental concerns and technological feasibility.

### Fondation pour l'innovation politique

*L'Europe face aux défis du pétro-solaire*

by Albert Bressand

3 November 2016

Link to the article in [French](#) (52 p.)

Regarding climate change, Europe is opposing its energy transition. However, there are two revolutions that are reshaping the world energy scene: on the one hand, renewable energies and energy saving and, on the other hand, so-called "unconventional" hydrocarbons. The time has come for Europe to take into account the dynamism of the oil sector via a new, more efficient carbon market conditioned by the combination of hydrocarbons and solar energy.

### Institut français des relations internationales

*Europe de l'électricité : une perspective historique*

by Jean-Paul Bouttes and François Dassa

24 November 2016

Link to the article in [French](#) (50 p.)

To find a common project for energy in Europe, one must rethink the social, technical, economic and institutional expectations and translate them into a coherent narrative. In this context, it must be possible to address the major climate challenges and the stakes linked to an economic, industrial and geopolitical Europe in a multipolar world.

## *Quelle politique énergétique dans un environnement aussi incertain ?*

by Olivier Appert

4 November 2016

Link to the article in [French](#) (4 p.)

Energy policies have always been determined by the global economic and energy landscape that could be anticipated. In the last century, the context seemed predictable and stable, and the means for implementation were clear. Today, the energy sector is confronted with an environment that has never been so uncertain.

### **Centre for European Policy Studies**

#### *Nord Stream 2: a legal and policy analysis*

by Alan Riley [@profalanriley1](#)

15 November 2016

Link to the article in [English](#) (30 p.)

This paper argues that the EU's energy regulatory regime applies to Nord Stream 2. It is indisputable that Union law applies in its own internal waters and territorial seas that Nord Stream 2 will pass through, and highly probable that Union law applies in the exclusive economic zone through which Nord Stream 2 will also pass. It goes on to argue that Nord Stream 2 is a transmission pipeline under EU law to which the full weight of the EU's liberalisation measures apply, including ownership unbundling, third party access and tariff regulation obligations.

#### *The disclosure of guarantees of origin: interactions with the 2030 climate and energy framework*

by Jaap Jansen [@JaapJansen](#), Eleanor Drabik [@Elliedrabik](#) and Christian Egenhofer [@CEgenhofer](#)

10 November 2016

Link to the article in [English](#) (23 p.)

Demand is increasing in the EU for specific electricity products of desired origin. For now, this demand relates almost exclusively to electricity generated from renewable energy sources, and comes from business organisations wishing to enhance their environmental credentials and households wishing to contribute to a better environment. The tracking system of guarantees of origin is instrumental to the reliable authentication of claims about the origin of a certain quantity of final energy.

### **E3G**

#### *Consumer led energy transition*

November 2016

Link to the article in [English](#) (9 p.)

Many large corporations with operations based across the EU now recognize that meeting electricity demand from 100% renewable sources represents a major strategic opportunity. Energy can be securely supplied with increased cost control, as well as helping to position businesses as progressive and forward thinking leaders in their sectors. However, it can be difficult for businesses to achieve this objective and supporting this agenda presents some real opportunities for policy makers. Policy makers should, therefore, use the current revisions to energy legislation to support businesses with this emerging commercial imperative.

*Efficiency first: from principle to practice. Real world examples from across Europe*

by Jan Rosenow [@janrosenow](#), Edith Bayer, Barbara Rososińska, Quentin Genard [@QuentinGenard](#) and Marta Toporek

November 2016

Link to the article in [English](#) (24 p.)

The EU's energy infrastructure faces numerous challenges over the next decades. It needs to be decarbonized whilst ensuring the competitiveness of EU industry, providing energy security, addressing energy poverty, reducing energy bills, and empowering consumers, who play a crucial part in the energy system of the future. Getting those choices right is key for ensuring a sustainable, fair, affordable and secure energy future. The principle of "Efficiency First" (E1st) delivers on all three.

## **Bruegel**

*Going local: empowering cities to lead EU decarbonisation*

by Simone Tagliapietra [@TagliapietraBxl](#) and Georg Zachmann [@GeorgZachmann](#)

30 November 2016

Link to the article in [English](#) (13 p.)

Four trends are reshaping the European energy system: decarbonisation, digitalisation and, as a result of the two, decentralisation and convergence. Based on strong public policies, decarbonisation is reshuffling the European energy mix, while innovation in digital technologies is enabling disruptive change in the way energy systems are operated. This enables the European energy system to become more decentralised with increasing interaction between services (electricity, heat, transport, data) that used to be largely separate.

## **Institut Montaigne**

*The circular economy: reconciling economic growth with the environment*

November 2016

Link to the article in [English](#) (104 p.) and in [French](#) (114 p.)

Since the Nobel Peace Prize was awarded in 2007 to the members of the Intergovernmental Panel on Climate Change, a genuine international consensus has formed around the need to curb climate change. This objective was enshrined during the COP21 in Paris, in December 2015. The same attention should fall on other major environmental challenges that need to be tackled, including access to water, increasing soil degradation, loss of biodiversity, local atmospheric pollution, etc.

## **NewClimate Institute for Climate Policy and Global Sustainability**

*10 steps: the ten most important short-term steps to limit warming to 1.5°C*

November 2016

Link to the article in [English](#) (48 p.)

This Climate Action Tracker report lays out the ten most important actionable steps to be taken by 2020-2025 to keep the window open for a 1.5 °C world.

## Brookings Institution

*Are the US and China ready, willing, and able to achieve their Paris Agreement goals?*

by Philip A. Wallach [@PhilipWallach](#)

1 November 2016

Link to the article in [English](#) (15 p.)

According to the author, the success of the Paris Agreement depends upon its signatory nations actually delivering on their commitments over time. Therefore, in order to assess the likely success of the Paris Agreement, one must ask whether countries are willing and able - both politically and technically - to deliver on the commitments they have stated they are ready to pursue. In this paper, the author investigates the readiness, willingness, and ability of both the US and China to achieve their self-identified goals. And he concludes, leaders must squarely confront the ways in which domestic politics could limit their ability to meet their Paris Agreement goals.

## Terra nova

*Pour une stratégie climatique audacieuse - Des propositions pour agir sans attendre*

by François Berthélemy and Antoine Guillou [@antoineguillou](#)

7 November 2016

Link to the article in [French](#) (23 p.)

In 2015, COP 21 and the Paris Agreement saw the emergence of a new hope: global action to combat climate change. As an organizing country, France played a facilitating role unanimously welcomed. However, the road to the implementation of the Paris Agreement remains fraught with obstacles and difficulties. The role of the EU and, within it, of France will be crucial in the coming years and decades to turn the promises made in Paris into action.

## United Nations Environment Programme

*The emissions gap report 2016: a UNEP synthesis report*

November 2016

Link to the article in [English](#) (86 p.)

Global climate change governance is becoming increasingly diverse, with many actors, other than national governments, undertaking climate change management actions. In this report, the focus is on actors like the private sector, civil society organisations, cities and regions, and other subnational actors, often referred to as non-state actors. Their actions could be either individual or cooperative. The 2015 Conference of the Parties (COP) to the United Nations Framework Convention on Climate Change (UNFCCC) showed a growing institutionalisation of processes aimed at engaging non-state actors in efforts to manage climate change.

## FROM TTR 42 - JANUARY 2017

### Oxford Institute for Energy Studies

*EU energy policy – 4th time lucky?*

by David Buchan and Malcolm Keay

12 December 2016

Link to the article in [English](#) (9 p.)

The European Commission has tabled a mega-package of legislative proposals to complete its blueprint for Europe's Energy Union. Billed as "the biggest transformation of Europe's energy system since the building of its centralised energy system a century ago", the draft legislation aims to accelerate decarbonisation by adapting the electricity market to decentralised and intermittent renewables, and progressive Europeanisation of the sector via a shift from national to regional focus in regulation, renewable payments and back-up systems.

### Centre for European Policy Studies

*Roadmap for post-carbon cities in Europe: transition to sustainable and resilient urban living*

by Noriko Fujiwara [@NFujiwara37](#)

15 December 2016

Link to the article in [English](#) (13 p.)

City-led initiatives have gained momentum in international cooperative action in 2016 (Global Covenant of Mayors initiative, the entry into force of the Paris Agreement, and the Habitat III UN Conference on Housing and Sustainable Urban Development). Yet, despite increasing awareness of these developments and an expectation that cities will play a key role in the transition to a post-carbon future, citizens, or more broadly stakeholders, have so far not fully participated in the decision-making process.

### Atlantic Council / Friedrich-Ebert-Stiftung (Friedrich Ebert Foundation) / Peace Research Institute Oslo

*Global energy debates and the Eastern Mediterranean*

by Ayla Gürel Moran [@GurelAyla](#), Harry Tzimitras [@h\\_tzimitras](#) and Hubert Faustmann

13 November 2016

Link to the article in [English](#) (76 p.)

In the Eastern Mediterranean, which is characterised more by conflict than cooperation, persistent conscious effort is needed to minimise the effects of narrow-minded populism or politicisation of issues. Such attitudes are particularly unhelpful when it comes to realising the potential of the region's hydrocarbons through solutions that are optimal both commercially and in public interest terms. This is a job that requires calm, serious planning, and responsible policy makers.

### Institute for European Environmental Policy

*Ensuring the sustainability of bioenergy and minimising the risk of carbon debt*

by Ben Allen, Kamila Paquel, Catherine Bowyer, David Baldock, Silvia Nanni and Martin Nesbit [@arrhenius](#)

9 December 2016

Link to the article in [English](#) (25 p.)

Bioenergy will continue to play a role in helping to decarbonise the EU's energy sector. To arrive at a lower carbon bioenergy system may require a combination of different actions and approaches. This package should include robust and workable sustainability criteria to guide operators in the

sourcing of biomass, and in choosing appropriate deployment scales, and to drive efficiency in conversion and transportation.

**Nederlands Instituut voor Internationale Betrekkingen - Clingendael (Netherlands Institute of International Relations) / Stockholm International Peace Research Institute / adelphi**

*Towards a global resilience agenda - Action on climate fragility risks*

by Malin Mobjörk [@MalinMobjork](#), Dan Smith and Lukas Rüttinger [@LRuettinger](#)

5 December 2016

Link to the article in [English](#) (39 p.)

This report of the Planetary Security Initiative (PSI) takes stock of key developments since the publishing of the independent report "A New Climate For Peace" commissioned by G7 members. It provides a concise risk horizon scan, and an overview and assessment of key policy developments in 2015 and 2016 that are of relevance for addressing climate-fragility risks and fostering the global resilience agenda.

*The economics of planetary security: climate change as an economic conflict factor*

by Michel Rademaker [@michelrademaker](#), Karlijn Jans [@KCH\\_Jans](#), Christopher Frattina della Frattina, Hannes Rööfs, Stephan Slingerland, Alexander Borum [@Akborum](#) and Louise van Schaik [@LouiseVanSchaik](#)

1 December 2016

Link to the article in [English](#) (86 p.)

Planetary security refers to the role of the environment in geopolitical risks and conflicts. As a relatively underexplored concept, this report examines the economic aspects of planetary security and, in particular, the vulnerabilities and resilience of countries to environmentally induced conflict.

**Grantham Research Institute on Climate Change and the Environment / Centre for Climate Change Economics and Policy / Bruegel**

*Climate policy in China, the European Union and the United States: main drivers and prospects for the future*

by Alina Averchenkova [@averchenkova](#), Samuela Bassi, Keith J. Benes, Fergus Green [@fergusgreen](#), Augustin Lagarde [@AugustinLagarde](#), Isabella Neuweg and Georg Zachmann [@GeorgZachmann](#)

November 2016

Link to the article in [English](#) (36 p.)

China, the EU and the US are responsible for the majority of global emissions of greenhouse gases, and produce about half of global GDP. Hence, their climate policies not only determine the success of global efforts to curb future emissions of greenhouse gases, but also affect policy developments in other countries. The aim of this report is to assist policy-makers, climate change negotiators and analysts to understand the domestic constraints and opportunities facing each jurisdiction, and to identify areas of common interest or concern between the three jurisdictions.

**Corporate Europe Observatory**

*Carbon welfare. How big polluters plan to profit from EU emissions trading reform*

by Oscar Reyes [@oscar\\_reyes](#) and Belén Balanyá

2 December 2016

Link to the article in [English](#) (35 p.)

The Emissions Trading System (ETS) is at the centre of EU climate policy, and a Directive currently passing through the European Parliament and Council intends to keep it that way until



2030. The EU ETS claims to make big polluters pay, but has actually become a way of enhancing polluter's profits, as well as undermining and preventing effective action to tackle climate change.

### **Ecologic Institute / World Wildlife Fund**

*Smart cash for the climate: maximising auctioning revenues from the EU emissions trading system*

by Eike Karola Velten, Matthias Duwe [@Matthias\\_Duwe](#), Elizabeth Zelljadt, Nick Evans and Marius Hasenheit [@MariusHasenheit](#)

16 December 2016

Link to the article in [English](#) (123 p.)

Member states earned close to 12 billion euro from auctioning in the EU Emissions Trading from 2013 to 2015 with over 80% of the money so far spent on climate action – most of it in the EU. The funding mainly went to renewables, efficiency and cross-cutting programmes. According to this study, the national reports on the use of auctioning revenues, however, contain mistakes while there seems to be no frequent quality review at present.

### **Institute for Advanced Sustainability Studies**

*Sustainable energy in the G20 - Prospects for a global energy transition*

by Sybille Roehrkasten, Sonja Thielges and Rainer Quitzow (eds.)

12 December 2016

Link to the article in [English](#) (112 p.)

The study analyses the energy sector developments of 14 G20 members (Argentina, Brazil, China, EU, France, Germany, India, Indonesia, Japan, Russia, Saudi Arabia, South Africa, Turkey and the US). Short case studies trace major trends and policy initiatives in the countries and identify both potential conflicts of interest and existing common ground within the G20. Each study offers an assessment of potential impulses originating from the respective case, and how these might help foster international cooperation for advancing a global energy transition.

### **Terra nova**

*Finance climat : le temps de l'action - Sept propositions pour la France et l'Europe*

by Michel Aglietta, Etienne Espagne and Baptiste Perrissin Fabert

15 December 2016

Link to the article in [French](#) (20 p.)

This article aims to show how France and Europe, with their legitimacy on climate issues in general, and climate finance in particular, could play a key role in redefining an overall financial framework accompanying the transition to a carbon neutral world.

### **Deutsches Institut für Entwicklungspolitik (German Development Institute)**

*Environmental tax reform in developing, emerging and transition economies*

by Jacqueline Cottrell, Kai Schlegelmilch, Matthias Runkel and Alexander Mahler

15 December 2016

Link to the article in [English](#) (126 p.)

This report highlights lessons regarding impacts, costs and acceptance from the implementation of environmental tax reform (ETR) in industrialised countries that are most transferable to the developing country context. The report draws together the experience of the authors in selected developing countries in connection with these lessons learned and relates them to the more general developing country context.

**Ústav mezinárodních vztahů (Institute of International Relations Prague)**

*Energetické vztahy EU a Írán: příležitosti a překážky pro dodávky zemního plynu*

by Lukáš Tichý

21 December 2016

Link to the article in [Czech](#) (13 p.)

Iran, with the largest gas reserves in the world is an alternative supplier of gas to the EU countries, which is one of the largest energy consumers. To export gas from Iran to the EU through pipelines or as LNG currently there are obstacles of technical, economic, energy, political, regional and security nature.

## FROM TTR 43 - FEBRUARY 2017

### Istituto Affari Internazionali

*Towards the Energy Union: the BEMIP and the case of Lithuania*

by Irma Paceviciute

24 January 2017

Link to the article in [English](#) (18 p.)

In the framework of the EU Energy Union, the Baltic Energy Market Interconnection Plan (BEMIP) represents one of the EU's key political platforms aiming to foster electricity and gas market integration in the Union's least interconnected Baltic region. The purpose of this paper is to measure the extent of the BEMIP's effectiveness in achieving energy sector integration by analysing the case of Lithuania in order to evaluate the Plan's coherence in addressing the EU's energy network deficiencies. The paper also examines the purposefulness of minimum electricity and gas market interconnection requirements set by the EU and to which extent the Energy Union is successful in urging Member States to adopt long-term national energy and climate strategies.

### E3G

*The clean energy transition and industrial strategy - Developing a coherent approach*

by Simon Skillings [@skillingssa](#) and Nick Smailes

January 2017

Link to the article in [English](#) (20 p.)

This note contains some preliminary high level thinking how the UK's government's action to promote a clean energy transition can be aligned with its emerging industrial strategy. There appears to be a number of areas where strategic action by government can deliver multiple benefits spanning both the transformation of the energy system and the industrial strategy. There is, therefore, a strong case for making this alignment an explicit driver of the approach to building a long term industrial strategy. The note also sets out some proposals for how this initial thinking could be developed and refined.

### Institut français des relations internationales

*The energy sector implications of Brexit*

by Steve Pye, Carole Mathieu and Paul Deane

January 2017

Link to the article in [English](#) (9 p.)

In her speech of January 2017, Theresa May did set out negotiating principles, including not seeking membership of the Single Market. In view of the most likely Brexit outcomes, this paper seeks to explore what the implications might be for energy and climate policy in the UK and the EU.

### Oxford Institute for Energy Studies

*The future of gas in decarbonizing European energy markets: the need for a new approach*

by Jonathan Stern

January 2017

Link to the article in [English](#) (37 p.)

In this paper the author reviews in detail the problems which gas continues to face in Europe, and highlights the potential impact on all parts of the gas value chain. The author suggests that it is the

fragmentation of the gas industry, and the different incentives within each sector, which is partly to blame for the lack of a coherent message from the industry as a whole.

*The OPAL exemption decision: past, present, and future*

by Katja Yafimava [@katyafimava](#)

January 2017

Link to the article in [English](#) (43 p.)

This paper focusses on the OPAL pipeline dispute and raises the question on whether the legal/regulatory framework should be used to obstruct the transportation of Russian gas.

### **Atlantic Council**

*Downstream oil theft - global modalities, trends, and remedies*

by Ian M. Ralby

January 2017

Link to the article in [English](#) (116 p.) and to the [summary](#) (8 p.)

This report is the first comprehensive study of the theft of refined oil products around the globe. It provides insight into the modalities and trends in oil theft, the culprits responsible, the stakeholders affected by illicit activities, and recommendations that could change the dynamics.

### **Deutsches Institut für Wirtschaftsforschung (German Institute for Economic Research)**

*Prosumage of solar electricity: pros, cons, and the system perspective*

by Wolf-Peter Schill, Alexander Zerrahn and Friedrich Kunz

January 2017

Link to the article in [English](#) (36 p.)

The authors examined the role of prosumage of solar electricity. They devised a qualitative account of arguments in favour of and against prosumage and gave an overview of prosumage in Germany. Prosumage will likely gain momentum as support payments expire for an increasing share of PV capacities after 2020. They modelled possible system effects in a German 2035 scenario. The conclusion is that policymakers should not unnecessarily restrict prosumage, but consider system and distributional aspects.

### **Ecologic Institute**

*Robust review and ratcheting up targets – EU climate policies after 2020*

by Nils Meyer-Ohlendorf

4 January 2017

Link to the article in [English](#) (22 p.)

The Paris Agreement states that Parties will scale up their commitments with every consecutive nationally determined contribution. This paper shows how EU legislation can help implement this requirement.

*Turkey's role in natural gas – becoming a transit country?*

by Istemi Berk and Simon Schulte

January 2017

Link to the article in [English](#) (32 p.)

This paper analyses the possible future role that Turkey can play in European natural gas markets. The authors employ a global gas market simulation model, COLUMBUS, to assess the outcomes of different scenarios concerning natural gas supply routes to Europe through Turkey up to 2030. The results imply simply that under current conditions, Turkey's role would be of only minor importance. In accordance with various scenarios presented in this study, Turkey's role is seen at its most important when European demand increases and Russia exerts power in the European markets.

*Competition and regulation as a means of reducing CO2 emissions: experience from U.S. fossil fuel power plants*

by Christian Growitsch, Simon Paulus and Heike Wetzel

January 2017

Link to the article in [English](#) (22 p.)

Levels of CO2 emissions from electricity generation in the US have changed considerably in the last decade. This development can be attributed to two factors. First, the shale gas revolution has reduced gas prices significantly, leading to a crowding out of the more CO2-intensive coal for electricity generation. Secondly, environmental regulations have been tightened at both the federal and the state level. In this article, the authors analyse the relative CO2 emission performance across 48 states in the US using a two-stage empirical approach.

## FROM TTR 44 - MARCH 2017

### European Union Institute for Security

*Securing the Energy Union: five pillars and five regions*

by Gerald Stang (ed.), Dimitar Bechev, Eamonn Butler, Zuzanna Nowak, Simone Tagliapietra [@TagliapietraBxI](#) and Kirsten Westphal  
February 2017  
Link to the article in [English](#) (67 p.)

This report seeks to investigate the energy situation of the different regions of Europe, highlighting shared priorities and common projects, as well as barriers to integration and cooperation, with a particular focus on regional efforts to improve energy security and cooperate with countries in the EU's neighborhood. The report's five chapters look at the balance of energy priorities of five different regions of the EU and how the Energy Union fits into the equation, while the closing chapter investigates the role of regional cooperation projects in pushing forward the development of the Energy Union.

### Centre for European Policy Studies

*Fulfilment of national objectives under the Renewable Energy Directive: state of play and projections*

by Arndt Hassel [@ArndtHassel](#), Razvan Nicolescu [@Raz\\_Nicolescu](#), Christian Egenhofer [@CEgenhofer](#), Andreea Nica and Sorin Elisei  
17 February 2017  
Link to the article in [English](#) (16 p.)

The [EU Directive on the promotion of the use of energy from renewable sources](#) contains the main body of the EU's current renewable energy policy. Adopted in April 2009, the Directive provides a common framework for the promotion of energy from renewable sources in all EU member states. The act specifies binding national targets for the share of renewable energy (as a percent of gross final energy consumption) for each member state, which together amount to an EU-wide target of 20%. This report reviews the progress made to date by each member state towards fulfilling its target and offers projections about possible outcomes in the year 2020.

### European Parliament Think Tank

*Promoting renewable energy sources in the EU after 2020*

by Alex Benjamin Wilson  
14 February 2017  
Link to the article in [English](#) (8 p.)

On 30 November 2016, the European Commission launched a legislative package entitled 'Clean energy for all Europeans'. This includes a recast of the existing Directive on the promotion of renewable energy sources ('RES Directive') to help meet the goals of the 2030 EU Climate and Energy Framework, in particular the binding target of a 27% EU share of RES in final energy consumption by 2030. This article presents both component of the legislative package.

## Atlantic Council

### *Energiewende - from Germany's past to Europe's future?*

by Thomas Cunningham

14 February 2017

Link to the article in [English](#) (12 p.)

Germany's historical experience explains how the energy transition (Energiewende) came about, and largely explains the resilience of the policies to abandon nuclear power and to scale-up renewables in the face of the challenges they have posed to Germany's consumers, utilities, and international competitiveness. Whereas the success of the Energiewende to date has come from the way it takes a unifying approach to energy, environment, and labour policies, its success will require expanding the scope from a German to an EU-wide scale.

## E3G

### *Climate & energy snapshot: Czech Republic - The political economy of the low-carbon transition*

by Julian Schwartzkopff [@JSchwartzkopff](#), Sabrina Schulz [@sbschulz](#) and Alexandra Goritz

26 February 2017

Link to the article in [English](#) (25 p.)

This paper presents an assessment of the political economy of the Czech Republic with regard to the low-carbon transition. It is part of a series of briefings on the four Central European states forming the Visegrad Group. Often perceived as one unified bloc working against the low-carbon transition, E3G digs deeper and studies their specificities, their influence and their particular social and economic interests, in order to identify opportunities to accelerate the low-carbon transition, domestically, and at the European level.

### *Climate & energy snapshot: Hungary - The political economy of the low-carbon transition*

by Sabrina Schulz [@sbschulz](#), Ada Amon [@AdaAmon23](#), Alexandra Goritz and Julian Schwartzkopff [@JSchwartzkopff](#)

26 February 2017

Link to the article in [English](#) (25 p.)

This paper presents an assessment of the political economy of Hungary with regard to the low-carbon transition. It is part of a series of briefings on the four Central European states forming the Visegrad Group. Often perceived as one unified bloc working against the low-carbon transition, E3G digs deeper and studies their specificities, their influence and their particular social and economic interests, in order to identify opportunities to accelerate the low-carbon transition, domestically, and at the European level.

### *Climate & energy snapshot: Poland - The political economy of the low-carbon transition*

by Julian Schwartzkopff [@JSchwartzkopff](#) and Sabrina Schulz [@sbschulz](#)

26 February 2017

Link to the article in [English](#) (26 p.)

This paper presents an assessment of the political economy of Poland with regards to the low-carbon transition. It is part of a series of briefings on the four Central European states forming the Visegrad Group. Often perceived as one unified bloc working against the low-carbon transition, E3G digs deeper and studies their specificities, their influence and their particular social and economic interests, in order to identify opportunities to accelerate the low-carbon transition, domestically, and at the European level.

## **Stiftung Wissenschaft und Politik (German Institute for International and Security Affairs)**

*Energy in the German-Polish relationship: acknowledging controversies – pursuing shared interests*

by Aleksandra Gawlikowska-Fyk, Kai-Olaf Lang, Karsten Neuhoff, Ellen Scholl [@EllenScholl](#) and Kirsten Westphal

10 February 2017

Link to the article in [English](#) (8 p.)

Germany and Poland stand as examples of the differing interests of individual EU member states in energy policy. Progress in bilateral engagement has stalled, as controversies, threaten to distract attention from other issues and avenues for energy cooperation. While acknowledging disagreements, the focus should be on identifying areas of agreement and opportunities for cooperation. Although the difficulty of resolving highly controversial issues is not to be discounted, addressing them will require taking steps to establish trust while designing programs and projects to transform the idea of solidarity from rhetoric into reality.

## **Institute for European Studies / Vrije Universiteit Brussel**

*Explaining goal achievement in international negotiations: the EU and the Paris Agreement on climate change*

by Sebastian Oberthur and Lisanne Groen [@Groen\\_Lisanne](#)

February 2017

Link to the article in [English](#) (21 p.)

The Paris Agreement on climate change adopted in December 2015 reflects EU policy objectives to large extent. To find an explanation, a general framework is developed that incorporates both structural and actor-/process-related factors, paying particular attention to negotiation strategy and diplomacy. On this basis, the authors argue that the high level of EU goal achievement in Paris resulted from the interplay of (1) evolving international structures, (2) effective EU strategy fitting these structures and domestic politics, and (3) favourable situational circumstances.

## **Deutsches Institut für Entwicklungspolitik**

*A new climate trilateralism? Opportunities for cooperation between the EU, China and African countries on addressing climate change*

by Moritz Weigel and Alexander Demissie

February 2017

Link to the article in [English](#) (37 p.)

The EU, having shown considerable leadership in forging the Paris Agreement, also expressed its intent to work trilaterally with China and African countries to support the treaty's implementation. The new EU strategy on China proposes to turn "what is often perceived as EU-China competition in Africa into "greater cooperation" and to pursue "joint approaches" to "speed up the implementation of the Paris Agreement wherever possible, including the implementation of Nationally Determined Contributions".

## **European Institute for Asian Studies**

*The EU-China energy cooperation - An institutional analysis*

by Chao Zhang

22 February 2017

Link to the article in [English](#) (33 p.)

As one of the components of the EU–China relations, the EU–China energy relationship has experienced an evolution of institutionalisation for over two decades. Now, an EU–China energy



cooperation institutional framework has been constructed. These institutions have been playing a significant role in helping EU–China energy cooperation by promoting bilateral dialogues and fostering cooperation projects. However, they still face some flaws. This paper discusses the EU–China energy relationship from an institutionalist point of view. Its purpose is to outline the institutional framework of the EU–China energy relationship, find out its flaws and give corresponding recommendations.

### **The Oxford Institute for Energy Studies**

*Towards a Balkan gas hub: the interplay between pipeline gas, LNG and renewable energy in South East Europe*

by Aleksandar Kovacevic

6 February 2017

Link to the article in [English](#) (113 p.)

This paper addresses the potential for the region to evolve to a situation where a more diverse set of gas supply options established a degree of competition through gas on gas pricing and an emergent trading activity. The author details possible routes by which competing supply could achieve an initial level of market opening. In addition to pipeline supply, small scale LNG penetration into the Black Sea and its major navigable rivers create possible options. Although gas demand growth is unlikely to be significant in the region, it is the unsustainable nature of the existing energy mix which will begin to catalyse change, followed by the penetration of supply seeking a competitive but cost reflective margin over European traded market prices.

## FROM TTR 45 - APRIL 2017

### European Parliament Think Tank

*EU energy independence, security of supply and diversification of sources*

by Luc Van Nuffel, Koen Rademaekers and Jessica Yearwood

31 March 2017

Link to the article in [English](#) (61 p.)

This report summarises the presentations and discussions during the workshop 'EU Energy Independence, Security of Supply and Diversification of Sources' organised on 6 February 2017 by Policy Department A for the Committee on Industry, Research and Energy (ITRE). The aim of the workshop was to evaluate the current and future EU gas import dependence and to identify and assess possible policy initiatives to enhance the security of gas supply in the EU by further diversification of sources and routes. The workshop and this report will also support the ITRE Committee in its evaluation of proposals for review of EU legislation related to this topic.

### World Economic Forum

*Global energy architecture performance index report 2017*

22 March 2017

Link to the article in [English](#) (32 p.)

This report ranks 127 countries on their ability to deliver secure, affordable, sustainable energy. The inequality between leaders and laggards is significant and accelerating. The diversity of top ranking countries underscores the potential for any country to make improvements to their energy systems.

*The future of electricity: new technologies transforming the grid edge*

10 March 2017

Link to the article in [English](#) (32 p.)

The electricity landscape is a prime example of the Fourth Industrial Revolution as it undergoes a transformation, becoming more complex than ever. Three trends are converging to produce game-changing disruptions: electrification, decentralisation and digitalisation. These trends are presently at the "grid edge" – smart and connected technologies at the end of the electric power grid. They encompass all of the major technologies – such as distributed storage, distributed generation, smart meters, smart appliances and electric vehicles – that are impacting the electricity system.

### Deutsches Institut für Wirtschaftsforschung (German Institute for Economic Research)

*Balancing reserves within a decarbonized European electricity system in 2050 – from market developments to model*

by Casimir Lorenz

March 2017

Link to the article in [English](#) (27 p.)

This paper expands the discussion about future balancing reserve provision to the long-term perspective of 2050. Most pathways for a transformation towards a decarbonised electricity sector rely on very high shares of fluctuating renewables. Apart from the transformation of the generation portfolio, various technical and regulatory developments within the balancing framework might further influence balancing costs: i) dynamic dimensioning of balancing reserves, ii) provision by fluctuating renewables or new (battery) storage technologies, and iii) exchange of balancing reserves between balancing zones.

## **Carnegie Endowment for International Peace**

*Managing the resource curse - Strategies of oil-dependent economies in the modern era*

by Andrey Movchan, Alexander Zotin and Vladimir Grigoryev

30 March 2017

Link to the article in [English](#) (136 p.) and in [Russian](#) (216 p.)

As the world reaches the end of a period of high hydrocarbon prices, limiting research to countries that experienced hydrocarbon dependence makes sense. This study contains comparative descriptions of economic developments of ten countries, all of which are leaders in the production and export of hydrocarbons. The success or failure of a diversification strategy depends above all on the implementation of appropriate economic policies. But most governments are conservative: even amid falling oil prices, a government with access to natural resources generally manages to preserve the structure of the economy without experiencing any social upheaval.

## **Friedrich-Ebert-Stiftung (Friedrich Ebert Foundation)**

*Auf dem Weg zu einer gerechten globalen Energietransformation? Die Gestaltungsmacht der SDGs und des Paris Agreement*

by Lukas Hermwille [@LukasHermwille](#)

March 2017

Link to the article in [German](#) (50 p.)

In this analysis it becomes clear that the Paris Agreement and the Sustainable Development Goals offer an important design framework for a global energy transformation, though they do not pretend to be a blueprint for a transformation, but rather that for a greenhouse gas neutral future. They support the importance of fast and effective action and, above all, define negotiation and design processes. Both the Paris Agreement and the Sustainable Development Goals provide guidance on the great 'transformational jungle' many states face.

*Energiearmut bekämpfen – Instrumente, Maßnahmen und Erfolge in Europa*

by Christoph Strünck

March 2017

Link to the article in [German](#) (48 p.)

With this study, the Friedrich Ebert Foundation would like to give an overview of the topic "energy poverty" and the political approaches of different EU member states to combat energy poverty. From the analysis of the instruments of different European countries, conclusions are finally drawn for Germany on how the problem of energy poverty can be better addressed.

## **Stiftung Mercator**

*The grand challenge: pathways towards climate neutral freight corridors*

by Claus Doll, Jonathan Köhler, Markus Maibach, Wolfgang Schade and Simon Mader

March 2017

Link to the article in [English](#) (41 p.)

This paper presents a preliminary screening of the current state of discussion on the options and barriers for de-carbonising long distance freight transport by rail, inland waterways and road towards 2050, compiled by the LowCarb-RFC study, co-funded by Stiftung Mercator and the European Climate Foundation (ECF).

## Istituto Affari Internazionali

### *Energy and climate strategies, interests and priorities of the EU and Turkey*

by Lorenzo Colantoni, Dicle Korkmaz, Nicolò Sartori [@ nsartori](#), Mirja Schröder, S. Duygu Sever [@sduygusever](#) and Suhnaz Yilmaz

March 2017

Link to the article in [English](#) (61 p.)

Energy is one of the sectors in which EU–Turkey cooperation could be most fruitful, possibly leading overall convergence through the common achievement of mutual interests in key areas – natural gas imports and diversification. This collaboration is undermined by the uncertainty over Turkey's position on these. This situation is partially balanced by both sides' participation in several platforms for energy cooperation on the bilateral and multilateral levels. Nonetheless, the overall energy framework still needs a strong policy boost to set it on a common path towards convergence.

### *The discursive construction of Turkey's role for European energy security: a critical geopolitical perspective*

by Mirja Schröder

March 2017

Link to the article in [English](#) (19 p.)

This paper analyses EU-Turkey energy relations from a critical geopolitics perspective – analysing the Turkish self-perception as well as the EU's perspective.

## FROM TTR 46 - MAY 2017

### Atlantic Council

*Reform of the global energy architecture*

by David Goldwyn and Phillip Cornell

April 2017

Link to the article in [English](#) (22 p.)

Between September and December 2016, the Atlantic Council convened a high-level task force to examine the state of international energy governance, and to determine if and how the prevailing institutional regime could benefit from reform. This paper represents the outcomes of those discussions - outcomes that are designed primarily to support decision-making within a new American administration, but also ones that are intended to resonate for practitioners of international energy policy across the globe.

### Real Instituto Elcano (Elcano Royal Institute)

*Energía y clima en 2017: volatilidad contenida, implementación climática e incertidumbre política*

by Gonzalo Escribano [@g\\_escribano](#) and Lara Lázaro [@lazarotouza](#)

5 April 2017

Link to the article in [Spanish](#) (13 p.)

The main factors for 2017 in the area of energy and climate are: a more restrained volatility in oil prices and the implementation of increasingly ambitious climate policies in a context of political uncertainty.

### Heinrich-Böll-Stiftung (Heinrich Böll Foundation)

*Die Energiewende als europäisches Projekt: Chancen, Reibungspunkte, Handlungsoptionen*

by Katharina Umpfenbach [@UmpfenbachK](#)

April 2017

Link to the article in [German](#) (40 p.)

In politically tense times, the EU is discussing the further development of its energy and climate policy after 2020. From the German perspective, the negotiations on the legislative package offer the opportunity to promote a pan-European energy market and to shape the European framework. The study shows that the further development of the European internal market is a prerequisite for the successful implementation of the energy market. Without a further link with the European neighbours the expansion of renewable energies in Germany will become significantly more expensive and inefficient.

### E3G

*Brexit scenarios - The implications for energy and climate change*

by Shane Tomlinson

April 2017

Link to the article in [English](#) (33 p.)

The formal process of Brexit has started after the official submission of Article 50 on the 29 March 2017. There is massive uncertainty on how the negotiations will unfold. The outcome of this negotiation will have major impacts for all areas of policy between the EU and UK, including energy and climate change.

## *Brexit and the EU Energy Union - Keeping Europe's energy and climate transition on track*

by Jonathan Gaventa [@jonathangaventa](#)

April 2017

Link to the article in [English](#) (15 p.)

This report maps out the key risks for the EU-27 on climate and energy from the Brexit process, and a way forward for building Europe's Energy Union after Brexit. So far, there has been relatively little political focus on energy and climate change. This is an unfortunate oversight: European citizens rank climate change as a key security risk, and investment in clean energy and low carbon technologies is central for the economic development of Europe. A positive approach is needed that both protects the EU's Energy Union and climate ambition, and recognises Europe's climate transition as core to Europe's future energy relationships and the future of Europe itself.

### **European Council on Foreign Relations**

*Pipelines and pipedreams: how the EU can support a regional gas hub in the Eastern Mediterranean*

by Tareq Baconi

21 April 2017

Link to the article in [English](#) (18 p.)

Large natural gas discoveries in the eastern Mediterranean have raised hopes that the region could serve EU energy needs, helping it to fulfil its goals of energy diversification, security, and resilience. Possible commercial and political hurdles are that Cyprus reserves are too small to be commercially viable and Israel needs a critical mass of buyers to begin full-scale production. Regional cooperation – either bilaterally or with Egypt – is the only way the two countries will be able to export.

### **Institut français des relations internationales**

*La stratégie des marges symétriques pour la conquête de nouvelles ressources pétrolières*

by Benjamin Augé

April 2017

Link to the article in [French](#) (22 p.)

The giant discoveries of Jubilee in Ghana (Tullow Oil) and Liza in Guyana (ExxonMobil) accelerated exploration of the Atlantic basin. Oil tankers have since intensified their efforts. Crude oil prices, which rose almost constantly between 2003-2014, have significantly increased risk-taking by oil companies. Oil discoveries in the offshore of some countries such as Ghana, have helped to strengthen the certainty of geologists, that deposits could also be found on the other side of the Atlantic. This note proposes to carry out an inventory of explorations on both shores of the Atlantic and to expose the new geological and geopolitical challenges for this type of exploration.

### **Oxford Institute for Energy Studies**

*Turkey's gas demand decline: reasons and consequences*

by Gulmira Rzayeva [@GulmiraRzayeva](#)

April 2017

Link to the article in [English](#) (16 p.)

Following the introduction of its Gas Market Law in 2001, gas demand in Turkey grew rapidly during the 2000s. Since then, however, growth has slowed dramatically as the government has come to regard its import dependence as a security risk. The country's new energy focus has been on the development of renewables, the use of domestically produced coal and the development of a nuclear programme. This paper provides a detailed sectoral breakdown of gas demand, and

suggests that while consumption in the industrial and residential sectors may show some growth, gas use in the power sector is set to fall significantly.

## FROM TTR 47 - JUNE 2017

### European Parliament Think Tank

*Circular economy with focus on waste, renewable energy and sustainable bioenergy in Estonia*

by Tony Zamparutti, Alicia McNeill, Harri Moora, Maarja Joe and Evelin Piirsalu [@EvelinUPiirsalu](#)

15 May 2017

Link to the article in [English](#) (12 p.)

This briefing reviews Estonia's progress in the transition to a circular economy, focusing on three crucial and related policy areas: waste, renewable energy and sustainable bioenergy.

### Chatham House - The Royal Institute of International Affairs

*Staying connected - Key elements for UK–EU27 energy cooperation after Brexit*

by Antony Froggatt, Georgina Wright and Matthew Lockwood

10 May 2017

Link to the article in [English](#) (60 p.)

Energy policy negotiations post-Brexit offer the UK and the EU an important opportunity to find common ground and develop new models of partnership which are imperative to the UK's future.

### Oxford Institute for Energy Studies

*Natural gas demand in Europe in the next 5-10 years*

by Anouk Honoré

11 May 2017

Link to the article in [English](#) (18 p.)

In this presentation, the author argues that even if gas demand growth in 2015 and 2016 may not necessarily be signs of recovery, the next 5-10 years will/could be different from the longer term 'future of gas' debate in Europe. She analyses the reasons to believe why gas demand could stay high in this timeframe. The presentation concludes that now is the time to make the arguments of the immediate benefits of natural gas, but at the same time, there will not be 'one scenario fits all' and specific factors need to be considered for each country.

*The Dutch gas market: trials, tribulations, and trends*

by Anouk Honoré

May 2017

Link to the article in [English](#) (63 p.)

The Dutch gas market is at a turning point. A strong earth tremor in 2012 caused by gas extraction prompted the government to take action and restrain production. In 2016, gas production was less than half the volumes produced just three years before. The use of renewables and an increased focus on energy efficiency have become key policy drivers. This evolution casts doubt over the future of gas in the country and in Europe, mainly for those in North-West Europe whose imports of Dutch gas have been important. It is no longer 'business as usual' and this paper offers some food for thought on the challenges and prospects/expectations for the Dutch gas industry.



## Overseas Development Institute

### *Cutting Europe's lifelines to coal: tracking subsidies in 10 countries*

by Shelagh Whitley [@shelaghwhitley](#), Laurie van der Burg [@LaurievdBurg](#), Leah Worrall and Sejal Patel

May 2017

Link to the article in [English](#) (14 p.)

This report reviews subsidies to coal in 10 countries that produce 84% of Europe's energy-related greenhouse gas emissions: France, the Czech Republic, Germany, Greece, Italy, Hungary, the Netherlands, Poland, Spain and UK. It is accompanied by individual briefs for each of the countries setting out where subsidies to coal remain. The research finds that despite significant commitments to address climate change, fossil fuel subsidies and air pollution, all countries reviewed still provided some form of subsidy to coal, in the form of budgetary support or tax breaks, in 2016.

## Rahvusvaheline Kaitseuringute Keskus (International Centre for Defence Studies)

### *Desynch or sink: a political analysis of Baltic electricity desynchronization*

by Emmet Tuohy [@ectuohy](#) and Anna Bulakh [@Bulakh\\_Anna](#)

8 May 2017

Link to the article in [English](#) (17 p.)

The electricity grids of Estonia, Latvia and Lithuania are still synchronized with Russia and Belarus in the framework of the so-called BRELL agreement. However, the Baltic states have clearly stated their intent to terminate this agreement and synchronize their grids with those of Europe. While representing a significant milestone both in reducing exposure to Russia's strategy of coercion and further integrating the Baltic states into Europe, this "BRELLxit" process might also cause some risks – ranging from possible Moscow's efforts to derail it to the exploitation of the Baltic states' desynchronization to justify various forms of pressure or even aggression.

## New Climate Institute for Climate Policy and Global Sustainability

### *A guide to greenhouse gas benchmarking for climate policy instruments*

by Carsten Warnecke [@CaWarnecke](#) and Ritika Tewari [@RitikaTewari](#)

23 May 2017

Link to the article in [English](#) (88 p.)

This document provides practical guidance on key design elements for establishing GHG benchmarks for applications in climate policy instruments. It discusses benchmarking applications for the Emission trading schemes (determining allocation of emissions allowances), carbon taxes (determining tax exemptions), and scaled-up crediting programs (baseline development). The process of GHG benchmark development, implementation and management is explained and illustrated.

## Expert-Grup/ National Endowment for Democracy

### *Energy, Russian influence and democratic backsliding in Central and Eastern Europe - A comparative assessment and case studies from Belarus, Ukraine, Moldova, Hungary, Romania*

by Ana Otilia Nuțu and Sorin Ioniță

16 May 2017

Link to the article in [English](#) (106 p.)

In Eastern Europe, two governance models collide. One is the liberal, Western model, the other is the illiberal alternative. Kremlin's influence in the region takes two forms. First, it seeks to influence policy decisions in a country by exerting control over a strategic sector in the economy. It has a

penchant for energy, the obvious choice considering how dependent these countries are on Soviet-built infrastructure (pipelines, technology). Second, and partly coupled with comes the support given to politicians, parties and movements in order to influence directly the domestic policies of these countries or their position in the EU on issues that affect Russia's interests.

## FROM TTR 48 - JULY 2017

### E3G

*Efficiency first scorecard: is the EU's energy union on track?*

by Ingrid Holmes [@IngridHolmes7](#), Tom Jess and Quentin Genard [@QuentinGenard](#)

12 June 2017

Link to the article in [English](#) (17 p.)

The Clean Energy for All Europeans package has at its heart the aim of speeding up both the EU clean energy transition to deliver the EU's 2030 climate change commitments. Related goals also include driving economic growth and job creation. Putting energy efficiency first is one of three main goals in the package to achieve these objectives and is fundamental to the EU's wider Energy Union strategy.

*Brexit scenarios: implications for energy and climate change*

by Shane Tomlinson

21 June 2017

Link to the article in [English](#) (15 p.)

The election of President Macron in France and the VVD remaining the largest party in the Netherlands has prevented extreme right-wing parties gaining power in key European capitals. This has enabled a clear, unified Brexit negotiating mandate to be established across the EU-27 Member States and reduced the likelihood of descending into an "EU in chaos" scenario.

### Notre Europe - Jacques Delors Institute

*Making the energy transition a European success - tackling the democratic, innovation, financing and social challenges of the energy union*

by Thomas Pellerin-Carlin, Jean-Arnold Vinois, Eulalia Rubio [@eulaliarubio](#) and Sofia Fernandes [@fernandesofiaEU](#)

June 2017

Link to the article in [English](#) (231 p.)

This report sets out four objectives which could contribute to the success of the Energy Union, and in turn restore trust between Europe and Europeans. Firstly, democracy must be at the heart of the Energy Union's governance. This involves mechanisms for more direct participation of citizens, local elected representatives and civil society in the major choices which shape national and European energy strategies. Secondly, Europe must implement a genuine innovation-driven industrial policy to make our companies the world leaders in clean energy. Thirdly, public and private investment arbitrations must fully integrate the energy transition's objectives. Fourthly, the Energy Union must serve a just and fair energy transition via a "Social Pact for the Energy Transition" which strives to create jobs for our young people and stamp out energy poverty.

### Institut français des relations internationales

*Le paysage des énergies renouvelables en Europe en 2030*

by Michel Cruciani

28 June 2017

Link to the article in [French](#) (51 p.)

This study analyses the European rules to promote renewable energies, pointing out their novelties and the difficulties they raise. It highlights the consequences of some of the measures envisaged and pays particular attention to the electricity market.

## Zentrum für Europäische Integrationsforschung (Center for European Integration Studies)

*EU external energy policy in natural gas: a case of neofunctionalist integration?*

by Robert Stüwe [@robertstuewe](#)

June 2017

Link to the article in [English](#) (38 p.)

This paper analyses to what extent the EU external energy policy in natural gas security follow the expansive spill over integration logic as set out by the theory of neofunctionalism. It looks at how the European Commission employs 'spill over'-strategies for integration-friendly policy outcomes in major natural gas pipeline projects, in the EU-Russia Energy Dialogue, the Trilateral Gas Talks and the Energy Community. It finds that political and legislative commitments for harmonizing the EU's external energy policy have set in motion a snowball effect culminating in the 'Energy Union'.

## European Parliament Think Tank / Bruegel

*Review of EU-third country cooperation on policies falling within the ITRE domain in relation to Brexit*

by J. Scott Marcus, Georgios Petropoulos [@georgionomix](#), André Sapir, Simone Tagliapietra [@TagliapietraBxl](#), Alessio Terzi [@terzibus](#), Reinhilde Veugelers [@R\\_Veugelers](#) and Georg Zachmann [@GeorgZachmann](#)

15 June 2017

Link to the article in [English](#) (120 p.)

This study was prepared at the request of the European Parliament's Committee on Industry, Research and Energy (ITRE). It provides a critical assessment of the implications of existing models of cooperation of third countries with the EU in the four thematic areas of energy, electronic communications, research policy, and small business policy. The relative desirability to the EU of EEA membership, bilateral relationships (as with Switzerland), a new generation Free Trade Agreement (FTA), membership in the Energy Community, or participation in the Horizon 2020 or COSME programmes are also considered.

## Oxford Institute for Energy Studies

*Biogas: a significant contribution to decarbonising gas markets?*

by Martin Lambert

June 2017

Link to the article in [English](#) (15 p.)

With a current focus on the need to decarbonise the energy system, and increasing interest in decarbonising the gas industry, this paper provides an overview of the current status and considers the potential for further growth in the production and use of biogas and biomethane. It focuses on key countries in Europe, which have been leading the way in commercial scale production, and touches briefly on the potential in the rest of the world.

*The decarbonised electricity system of the future: the 'two market' approach*

by Malcolm Key and David Robinson

June 2017

Link to the article in [English](#) (16 p.)

Electricity markets are broken; they no longer fulfil their primary functions of providing appropriate signals for producers and consumers. The problem arises from a combination of changes in technology (from predominantly marginal cost plants to predominantly capital cost plants) and of policy which undermine traditional market structures. The authors propose a new approach to market design which will enable intermittent renewable sources to be accommodated; maintain

overall system reliability while enabling consumers to put a value on their own supply security; provide clear signals to generators for investment and operation.

*The significance of the US withdrawal from the Paris Agreement on climate change*

by David Robinson [@DRAenergy](#)

June 2017

Link to the article in [English](#) (12 p.)

This paper discusses the significance of the US withdrawal from the Paris Agreement on Climate Change. Although it is too early to predict the long-term implications for climate change of the US decision to withdraw from the Paris Agreement, it is argued that the decision is unlikely to have a major negative impact on the world's prospects for addressing climate change, at least in the short term. The recent decision however reflects a rejection of multilateral agreements and is an invitation for rethinking global governance and amounts to an invitation to China to play a more important role.

**Friedrich-Ebert-Stiftung (Friedrich Ebert Foundation)**

*En route to a just global energy transformation? The formative power of the SDGs and the Paris Agreement*

by Lukas Hermwille [@LukasHermwille](#)

June 2017

Link to the article in [English](#) (49 p.)

The present analysis also shows that in most cases the sustainability goals can be achieved only if the global energy transformation is successful. This is equally true in the opposite direction, because many of the SDGs can have real effects only in the context of sustainable energy systems. One sentence from the study is central in this regard: "It will be virtually impossible to realize the SDGs without effective climate protection. Conversely, the battle against climate change can be won only if we manage to steer the world's states onto sustainable development paths".

**Terra nova**

*Régulation financière et urgence climatique - Pour des normes prudentielles et comptables plus vertes*

by Abdeldjellil Bouzidi [@Djellil\\_11](#), Alain Grandjean [@alaingrandjean](#) and Mireille Martini [@mireillmartini](#)

6 June 2017

Link to the article in [French](#) (24 p.)

Following the announcement by Donald Trump of the US withdrawal from the Paris Climate Accord, the fight against climate change remains a priority. In this study, Terra Nova demonstrates that the struggle for the environment must be at the heart of our ability to regulate our economic model.

**Institut Montaigne**

*Énergie: priorité au climat !*

by Benjamin Fremaux

June 2017

Link to the article in [French](#) (86 p.)

In France, energy policies systematically face the opposition between nuclear and renewables. The Paris Agreement concluded in December 2015 reiterated that priority should always go to climate action. The objective of the United Nations have commonly set is ambitious: in order to

contain global temperature rise below 2°C by the end of this century, emissions of greenhouse gases (GHGs) have to be reduced from 40 to 70%. This is the condition for the transition to a low carbon economy that is economically and politically feasible.

### **New Climate Institute for Climate Policy and Global Sustainability**

*Allianz Climate and Energy Monitor 2017- Assessing the needs and attractiveness of low-carbon investments in G20 countries*

June 2017

Link to the article in [English](#) (37 p.)

The Allianz Climate and Energy Monitor ranks G20 member states on their current attractiveness as potential destinations for investments in low-carbon electricity infrastructure. It further considers their current and future investment needs in line with a trajectory compatible with the 2°C/1.5°C temperature limits of the Paris Agreement.

### **Sheffield Political Economy Research Institute**

*Oil: the missing story of the West's economic and geopolitical crises*

by Helen Thompson

June 2017

Link to the article in [English](#) (10 p.)

Oil has been the material stuff of modern economies and geo-politics since the early years of the 20th century. Although some have hoped that we are moving towards a world in which oil becomes significantly less important, the present economic and political world has in good part been shaped by oil. Oil is the missing story behind the economic and geopolitical crises that face the West. Without understanding this story, we cannot understand the present economic and geopolitical landscape.

## FROM TTR 49 - SEPTEMBER 2017

### Centre for European Policy Studies

*Improving cooperation among EU Member States in handling electricity crises: lessons for the regulation on risk-preparedness*

by Arndt Hassel [@ArndtHassel](#), Cristian Stroia [@Cristian\\_Stroia](#), Christian Egenhofer [@CEgenhofer](#), Jaap Jansen [@JaapJansen](#) and Arno Behrens

4 July 2017

Link to the article in [English](#) (13 p.)

As part of the "Clean Energy for All Europeans" package, the European Commission has proposed a regulation on risk-preparedness in the electricity sector that aims to improve cooperation among Member States in preventing, preparing for and managing electricity crises. To reap the benefits of improved cooperation compared with the current diverging national approaches, the proposal foresees, national risk-preparedness plans, a number of principles for crisis management and ex post crisis evaluation. This policy insight analyses the proposal and confronts it with a case study about a recent crisis in south east Europe.

### Ośrodek Studiów Wschodnich (Centre for Eastern Studies)

*A neighbour discovered anew. The Czech Republic, Slovakia and Hungary's relations with Ukraine*

by Jakub Groszkowski [@jgosw](#), Tadeusz Iwański and Andrzej Sadecki

8 August 2017

Link to the article in [English](#) (36 p.) and in [Polish](#) (35 p.)

The big success in the relationship between the Visegrad countries and Ukraine has been their booming energy cooperation. However, the pro-Russian gestures made by some leading politicians from the Czech Republic, Slovakia and Hungary remain a challenge for relations between Bratislava, Budapest, Prague and Kyiv.

### Terra nova

*Accélérer la décarbonation: vers un prix minimum du CO2 pour l'électricité en Europe de l'Ouest*

by Alain Grandjean [@alaingrandjean](#), Sébastien Timsit, Jeannou Durtol, Antoine Guillou [@antoineguillou](#), Émilie Alberola [@emilie\\_alberola](#) and Charlotte Vailles

29 August 2017

Link to the article in [French](#) (31 p.)

The aim of this paper is to present a measure based on a minimum CO2 price for the electricity sector in several countries that would volunteer - France and Germany in the first place - to decarbonise the European electricity production.

### Foundation for European Progressive Studies

*Engaged in the democratic, social and ecological future of Europe: how to set a future PES coherent programme to address pollution and climate change?*

by Diana A. Hanry-Knop

10 July 2017

Link to the article in [English](#) (65 p.)

The purpose of this paper is to argue that the environmental and climate change issues represents one of the most suitable policy areas, where the Social Democratic members of the PES will be able to build a more coherent progressive programme. Despite some differences that are existing in the response proposed by European Social Democratic parties to tackle climate change (e. g.

the consensus in the abandonment of nuclear energy), there are common orientations in their national programmes. Concrete recommendations on how to build a more coherent progressive programme related to climate change at the European level are presented in the end of this paper.

### **Oxford Institute for Energy Studies**

*The EU competition investigation into Gazprom's sales to central and eastern Europe: a detailed analysis of the commitments and the way forward*

by Jonathan Stern and Katja Yafimava [@katyafimava](#)

3 July 2017

Link to the article in [English](#) (44 p.)

EU competition authorities initiated an investigation into Gazprom's supply and pricing of gas in central and eastern European Member States on the grounds that the company might have: hindered the free flow of gas, prevented the diversification of gas supply, and imposed unfair prices on its customers by linking the price of gas to oil prices. At the end of 2016, a set of commitments was offered by Gazprom which, after further negotiations in March 2017, satisfied DG COMP that it would address the problems which it had identified. This study investigates the possible outcomes from this and considers options should Member States attempt to derail the settlement.



## FROM TTR 50 - OCTOBER 2017

### Terra nova

*Pour des transitions énergétiques locales: repenser en profondeur le rôle des collectivités*

by Laurent Simon, Alexandre Hierochinsky, François Berthélemy and Antoine Guillou

26 September 2017

Link to the article in [French](#) (32 p.)

While the French government is now trying to define the content of the ecological transition strategy, this work proposes a number of operational tools to redefine the relations between the central government and the local administrations in the future energy transition.

### Centre for Climate Change Economics and Policy

*The effects of home energy efficiency upgrades on social housing tenants: evidence from Ireland*

by Bryan Coyne, Sean Lyons and Daire McCoy

28 September 2017

Link to the article in [English](#) (28 p.)

Social housing residents, who often rent rather than owning and have low income, are less likely to invest in energy saving measure than the general population. Therefore, improving energy efficiency of such residences often requires the state intervention. This research examines the impact of a home energy efficiency upgrade plan on social housing tenants in Ireland.

### Centre for European Reform

*Brexit and energy: time to make some hard choices*

by Philip Lowe

25 September 2017

Link to the article in [English](#) (8 p.)

The author examines what impact will the UK's vote to leave the EU have on its energy market, as well as if the UK is able to safeguard some of the benefits which they obtain, or could obtain, from continued involvement in the development of integrated European electricity and gas markets. He argues that the UK faces a choice between economics and sovereignty and adds that if it opts for sovereignty, it will mean the UK leaving the EU's single energy market, having to invest more in new electricity generating capacity, pay higher prices, enjoy less security of supply, and accept a bigger role for the state in the energy sector.

### E3G

*Unlocking Britain's first fuel: the potential for energy savings in UK housing*

by Jan Rosenow [@janrosenow](#), Nick Eyre, Steve Sorrell [@steve\\_r\\_sorrell](#) and Pedro Guertler [@enfinnEU](#)

6 September 2017

Link to the article in [English](#) (12 p.)

This paper analyses how new energy efficiency investments could save energy and lower its costs per household in UK. The authors argue that one half of the energy currently used in UK housing could be saved by investments in mixed technologies. They add that the possible savings would be approximately equivalent to the output of six nuclear power stations the size of Hinkley Point C. The authors also estimate that, apart for the net value of 7,5 billion pounds, this investment could bring additional benefits in the value of up to 57 billion pounds.

## *Catalysing cooperation maintaining EU-UK cooperation on energy & climate change post-Brexit*

by Peter Clutton-Brock [@pcbrock](#)

6 September 2017

Link to the article in [English](#) (14 p.)

This paper analyses both the negotiation process and key issues at stake on energy and climate change in the context of Brexit. It proposes public interest benchmarks against which EU citizens can assess the Brexit negotiations on climate change and energy. The author stresses that it is imperative that potential areas of cooperation, such as clean energy and climate change, are identified. He argues that unless EU negotiators are given a specific mandate to make progress on areas where there is greater potential for cooperation, at the same time as discussing a future trade relationship, there is a real risk of the UK chaotically crashing out of the EU.

## **Deutsches Institut für Wirtschaftsforschung (German Institute for Economic Research)**

### *Renewable energy policy: risk hedging is taking center stage*

by Nils May, Ingmar Jürgens and Karsten Neuhoff

27 September 2017

Link to the article in [English](#) (9 p.)

The cost of renewable energy technologies has fallen. Financing costs of new installations plays an increasing role in the cost of Germany's energy transition. This puts the focus of support instruments for renewable energy on creating affordable financing conditions for investments. This report compares the effects of various policy instruments on risk factors and on the costs of financing investment in the energy transition. It shows increases in the financing costs under green certificates and fixed premiums, which are passed on to end customers. Development of support instruments should avoid unnecessary risks for investors that could lead to higher financing costs.

## **Centre for European Policy Studies**

### *CESEC 2.0: opening the door to a new level of regional cooperation*

by Christian Egenhofer [@CEgenhofer](#) and Cristian Stroia [@Cristian\\_Stroia](#)

27 September 2017

Link to the article in [English](#) (8 p.)

The Central and South-Eastern Europe Gas Connectivity (CESEC) initiative brings together EU and non-EU countries under a single regional framework promoting energy policy cooperation. All states in the region share common challenges in the areas of energy security and energy market development that can best be addressed via a joint regional approach. To date, the initiative has been a major political success for all those participating – the European Commission, the Member States and the Energy Community contracting. This paper takes stock of the progress achieved so far and highlights the implementation of the new phase of regional cooperation.

## **Center for a New American Security**

### *After Paris. A climate agenda that serves U.S. interests*

by David F. Gordon [@DavidFGordon](#), Divya P. Reddy and Elizabeth Rosenberg [@Energy\\_Liz](#)

September 2017

Link to the article in [English](#) (18 p.)

The first sections of this report focus on analysing each of these four questions: will the Paris Agreement start to fragment? Will US businesses experience substantial reprisals and increased reputational risk? Will China be able to take advantage of the US withdrawal to provide leadership on global climate change? Will that lead to a narrowing of the political space for climate action in the US by actors other than the federal government? Based on this analysis, the final section of

the report offers a series of strategy and policy recommendations for carrying forward a climate-friendly clean energy agenda.

## **Atlantic Council**

*The ties that bind - Germany and the United States in a new era*

by Alina Polyakova [@apolyakova](#) and Henning Riecke [@HRiecke](#)

27 September 2017

Link to the article in [English](#) (12 p.)

As German Chancellor Angela Merkel enters her fourth term in office, the US-German relationship will need to overcome trade and policy disagreements in order to thrive in today's uncertain political climate. The administrations in Berlin and Washington, DC should seek new opportunities for closer cooperation, particularly related to security around NATO, policy toward Russia, bilateral trade, and the energy sector. The shared interests of the US and Germany should drive both administrations to pursue these areas of cooperation in order to strengthen the alliance on which they will continue to depend as the world grows more insecure and the challenges more complex.

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