CENTER FOR THE STUDY OF DEMOCRACY

Sanctions Enforcement and Phasing Out Russian Energy in Europe

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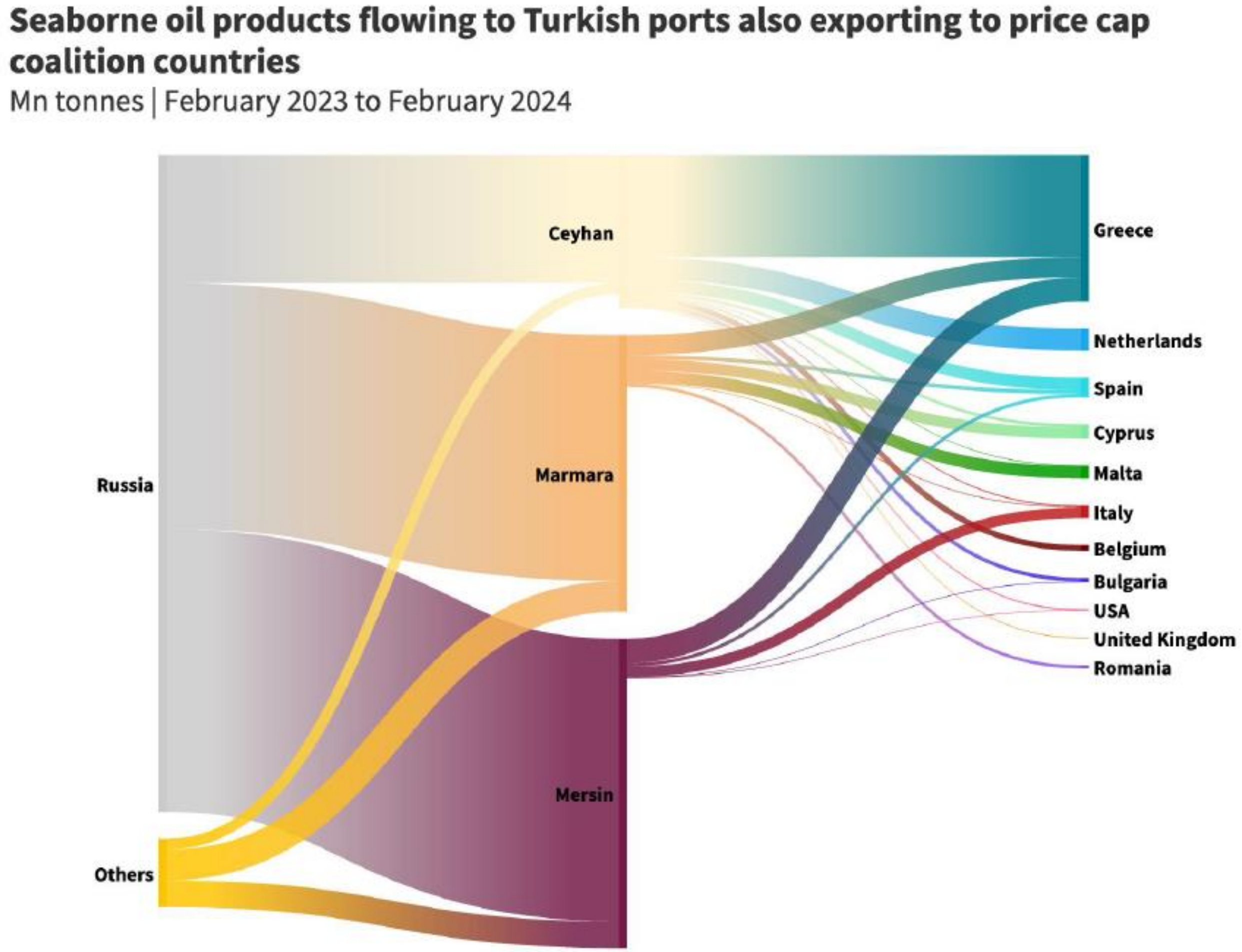
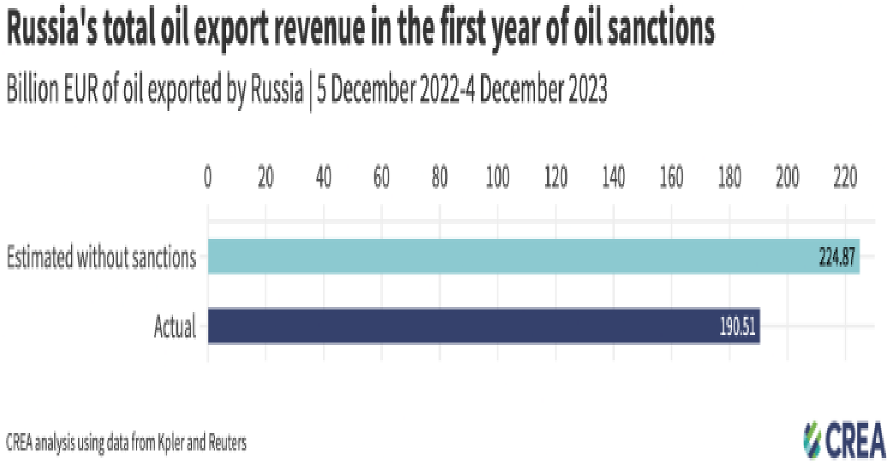
European Union Still Imports Large Volumes of Russian Crude Oil and Petroleum Products

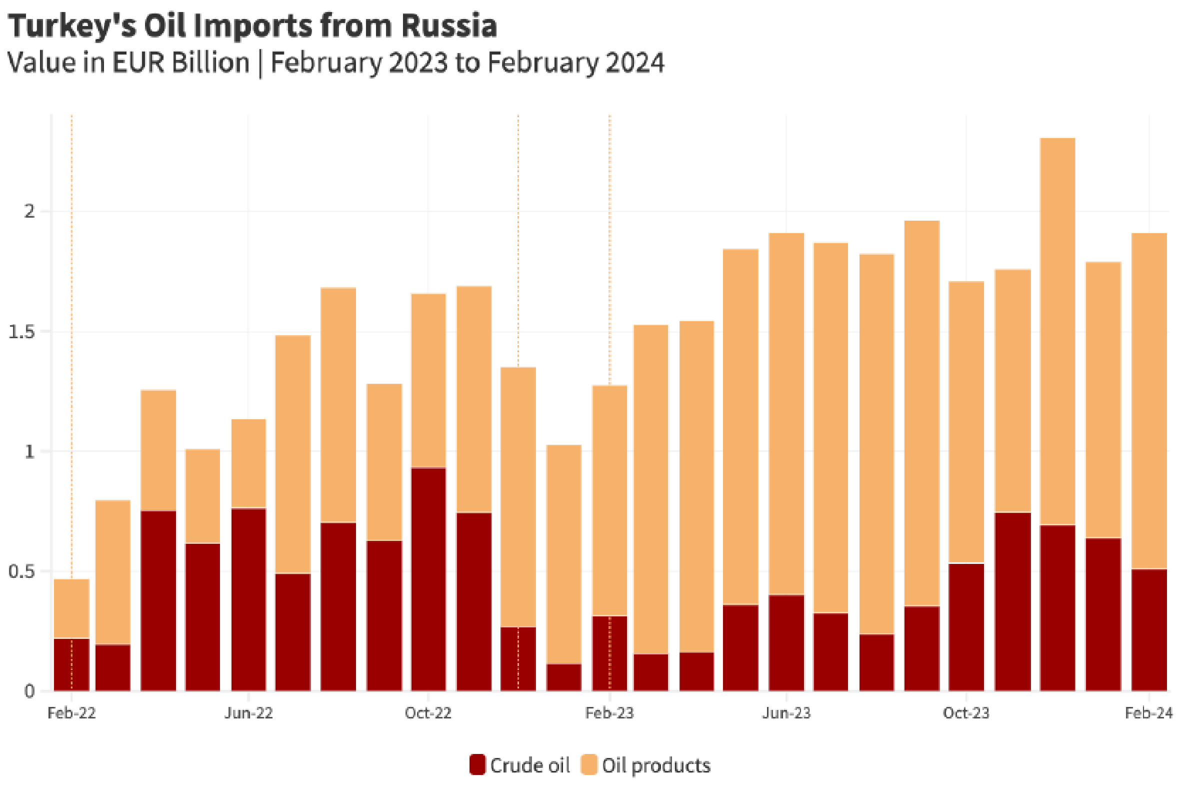




Source: CSD and CREA Analysis

The Turkey Pitstop

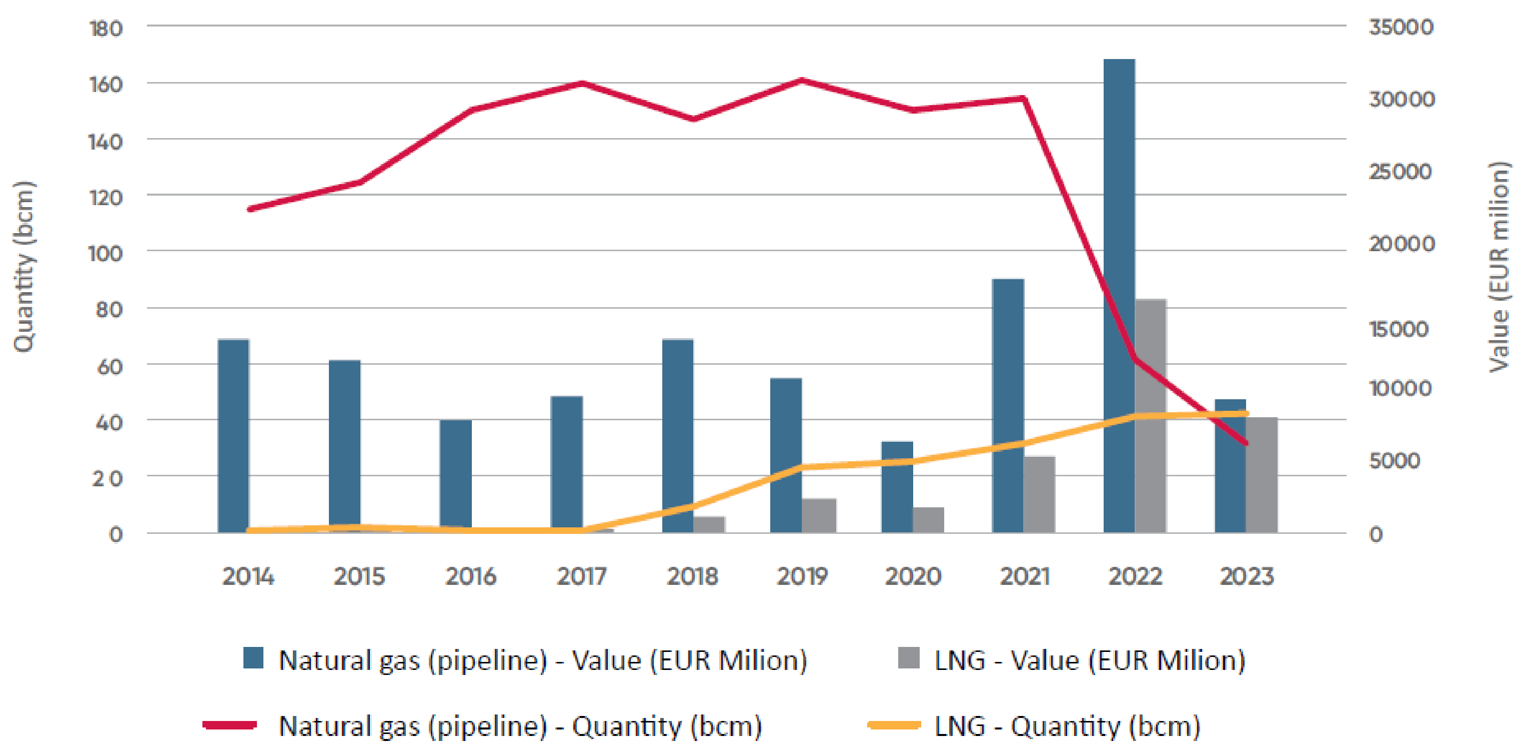
How have Turkey's imports of Russian oil changed since the EU/G7 sanctions?



Source: CREA Analysis •

Dotted lines represent: Russia's invasion of Ukraine, crude oil ban and price cap, ban on oil products.

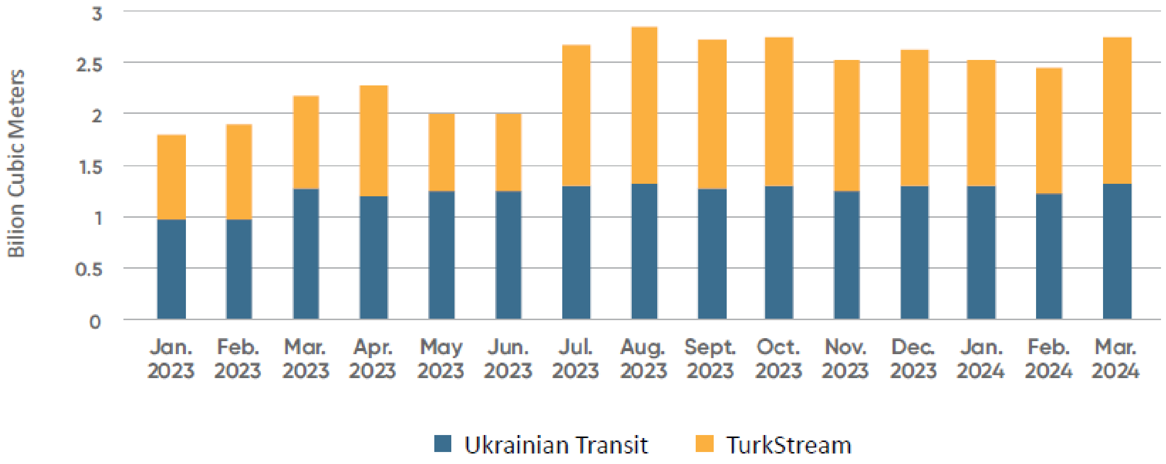
EU Still Pays More for Russian Gas than Gives Aid to Ukraine

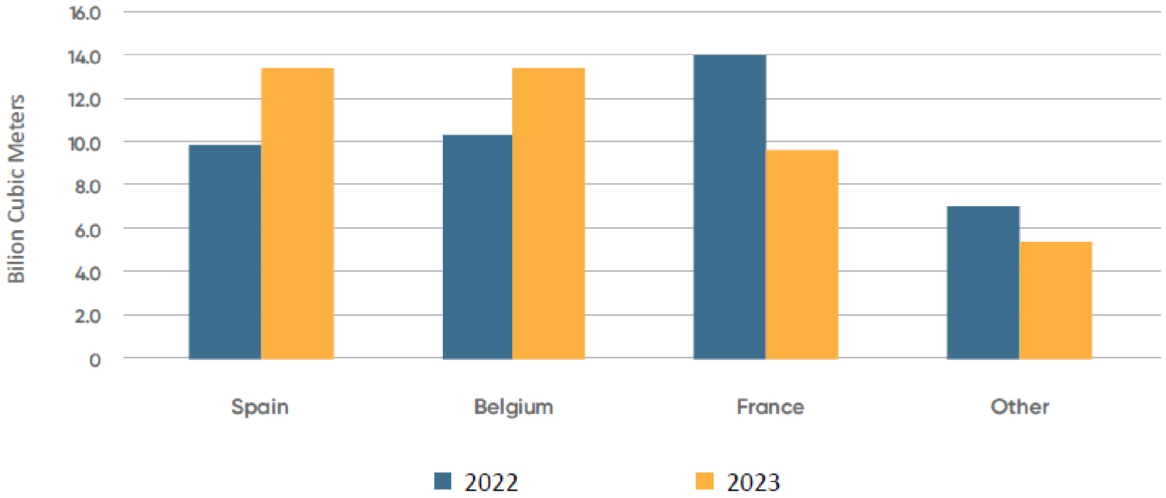


***Source**: CSD based on Eurostat Data.*

TurkStream: the main hub for Russian gas exports to Europe

Russian Pipeline (graph 1) and LNG Exports to Europe (graph 2)





Source: *CSD based on Eurostat Data.*

Phasing Out Russian Pipeline Gas Imports in Europe

Source: CSD.

Source: *CSD based on Eurostat Data.*

Mission Possible: Replacing Russian Gas with Alternative Supply

Country	2023 Demand (mcm)	Russian Gas Supply (mcm)	% Russian Gas Dependance	Alternative Supply Routes (mcm)	% Coverage of Russian Supply by Alternatives	Alternative Supply Routes
Bulgaria*	2544	1492	59%	7800	523%	From Greece: booked capacity at FSRU Alexandroupolis (1.000 mcmyr) and ICGB expansion to 5.000 mcm/yr; From Turkey: booked LNG capacity 1800 mcm/yr
Greece	5211	2449	47%	13300	543%	From domestic LNG: 4500 mcm/yr of capacity at FSRU Alexandroupolis and 6800 mcm/yr at Revithoussa; From Turkey: 2.000 mcm/yr available capacity at TAP
Croatia	2536	1395	55%	5782	415%	From domestic LNG: Krk LNG regasification plant (2899 mcm/yr); From Hungary: Dravaszerdahely (2883 mcm/yr)
Hungary	8499	5000	59%	7900	158%	From Croatia: Krk LNG regasification plant (1800 mcm/yr); From Romania: 1700 mcm/yr; From Austria: 4400 mcm/yr
Romania	9545	1479	15%	7885	533%	From Bulgaria: Ruse (985 mcm/yr) and Kardam (6898 mcm/yr)
Moldova (w/o Transnistria)	657	0	0%	2085	317%	From Romania: Ungheni (2080 mcm/yr)
North Macedonia	350	350	100%	1241	355%	From Bulgaria: Kyustendil (1241 mcm/yr)
Serbia	3057	2500	82%	6800%	272%	From Bulgaria: Kulata (2007 mcm/yr); From Hungary: Szeged (4800 mcm/yr)
BiH	254	254	100%	1496	589%	From Croatia: 1496 mcm/yr (planned)
Total	32653	14919	46%	54289	364%	

***Source**: CSD.*

*Bulgaria imports only around 300 million cubic meters of Russian gas directly via TurkStream. However, there is evidence that Bulgargaz, the biggest wholesale supplier, are buying around 1.1 bcm/yr of gas from the Greek traders DEPA and Mytilineos, which both have long-term supply contracts with Gazprom, at the TurkStream gas entry point Strandzha-2. This import volumes correspond roughly to 80% of the total Greek gas exports.

Towards Strategic Decoupling from Russia

- Strengthen the enforcement of its existing sanctions to minimise the possibility for sanctions evasion
- The coalition must also lower the price cap of oil products which are currently above the market price.
- The EU should expand the scope of sanctions to include natural gas with a priority on TurkStream.
- Enhance the security of supply infrastructure for storing, importing, and transporting natural gas within Europe
- Align EU and U.S. energy and climate security priorities to speed up the diversification of natural gas supply
- Block the entry of Russian LNG in the European gas market and phaseout long-term pipeline-based contracts
- Agree on a common EU timeline for nuclear fuel diversification and gradual phase-in of sanctions on Rosatom
- Target the state capture networks that have enabled strategic partnerships between Russian and European energy companies

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Thank You!

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