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Narratives, dependencies, and financial drivers of European resistance to Russian fossil fuel phase-out

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Abstract

Despite commitments to reduce dependence on external fossil fuels, significant imports persist, raising concerns over energy security, climate objectives, and geopolitical strategy. Existing analyses often overlook the complex networks through which external energy interests maintain influence over regional energy markets. This study addresses this gap by examining how foreign energy actors exert influence through ownership structures, financial flows, lobbying networks, and narrative shaping. A multi-method approach was employed, incorporating corporate and contractual documentation, financial tracking, and lobbying analysis. The findings reveal that former officials and organizations have facilitated favorable narratives, while energy companies have indirectly supported external revenues. These dynamics demonstrate how entrenched influence networks can undermine policy goals and perpetuate dependency. The study highlights the importance of targeted regulatory measures and enhanced cooperation with independent actors to mitigate undue influence. Recommendations include the expansion of sanctions against key external energy firms and strengthened collaboration with civil society and regional partners. By mapping these mechanisms, the research provides actionable insights for policymakers seeking to reinforce energy sovereignty and align energy practices with strategic and environmental objectives.

***Keywords*:** Energy dependence; energy security; lobbying networks; policy influence; strategic governance.

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1. INTRODUCTION

Before the 2022 full-scale invasion of Ukraine, Russia's fiscal and economic structure was deeply anchored in hydrocarbon revenues, underscoring the centrality of energy exports to the country's financial stability and geopolitical leverage. Between 2016 and 2021, oil and gas revenues accounted for roughly 36-45% of the federal budget, while energy exports represented about 60% of total export earnings. Annual natural gas deliveries to the European Union averaged 155 billion cubic meters (bcm), and combined oil and gas income generated between $180 billion and $240 billion per year, depending on global market prices (Sohag et al., 2023). This revenue stream shaped every level of public finance.

The federal budget relied heavily on taxes and export duties from oil and gas companies, while the National Welfare Fund, Russia's sovereign wealth reserve, was largely capitalized by surplus energy revenues (Alexeev et al., 2024; Sohag et al., 2023; Globa, 2021). At the regional level, economies in producing areas were almost entirely dependent on the energy sector, both for employment and fiscal inflows. Furthermore, Russia's foreign currency reserves were accumulated primarily through energy exports, highlighting how the state's macroeconomic resilience and its capacity to project influence abroad were fundamentally tied to the global demand for fossil fuels (Sohag et al., 2023).

For years, Russia has demonstrated that energy dependence is never merely commercial; it is strategic (Tsekeris, 2025; Erixon, 2022). The manipulation of supply, infrastructure, and pricing became an extension of foreign policy, weaponizing interdependence to project power deep into the heart of Europe's energy system (Hartvig et al., 2024). Moreover, since the 1970s, the weaponization of energy exports has become a real possibility, used to great effect in a handful of cases. The Ukrainian war is not an exception (Hartvig et al., 2024).

Oil has also been a point of leverage and control for Russia on the EU. Over the past two decades, Russian activities have had a significant impact on oil supplies to Central and Eastern Europe. In July 2006, Transneft permanently halted deliveries to Lithuania's Mazeikiai refinery, the country's largest economic entity, after its acquisition by a Polish company rather than Russian firms, citing technical reasons. In April 2019, the contamination of five million tonnes of Russian crude oil transported via the Druzhba pipeline resulted in significant disruption, causing damage to the Mozyr refinery in Belarus, halting deliveries to Poland and Ukraine, and necessitating the temporary closure of refineries in Germany, Slovakia, Hungary, and the Czech Republic for several weeks.

Turkey occupies a paradoxical position in the Russian energy landscape: officially a NATO member supporting Ukraine diplomatically, yet simultaneously refusing to adopt sanctions against Moscow and serving as Russia's most critical energy lifeline to both European and global markets. In 2025, Turkey is not merely maintaining trade relations; it is actively enabling Russia's circumvention of Western sanctions, providing vital transit routes, and offering financial mechanisms that sustain Moscow's war economy.

1.1. Purpose of study

The purpose of this study is to investigate how foreign energy actors maintain influence over regional energy markets through ownership structures, financial flows, lobbying networks, and narrative shaping. By mapping these mechanisms, the research aims to provide actionable insights for policymakers to reduce external energy dependence, strengthen energy sovereignty, and align energy practices with strategic and environmental objectives.

2. METHOD AND MATERIALS

This study employed a multi-method approach to examine how foreign energy actors exert influence over regional energy markets. Data were collected from corporate and contractual documentation, including ownership structures and financial disclosures of energy companies such as Novatek, TotalEnergies, and CNPC, as well as joint ventures like Yamal LNG, TurkStream, and the Akkuyu Nuclear Power Plant. Financial flows, trade volumes, and import statistics were analyzed to quantify the scale of Russian energy dependence in Europe and Turkey, with particular attention to liquefied natural gas (LNG) imports and pipeline agreements. The analysis incorporated longitudinal data spanning 2016–2025 to capture both historical trends and recent shifts following geopolitical developments, such as the 2022 Russian invasion of Ukraine.

In addition, lobbying networks and narrative-shaping activities were investigated through examination of the roles of former officials, think tanks, foundations, and advisory organizations, including the German-Russian Forum, Dialogue of Civilizations Research Institute, and Stiftung Klima- und Umweltschutz MV. Data sources included public statements, board memberships, conference records, and media publications, which were cross-referenced to trace the connections between actors and their influence on energy policy. By integrating corporate, financial, and network analyses, the study mapped the mechanisms through which external energy actors maintain leverage over importing countries, highlighting structural dependencies, policy influence, and the facilitation of revenue streams for foreign energy interests.

3. RESULTS

3.1. Liquefied Natural Gas (LNG) imports as the new frontier of dependency

Although the European Union intends to phase out imports of Russian fossil fuels by no later than the end of 2027, its imports of Russian liquefied natural gas increased by seven percent year on year during the first half of 2025. An analysis by the Institute for Energy Economics and Financial Analysis indicates that France accounted for forty-one percent of Europe's Russian LNG imports in the first semester of 2025, followed by Belgium with twenty-eight percent, Spain with twenty percent, the Netherlands with nine percent, and Portugal with two percent.

Despite the ongoing conflict in Ukraine and the associated sanctions, the Yamal LNG project has continued to maintain substantial exports to both Asian and European markets, with two hundred eighty-seven shipments departing in 2024, each carrying approximately seventy-four thousand metric tons of LNG. Russia's Arctic infrastructure, in particular the Yamal LNG project, has facilitated the exploitation of previously inaccessible gas reserves. The Northern Sea Route further shortens delivery times to Asia, enhancing Russia's strategic positioning and market access. Nevertheless, in 2023, seventy-two percent of Yamal LNG exports were destined for European markets, while in 2024, around forty-one shipments were delivered to Asian ports, predominantly in China.

The growing global demand for LNG provides Moscow with additional opportunities to sustain energy revenues. According to the International Energy Agency (2021), worldwide LNG demand is expected to increase by sixty percent by 2040, driven largely by economic growth in Asia, especially China, and rising demand for cleaner energy sources. In 2024, China's imports of Russian LNG increased by 3.3 percent to reach 8.3 million metric tons compared with 2023, positioning Russia as the third largest LNG supplier to China after Australia and Qatar.

Since February 2022, EU member states have spent over 36 billion euros on imports of Russian LNG, according to Eurostat (n. d.). Overall, the EU has also paid more than 216 billion euros for Russian fossil fuels (oil, gas, and coal) since the full-scale invasion of Ukraine began. Even after implementing sanctions and a ban on the transshipment of Russian LNG at European ports in March 2025, imports of Russian gas have remained relatively steady throughout 2025.

From April to September 2025, EU imports of Russian LNG alone were valued at over €3 billion. All of this LNG comes from Russia's largest LNG facility, Yamal LNG, which is majority-owned by Russian PJSC Novatek, with its 50.1% stake. Other shareholders include TotalEnergies (20%), the China National Petroleum Corporation (CNPC) (20%), and the Silk Road Fund (9.9%).

3.2. Putin's wonder weapon and his door-openers

Former officials and media commentators act as amplifiers of Russia-friendly narratives, not always through direct coordination, but rather via structural incentives such as personal networks, energy-sector ties, and ideological leanings toward "dialogue with Russia.

3.2.1. Former officials

Former German Chancellor Gerhard Schröder, in 2005, shortly after leaving the German Chancellorship following his government's approval of Nord Stream 1, joined Nord Stream AG, a subsidiary of Gazprom, as chairman of the board. Over the following decade, he deepened his ties with Russia's state energy sector, joining the board of the Russian oil group Rosneft in 2017. In 2022, he was nominated to Gazprom's board of directors, though he ultimately declined the position in the aftermath of Russia's full-scale invasion of Ukraine.

Matthias Warnig is widely regarded as Vladimir Putin's oldest German confidant and one of the most influential Western figures within Russia's business and energy elite. A former Stasi officer who transitioned into banking after the fall of the Berlin Wall, Matthias Warnig became a key intermediary between German corporate interests and Russian state enterprises during the 1990s and 2000s. Over the years, Matthias Warnig has held senior supervisory positions in several major Russian companies, including the state oil giants Transneft and Rosneft, where he has served on the boards since 2011. His network spans German-Russian financial institutions and energy partnerships, making him a central figure in the web of economic relations that have long bound Berlin to Moscow.

Esko Aho, who served as the Prime Minister of Finland from 1991 to 1995, has been a member of the board of the Skolkovo Foundation since its establishment in 2010. The foundation is a non-profit organization tasked with developing a science and technology innovation hub in the Moscow suburb of Skolkovo. In May 2016, Esko Aho was appointed to the Supervisory Board of Sberbank.

François Fillon, who served as Prime Minister of France under President Nicolas Sarkozy from 2007 to 2012, was appointed to the board of the state-owned oil company Zarubezhneft in July 2021 and subsequently to the board of the petrochemicals group Sibur.

Karin Kneissl, an Austrian ex-Foreign Minister; now based in Russia. In 2021, she landed a position on the board of directors of Rosneft (2021–2022). In 2023, she moved to Russia to run the think tank Geopolitical Observatory for Russia Key Issues (G.O.R.K.I.), within the St. Petersburg State University. The Gorki center, Karin Kneissl told, "*deals, among other things, with issues of energy, migration, and new alliances, issues in which I am well versed, which also affect the Arab and Islamic world, with which I am familiar.*" Kneissl also

said on Telegram that "*since apparently nothing is going on in Austria and Germany beyond the economic crisis, my relocation is becoming a political issue*.

Alexander Rahr is recognized as one of Germany's foremost experts in foreign policy. He spent twenty years at the German Council on Foreign Relations, where his leadership contributed significantly to shaping the nation's foreign policy direction. Rahr specializes in German Russian relations and is noted for his research on Eastern European policy issues. Renowned for his analytical rigor and intellectual approach, he is highly regarded in both academic circles and among policymakers. A recipient of the Order of Merit of the Federal Republic of Germany, Rahr has played a key role in bringing public attention in Germany to strategic developments in the Eurasian region. He has long expressed support for the Russian government and holds several positions linked to Russian interests, including serving as research director of the German-Russian Forum, deputy chair of the Council of the Russian Economy in Germany, and advisor on European Union affairs for Gazprom, as well as a consultant and lobbyist for Wintershall, which has close ties to Gazprom.

3.2.2. Think tanks and foundations

Stiftung Klima- und Umweltschutz MV of Mecklenburg-Vorpommern Climate & Environment Foundation, from Germany. Not a think tank, but a publicly registered foundation used as a policy vehicle around Nord Stream 2. Since June 2022, a state parliament committee of inquiry has been examining the circumstances surrounding the establishment of the Mecklenburg-Western Pomerania Climate Foundation, which was also established by the state government to ensure the continued construction of Nord Stream 2. Created in 2021 with greater than 99% funding from Gazprom's Nord Stream 2 AG, widely reported as intended to facilitate Nord Stream 2 works and blunt sanctions exposure.

Dialogue of Civilizations Research Institute (DOC Research Institute), in Germany, founded in 2016 by Vladimir Yakunin, former head of Russian Railways and a close associate of Vladimir Putin, the organization presented itself as an independent think tank promoting "dialogue between civilizations." In practice, it served as a platform for advancing Russian geopolitical and energy narratives within Europe. Through initiatives such as the annual Rhodes Forum, it convened politicians, academics, and business leaders to discuss global issues, often emphasizing the importance of EU–Russia energy cooperation and opposing sanctions. Its publications and conferences frequently questioned EU energy diversification policies and promoted Russian projects, such as Nord Stream, aligning closely with the Kremlin's strategic interests in sustaining Europe's reliance on Russian energy. It closed its operations in March 2022 following the invasion of Ukraine.

German-Russian Forum (Deutsch-Russisches Forum), founded in 1993 to promote German-Russian relations, the organization operated as a civil society and business forum with strong participation from the energy sector (Nebot Pérez, 2023; Avdic, 2017). Despite claims of independence, its board and sponsors included executives from companies with ties to Russian energy firms, notably Gazprom Germania and its related subsidiaries. The group openly supported the Nord Stream 1 and 2 projects, opposed energy-related sanctions, and consistently advocated for a German-Russian "energy partnership" while criticizing EU diversification efforts. Its activities were financed through membership fees and event sponsorships from Russian energy companies, alongside partial support from the German government, although the extent of Russian corporate funding remained opaque.

Austrian-Russian Friendship Society in Austria; the organization maintained close ties to OMV, the Austrian oil and gas company, which is deeply involved in Russian energy projects, and consistently promoted Austrian–Russian energy cooperation. Its activities included cultural exchanges, business networking events, and

publications endorsing continued gas imports from Russia. However, its overlapping membership with OMV executives, alignment with Russian and corporate commercial interests, and limited transparency in funding raised concerns about its independence and role in shaping Austria's energy discourse.

Institute of Energy for South East Europe (IENE), in Greece, positions itself as an independent energy research institute focused on Southeast Europe. The organization has produced extensive analysis on regional energy markets, often with a strong emphasis on Russian projects. Its publications and events have promoted the TurkStream pipeline, highlighting the strategic role of Russian gas in the Balkans.

3.3. Turkey as Russia's essential partner

While the European Union is influenced by Russia due to its highly effective propaganda and officials who defend the Kremlin's interests, Turkey is pursuing its own path, anticipating benefits from further cooperation with Russia.

Turkey's geographic position makes it both a strategic gateway and a geopolitical risk for Russia (Gol, 2024; Erşen & Çelikpala, 2019). As Ankara continues to diversify its energy mix and expand its regional partnerships, Moscow faces an uncomfortable reality: the very country it once viewed as a conduit for influence has become a potential pressure point capable of reshaping Russia's energy reach across Southern Europe and the Mediterranean.

Russia wields energy as both a carrot and a stick, rewarding cooperation with preferential supply deals and hinting at disruptions when Ankara's actions challenge its interests. Joint ventures, notably TurkStream and Akkuyu, foster interdependence, while shared intelligence on energy markets enables Moscow to coordinate pricing strategies and retain partial control over Turkey's energy calculus.

In 2025, Turkey is not merely trading with Russia; it is actively sustaining Russian energy ambitions through:

- TurkStream pipeline: Guaranteed European market access despite sanctions
- Gas contract renewal: Locking in 22 bcm/year through at least 2026-2030
- Akkuyu nuclear project: $20 billion strategic investment proceeding unimpeded
- LNG transshipment: Facilitating Russian export flows and origin obscurity
- Shadow fleet passage: Enabling oil exports worth tens of billions
- Financial infrastructure: Providing payment channels bypassing Western systems
- Diplomatic cover: Legitimizing continued Russian energy trade within the NATO framework

3.4. Gas contracts

The current agreements between Russia's energy giant and Turkey's state-owned company BOTAŞ, covering the annual supply of 21.75 bcm of natural gas, are set to expire on December 31, 2025 (BOTAŞ Petroleum Pipeline Corporation, n. d.). Both sides have expressed their intention to maintain deliveries at roughly 22 bcm per year under new terms. In the previous year, Gazprom supplied 21.6 bcm of gas to Turkey, cementing Ankara's position as Russia's second-largest gas customer after China.

3.5. Turkey's position

Despite successful diversification efforts that reduced Russia's share from 60% (2000s-2010s) to 41,32% in 2024, Turkey refuses to eliminate Russian gas:

- Economic argument: Russian gas remains competitively priced compared to LNG alternatives
- Leverage maintenance: Turkey uses energy relations to maintain diplomatic flexibility with Moscow
- Infrastructure reality: Existing pipeline capacity and contracts create path dependency

Turkey is now Russia's second-largest gas customer after China, providing:

- A stable and predictable revenue stream worth €6-8 billion annually.
- Political validation that major economies still depend on Russian energy
- Strategic depth against a complete European market collapse

Moreover, despite the EU agreeing on a regulation that will ban Russian pipeline gas as of 1 November 2027 at the latest, Ankara has explicitly stated it will not comply with any EU ban on Russian gas imports. This position creates a critical loophole:

- Gas flowing through the TurkStream Line 2 can still reach EU Member States (Bulgaria, Hungary)
- Turkey serves as a "sanctions buffer", allowing Russia to maintain European market access
- Ankara's refusal to align with EU energy sanctions undermines the impact of the bloc's unified approach

3.6. Akkuyu project

The Akkuyu Nuclear Power Plant, built and operated by Russia’s state-owned Rosatom, has far-reaching strategic consequences for Turkey’s energy sovereignty and for regional geopolitics. Far beyond a conventional infrastructure project, Akkuyu establishes long-term structural leverage that is likely to shape Ankara’s relationship with Moscow for decades.

First, the project creates a profound financial lock-in: Turkey is bound by long-term electricity purchase agreements that guarantee revenue to the Russian side for several decades. This arrangement ensures a continuous financial dependency embedded directly into Turkey’s energy system.

Second, Akkuyu establishes technical dependency, as Rosatom will control the supply of nuclear fuel, oversee maintenance, and retain critical operational expertise. Such reliance limits Turkey’s autonomy in managing and regulating a key component of its national energy infrastructure.

Third, the project introduces a significant strategic vulnerability. By securing a permanent presence in Turkey’s critical infrastructure, Russia gains a durable geopolitical foothold that could influence Ankara’s decision-making in sensitive policy areas.

Finally, Akkuyu serves as a form of sanctions evasion signaling. The uninterrupted cooperation between Turkey and Russia on this multi-billion-dollar project suggests to international markets that large-scale ventures with Russian entities remain viable, despite the ongoing sanctions. Over its planned 60-year operational lifespan, Russia is expected to earn between $50 and $80 billion from Akkuyu through multiple channels, including:

- Construction and project development payments
- Long-term contracts for nuclear fuel supply
- Maintenance, servicing, and operational support
- Guaranteed electricity purchase agreements with the Turkish government

3.7. What would be the worst outcome for Moscow?

3.7.1. Closure of TurkStream

The TurkStream pipeline, which carries Russian gas to Turkey and onward to Southern Europe, is one of the Kremlin's few remaining viable export routes following the collapse of Nord Stream. As of December 2025, the EU has reached a political agreement in a regulation that will stop gas flows via TurkStream. A potential shutdown of a pipeline would immediately cut off billions in annual revenue, deprive Russia of access to key EU markets, and deal a major geopolitical humiliation. Ankara has stated that it will not abide by the upcoming EU ban on Russian gas, potentially complicating the implementation of the regulation and creating a loophole that could allow Russia to continue sending pipeline gas into the bloc.

3.7.2. Turkish diversification away from Russia

Turkey has actively developed alternatives to Russian gas. The Trans-Anatolian Natural Gas Pipeline (TANAP) already delivers Azerbaijani gas with an annual capacity of 16 bcm, expandable in the future. Meanwhile, Turkey's LNG regasification capacity exceeds 45 bcm per year, and potential imports from the East Mediterranean or Iran could further erode Russia's position. A full-scale Turkish pivot would represent a permanent loss of one of Moscow's largest energy markets.

3.7.3. Akkuyu nuclear project risks

The Akkuyu nuclear power plant, the first nuclear power plant in Turkey, is currently the largest nuclear construction project in the world. Four power units with the most advanced Russian-designed VVER-1200 reactors are being constructed simultaneously. The project is built and financed by Russia's Rosatom at a cost exceeding $20 billion. Ankara could nationalize or cancel the project, resulting in massive financial and reputational losses for Russia's nuclear export program, along with protracted legal disputes. The loss would also deprive Moscow of a long-term strategic foothold in Turkey's energy infrastructure.

4. CONCLUSION

By continuing to import gas from Russia, the EU undermines its credibility as a climate protection leader and exacerbates global environmental challenges associated with the Russian fossil fuel industry. Russian gas production, particularly in Arctic regions such as Yamal, exhibits extremely high methane leakage rates, potentially three to ten times above the global average, while methane itself is more than 80 times as potent as CO_2 over a 20-year horizon. In addition, liquefied natural gas (LNG) carries a high carbon footprint, as the processes of liquefaction, shipping, and regasification add 15–30% more emissions compared to conventional pipeline gas. Russian Arctic LNG is among the most carbon-intensive globally due to remote production locations requiring energy-intensive infrastructure, fuel consumption by ice-breaking tankers, flaring of associated gases, and aging, inefficient facilities.

To counter Russian influence, the EU and its partners must take decisive action. Sanctions on LNG should be expanded to target Novatek, its subsidiaries, and affiliated legal and natural persons. Currently, these entities remain only partially designated under EU and G7 sanctions, leaving gaps that allow continued exports, financing, and technology transfers through intermediary structures and joint ventures. Novatek generates substantial fiscal revenue for the Russian state through taxes, export duties, and contributions to strategic reserves, directly supporting the federal budget, while also serving as a channel to evade restrictions on pipeline gas by redirecting exports toward globally fungible LNG shipments.

In parallel, the adoption and implementation of comprehensive transparency rules is critical. Legally binding standards should apply to all EU institutions, ensuring that think tanks link funding to specific research outputs rather than general budgets. Mechanisms must track personnel transitions between think tanks, consultancies, and EU institutions to identify potential conflicts of interest. Additional transparency standards should require energy companies to disclose all contacts and agreements with foreign governments or state-linked entities, make key terms of major supply deals exceeding €100 million publicly available, and fully report ownership and debt structures for pipelines, LNG terminals, and related infrastructure.

Finally, cooperation with Ukraine and civil society watchdogs must be strengthened. Ukraine is a critical strategic partner in European energy security, anti-corruption efforts, and EU integration. Joint efforts between Ukrainian intelligence agencies and European civil society organizations should focus on identifying and publicizing Russian lobbying networks embedded in Europe's energy sector. Turkey, as the next host of the United Nations Climate Change Conference (COP31), should recognize the implications of supporting Russia's energy ambitions. A joint Ukraine-EU-Turkey early warning mechanism should be established to monitor disinformation campaigns, market manipulation, and covert lobbying targeting energy policymaking. Integrating real-time intelligence sharing and rapid-response communication protocols would enable partners to detect emerging threats and respond before they distort political and energy decisions.

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