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# THE TRUMP ADMINISTRATION'S APPROACH TO ENERGY SECURITY IN POLAND AND THE BALTIC STATES**

## Abstract

*The subject of this paper encompasses US policy towards Poland and the Baltic States regarding energy security during Donald Trump's presidency. It is discernible that vast domestic energy resources have created an opportunity for the US to project more power to these countries, and the surrounding region. We argue that Trump and his administration's perceptions have served as an intervening variable in that opportunity assessment, in accordance with the neoclassical realist theory. The main research question addressed in this paper is whether US has used that opportunity to contribute to energy security in countries it has traditionally deemed as allies. Two aspects of US approach to energy security of the designated countries are taken into consideration: liquified natural gas exports and support for the Three Seas Initiative. The way Trump presented his policy and its results in his public statements has also been considered in this paper. The article will proceed as follows. The first subsection of the paper represents a summary of energy security challenges in Poland and the Baltic States. The second subsection is dedicated to the opportunity for the US to project energy power and to Trump's perceptions relevant for the opportunity assessment. The third subsection deals with American LNG exports to these countries as a possible way*

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*for contributing to energy security in Poland and the Baltic States. The last part of the paper addresses the Three Seas Initiative and US approach to this platform.*

**Keywords:** *Poland, the Baltic States, Central and Eastern Europe, energy security, energy dependence, USA, Donald Trump*

## INTRODUCTION

This paper focuses on the US approach to the energy security in Poland and the Baltic States (Lithuania, Latvia and Estonia) during Donald Trump's presidency. Considering Poland and the Baltic States are energy importers, the definition of energy security used in this paper is based on importing countries' view, which accentuates the need for uninterrupted supply of energy at affordable prices.[1] For instance, Polish Ministry of Energy ([MoEP] 2018, 2) defines energy security as covering "current and future needs of fuel and energy in a technically and economically viable manner, subject to applicable environmental requirements". Some of the main challenges these countries face come in the form of severe energy dependence and infrastructure deficit. Not only is energy dependence considered a problem in each of these countries, but taking the importance of interconnectedness of energy markets into account, it also transfers to the regional sphere – to the rest of Central and Eastern Europe, and subsequently to the EU, and to the Baltic Sea Region. Even though the definition of the term "Central and Eastern Europe" has evolved over time to encompass the countries of the Western Balkans and beyond,[2] we adopt a narrower view in this paper, which for the most part corresponds to the OECD definition[3] or the Three Seas Region[4]. We believe this

1 For a vast assortment of energy security definitions see: (Sovacool 2011, 3–6).

2 For instance, Bursać (2019, 148) includes the following countries into analysis regarding Central and Eastern Europe: Poland, Hungary, the Czech Republic, the Slovak Republic, Estonia, Latvia, Lithuania, Romania, Bulgaria, Moldavia, Slovenia, Croatia, [North] Macedonia, Albania, Montenegro and Serbia.

3 As defined in the OECD glossary, Central and Eastern Europe consists of the following countries: Albania, Bulgaria, Croatia, the Czech Republic, Hungary, Poland, Romania, the Slovak Republic, Slovenia, and the three Baltic States: Estonia, Latvia and Lithuania (Organisation for Economic Co-operation and Development [OECD] 2001).

4 The term "Three Seas Region" was used throughout the following document (Three Seas

is the more suitable approach when contemplating US policy, as it differs when it comes to countries of the Western Balkans and vice versa. Also, the most of proposed and implemented actions were directed towards the countries of the Three Seas Region. Therefore, when mentioning Central and Eastern Europe in this paper we think of the following countries: Poland, Lithuania, Latvia, Estonia, the Czech Republic, the Slovak Republic, Hungary, Romania, Bulgaria, Croatia and Slovenia.

During Trump's presidency, overall energy trade with European countries has ascended, particularly when it comes to exporting US liquified natural gas. Concerning Central and Eastern Europe, Trump's administration has been expanding liquified natural gas exports to Poland and Lithuania since 2017. Besides reiterating commitment to deterrence and defence on the Eastern flank[5] (National Security Strategy [NSS] 2017, 49) Trump's administration has granted political support and provided certain funds for the purpose of energy diversification strategies in Central and Eastern Europe within the Three Seas Initiative, as a platform for cooperation in energy, transport and digital area. We address the question whether Trump's actions regarding energy in Central and Eastern Europe represent American effort to enhance the energy security in countries it has traditionally considered allies.

We adopt a stance that structural variables, first and foremost the distribution of power can act as an incentive for certain foreign policy decisions (Ripsman et al. 2016, 43). In that sense, we believe that US energy revolution represented a shift in relative power in the energy area and an opportunity for the US to try and alter the distribution of power in Central and Eastern Europe. However, in accordance with neoclassical realist theory, there's an intervening variable (Ripsman et al. 2016, 58), which in this paper takes form of foreign policy makers perceptions. President Obama's foreign policy didn't reflect the same views even though the opportunity existed on a certain level. We try to describe the US approach to energy security in Poland and the Baltic States and the way Donald

Initiative Summit 2018) to designate the region bordered by the Adriatic, Black and Baltic Sea, including the following countries: Austria, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia.

5 Estonia, Latvia, Lithuania, Poland, Slovakia, Romania, Hungary and Bulgaria (Biziewski 2019, 179).

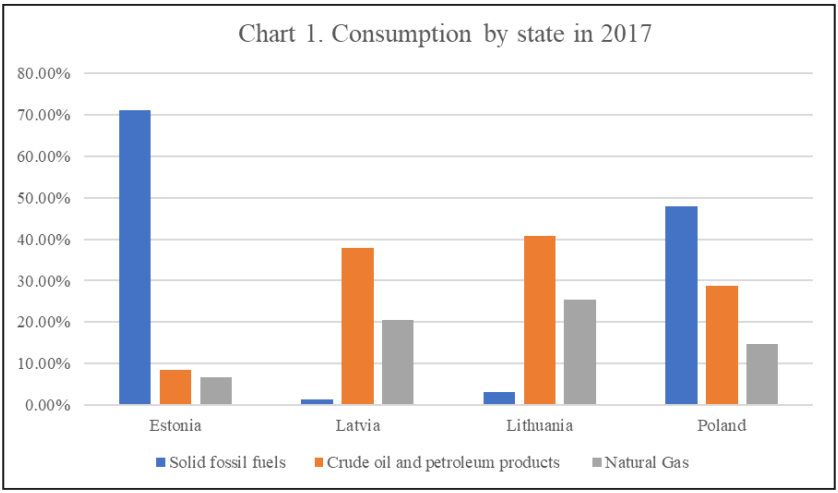
Trump and members of his administration have presented it, as well as the reasons they suggested for such policies.

## OVERVIEW OF ENERGY SECURITY CHALLENGES IN POLAND AND THE BALTIC STATES

Before addressing the US approach to energy security in Poland and the Baltics, this subsection of the paper provides an overview of energy availability in these countries. Specifically, it deals with common challenges these countries face in this area. Availability, as an element of energy security, is defined as "relative independence and diversification of energy fuels and services" (Sovacool 2011, 9–10). There are three dimensions of diversification: 1. "source diversification" which means relying on more types of energy sources; 2. "supplier diversification" which means procuring energy from different companies and providers and 3. "spatial diversification" which means "spreading out the locations of individual facilities so that they are not disrupted by single attack, event, malfunction, or failure" (Sovacool 2011, 9). Possible threats to availability include the lack of domestic resources that can be extracted cost-effectively, problems in infrastructure, investment and development inhibitions (Sovacool 2011, 10).

Most of the CEE countries face similar problems when it comes to availability of energy, one of them being related to building or modernization of transport infrastructure (Biziewski 2019, 188). Until recently, they have chiefly relied upon the existing infrastructure which was built during the Cold War. There wasn't much development over infrastructure after that period, especially when it comes to reversing the east to west energy flow until achieving full reverse flow capacity of Russian gas from Germany to Poland in 2014 (Posaner 2016, 88). All of these countries are net energy importers, which means they can't satisfy the needs for energy from domestic production and mostly rely on imported energy (Eurostat 2019a). Some of them also experienced a drop in energy production in the last thirty years.[6]

6 For detailed information on energy production see country profiles at (International Energy Agency [IEA] 2020).




Source: Author's selection of data retrieved from (Eurostat 2017a)

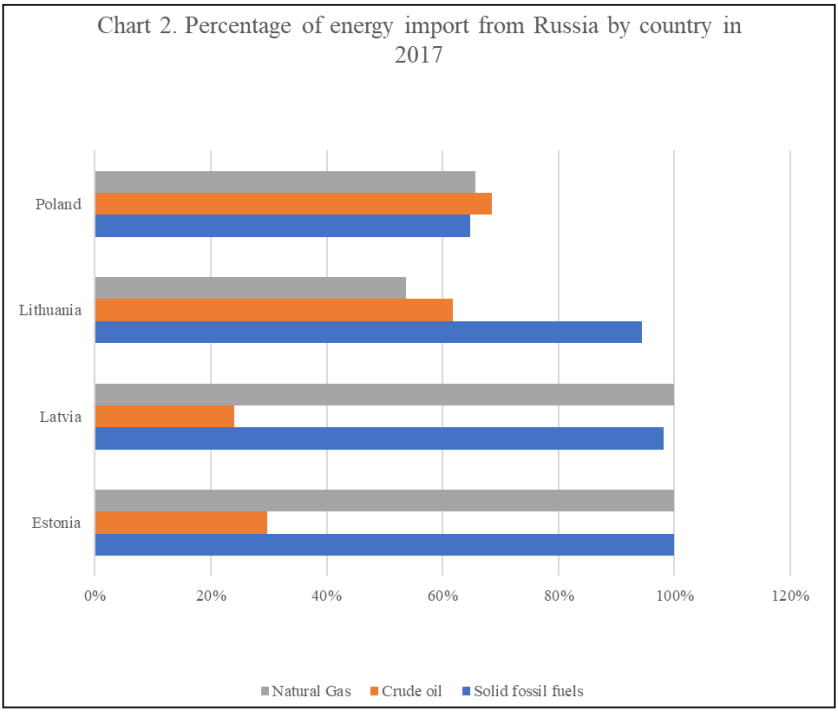
Chart 1 represents gross inland energy consumption[7] in Poland and the Baltic States. Considering the available data, these countries have different types of energy sources included in the energy mix, but, as shown in the chart, they still predominantly rely on solid fossil fuels, crude oil and petroleum products and natural gas, therefore carbon-based sources of energy. Consequently, high percentages of solid fossil fuels such as coal in Poland or oil shale[8] in Estonia raise environmental concerns about CO2 emissions. Coal as a primary source of energy in Poland can be substituted with natural gas, crude oil or renewables, which would lower the greenhouse gas emissions (Rybak 2019, 2–3). However, as Rybak (2019, 2) indicates, there are restrictions to such supply diversification strategies: the majority of crude oil and natural gas would have to be imported, and most of the imports are from a single supplier. Renewables are also represented in primary energy supply of these countries, 8.5% in Poland, 17.5% in Estonia, 20.9% in Lithuania and 40.2% in Latvia (Eurostat 2017a). Despite its vast renewable

7 Gross inland energy consumption refers to "the quantity of energy necessary to satisfy inland consumption of the geographical entity" (Eurostat 2018).

8 There's a difference between shale oil and oil shale. Oil shale refers to "rocks that contain solid bits of kerogen, a precursor to oil". Shale oil refers to hydrocarbons that are trapped in formations of shale rock. (Investopedia 2019). This is the probable reason for including the oil shales into the solid fossil fuels category in Eurostat data. OECD statistics also include oil shales in the "coal" category. (OECD 2019a)

energy sources, though, Latvia still relies on imported fossil fuels (OECD 2019b). Therefore, we can draw a conclusion that there's source diversification at some level in these countries, although this could be further improved with regards to clean energy. Nevertheless, considering the costs of renewable energy development, most of these countries favour natural gas as the most viable substitute.

More importantly, these countries haven't achieved supply diversification. They are severely dependent on natural gas imports – Estonia 100%, Lithuania 99%, Latvia 86.6%, Poland 77.8%, data for 2018 (Eurostat 2019b, 4). As shown in Chart 2, Latvia and Estonia imported almost exclusively Russian natural gas in 2017. Having only one supplier of natural gas makes these countries vulnerable in terms of supply, because there's a greater risk for interruptions in the flow of energy. This is significant because of some CEE governments' stance that Russia has used this dependence as a foreign policy tool or as an "energy weapon" although Russia has never explicitly connected disruptions in energy supply and foreign policy goals (Högselius 2019, 133). Dependence can also result in economic risks such as price volatility because of the lack of competition, as in the case of Baltic states which often paid higher prices for Russian gas than western Europe despite geographical proximity (Högselius 2019, 87). Furthermore, statistical data (Chart 2) show that some of these countries rely on Russia not only for natural gas imports, but other energy sources, as well, which only increases the risks of dependence. A combination of at least two cases of high percentages of natural gas, crude oil and solid fossil fuels imports from Russia can be found in Latvia and Estonia (more than 90%), and Poland and Lithuania (more than 60%).




Source: Author's selection of data retrieved from (Eurostat 2017b)

All of these countries have recognized energy security as vital and started coping with challenges with internal energy strategies. The most prominent internal energy strategies of coping with vulnerabilities stemming from energy dependence (Högselius 2019, 103) are in case of these countries: mobilization of domestic resources where possible, energy conservation for security purposes and diversification of energy imports. Poland has drafted a strategy which accentuates the need for different actions in pursuit of energy security, especially its three main components: energy sources, generation and supply (MoEP 2018, 3). Some of the strategic directions include optimal use of domestic resources such as coal and lignite, and developing other energy resources domestically, mainly nuclear energy and renewables (MoEP 2018, 4–5). Nevertheless, Poland is also trying to diversify the supply of natural gas and crude oil and to build the required infrastructure as a part of the strategy (MoEP 2018, 4). Lithuania has approved the National Energy Inde-

pendence Strategy in 2018 with prospective goals for 2020, 2030 and 2050. Short- to medium-range goals include integration to EU energy system, optimization and modernization of infrastructure, renewable energy sources development and improvement of energy efficiency (Ministry of Energy of the Republic of Lithuania [MoEL] 2018, 9). Estonia has approved the National Energy and Climate Plan 2030 (NECP) in 2020. In the dimension of energy security, the Plan (NECP 2020, 92) has underscored four objectives, "security of supply, security of infrastructure, interconnectivity with the energy networks of other EU Member States and the diversity of energy sources". Compliance with the Paris agreement and EU regulations regarding reduction of greenhouse gas has an impact on the Estonian carbon-intensive oil shale industry. Therefore, the Plan stresses the importance of continuing with exploitation of this energy resource, with implementation of certain required environmental standards (NECP 2020, 95).

When it comes to external approaches to coping with energy dependence, possible strategies include direct military action, supporting or orchestrating coups, negotiations, to investment in producing countries, having good general relations with producing countries, and with each other (Högselius 2019, 119, 120, 121, 123). All the national plans mentioned here emphasize the need for critical infrastructure modernization, a goal further promoted through the regional energy cooperation platform, the Three Seas Initiative, which can serve as an external strategy of coping with dependence. Other than that, and having good general relations with producing countries, Poland and the Baltic states haven't used other external strategies.

## OPPORTUNITY ASSESSMENT DURING TRUMP'S PRESIDENCY

United States, which had faced energy dependence risks as an energy importer for many years before the energy revolution, now has the opportunity to stand at the opposite end of the global energy supply system, at least when it comes to liquified natural gas.[9] We

9 United States is a net natural gas exporter (EIA 2019e) but continues to be a net crude oil importer (EIA 2020f). Therefore, in this specific case of LNG exports to Europe, US energy security can be defined from the exporting countries' view, which is not the case regarding the Middle East (Pavković 2019, 67–68).

believe that energy revolution in the US provided a systemic opportunity for this country to project more power in different regions which have traditionally been considered as strategically important, such as Central and Eastern Europe. Following the neoclassical realist theory, there are three components of clear opportunities: "(1) evidence that relative capabilities favor the state in question; (2) evidence that other consequential parties lack the political resolve to resist the state's moves in the theater in question; and (3) evidence that a favorable balance of capabilities and resolve will not persist indefinitely, making it important to act as soon as possible" (Ripsman et al. 2016, 47).

Energy revolution has provided enhanced material capabilities for the US, mostly based on technologically advanced extraction of the shale oil and gas reserves. There was constant growth in extensions and discoveries of crude oil proven reserves since 2009 (Energy Information Administration [EIA] 2019b), as well as of natural gas proven reserves (EIA 2019c). US was the biggest producer of crude oil and petroleum products in the world in 2019 (EIA 2020e), continuing a trend which started during Obama's time in office. The energy revolution also created a big surge in natural gas production, as US continues to be the biggest natural gas producer in the world since 2012 (Global Energy Statistical Yearbook 2019). Therefore, the change of material capabilities in energy area creates favorable distribution of power in respect to energy, which can be used as leverage in US foreign policy, should it choose to.

As for the countries in question, there's a small possibility they would oppose any potential US effort to project its power to the region, especially in energy area. Poland and the Baltic States are NATO members and rely on US for security guaranties. Also, they're pursuing their own strategies of energy security, and US involvement in their energy diversification is in accordance with those strategies. Experiences so far suggest that Poland and the Baltic States welcome US as an exporter of LNG to the region, and count on its political support and financial help in achieving infrastructure and transport projects within the Three Seas Initiative. However, not all the countries in the region have the same level of support for US involvement in the region. Kurečić (2018, 110) identifies two informal groups: "New Cold War War-

riors" comprising of Poland, Latvia, Lithuania, Estonia, Romania and Croatia, which show greater compliance with US policy, and "Pragmatics" consisting of Austria, Hungary, Slovakia, Slovenia and Bulgaria, which have better relations with Russia and a "lesser sense of perceived threat from Russia".

European Union, which recognizes energy dependence of its member states as a serious problem, has mostly been supportive of US efforts to export more natural gas to the region. As stated in the European Parliament Resolution of 12 September 2018 on the state of EU-US relations (EP, 2017/2271(INI)), EU "welcomes US support for ensuring energy security in Europe". Even though transatlantic relations have deteriorated during Trump's presidency, energy area remained relatively unharmed. However, US could aggravate Russia, which is the primary energy exporter to those countries and to Europe, especially considering the rhetoric Trump and members of his administration have used regarding Russia's approach to energy area in Europe, which is discussed further below. As Kropatcheva (2014, 4) argues, although there was some contradiction in Russian perception of the American shale revolution, Russian policy makers have been concerned with the possible implications of increase in LNG. Even though her paper was written before the Trump's presidency it points that the "shale gas 'revolution' will have important consequences for Russian energy relations with its main customer – the EU" (Kropatcheva 2014, 5).

Finally, Russian pipeline project Nord Stream 2 has come close to being finished, so the timeline for US to enter the region as an energy supplier has shortened. The fact that this pipeline bypasses Ukraine and Poland can be interpreted in the West as an attempt to expand Europe's energy dependence of Russia. Hence, it's possible that the threat of sanctions for companies constructing the pipeline serves the purpose of expanding the time slot for the US to bolster its economic presence. This, however, doesn't necessarily mean that US will pursue the goal of providing energy security for the countries in Central and Eastern Europe, but rather that there's an opportunity for it.

Rossbach (2019, 121–122) summarizes three possible ways for the use of energy as a foreign policy tool in this context: US

could adopt a more isolationist foreign policy and secure the domestic supply; it can continue with activist foreign policy if it chooses to give technical aid to states with similar potential for shale exploitation; finally, it can choose to strengthen its allies in case of confrontation with bilateral energy aid. For instance, some American companies (ExxonMobil, ConocoPhillips and Chevron) were involved in shale oil exploration in Poland, but they ceased because of the disappointing results (EIA 2016).

It can be argued whether Central and Eastern Europe continues to be valuable for projecting US power internationally or even whether US still wants to continue with those practices at all. However, considering the subject and scope of this paper, we accept the stance that Central and Eastern Europe still is of some geostrategic importance for the US (e.g. Kurečić 2018, 122), or that it's at least perceived that way and that this country would continue to project its power to the region. This, however, doesn't have to be in the form of military power if needn't to. Even though it may not be crucial to American interests, retrenchment from this region would be a signal for other regions of the world that US is reassessing its grand strategy and foreign policy. In that sense, Jervis (2017, 236) defines domino beliefs as "the expectation that a defeat or retreat on one issue or in one area of the world is likely to produce […] further demands on the state by its adversaries and defections from its allies". Given the exacerbation of tensions in the Middle East during Trump's administration,[10] impaired international prestige and reputation would hinder the success of policies towards the regional countries, especially Iran.

We adopt the stance that it's important for the US to be "in a position of perceived strength internationally" (McCrisken and Downman 2019, 281).[11] Trump has expressed his belief that US has to negotiate with certain leverage stemming from invigorated military and economy and from regaining leadership position in

10 For Obama's foreign policy towards the Middle East in context of energy revolution see (Pavković 2018; Pavković 2019).

11 Although the subject of McCrisken and Downman's (2019, 281) paper is US nuclear posture review, they analyze the "peace through strength" approach to security and foreign policy, and suggest that: "The idea of 'peace through strength' is that, although global peace and stability are the stated goals of US policy, they can only be achieved if the United States is in a position of perceived strength internationally". We think that this belief transcends the military sphere, and as mentioned above, that Trump wants to be perceived as a good negotiator, with leverage in interstate relations.

the world (Trump 2016a). Similarly, Trump stated that his administration is "working to restore America's standing abroad", but without "people taking advantage of the United States" (Trump 2017d). Taliaferro's (2004, 51) "[b]alance-of-risk theory holds that central decision makers' aversion to losses in their state's relative power, international prestige, or reputation for resolve drives foreign policy behavior." Even though we don't completely follow his line of argument in the paper, we draw on the general conclusion that foreign policy executives are avert to losses in their international prestige. As portrayed in mentioned Trump's public papers, he has been keen on improving US posture in the world politics. It is important to address Trump's view of the nature of inter-state relations as transactional. Jervis (2018, 19) argues that Trump's orientation to world politics reflects the belief that "politics and all relations are transactional", which also includes relations with allies. Trump's "unilateralist 'America first' foreign policy and his transactional approach to multilateral institutions" are considered a great part of the problem in transatlantic relations (Aggestam and Hyde-Price 2019, 114).

During his campaign, Trump has questioned US participation in NATO, and has raised many concerns regarding US involvement in providing security for allied countries, considering the problem of free riders. Although the issue of burden-sharing isn't novel, Trump's rhetoric on the matter seemed to attract the most attention. Naturally, Trump's stance was most unsettling for the countries on the Eastern flank of NATO, specifically Poland, the Baltic states (and Romania) which have deemed the US as a "reliable security guarantor" (Biziewski 2019, 178). However, transactional approach doesn't necessarily mean questioning all alliances, but mostly those which Trump and his administration see as benefiting others more than US. Harris (2018, 628) points out that "For Trump, making America "safe again" means bolstering America's position as the world's preponderant geopolitical force and marginalizing international institutions and multilateral agreements, which have too often benefited others as much as (or more than) they have the United States". Trump's been vocal in criticism of Germany's reneging on the financial obligation to NATO whilst increasing its dependence on Russian gas (Trump 2018c), and on the other hand he commended Poland and the Baltic States (as well

as Romania, Greece and the UK) for meeting the 2% requirement (Trump 2018c).

In accordance with the need of being perceived as in a position of strength, right from the beginning, Trump's administration has recognized the energy area as a potential leverage – in the form of "energy dominance" as "America's central position in the global energy system as a leading producer, consumer, and innovator" (NSS 2017, 22) which was introduced in the National Security Strategy in 2017. He adopted quite permissive energy policy which enabled further exploitation of domestic resources and higher rates of production (The White House 2019). When it comes to Poland, Trump has expressed that US "will explore new opportunities stemming from the transformation of energy markets and we will work to ensure better energy diversification of Europe" (Trump 2018a). Therefore, we believe that Trump administration's perception of US international status served as an intervening variable (Ripsman et al. 2016) when it comes to opportunity assessment in Central and Eastern Europe. We also think that his administration has been trying to seize that opportunity, although with some limitation which emanate from the transactional approach.

As further discussed below though, considering the type and the scope of foreign policy instruments his administration has implemented, the US contribution to energy security and overall projection of power to the region can be described more as an effort than definite course of action. As Jervis (2017, 256) points out, "statesmen often argue that the damage to their state's reputation comes, not from being unable to prevent a local defeat, but from refusing to make a major effort to do so." However, effort can be enough in some cases as it "indicates that the state will incur high costs to help its allies" (Jervis 2017, 257). Considering that EU has provided support for energy security in Central and Eastern Europe, as well as their own internal energy security strategies, Poland and Baltic States might suffice with the US effort for contributing to their energy security.

## UNITED STATES AS AN ENERGY EXPORTER

American crude oil exports have substantially increased since 2015 overall, but considering the export structure, they were primarily concentrated in the neighboring region to the US. Crude oil was for the most part sold to Canada, although some European countries such as the Netherlands, Italy or UK have also bought American oil (EIA 2020a). When it comes to Central and Eastern Europe, smaller quantities of crude oil were sold to Croatia (1.2 million barrels) and Poland (3.5 million barrels) during 2018 (EIA 2020a). A greater opportunity for American energy export worldwide and to Europe would be natural gas exports. Since 2010, US natural gas exports quadrupled (EIA 2020b). Of total US natural gas exports, 40% are LNG exports via vessel, and the rest is exported via pipelines to Canada and Mexico (EIA 2020d).

Liquified natural gas is natural gas cooled down and compressed for the purposes of shipping and storing. As opposed to natural gas, which is transported through pipelines, LNG can be transported on tankers "between export terminals, where natural gas is liquefied, and import terminals, where LNG is returned to its gaseous state or *regasified*" (EIA 2019d). United States is currently the third-largest LNG exporter in the world and is investing in building additional infrastructure for LNG exports (EIA 2019a). There are seven operating export terminals in the USA[12] (Federal Energy Regulatory Commission [FERC] 2020a), eight more under construction and twelve approved (FERC 2020b). Since many of these terminals are built upon the existing infrastructure of former import terminals, the cost of their repurposing is lower than in other countries, which provides a relative advantage for the US (Cornot-Gandolphe 2016, 26). On the other hand, a problem related to importing American LNG stems from its higher price in comparison to Russian (Zubovic 2019, 88).

"LNG is an important part of EU's diversification strategy" to improve energy security of its members (EC 2019b). Countries in Europe which have operational LNG import terminals are Belgium, France, Italy, Greece, Malta, The Netherlands, Spain, Portugal, Turkey, Poland and Lithuania (Gas Infrastructure Europe [GIE] 2019).

12 Kenai, AK; Sabine, LA; Cove Point, MD; Corpus Christi, TX; Hackberry, LA; Elba Island, GA; Freeport, TX.

When it comes to Central and Eastern Europe, Poland and Lithuania have operationalized LNG import terminals – Świnoujście and Klaipėda (King & Spalding LLP 2018) – as a part of their internal energy strategies of energy supply diversification. Poland's LNG terminal, which was put in operation in 2016, serves for importing LNG from Qatar, Norway and USA which has cumulatively increased three-fold in the first three years (*Statista*, n. d.). On the other hand, Klaipeda, which started operations in 2014, has been the destination for LNG from the following countries: Norway, the United States, Trinidad and Tobago, and Nigeria (Klaipėdos nafta [KN] 2018). Both terminals are considered crucial for procuring natural gas from alternative sources and are therefore recognized by the EU as a way for enhancing energy security in Poland and Lithuania, and in the European Union. The EU has recently granted 128 million euros to Poland for extending the Świnoujście LNG terminal (in addition to 250 million EU had already invested in the terminal) and 350 million euros to Lithuania for upgrading the Klaipeda LNG terminal in terms of safety and size (EC 2019a; EC 2020).

These two terminals have provided US with a chance to export LNG to Central and Eastern Europe and contribute to diversification strategies and overall energy security of Poland and Lithuania. Indirectly, this can also mean improved energy security if in prospect CEE countries develop more integrated gas market, since the contracts for LNG trade with the US don't include the destination clause and the buyer is free to resell the gas to another country (Cornot-Gandolphe 2016, 25).

In spite of certain tensions in transatlantic relations, energy security is an area where US and EU have mostly agreed upon. US became the sixth LNG supplier to the EU in 2017 (6%), along with Norway (7%), Peru (7%), Nigeria (20%), Algeria (20%) and Qatar (37%) (European Commission [EC] 2017). President Trump and former President of the European Commission Juncker met in 2018 in the White House and joint US-EU Statement was issued subsequently. Strengthening "strategic cooperation with respect to energy" was one of the main points in the statement, meaning that EU would import more gas from the US (EC 2018b). The White House has reported 272% increase in US LNG exports as a result of Trump's energy policy and this agreement (The White

House 2019). Exports to Poland have accordingly increased – US has exported 3.440 mcf[13] to Poland in 2017, and continued with similar quantity in 2018, while more than a tenfold increase in LNG export has been spotted in 2019 – 38.653 mcf (EIA 2020c). On the other hand, exports to Lithuania have decreased in the same period – this country received 6. 844 mcf in 2017, and 3. 455 in 2019 (EIA 2020d).

It is possible that Trump has tried to deflect from criticism in security and defense area regarding commitment to allies by putting an effort to contribute to energy security in Central and Eastern Europe. He tried to present US as a defender in comparison to others' aggressive behavior when it comes to energy trade – "As a growing supplier of energy resources, technologies, and services around the world, the United States will help our allies and partners become more resilient against those that use energy to coerce" (NSS 2017, 23). Trump and other people from his administration have dubbed US LNG exports as "freedom gas" or "molecules of freedom" on various occasions (e. g. US Department of Energy [DoE] 2019; Buurma 2019). During the World Economic Forum in Davos in 2019, Trump declared "We've been so successful that the United States no longer needs to import energy from hostile nations. With an abundance of American natural gas now available, our European allies no longer have to be vulnerable to unfriendly energy suppliers either. We urge our friends in Europe to use America's vast supply and achieve true energy security" (Trump 2020).

During his first visit to Poland, Trump reassured the Polish about US commitment to Art. 5 and mutual defense and lauded their decision to acquire Patriot air and missile defense system from the US (Trump 2017c). Trump also expressed American commitment to "securing your access to alternate sources of energy so Poland and its neighbors are never again held hostage to a single supplier of energy" (Trump 2017c). As Drezner (2019, 8) points out, Trump's stance that US should use its enormous capabilities to achieve better deals with other countries, including allies, was salient in the security sphere. Trump has also linked providing protection within NATO and energy security, with regard to which countries member states import their energy from. He condemned German-Russian efforts to build the Nord Stream 2 and thus further

13 Million cubic feet.

connect German energy security to import of Russian natural gas and said that is something "NATO has to look at" (Trump 2018b). "[Y]ou have a country like Poland that won't accept the gas. You take a look at some of the countries, they won't accept it, because they don't want to be captive to Russia. But Germany, as far as I'm concerned, is captive to Russia, because it's getting so much of its energy from Russia. So we're supposed to protect Germany, but they're getting their energy from Russia. Explain that. And it can't be explained." (Trump 2018b). Accordingly, Trump has signed a bill containing Protecting Europe's Energy Security Act of 2019 which calls for immediate cessation of Nord stream 2 construction activities and posits that non-complying parties will face sanctions (US Department of State [DoS] 2019). Simultaneously, Poland's efforts to lower the imports of Russian gas were commended and rewarded with financial support for infrastructure projects within the Three Seas Initiative.

It seems that it's important for US during Trump's administration to be perceived as a provider of energy security in Central and Eastern Europe, i. e. to link the achieved level of diversification in those countries with American involvement. Prior to US-Poland meeting in June 2019, former US Secretary of energy Perry commented on bilateral relations in the area of energy and acclaimed President Trump's contribution to energy security in Poland – "You can't have national security until you have energy security. And Poland is headed towards that energy security platform. Mr. President, it is thanks to your policies. And your clear message to all of us on the administration team is to get out there and get these deals done. And nothing is more powerful than what's happening in the American energy front right now. And so, LNG is a big part of that." (Trump 2019b). Admitting, alternative sources of energy supply can be considered as contributing to energy security in Poland and the Baltic States. Nevertheless, countries in Central and Eastern Europe, including Poland, Lithuania, Latvia and Estonia are still predominantly relying on Russian energy, even though their diversification strategies have proven partly efficient. There's still a long way ahead of them to improve their energy security, albeit they have taken the first step towards that goal. As mentioned earlier, their imports of natural gas from the US are still rather small. Also, they don't import only American

natural gas, but also natural gas from other countries. Therefore, Trump's claim that "American allies all around the world, like in Poland and Lithuania, are now using American natural gas to reduce their dependence on countries who use energy as a weapon of coercion" (Trump 2019a) seems somewhat exaggerated. This and similar statements, however, can signal that US is still committed to its allies in energy security and areas other than that, and that if needed to, it will stand in their defence.

## US APPROACH TO THE THREE SEAS INITIATIVE

Another aspect of US approach to energy security in Poland and the Baltic States, in addition to expanding LNG trade, is the political and financial support Trump's administration provides for the Three Seas Initiative. The Initiative is a platform of 12 countries[14] in Central and Eastern Europe launched in 2015 with the proclaimed goal of enhancing three main pillars: economic development, European cohesion and transatlantic ties (Three Seas Initiative, n. d. a). One of the main areas of interest is energy security, especially building new energy infrastructure in designated countries and connecting their energy markets. Since infrastructure is a source of many challenges for diversification of energy supply, the Initiative can provide a framework for cooperation in this area and attract more attention and financial support than individual countries. As mentioned earlier, the national energy strategies of these countries consider modernizing infrastructure a big part of their energy security. Besides the Three Seas initiative, there are some regional and bilateral infrastructure projects, mostly financially supported by the EU, such as the Baltic connector which should connect Finland and the Baltic states' gas markets (EC 2016), enhancement of the Estonia-Latvia interconnection (EC 2018a) and enhancement of Latvia-Lithuania interconnection (EC 2019c, 8).

According to the Three Seas Initiative progress report, there are eight multilateral and six bilateral and national projects in energy area (Three Seas Initiative Summit, n. d. b). Two multilateral projects have been completed and substantial progress has been reported for four of them. The projects are in accordance with

14 Austria, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia.

the EU regulation and EU supports the efforts of its members to diversify energy supply and transport. That's the reason why EU has provided financial support for the implementation of projects. More than 50% are to be financed through EU, EBRD and EIB, and the most financing from EU (88%) goes to energy multilateral projects (Three Seas Initiative Business Forum 2019). Most of the planned projects have the aim of connecting the energy infrastructure in participating countries, which is of the essence if they want to create a regional gas market. Gas Interconnector Republic of Poland-Republic of Lithuania (GIPL) is one of the most important projects within the Initiative, recognized as a Project of Common Interest by the EU (EC 2019c, 8). Submitted by Poland and Lithuania, the project aims to connect their gas transmission systems and to incorporate the Baltic states into the European gas market, thus reducing their energy dependence and improving overall energy security in the region (Three Seas Initiative Summit 2018, 9). One of the planned projects encompasses integration of the Baltic pipe and Poland-Slovak interconnection into the Three Seas region infrastructure (Three Seas Initiative Summit 2018, 24–25).[15]

The representatives of twelve countries first convened for an official summit in Dubrovnik in 2016 (Three Seas Initiative Summit. n. d. a.). Since then, three more summits have taken place, in Warsaw in 2017, in Bucharest in 2018, and in Ljubljana in 2019. Warsaw summit received a great deal of attention because of Donald Trump's presence. This represented diplomatic support, which continued with former US Secretary of Energy Perry's presence in the 2018 and 2019 summits. During his speech at the Warsaw summit, Trump expressed that US abundant resources offer a possibility for diversification of energy and that US wouldn't use energy to coerce the CEE countries (Trump 2017b). According to Zubovic (2019, 86) Trump's statement created apprehension in Germany and Russia and was interpreted as an attempt to divide Europe. Even though such accusation were later dismissed, Zubovic (2019, 86) still holds that his presence was a demonstration of power or as she puts it "showing muscle".

15 United States has also shown interest in the project of building the LNG import terminal on the island of Krk in Croatia. This project, which is also included in the EU PCI list, has the goal of diversification of energy supply and connection of Central and Eastern Europe gas market (Three Seas Initiative Summit 2018, 32).

Despite his disapproving of other countries' actions as coercive, economic coercion can be found in Trump administration's foreign policy as well. According to Drezner (2019, 17) Trump's administration has used economic coercion extensively "[w]hether through tactical issue linkage, traditional tariffs, financial statecraft, export controls, or combined uses of multiple measures". His transactional approach to relations is also of significance regarding this, since allies weren't exempt from linking security with economic issues and from indirect consequences of sanctions. Moreover, coercion can also present itself in the form of positive sanctions or reward-based strategy (Morin and Paquin 2018, 35).

American support for the Initiative is in compliance with the goal of expanding US LNG exports to Central and Eastern Europe. Building or improving critical infrastructure can create more opportunities in terms of trade. However, some authors explain America's interest in the Initiative as a manifestation of its "geo-economic and geopolitical interests in Central and Eastern Europe" (Kurečić 2018, 122). This relates to the stance that this region continues to be strategically important as "the area of overlapping influences of Russia and the USA in several domains" (Biziewski 2019, 194). As Soroka and Stepniewski (2019, 19) point out, Trump's presence at the Warsaw summit, as well as the presence of other high official from the EU, US and China at other Three Seas Initiative gatherings have provided the Initiative with geopolitical significance. Górka (2018, 60) believes that "America's participation in the initiative will give it further opportunities to export oil, gas and other raw materials and thus lead to greater revenue and world influence". Zubovic (2019, 88) thinks that America is using the project to establish itself as a direct competition to Russia in the sphere of energy in Europe".

We also believe that this support transcends the economic sphere. Surely, it is in the US economic interest to increase the number of destination countries and overall quantities of exported energy, especially since Trump promised creating jobs for Americans through energy exports (Trump 2016b, Trump 2017a). This will probably happen if the gas markets in the Central and Eastern Europe, and specifically in the Baltic States become interconnected. Providing that some quantities of LNG get to other markets in Central and Eastern Europe would require investment in infra-

structure that connects their gas supply (although smaller quantities can be transported by truck). As written above, there are plenty of projects envisaged in the energy area and many of them have been started. However, the timeline for their completion will probably exceed Trump's time in office, which indicates that there are some constraints for US to abundantly expand the export to countries other than Poland and Lithuania. Even if the interconnections were built during Trump's presidency, LNG shipping in larger quantities would probably require additional commitment for securing the maritime route or the onshore infrastructure, so this cannot be considered only from economic perspective. Concomitantly, Trump's view on energy trade reflects the stance that it differs from other commercial goods – "I think energy is a whole different story. I think energy is a much different story than normal trade" (Trump 2018b). Additionally, Trump's National Security Strategy and his subsequent public documents have declared providing energy security for allies as their goal. As stated in the National Security Strategy, US "will work with our allies and partners to diversify European energy sources to ensure the energy security of European countries" (NSS 2017, 48).

It seems that US response to the opportunity for projecting energy power to Poland and the Baltic States is more salient when it comes to the Three Seas Initiative, considering the lesser economic benefits in the short term for the US than it case of increase in LNG exports. Also, besides Trump's promises, there were more concrete actions regarding this Initiative. Members of the House of Representatives introduced a resolution in "support of the Three Seas Initiative in its efforts to increase energy independence and infrastructure connectivity thereby strengthening the United States and European national security" in October 2019 (US Congress 2019). This document calls for US support in diversifying energy supply and enhancing energy security in member countries of the Initiative, reiterating that some of the CEE countries are perceived as "vital allies" to the US (US Congress 2019). Although it isn't binding, the resolution serves as a political statement. Some of the perceived risks for those countries encompass their dependence on Russian energy and infrastructural deficits (US Congress 2019). Moreover, this document indicates that Russia is perceived as threat regarding energy security by US congress, claiming that it uses

"energy as a tool for coercion" and condemning pipeline projects as a risk to energy security in Europe (US Congress 2019). In accordance with the HR resolution, US pledged to provide up to 1 billion dollars as a financial support for the Three Seas Initiative, which US Secretary of State Pompeo announced during the Munich Security Conference in February 2020 (Axelrod 2020). The funding will be provided through the International Development Finance Corporation (Axelrod 2020), which serves as a development bank.

## CONCLUSION

This paper addressed the question of US approach to energy security in Poland and the Baltic States during Trump's presidency, considering two main aspects – increase in LNG exports and support for the Three Seas Initiative. In accordance with the neoclassical realist theory view of systemic opportunities, we tried to describe US response to the opportunity of projecting its energy power to the designated states. Considering the types and scope of actions, we can conclude that US has partially responded to this opportunity. Trump's perception that US needs to have certain leverage in negotiations with other countries, both allies and adversaries, has contributed to this response. Energy area had been recognized as potential leverage, which was manifested through Trump's "energy dominance" approach. In accordance with this, Trump proclaimed that US is using its energy resources to reduce the energy dependence of its allies in Europe. Nevertheless, transactional approach which has been attributed to him and his administration was applied in these cases as well – Trump linked the energy security and meeting the spending obligation for NATO. His public documents suggest that US should be regarded somewhat as a defender when it comes to energy dependence, while other exporting countries actions were deemed as coercive. Trump's administration has reiterated that US is greatly contributing to energy security in Poland, which can be in accordance with the need to be perceived as in position of strength internationally. This is also related to improving US international prestige and reputation, which can be of significance in other regions such as the Middle East. US exports of LNG have been increased; however, they are still relatively moderate, and until infrastructure projects will have

been finished, they can't be substantially expanded. Regarding the Three Seas Initiative, Trump's administration has shown the will to provide financial support, and the Initiative has been given geopolitical significance with US and other great powers presence at its annual gatherings. Moreover, the resolution introduced in the US Congress stated energy security of the Three Seas Region is considered American interest, and that US should be involved in reducing energy dependence of these countries. However, considering that these countries have already started with internal energy diversification strategies, and that EU has provided the most of funding for implementation of those strategies, the significance of US involvement in the matter can't be regarded as crucial. It can however be a signal of commitment to the countries which rely on the US for security guaranties.

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# ПРИСТУП ТРАМПОВЕ АДМИНИСТРАЦИЈЕ ЕНЕРГЕТСКОЈ БЕЗБЕДНОСТИ У ПОЉСКОЈ И БАЛТИЧКИМ ЗЕМЉАМА**

## Резиме

*У овом раду се разматра приступ Сједињених Америчких Држава енергетској безбедности у Пољској и Балтичким земљама – Естонији, Литванији и Летонији за време администрације Доналда Трампа. Постоји неколико изазова енергетској безбедности ових земаља који пре свега произилазе из недостатка диверзификације понуде, као и застарелости инфраструктуре за транспорт и дистрибуцију енергије. Према моделу који пружа неокласични реализам, може се уочити могућност или прилика да САД пројектују своју енергетску моћ у региону. Ипак, само постојање могућности не подразумева нужно и деловање, које је резултат и филтрирања кроз интервенишућу варијаблу, у овом случају перцепције америчког председника Доналда Трампа и чланова његове администрације. У раду је истраживан приступ САД у два случаја – повећање извоза течног природног гаса у земље Централне и Источне Европе и подршка Иницијативи Три мора, као регионалној платформи за сарадњу у области енергије и транспорта. У Трамповим јавним излагањима и јавно доступним документима може се приметити његов став да САД треба да допринесу енергетској безбедности савезника у складу са перцепцијом да су САД „енергетски доминантна" земља и у складу са веровањем да ова држава мора да наступи са јаче позиције у преговарању. Поред тога, пропуштање деловања у овој прилици може бити схваћено и као свеукупна слабост и пренети се на америчку политику према другим регионима, попут Блиског истока, што је нарочито важно у контексту заоштравања односа*

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*са Ираном. Ипак, прихвата се став да је Трампов поглед на свет заснован и на „трансакционом приступу", тако да се и у случају односа са савезницима првенствено сагледава да ли постоји перципирани добитак или губитак за САД. У складу са тиме, САД су делимично допринеле диверзификацији енергије у овим земљама, али је тај допринос још увек на релативно ниском нивоу. С друге стране, постоји извесно неслагање између начина на који су Трамп и чланови његове администрације представили свој приступ енергетској безбедности у наведеним земљама и мера које су у том циљу предузете.*

**Кључне речи**: *Пољска, Балтичке земље, Централна и Источна Европа, енергетска безбедност, енергетска зависност, САД, Доналд Трамп*

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