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Empowering the Geopolitical EU

in the Eastern Neighbourhood and the Western Balkans

DELIVERABLE

D 2.3

Green Energy Transition

WORK PACKAGE

WP 2

LEAD BENEFICIARY

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BACKGROUND

About GEO-POWER-EU

GEO-POWER-EU aims to empower the EU to manage security threats in its Eastern Partnership and the Western Balkans amidst a deteriorating geopolitical environment. The project's primary ambition is to surpass current standards and develop a comprehensive EU strategy for these regions, utilizing new and reformed policy instruments while considering the strategic ambitions of other geopolitical actors.

To achieve this, GEO-POWER-EU's work plan is built on six specific objectives: proposing adaptations to the EU Enlargement policy to reflect new realities; examining the relevance of the Eastern Partnership (EaP) and providing policy recommendations for its reform; assessing the influence of other geopolitical actors, including the United States, Russia, China, and Turkey, in these regions; offering strategic foresight on the prospects of geopolitical competition in these areas; exploring ways to enhance the EU's ability to contain military threats from beyond its borders; and proposing a comprehensive, multidimensional EU strategy to guide relations with Western Balkan and Eastern Partnership countries.

The project's research aims to advance beyond the current state of the art by developing a new conceptual and policy framework using both quantitative and qualitative methods. Methodologically, GEO-POWER-EU leverages cutting-edge expertise from various disciplines, implementing a multi-stage plan grounded in a participatory and inclusive approach. This approach involves systematic engagement of researchers from third institutions, decision-makers, stakeholders, and citizens—including those from the regions under analysis—throughout the project cycle.

More about the project: geo-power.eu

Partner beneficiaries

- 01 European Neighbourhood Council (ENC), Belgium
- 02 University of the Peloponnese (UoP), Greece
- 03 Kentro Erevnon Notioanatolikis Evropis Astiki Mi Kerdoskopiki Etaireia (SEERC), Greece
- 04 Alma Mater Studiorum - Universita Di Bologna (UNIBO), Italy
- 05 Wiener Institut Fur Internationale Wirtschaftsvergleiche (WIIW), Austria
- 06 Sveuciliste U Rijeci (UNIRI), Croatia
- 07 Institut Za Demokratija Societas Civilis Skopje (IDSCS), Republic of North Macedonia
- 08 Univerzitet U Beogradu – Fakultet Političkih Nauka (FPN), Serbia
- 09 Vienneast Consulting Gmbh (VE Insight), Austria
- 10 Democratization Policy Council (DPC), Germany
- 11 Institutul Pentru Dezvoltare Si Initiative Sociale Viitorul (IDIS VIITORUL), Moldova
- 12 Odeskiy Nacionalniy Universitet Imeni I.I. Mechnikova (ONU), Ukraine
- 13 Gruusia Strateegiliste Ja Rahvusvahliste Uuringte Sihtasutus-EEST (GFSIS Estonia), Estonia
- 14 Utrikespolitiska Institutet Informationsavd (UII), Sweden

Glossary, Abbreviations and Acronyms

EU	European Union
WB	Western Balkans
EaP	Eastern Partnership
BiH	Bosnia and Herzegovina
CBAM	Carbon Border Adjustment Mechanism
EEES	External Energy Engagement Strategy
FIMI	Foreign Information Manipulation and Interference
CC	Candidate Countries

Executive Summary

This report examines the interrelationship between green energy transition, energy security, and energy poverty in selected countries of the Western Balkans (WB) and Eastern Partnership (EaP), namely Serbia, Bosnia and Herzegovina, Kosovo, Moldova, and Ukraine. The analysis is situated within a broader context characterised by the European Union's accelerating decarbonisation agenda, growing concerns over energy security following Russia's full-scale invasion of Ukraine, and ongoing processes of EU enlargement and neighbourhood integration. The report explores how energy transition policies are perceived and implemented in countries facing varying levels of institutional capacity, socio-economic vulnerability, and alignment with EU energy and climate frameworks.

The study addresses four interrelated research questions concerning: (a) the socio-economic and governance dimensions of the energy transition; (b) the geopolitical implications of green transformation; (c) the mechanisms through which the EU can support decarbonisation and energy sector reform; and (d) pathways towards enhanced energy security, resilience, and market integration. Drawing on qualitative evidence from ten focus groups involving 75 participants across the five countries, the report captures the perspectives of local and regional public authorities, civil society organisations, and business representatives directly engaged with energy transition processes.

The findings demonstrate that energy transition in the specific countries in the WB and EaP is not primarily perceived as an environmental issue alone. Rather, stakeholders understand it as a broader socio-economic, governance, and geopolitical challenge closely linked to questions of development, institutional effectiveness, social justice, and European integration. Across all five countries, three interconnected findings emerge.

First, energy poverty is widely perceived as a structural condition rooted in long-term economic vulnerability rather than a temporary consequence of energy market fluctuations. Participants consistently linked energy insecurity to low incomes, uneven regional development, weak industrial bases, deteriorating infrastructure, and limited economic opportunities. Vulnerable groups, including low-income households, pensioners, rural populations, single-parent families and families with children, were viewed as disproportionately exposed to rising energy costs and the distributive consequences of decarbonisation measures. Stakeholders frequently

emphasised that households face difficult trade-offs between energy consumption and other basic needs, including food, healthcare, and education. These findings suggest that energy transition policies risk exacerbating existing inequalities unless accompanied by robust social protection measures and inclusive governance arrangements.

Second, stakeholders highlighted significant governance and institutional constraints affecting the implementation of energy transition policies. Across all cases, participants identified administrative fragmentation, limited technical expertise, weak implementation capacity, and insufficient coordination between national and local authorities as major obstacles to reform. At the same time, concerns regarding transparency, corruption, and limited public participation were frequently raised, particularly by civil society representatives. The findings reveal a persistent gap between externally driven policy commitments and domestic implementation capacity, contributing to perceptions that reforms are often adopted formally but not fully translated into practice.

Third, the green transition is increasingly understood through a geopolitical and security-oriented lens. Energy security was consistently framed as a matter of resilience, sovereignty, and strategic autonomy rather than solely a technical issue of energy supply. Dependence on external suppliers, particularly Russia, was widely associated with geopolitical vulnerability and exposure to external pressure. Consequently, decarbonisation, renewable energy deployment, and market diversification were frequently viewed as strategic necessities that can reduce dependency and strengthen resilience. At the same time, access to the EU market emerged as a major driver of policy convergence and regulatory reform. While participants generally regarded closer integration with European energy markets as beneficial, they also expressed concerns regarding unequal adjustment costs and the capacity of domestic industries and institutions to comply with increasingly demanding regulatory requirements.

The findings further highlight the importance of infrastructure modernisation, institutional strengthening, and human capital development in supporting a successful transition. Participants consistently identified ageing electricity grids, insufficient storage capacity, weak interconnectivity, and limited technological readiness as major barriers to renewable energy deployment and energy resilience. Financial support alone was viewed as insufficient. Instead, stakeholders emphasised the need for integrated approaches combining infrastructure investment, implementation-oriented technical assistance, institutional capacity-building, and specialised skills development.

Based on these findings, the report advances six policy trajectories. First, the EU should prioritise targeted investment in strategic energy infrastructure, including electricity grids, district heating systems, storage technologies, and decentralised renewable energy solutions. Second, energy transition policies should incorporate stronger social protection measures aimed at mitigating energy poverty and protecting vulnerable populations from disproportionate adjustment costs. Third, long-term institutional capacity-building initiatives should be expanded through technical assistance, embedded expertise, and sustained support for local governance structures. Fourth, strategic communication efforts should be strengthened to counter disinformation and increase public understanding of the economic, environmental, and security benefits of the transition. Fifth, EU funding mechanisms should be simplified and adapted to local administrative realities through reduced bureaucratic complexity, multilingual application procedures, and improved accessibility for smaller municipalities and under-resourced actors. Finally, further investment in market integration, interconnectivity, and energy storage should be prioritised in order to strengthen system resilience and reduce external dependencies.

Overall, the findings of this deliverable demonstrate that the green energy transition in the specific WB and EaP countries represents a deeply structural, socio-political, and geopolitical transformation unfolding within contexts characterised by institutional fragility, economic precarity, and uneven European integration. While EU conditionality and market incentives constitute significant drivers of reform, the legitimacy and long-term sustainability of the transition ultimately depend on the extent to which policies are socially inclusive, institutionally grounded, and responsive to domestic realities. The findings further suggest that the sustainability of the transition will depend on whether candidate and potential candidate countries perceive themselves not merely as rule-takers adapting to externally defined decarbonisation objectives, but as beneficiaries of a transformation that supports their own economic development, energy resilience, and green industrial potential. Addressing perceptions of uneven adjustment burdens and ensuring that the benefits of integration are visible at the local level will therefore be critical for maintaining public support and strengthening the legitimacy of both the transition and the broader European integration process. Without an integrated approach, the transition risks exacerbating existing inequalities, weakening public trust, and limiting the transformative potential of EU engagement in the Western Balkans and Eastern Partnership regions.

Introduction

In the context of shifting geopolitical dynamics and the European Union's (EU) strategic push toward green transition, EU candidate and potential candidate countries in the Western Balkans (WB) and in the Eastern Partnership (EaP) are expected to align with EU energy transition targets. Green transition,¹ however, poses significant risks to energy security and may exacerbate energy poverty.² Most WB and EaP countries rely significantly on imported fossil fuels, rendering energy supply a security concern, while continuing to operate outdated infrastructure dating back to the Cold War era, a fact that makes them vulnerable to energy poverty. The EU has intensified its efforts to support partner countries' energy security and transition, as reflected in the EU's 2014 External Energy Engagement Strategy (EEES)³, the 2022 RePowerEU Plan,⁴ and the Energy Support Package.⁵

The countries examined in this research i.e. **Serbia, Bosnia and Herzegovina, Kosovo*, Moldova, and Ukraine** have been selected as they are part of the Energy Community and thus affected by EU policies, while at the same time they are heavily inflicted by energy poverty.⁶ The aforementioned countries have progressed at various speeds and levels in adopting national green agendas, in line with their international commitments. However, the process of energy transition entails unintended consequences, including significant societal and economic concerns related to energy poverty and vulnerability. Inefficient housing and infrastructure,

¹ European Commission (2019a). *The European Green Deal*. [online] European Commission. Available at: https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en

² According to UNDP, 'Energy poverty is a lack of adequate, reliable, and affordable energy for lighting, cooking, heating, and other daily activities necessary for welfare and economic development' (<https://data.undp.org/blog/1-18-billion-around-the-world-in-energy-poverty>)

³ European Commission (2025). *EU external energy engagements*. [online] energy.ec.europa.eu. Available at: https://energy.ec.europa.eu/topics/international-cooperation/eu-external-energy-engagements_en.

⁴ European Commission (2022). *REPowerEU*. [online] European Commission. Available at: https://commission.europa.eu/topics/energy/repowereu_en.

⁵ European Commission (2023). *COMMISSION RECOMMENDATION (EU) 2023/2407 on energy poverty*. [online] EUR-Lex. Available at: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:L_202302407

⁶ See for example: Young, J. and Macura, A. (2023) 'Forging local energy transition in the most carbon-intensive European region of the Western Balkans', *Energies*, 16(4), p. 2077. <https://doi.org/10.3390/en16042077>; Naumenkova, S., Tishchenko, I., Mishchenko, V. and Mishchenko, S. (2024) 'Rethinking energy poverty alleviation through energy efficiency: Evidence from Ukraine', *Environmental Economics*, 15(2), pp. 198–214. [https://doi.org/10.21511/ee.15\(2\).2024.14](https://doi.org/10.21511/ee.15(2).2024.14); Arion, V., Leu, V. and Hlусov, V. (2023) 'Republic of Moldova: Assessment of energy poverty', *Journal of Engineering Science*, 30(1), pp. 85–98. [https://doi.org/10.52326/jes.utm.2023.30\(1\).07](https://doi.org/10.52326/jes.utm.2023.30(1).07)

reduced subsidies, rising inequality and low incomes, in addition to outdated infrastructure systems, are among the main parameters contributing to sustaining and reproducing energy poverty in the region.⁷

This report aims to assess the perceived and actual exchanges between green energy transition, energy security, and energy poverty in the selected countries; to collect and analyse perspectives from involved stakeholders on policy implementation challenges and socio-economic implications; and to identify policy recommendations and context-sensitive opportunities for collaborative strategies in relation to the five case studies.

Note on Methodology

Deliverable (D2.3) is based on findings of a series of focus groups, the latter being part of the third stage of the project's methodology focusing on deeper qualitative exploration of complex policy challenges through stakeholder interaction. The purpose of this deliverable is to investigate how competing imperatives, such as green transition, energy security, and poverty alleviation, are perceived and managed at the local and regional levels, by gathering insights from key stakeholders.

The methodology applied is rooted in the project's interdisciplinary approach, with qualitative insights from group dynamics offering layered meaning. Focus groups were selected as the primary method due to their capacity to capture socially constructed meanings and to facilitate interactive discussions through which participants can articulate, negotiate, and challenge viewpoints⁸ (Morgan, 1997). This approach was deemed particularly appropriate for examining complex policy issues, such as green transition, where perceptions are shaped by institutional roles, socio-economic conditions, and local governance contexts. Focus groups allow participants' interpretations and lived experiences to surface through dialogue, complementing the project's strategic focus on measuring both external influence and internal orientation.

⁷ Bouzarovski, S., Brajković, J., Robić, S., Brown, C. and Vuchkova, I. (2024) 'Energy poverty in the Energy Community region: Interrogating policy formulation and coverage', *European Urban and Regional Studies*, 31(2), pp. 184–199. <https://doi.org/10.1177/09697764231162229>

⁸ David L. Morgan, *Focus Groups as Qualitative Research*, 2nd ed. (Thousand Oaks, CA: Sage Publications, 1997), <https://doi.org/10.4135/9781412984287>

The research was conducted across five countries: Serbia, Bosnia and Herzegovina, Kosovo*, Moldova, and Ukraine. These countries were selected based on their diverse positions in relation to EU integration processes and their shared challenges concerning energy vulnerability and socio-economic transition, representing the two focus areas of the project: Western Balkans and EaP. Two different target groups of stakeholders participated in the focus groups: Local and regional public administration officers (e.g. energy, social policy, local governance) and Representatives of social partners (e.g. business associations in relevant sectors, civil society organisations working on green transition and energy poverty). Each participating country hosted two in-person focus groups, with a total of 10-20 participants per country. Two focus groups were mixed. A gender balance was accomplished among the participants in the focus groups.

The implementation of focus groups encountered some challenges, particularly related to the societal and ethnic composition of each country and participant recruitment. Addressing such methodological challenges the research was adapted to incorporate a) a mini group held in Kosovo consisting of local and regional public administration and b) the two mixed groups held in Bosnia and Herzegovina.

Prior to collecting data, a training session was conducted in September–October 2025 in order to cover the project’s methodological framework, focus group moderation techniques, ethical procedures, and use of the reporting template. All partners taking part in this task were handed a guide which included questions and suggested prompts.

The guide included open-ended questions designed to elicit participants’ views on the challenges and opportunities associated with the EU green transition, the drivers and manifestations of energy poverty, and the vulnerabilities experienced by different population groups. Each session lasted approximately 60–90 minutes and was moderated by a convener and a rapporteur from the local partner. All focus groups were conducted in the local language, apart from the focus group taking place in Kosovo, where there was no local partner.

All focus groups were conducted either in person or online, depending on local conditions. In Ukraine both focus groups were conducted online due to the ongoing Russian offensive. Likewise, the focus group with public authorities in Serbia was conducted online amidst the continuous friction between Academia in Serbia, most notably the University of Belgrade, and the current government over supporting the student protests resulting from the tragic events in Novi Sad in 2023. Discussions were audio-recorded with participants’ informed consent and

subsequently transcribed verbatim. Where necessary, transcripts were translated into English to ensure consistency in analysis across country cases. To analyse collected data, thematic analysis was employed as the method for identifying, analysing, and reporting shared and divergent patterns within the views expressed by participants.⁹

The obtained ethics approval and related documents by the UoP for conducting ethically approved research within the framework of the project were applied in the conduct of the focus groups. All activities complied with GDPR and the GEO-POWER-EU Ethics and Data Management Plan (D6.1). Participants were fully informed of the study's purpose, data protection provisions, and their rights (including voluntary participation and withdrawal).

Current State of the Policy Debate

The EU's green transition links to the EU Green Deal¹⁰, which is a **comprehensive economic transformation strategy**, whose main goal is to transform the EU into a modern, resource-efficient and **competitive economy**. It addresses the urgency for climate action and it organises its actions around activities linking to transforming the EU's economy, energy, transport and industries for a more sustainable future. Alongside cutting down emissions by 2030, related policies promote a clean transition that protects people and planet, is economically sound and socially fair.

The EU uses financial, regulatory, and accession conditionality to externalise the European Green Deal¹¹ to candidate states and neighboring countries. In the WB, the Green Deal is implemented via a very structured trajectory which includes the Green and Just Transition¹² framework and the Growth Plan for the Balkans conditional funding instrument. In the candidate countries of the EaP, the EU mirrors policies and instruments applied in the WB in its implementation of the Green Deal in the region. These vary in their deliberation and focus.

⁹ Braun, V. and Clarke, V. (2006) 'Using Thematic Analysis in Psychology', *Qualitative Research in Psychology*, 3, pp. 77-101.

¹⁰ European Commission (2019b). *The European Green Deal*. [online] European Commission. Available at: https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en.

¹¹ European Commission (2019c). *The European Green Deal*. [online] European Commission. Available at: https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en.

¹² Joint Research Centre (2025). *Green and just transition*. [online] Joint Research Centre. Available at: https://joint-research-centre.ec.europa.eu/scientific-portfolios/green-and-just-transition_en.

In the case of Ukraine, the focus is largely post-war reconstruction, such as rebuilding the electricity system. Thus elements of the EU Green Deal are tailored to the specific case's green transition. The main funding instrument is the Ukraine Facility.¹³ Moldova's green transition is more focused on energy diversification and decarbonisation in order to decrease its dependence on Russia. The EU funds these policies via macro-financial assistance. Finally, the EU promotes both regions' Green Agenda and energy autonomy through the implementation of the Energy Community,¹⁴ which, among other things, facilitates the integration of the WB, Ukraine, Moldova and Georgia into the EU internal energy market. The EU has sought to advance reforms aimed at liberalising energy markets, unbundling and privatising state-owned enterprises, and accelerating the transition to renewable energy through a combination of incentives and conditionalities.

The energy sectors of Bosnia and Herzegovina, Kosovo, Moldova, Serbia and Ukraine are characterised by a significant dependence on fossil fuels, although the structure of their energy systems, levels of import dependency, and progress towards renewable energy deployment vary considerably. As Contracting Parties to the Energy Community and, with the exception of Kosovo, candidate countries for European Union accession or countries pursuing closer integration with the EU, they are simultaneously engaged in a process of regulatory convergence with Chapter 15 (Energy) of the EU acquis. Across the five cases, the energy transition is shaped by a combination of decarbonisation objectives, energy security concerns, and accession-related conditionality. While all countries have adopted measures aimed at advancing renewable energy deployment and strengthening market integration, significant challenges persist with regard to fossil fuel dependence, infrastructure modernisation, market liberalisation, and institutional capacity to implement reforms.

Bosnia and Herzegovina maintains a very carbon-intensive energy system in the Western Balkans region, coal remains the dominant energy source, accounting for 47.9% of total energy supply in 2023, while oil represented 23.1% and natural gas only 3% (IEA, 2023a)¹⁵. Despite its heavy reliance on fossil fuels, the country benefits from significant hydropower resources, with hydropower contributing approximately 32.5% of electricity generation in 2024, while coal-fired power plants continued to generate around 58% of electricity. This dual structure illustrates a

¹³ European Council (2024). *The Ukraine Facility*. [online] Consilium. Available at: <https://www.consilium.europa.eu/en/policies/ukraine-facility/>.

¹⁴ Energy Community (2006). *Energy Community*. [online] www.energy-community.org. Available at: <https://www.energy-community.org/>.

¹⁵ IEA (2023a) *Bosnia and Herzegovina - Countries & Regions*. Paris: International Energy Agency. Available at: <https://www.iea.org/countries/bosnia-and-herzegovina>

broader tension between the country's substantial renewable resource base and its continued dependence on lignite-based electricity production. From an EU accession perspective, progress towards alignment with Chapter 15 of the *acquis* remains limited. The European Commission's 2025 Report identifies persistent shortcomings in electricity and gas market liberalisation, delays in adopting a National Energy and Climate Plan (NECP), and insufficient development of renewable energy support mechanisms (European Commission, 2025a)¹⁶.

Serbia's energy transition is primarily shaped by the challenge of balancing decarbonisation objectives with a long-standing dependence on fossil fuels. Coal remains the dominant source of energy, accounting for 42.2% of total energy supply in 2023, while oil contributes a further 25.8%. At the same time, Serbia benefits from significant renewable energy potential. Hydropower remains the country's most important renewable energy source and continues to provide a substantial share of electricity generation, while considerable untapped solar and wind resources have increasingly become a focus of government energy policy (IEA, 2023c)¹⁷. Recent renewable energy auctions have supported significant investments in new wind and solar capacities, reflecting growing momentum towards diversification of the energy mix. Nevertheless, Serbia continues to depend significantly on Russian gas supplies, progress in gas market liberalisation remains limited, and further reforms are required to strengthen market competition, improve energy efficiency, and support the implementation of a Just Transition associated with the gradual phase-out of coal. Compared to several countries in the region, Serbia has made measurable progress towards Chapter 15 alignment through the adoption of a new Energy Law, implementation of elements of the EU Third Energy Package, renewable energy support schemes, and the adoption of an Energy Development Strategy extending to 2050 (European Commission, 2025d)¹⁸.

Among the examined countries of the Western Balkans, Kosovo possesses the most coal-dependent energy systems in the region. Coal and coal products account for approximately 52.3% of total energy supply, while oil products contribute a further 34.1% (IEA, 2023e)¹⁹. This

¹⁶ European Commission (2025a). *Bosnia and Herzegovina Report 2025*. [online] *Enlargement and Eastern Neighbourhood - European Commission*, pp.82–83. Available at:

https://enlargement.ec.europa.eu/bosnia-and-herzegovina-report-2025_en [Accessed 4 Nov. 2025].

¹⁷ International Energy Agency (IEA) (2023c) Serbia. Paris: International Energy Agency. Available at: <https://www.iea.org/countries/serbia> (Accessed: 17 June 2026)

¹⁸ European Commission (2025d). *Serbia Report 2025*. [online] *Enlargement and Eastern Neighbourhood - European Commission*, pp.92–93. Available at: https://enlargement.ec.europa.eu/serbia-report-2025_en [Accessed 4 Nov. 2025].

¹⁹ International Energy Agency (IEA) (2023e) Kosovo. Paris: International Energy Agency. Available at: <https://www.iea.org/countries/kosovo> (Accessed: 17 June 2026).

dependence is reflected in the electricity sector, where generation remains overwhelmingly reliant on ageing lignite-fired thermal power plants, particularly Kosovo A and Kosovo B, which continue to generate significant environmental and public health concerns. While Kosovo has begun diversifying its energy mix through wind and solar energy auctions and has strengthened electricity market integration with Albania, renewable energy sources continue to represent a relatively limited share of overall energy consumption. Progress towards Chapter 15 alignment has been mixed. The European Commission highlights advances in electricity market coupling and energy efficiency programmes, demonstrating gradual movement towards regional market integration. However, significant obstacles remain, including delays in the adoption of key energy legislation, insufficient emergency oil stocks, slow implementation of the Energy Strategy, and limited progress towards achieving renewable energy targets (European Commission, 2025b)²⁰.

In contrast to the Western Balkan cases, Moldova's energy transition is primarily shaped by concerns related to energy security and external dependence rather than domestic fossil fuel production. The country's energy system relies heavily on imported natural gas, which historically created significant vulnerability to external supply disruptions. Since 2022, however, the geopolitical consequences of Russia's invasion of Ukraine have accelerated efforts to diversify energy sources and strengthen integration with European energy markets. These developments have positioned renewable energy deployment as both a decarbonisation strategy and an instrument of energy security. Supported by EU financial assistance and programmes such as EU4Energy, Moldova has expanded investments in solar and wind energy while simultaneously pursuing closer integration with the Romanian and wider European electricity markets. Compared with several countries in the region, Moldova has also made notable progress in aligning with Chapter 15 through the adoption of legislation implementing elements of the EU Electricity Integration Package and measures aimed at completely phasing out dependence on Russian energy resources. Nevertheless, challenges remain regarding strategic oil stock obligations, electricity market development and the expansion of renewable energy infrastructure necessary to support long-term energy security (European Commission, 2025c)²¹.

²⁰ European Commission (2025b). *Kosovo Report 2025*. [online] *Enlargement and Eastern Neighbourhood - European Commission*, pp.82–84. Available at: https://enlargement.ec.europa.eu/kosovo-report-2025_en [Accessed 4 Nov. 2025].

²¹ European Commission (2025c). *Republic of Moldova 2025 Report*. [online] *Enlargement and Eastern Neighbourhood - European Commission*, pp.88–89. Available at: https://enlargement.ec.europa.eu/document/download/23fa6af0-89b3-4532-a3d9-d1638727d14c_en?filename=moldova-report-2025.pdf [Accessed 4 Nov. 2025].

Ukraine's energy transition is increasingly shaped by the intersection of energy security, post-war reconstruction, and European integration. Prior to Russia's full-scale invasion, the country possessed one of the largest and most strategically important energy sectors in Eastern Europe, characterised by a diversified energy mix in which coal accounted for approximately 21.5% of total energy supply and oil for around 17% (IEA, 2023d). Nuclear energy has historically played a central role in electricity generation, alongside coal and natural gas, providing a significant degree of domestic energy production capacity. Since 2022, however, extensive attacks on energy infrastructure have fundamentally reshaped national energy priorities. The war has accelerated efforts to strengthen energy independence, diversify supply routes, and deepen integration with European energy markets. Despite wartime conditions, Ukraine has achieved significant progress towards Chapter 15 alignment, including the expansion of electricity and gas interconnections with neighbouring EU Member States, implementation of elements of the NECP, the introduction of biomethane exports to the EU, and continued regulatory reforms aimed at market integration. Nevertheless, substantial challenges persist, including incomplete market liberalisation, extensive infrastructure damage, governance weaknesses in state-owned enterprises, corruption risks, and the need for further alignment with EU renewable energy and nuclear safety legislation (European Commission, 2025e)²².

Policy debates that form around green transition in their majority concern issues such as the pace of the transition, economic costs, distributional effects, competitiveness implications, and governance of the transition. In the case of the Western Balkans and the EaP, the policy debates focus on the intersection of **EU accession, economic development, energy security, and governance reforms**. Literature on the topic highlights the local constraints in fully adapting the Green Agenda, such as weak institutions, governance deficit, limited administrative capacity, dependence on coal and fossil fuels and corruption (for example see Berisha 2026)²³; significant distributional effects due to the costs and benefits of transition unevenly distributed across regions, social groups, and economic sectors, affecting negatively notions of **just green**

²² European Commission (2025e). *Ukraine Report 2025*. [online] *Enlargement and Eastern Neighbourhood - European Commission*, pp.89–90. Available at: https://enlargement.ec.europa.eu/ukraine-report-2025_en [Accessed 4 Nov. 2025].

²³ Berisha, E. (2026). Green EU Integration: The Role of the Green Agenda in Accelerating Just Green Transitions in the Western Balkans. In: Berisha, E., Moodie, J., Allkja, L., Jeftić, M. (eds) *The Palgrave Handbook of Just Green Transitions in the Western Balkans and Beyond*. Palgrave Macmillan, Cham. https://doi.org/10.1007/978-3-031-95075-9_20

transition (for example see Süsser et al. 2024)²⁴ a phenomenon which adds the geopolitical dimension of weakened local economies, vulnerable to external actors such as Russia, China etc (for example see Prelec, Tzifakis and Bechev 2023)²⁵.

Taken together, the five cases illustrate diverse pathways and constraints in the green energy transition. While Bosnia and Herzegovina, Serbia, and Kosovo remain characterised by significant coal dependence, Moldova's transition is primarily driven by concerns related to energy security and external dependence, whereas Ukraine's energy transformation is increasingly shaped by the challenges of war, reconstruction, and European integration. Despite these differences, all five countries face common challenges relating to infrastructure modernisation, market integration, institutional capacity, and the implementation of EU-aligned decarbonisation policies. These structural characteristics provide the broader context within which stakeholder perceptions of energy poverty, energy security, and the green transition are examined in the subsequent analysis.

Analysis of Research Findings

The data collected from focus groups in five countries, were analysed using thematic analysis, following a systematic process of familiarisation, coding, and theme development. Transcripts were first read repeatedly to ensure immersion in the data. Initial codes were then generated to capture meaningful units of text related to the research questions. These codes were subsequently organised into broader themes reflecting recurring patterns across the dataset.

The thematic analysis was based on the following four research questions:

²⁴ Süsser, D., McGookin, C., McDowall, W., Lombardi, F., Braunreiter, L. and Bouzarovski, S. (2024) 'Rethink Energy System Models to Support Interdisciplinary and Inclusive Just Transition Debates', in Crowther, A., Foulds, C., Robison, R. and Gladkykh, G. (eds.) *Strengthening European Energy Policy: Governance Recommendations From Innovative Interdisciplinary Collaborations*. Cham: Palgrave Macmillan, pp. 145–157. , D., McGookin, C., McDowall, W., Lombardi, F., Braunreiter, L. and Bouzarovski, S. (2024) 'Rethink Energy System Models to Support Interdisciplinary and Inclusive Just Transition Debates', in Crowther, A., Foulds, C., Robison, R. and Gladkykh, G. (eds.) *Strengthening European Energy Policy: Governance Recommendations From Innovative Interdisciplinary Collaborations*. Cham: Palgrave Macmillan, pp. 145–157.

²⁵ Prelec, T., Tzifakis, N. and Bechev, D. (2023) *Green Power Politics: External Actors and Energy Transition in the Western Balkans*. Sarajevo/Graz: Balkans in Europe Policy Advisory Group (BiEPAG). Available at: <https://www.biepag.eu/wp-content/uploads/2023/12/Green-Power-Politics-External-Actors-and-Energy-Transition-in-the-Western-Balkans.pdf> (Accessed: 6 June 2026).

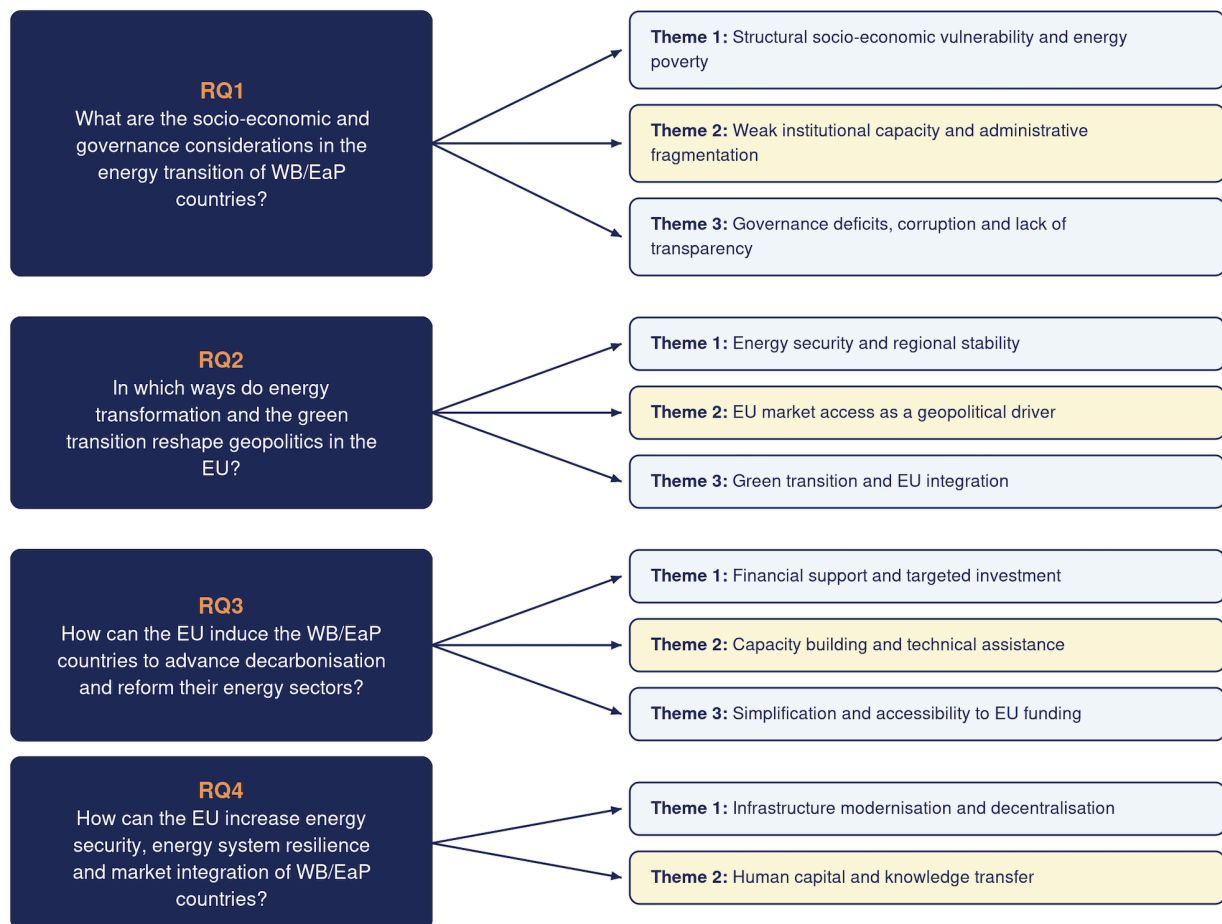
Research Question 1: What are the socio-economic and governance considerations in the energy transition of WB/EaP countries?

Research Question 2: In which ways the energy transformation and green transition reshape geopolitics in the EU?

Research Question 3: How can the EU induce the WB/EaP countries to advance decarbonisation and reform their energy sectors?

Research Question 4: How can the EU increase energy security, energy system resilience and market integration of WB/EaP countries?

As a result of the analysis, three themes, shared across the five countries, were identified per research question:



1. Socio-economic and governance considerations in the energy transition

Theme 1: Structural socio-economic vulnerability and energy poverty

Structural socio-economic vulnerability and **energy poverty** emerge as fundamental constraints shaping the energy transition in WB/EaP countries. The findings indicate that **energy poverty is neither a temporary nor isolated phenomenon**, nor a side-effect of the transition. It is a deeply embedded structural and multidimensional condition rooted in long-term economic underdevelopment, low incomes, and regional inequalities.

Energy poverty is rooted in the wider economy. Respondents traced this condition back to the structure of the economy itself. A Moldovan social partner argued that with "deep poverty and a lack of industrialisation and development" there is "no way to avoid energy poverty" (Moldova, SP-10) while a Kosovo administrator identified "a very narrow industrial base" as an underlying weakness (Kosovo, PA-2). On this structural diagnosis the two groups converge. The link between economic precarity and energy poverty was thus consistently emphasised, with limited industrialisation, persistent poverty, and uneven development understood to shape households' ability to access and afford energy. This uneven development also has a territorial dimension: a Moldovan administrator described "big differences between big cities and rural areas," generating "mass migration of young people to Chişinău or abroad" and leaving "provincial villages and towns... with only the elderly and vulnerable families" (Moldova, PA-4). Such constraints were also seen as persistent and difficult to escape, with one Moldovan social partner doubting the country would ever overcome the development difficulties, noting the slow return to population well-being in recent years (Moldova, SP-1).

Price shocks, such as significant tariff increases, further **deepen existing vulnerability**. For already vulnerable populations, such as families with children and the elderly, as well as very poor households, energy affordability remains a much more critical issue than for their wealthier counterparts (Moldova, PA-4).

The framing of vulnerability differs across the two regions. In the Western Balkans, participants have tied it to environmental and health degradation. A Bosnian social partner observed that the country would face "enormous costs in the health sector caused by fossil fuels" even "if we had not signed the energy transition agreement" (Bosnia, SP1-1) while a Kosovo administrator described winter air quality as a problem shared "in all the Western Balkan countries" (Kosovo, PA-6), generally framing dependence on polluting energy as a standing liability. No comparable framing exists in the EaP accounts, where vulnerability is instead expressed through acute shock and survival. A six-fold increase in the tariff has been

labelled as "the biggest energy shock in all of Europe", particularly for poorer households (Moldova, SP-1). In Ukraine, inevitably, the register is one of survival under wartime conditions, a situation of "forced stability" experienced through the prism of survival, largely sustained with help from European partners (Ukraine, PA-3). A Western Balkan parallel exists in Bosnia, where social partners stated that "we are barely surviving, and BiH citizens are used to this" (Bosnia, SP1-1). However, the tone is different: here it is one of chronic endurance rather than the crisis-driven precarity of the EaP cases.

Energy poverty is lived through severe everyday trade-offs affecting well-being and quality of life. Participants described situations in which households must choose between heating and other essential needs, including food, healthcare, and education, or rely on polluting energy sources to cope with rising costs. In Serbia, a social partner described households deciding whether to "freeze or breathe extremely polluted air," or spending less on "education, on transportation, on food, on healthcare" (Serbia, SP-7). Such conditions reflect not only economic precarity but also broader patterns of socio-economic instability, where uncertainty, short planning horizons, and survival-oriented behaviours dominate everyday life. Public administration officials drew particular attention to the role of price and the reach of support measures in this everyday experience. A Kosovo administrator described "fear, especially [of] energy poverty," because "the first thing that we do see is the price" and whether rising prices "will be affordable for citizens" (Kosovo, PA-2), while a Serbian administrator pointed to the failure of support to reach its targets, noting that local subsidy schemes "reproduce inequality" because "those who need it most do not apply... we cannot reach them" (Serbia, PA-4). This concern with affordability and delivery was voiced chiefly by administrators; the structural diagnosis, by contrast, was shared across both groups.

Overall, the findings demonstrate that the **energy transition in WB/EaP countries unfolds within a context of structural vulnerability, where socio-economic constraints significantly limit both the capacity of households to adapt and the effectiveness of policy responses.**

Theme 2: Weak Institutional capacity and administrative fragmentation

Governance-related challenges constitute a major constraint in the energy transition of WB/EaP countries, extending beyond policy design to issues of implementation, coordination, and institutional effectiveness. Across both stakeholder groups, the same underlying weaknesses recur: insufficient administrative capability, fragmentation between levels of

government, and dependence on externally driven frameworks; however, the two groups approach them from different positions.

Public authorities frame the problem as one of capacity and resources. In the presence of institutional capacity gaps, funding and policy frameworks cannot be put to use even where they exist. Respondents highlighted that funding instruments, such as grants, often remain underused because institutions lack specialist staff and trained personnel to manage them; as one Moldovan administrator put it, "What's the point of having grants if we don't have competent staff to manage them?" (Moldova, PA-6). Besides funding, procedural systemic obstacles, such as burdensome bureaucracy and required environmental consents slow delivery and act as investment deterrents (Kosovo, PA-1). Fragmentation of responsibility across institutions is also cited as an additional constraint (Kosovo, PA-5). Against this background, partial policy implementation emerges as a recurring pattern, with authorities selectively prioritising less complex measures while deferring more demanding structural reforms. This reflects not only capacity limitations but also a lack of sustained political commitment and strategic leadership.

Social partners locate the problem primarily in commitment and inclusion. Where administrators see a capacity deficit, social partners see a genuine intent deficit. In Bosnia, respondents argued that obligations had been taken without any real intention of meeting them, and without citizens being consulted in the decision (Bosnia, SP2-1). The same selective implementation that administrators attribute to capacity limits is read here as a matter of will: authorities signed up to the full Sofia Declaration but "focused only on" its easiest component, leaving available solutions unapplied (Bosnia, SP2-2). Additionally, lack of vision in policy was also highlighted, as per the quote of a Kosovo respondent "I would also like to add that so far the government policies, especially in the last five years, have been, let's say, a bit non-visionary" (Kosovo, SP-5). The effects are felt directly by those outside the institutions: a business owner reported having no one to approach for guidance, and an electricity network too underdeveloped to connect to even where the means to pay existed (Bosnia, SP1-2). This commitment deficit has a further consequence: where obligations are adopted without public consultation or genuine intent to implement, trust in institutions erodes, and policies are seen as formally adopted yet lacking legitimacy and practical impact (Bosnia, SP2-1).

There is consensus in the perceived coordination failure between central and local governance. The so-called "rift" between the government and local administration has been described by some discussants as the single biggest impediment to the transition (Moldova, SP-2). The remedy is seen as central-driven, backed by political will, with ministries compelling

local bodies to act through binding normative measures (Moldova, SP-8). Administrators described the same disconnect: municipalities left waiting on a central government, which lacks the means of a horizontal resource allocation (Kosovo, PA-1). At the same time, respondents insist on the existence of a persistent gap between donor programmes and local capacity, illustrated by an EU-funded initiative which found municipal knowledge of energy efficiency close to non-existent (Kosovo, PA-4). Besides the regional discrepancy, findings also flag distortions of externally driven frameworks during domestic adaptation: “everything we get from the EU, we additionally deform” (Bosnia, PA1-4).

Overall, the findings suggest that institutional weakness in WB/EaP countries is not a single problem but a multi-faceted one: administrators experience it as a deficit of capacity and resources, social partners as a deficit of commitment and inclusion, and the two converge on the failure of coordination between central and local government. This divergence is consequential, since the two diagnoses point toward different remedies: strengthening energy transition depends not only on financial and technical solutions, but on addressing governance structures, institutional capacity, and policy coherence.

Theme 3. Governance deficits, corruption and lack of transparency

The findings reveal that **governance is not only a matter of capacity, but also of institutional integrity, transparency, and legitimacy.**

Governance is captured by political and elite interests. In Bosnia, social partners describe the system as serving two constituencies at once, "two systems: one dysfunctional for citizens, the other functional for the elites" (Bosnia, SP2-2). The politicisation of public administration further weakens institutional effectiveness, with employment being based on party affiliation and connections rather than merit, and ownership of energy production being held in the hands of politics (Bosnia, SP2-2). The implication drawn by these respondents is significant: where energy production itself functions as an instrument of political control, decarbonisation is not merely a technical reform but a threat to entrenched interests.

Reform is seen as imposed and opaque, hurting institutional trust. Bosnian social partners described their country as a "political protectorate," where "the policy itself was made so that we wouldn't be asked anything" (Bosnia, SP1-1). The perception of externally imposed reform recurs in Serbia, where decarbonisation is characterised as undertaken "because of pressure, not because of conviction", a pattern of reactive compliance in which reform is discharged as an

externally imposed obligation rather than stemming from domestic conviction (Serbia, SP-4). This feeds a critique of symbolic policymaking: strategies are adopted "only on paper" while action plans are "delayed, diluted, or ignored" (Serbia, SP-6), and public policy is experienced as fluid and frequently revised, which undermines predictability and makes expectations unreliable (Serbia, SP-3). Underlying this is a transparency complaint: "we have no transparency in decision-making and signing agreements" (Bosnia, SP1-1). With reforms externally imposed and only symbolically adopted, and the decision-making process lacking clarity, the result is decrease in public trust, running the risk of meeting passive compliance rather than real uptake.

Local capacity to act is uneven. Social partners pointed to the unevenness of local implementation: much of the reform agenda "should be realised locally," yet local capacities range from "great" in some municipalities to "literally non-existent" in others (Serbia, SP-4). Administrators recognised the same unevenness, situating the transition within "external pressures, price shocks and uneven local capacities" (Serbia, PA-2). Where the two groups diverge is in explaining why local action stalls. For social partners the cause lies in capture and imposed reform; for the administrator, it is structural: municipalities "lack budgetary autonomy and decision-making power," so that even well-designed local initiatives depend on approval from city or national institutions (Serbia, PA-2). The same failure is thus attributed by social partners to political interests and by administrators to the centralisation of authority. The distinction is important, because different diagnoses imply different fixes: tackling capture points toward transparency reform, whereas tackling centralisation points towards distributing budgetary decision-making power to the local level.

Overall, the findings suggest that without addressing corruption, improving transparency, and strengthening accountability mechanisms, governance deficits will continue to undermine the credibility and effectiveness of the energy transition in all country cases.

2. The Geopolitical implications of energy transformation and green transition

Theme 1: Energy Security and Dependence

Energy security is framed not merely as a technical or infrastructural issue, but as a deeply geopolitical and, in places, existential concern. Respondents consistently link energy dependence (particularly on a single external supplier) to vulnerability, instability, and susceptibility to political pressure, and the transition away from such dependence is understood as a security imperative, rather than a purely environmental or economic choice.

The transition is framed as a security and growth imperative. At its starkest, the transition is understood in existential terms, a matter of survival rather than environmental ambition, with green energy described as "not about environmental activism, but about physical survival, energy independence, and autonomy" (Ukraine, country report). The imperative is reinforced by the cost of delay and the promise of gain. Failure to act risks "a slowdown in economic growth" (Serbia, SP-7), while the transition is expected to "create jobs," "save money for the consumer" (Moldova, SP-6), and enhance energy security, stimulate innovation, and support local development.

Reduced dependence is valued as protection against external influence and pressure. The Moldova accounts, from both stakeholder groups, tie the green transition directly to independence. Weighing whether transition would make the country more or less secure, a Moldovan administrator posited that it would be "less dependent and harder to manipulate" (Moldova, PA-10), so that reduced external dependence is perceived as a direct outcome of the transition. This is particularly evident in references to past single-supplier reliance on Russian energy: the need is framed as overcoming "the systemic shocks" caused by giving up a dependence that "until recently... was, in one form or another, only Russia" (Moldova, SP-6). The wording of blackmail reveals that energy is understood as a form of leverage held by an external supplier over a dependent state, so that reducing dependence is, at large, about removing that leverage (Moldova, SP-3). The same priority is voiced through domestic capacity in Kosovo, stressing that security of supply rests on "strong generation capacities, strong transmission grid, and strong distribution network" (Kosovo, PA-1). The direction of the transition matters here too: as a Bosnian administrator warned, "replacing one fossil fuel with another poses a security issue", since swapping one import dependence for another can reproduce the very insecurity the transition aims to resolve. In this sense, energy security is closely tied to broader questions of sovereignty, resilience, and the ability to withstand external disruptions.

Reduced dependence is pursued through interconnection and regional integration. Reducing dependence is largely associated with deeper integration into regional and European markets. Interconnection with neighbouring countries is perceived as a mechanism that increases

resilience: in Moldova, market integration is understood to mean "interconnection with Romania, which will secure our energy sector," still regarded as "very vulnerable" (Moldova, SP-2); in Kosovo, the establishment of the Albanian power exchange is expected to reinforce "regional integration on electricity markets" and strengthen security of supply (Kosovo, PA-1). Security, thus, is sought not by insulating the national system but by embedding it in a larger regional one, reducing the likelihood of unilateral vulnerability.

Security is also articulated in emotional and human terms, not only strategic ones. This process is not without tension. Fear, uncertainty, and loss of predictability reflect lived experiences of crisis and instability in Serbia, where energy security is discussed primarily in emotional terms, linked to fear and loss of predictability, rather than framed as a strategic or infrastructural issue. This suggests that energy security is not only a strategic objective but also a dimension of human security, affecting everyday life and shaping public perceptions of the transition.

Overall, the findings indicate that energy security is inseparable from the choice of energy pathway and from broader questions of independence and autonomy, and is sought not through isolation but through reducing dependence, by means of domestic capacity, interconnection and regional integration.

Theme 2. EU Market Access as a Strategic Driver

The EU market is perceived as operating like a powerful strategic driver of the energy transition, reshaping domestic policies and economic strategies. Respondents consistently frame decarbonisation and regulatory alignment not primarily as internally driven choices, but as steps necessary to maintain or gain access to the European market.

Market access operates as indirect conditionality and reform pressure. Access to the European market is widely understood as the mechanism that pushes domestic reform. In Bosnia this is seen as legitimate and even desirable, a way for the EU to "force politicians to respect everything they signed" (Bosnia, PA2-1). In Ukraine, decarbonisation is arguably driven less by domestic policy than by the need to meet EU standards in order to retain market access (Ukraine, SP-2); at the same time, the pressure has commercial power: for instance, a Ukrainian energy exporter faced EU border duties distinguishing clean from carbon-intensive energy, exposing the political and economic factors built into market access (Ukraine, PA-3). In this sense, the EU exercises influence as a regulatory and market power, where compliance is incentivised, and occasionally compelled, through the promise of integration and the risk of

exclusion. Market access thus becomes a mechanism of indirect conditionality, pushing countries toward policy convergence even in the absence of strong domestic ownership.

EU market integration is perceived as both an opportunity and a constraint. On the one hand, it offers prospects for economic growth, increased competitiveness, and enhanced energy security through interdependence and export potential, particularly in the context of green energy. Moldovan respondents cast green energy as the only competitive basis on which the country can integrate into the regional market (Moldova, SP-2), and treat connection to the European market as a guarantee against future trouble (Moldova, SP-1). On the other hand, respondents highlight asymmetries in capacity, where not all countries or sectors are equally prepared to meet EU requirements, potentially exposing key industries to new risks. This is voiced in Bosnia around the Carbon Border Adjustment Mechanism (CBAM), identified as a major challenge for key industries and exporters whose impact is downplayed, since "people pretend that it is not a big problem" (Bosnia, SP2-1). Another example is presented by a Kosovo respondent "CBAM is also coming along. It's going to be hard for us, for our businesses [...] CBAM, is going to be one of those points where the state fails to meet the demands and [fails] to release the certificates for certain numbers of pilots, etc. so that they can be competitive on the market. [...] So, they don't know what to expect. They know that they're going to be faced with new tariffs from the EU when they try to export wood. How much? And when? And how? [is unknown]" (Kosovo, SP-9). This dual dynamic underscores that integration into the EU market is not a neutral process, but one that can reconfigure economic hierarchies and dependencies.

Regulatory alignment and policy convergence underpin the above. Beneath conditionality and market integration lies the work of aligning rules and standards. Respondents have been calling for EU help to strengthen the regulatory framework for a functioning market (Moldova, SP-3). At the same time, alignment with EU policies is strictly assessed, with a Ukrainian respondent attributing the country's poor alignment with environmental policy primarily to the war's detrimental effects on energy capacity rather than lack of will (Ukraine, PA-6). This implies that assessment against EU criteria does not necessarily consider the exceptional conditions in place.

Interestingly, the two stakeholder groups appear to approach market access from different angles. The public authorities concentrate on conditionality and compliance. Social partners, conversely, frame market access through opportunity and (asymmetric exposure on) risk.

Theme 3: Green Transition and EU Integration

Green transition is increasingly understood as a core pathway to EU integration, rather than a separate or purely sectoral policy agenda. Respondents consistently frame decarbonisation, regulatory harmonisation, and alignment with EU standards as integral components of the accession process. The transition is thus embedded within a broader trajectory of political, economic, and institutional convergence with the EU.

The green transition is treated as a pathway to accession and belonging. Adopting environmental legislation and energy reforms appears as being part of the European system, where compliance with EU norms becomes a strategic obligation. This is unanimous: in Bosnia, regulatory harmonisation is presented as one of the key pillars of EU integration and a strategic obligation to synchronise (Bosnia, SP2-1); in Kosovo, the orientation is to keep transforming "in the same direction as the EU" (Kosovo, PA-5); in Ukraine, it is regarded as an integral part of European integration (Ukraine, PA-2). The green transition therefore functions as a key mechanism through which the EU projects its influence, shaping domestic policy frameworks and institutional structures in candidate and neighbouring countries.

Integration requires genuine domestic transformation, not formal transposition. The transition's value to integration is seen to depend on its being effectively implemented. A Bosnian social partner described transition and development as "two sides of the same coin," expecting it to drive rather than delay economic development (Bosnia, SP2-1). Their Moldovan counterparts took it one step further: transposing and implementing legislation is not enough on its own; it must be done so that people "feel the beneficial effect" of the transformation, which in turn builds popular support for the European Union (Moldova, SP-2). Integration, in this view, needs tangible benefits to be secure; legal harmonisation does not suffice.

Alignment is in tension with domestic ownership. At the same time, the findings reveal a tension between externally driven integration and domestic ownership. Policies have been described as "adopted under external pressure, particularly from the EU, without sufficient domestic ownership, public debate, or implementation mechanisms" (Serbia, SP-3). This can produce a pattern of formal compliance without substantive transformation, where alignment exists on paper but is not fully internalised in practice. Ukrainian accounts point to a mechanism that may work together with rather than against national agency: by expanding grant programmes the EU "creates a competitive environment" that prompts the state to adapt its legislation (Ukraine, SP-1). In this reading, normative influence is exercised through incentives rather than imposition.

Of note, the way integration is discussed is unevenly distributed between the two groups, and the distribution is telling. The public-authority contributions are scarce, and concentrated on the accession-alignment trajectory. The conditional material comes entirely from social partners, who foreground the conditions under which integration is legitimate.

The success of integration is therefore seen as contingent on whether the benefits of the transition are felt by citizens, highlighting the importance of societal legitimacy. Without tangible improvements - such as reduced costs, improved services or enhanced living standards - in tandem with updated communication, public support for both the transition and EU integration may weaken. The green transition thus emerges as a deeply political and transformative process, often EU driven, which simultaneously advances integration while exposing structural constraints, governance gaps, and the need for more inclusive and context-sensitive implementation.

3. The EU's role in advancing decarbonisation and reform in the energy sector

Theme 1: Financial support and targeted investment

Financial support and targeted investment are perceived as central mechanisms through which the EU can induce decarbonisation and energy sector reform in WB/EaP countries. Respondents consistently emphasise that aligning with EU standards and modernising energy systems requires substantial capital, often beyond the capacity of domestic budgets, so that external funding is treated as a precondition to reform and not a supplement to it.

EU funding is seen as a reform driver. Harmonisation with EU standards is argued to carry a heavy weight, requiring substantial investments (Moldova, SP-3), which positions external funding as the lever that makes reform possible. This is voiced both as social provision and as post-crisis recovery. In Kosovo, EU-funded programmes target to support disadvantaged and single-parent households, softening the social impact of the transition (Kosovo, PA-5), while in Ukraine the call is for the EU to "increase funding for decarbonisation after the war" (Ukraine, PA-2). Funding here is not merely enabling but steering: by financing particular measures, the EU shapes which reforms see progress.

Targeted investment in infrastructure **carries the greatest transformative potential.** Beyond funding in general, respondents stressed that investment directed at specific areas of needs, such as storage, grid infrastructure, and energy efficiency has the most impact. In Moldova, the EU is asked to "help the Government... create subsidy instruments and state aid for developing

storage capacities" (Moldova, SP-3), stressing that attracting external funds is a determining factor of transformative success (Moldova, PA-7). In a different EaP/candidate country, the emphasis falls on resilience, by means of financing solutions that make the system "more resistant to physical attacks" endorsing the "security through dispersion" strategy that EU is well placed to support (Ukraine, PA-2).

Overall, the findings suggest that EU financial support functions as both an enabler and a steering mechanism, capable of accelerating decarbonisation when aligned with infrastructure needs, local contexts, and long-term system resilience objectives.

Theme 2 : Capacity building and technical assistance

Capacity building and technical assistance are seen as essential complements to financial support, as the availability of funding alone does not guarantee successful reform or decarbonisation. Respondents consistently point to institutional, technical, and human capacity gaps as major bottlenecks in implementing energy transition policies, and look to the EU to transfer knowledge and to build expertise.

Lack of trained specialists is a recurring concern. A shortage of qualified people to design, install, and operate new technologies and to manage the funds attached to them dominated the discussions, particularly among public administrators (Moldova, PA-7 and PA-3; Ukraine, SP-7). A Moldovan public administrator phrased it bluntly: "what's the point of having grants if we don't have competent staff to manage them?" (Moldova, PA-1). Capacity building has, in fact, been identified as the most crucial link for staff training and professional education (Kosovo, PA-4), yet it is often hampered by the absence of anyone to deliver these training (Moldova, SP-10). Awareness gaps compound skills gap, with rural regions in particular not being reached by information regarding the energy transition (Kosovo, PA-1). In this context, EU support is expected not only to promote knowledge, but to build sustained expertise through training, education, and long-term institutional development.

EU assistance should be hands-on and implementation-oriented. Respondents look to the EU to close these gaps through knowledge transfer rooted in experience rather than short interventions. Practical implementation support is preferable to seminar-style, one-off events (Serbia, PA-4). Ukrainian social partners likewise highlighted the value of involving European experts in training and policy discussions due to longstanding experience (Ukraine, SP-4).

Capacity is also a question of local and decentralised governance. Beyond individual skills, respondents located capacity at the level of local administration, emphasising the EU's role in providing technical expertise, funding instruments and policy frameworks to local public bodies (Moldova, PA-7). This connects the skills gap to the local-governance and coordination weakness identified in RQ1.

Public authorities were much more vocal than by social partners in this theme, consistent with capacity building and fund absorption being primarily an administrative concern; where social partners do speak, in Moldova and Ukraine, they reinforce rather than complicate the same diagnosis. The accounts are also concentrated in the Eastern Partnership, with fewer Western Balkan voices in this regard.

Theme 3: Simplification and accessibility to EU funding

Simplification and accessibility of EU funding are considered critical conditions for effective reform, since complex procedures and administrative barriers often prevent countries from benefiting from available support.

Accessibility is hardest for small and local actors. Bureaucratic complexity, unclear requirements, and burdensome application processes emerged key obstacles that limit access to EU programmes. The project preparation has been described as complicated, with excessive procedural complexities harming the bodies which cannot absorb this administrative workload (Serbia, PA-5). These challenges are particularly acute for smaller municipalities and rural communities, where administrative capacity is limited and responsibilities are concentrated in a few individuals ("the mayor does everything": Moldova, PA-4); "in the villages, we do not have specialists who can write complex projects in English" (Moldova, PA-10). As smaller municipalities and rural communities are the least able to navigate such procedures, territorial and institutional inequalities exist.

Administrative simplification is key. Respondents called directly for the mechanics of application to be eased, and tied that call explicitly to the local capacity gaps above. Both EaP countries in this research, Moldova and Ukraine, voiced the same request about simplification of applications, particularly for the sake of communities that lack the specialists to manage demanding applications (Moldova, PA-10; Ukraine, SP-4). In both cases, simplification is a direct answer to local complexity.

These are primarily the views of public authorities, and specifically local administration, which is consistent with funding being a primary concern of the bodies that apply for and absorb the funds. Social partners, on the other hand, were less engaged in this topic.

Overall, the findings suggest that improving the accessibility of funds is not merely a technical adjustment but a strategic imperative. Beyond easing procedures, respondents argued that instruments should be designed with their social effects in mind so that accessibility and equity are built into the design rather than left to applicants to overcome.

4. The EU's role in increasing energy security, energy system resilience and market integration

Theme 1: Infrastructure modernisation and decentralisation

Infrastructure modernisation and decentralisation are viewed as foundational conditions for energy security, resilience, market integration and convergence with the EU.

Modernisation is treated as a precondition for everything else. Accounts from the majority of discussions conducted for this research point to the outdated energy infrastructure in their countries. Ageing and underinvested grids with a doubtful lifespan (Bosnia, SP1-1), distribution networks unable to accommodate growing demand, and technically inadequate systems (Moldova, PA-4) formulate a disheartening picture. The "radical" modernisation of infrastructure thus emerges as a prerequisite for transition and EU integration. At the same time, modernisation is not framed as incremental, but as a radical and system-wide transformation, necessary for convergence with EU standards and participation in integrated energy markets (Moldova, SP-6). The findings therefore position infrastructure not as a supporting element, but as the core enabler of both security and integration.

Storage, decentralisation and resilience are priorities within modernisation. Storage is passed as a stability condition: without sufficient storage capacity, network modernisation and renewable expansion "could create new vulnerabilities" rather than resolve them (Moldova, SP-8). Decentralisation is foregrounded, particularly in the wartime context of Ukraine, as it is given concrete form through "small modular reactors... on the sites of destroyed coal-fired thermal power plants" (Ukraine, SP-3). The EU is asked to transfer "specific modern equipment" to allow Ukraine to balance its system after destruction (Ukraine, SP-6), tying resilience directly to technology transfer. For these respondents the connection is categorical: both energy

security **and market integration** are held to be impossible without technology transfer and decentralisation (Ukraine, SP-1, SP-7).

In this context, there is criticism over the EU financial support allocation. The criticism is that available EU funds are "often channelled into training [rather] than infrastructure" (Serbia, PA-3), with the recommendation that the EU "recalibrate its financial and technical assistance to prioritise tangible infrastructure and household-level impacts" (Serbia, PA-3), funds directly supporting "building renovation, district heating modernisation, grid upgrades" being seen as more transformative (Serbia, PA-2). This sits in tension with the capacity-building emphasis of RQ3: where that theme called for more training and expertise, these Serbian voices argue EU money is already over-weighted toward training and should shift toward physical systems.

Overall, the findings indicate that physical infrastructure modernisation and decentralisation is treated as the material precondition for energy security, resilience, and EU market integration, and that EU support is most valued when directed at tangible systems rather than at capacity-building activities alone.

Theme 2: Human Capital and Knowledge Transfer

Human capital and knowledge transfer are presented as enablers of energy security, system resilience, and market integration: infrastructure and regulatory reforms cannot function without the expertise and technology to operate and sustain modern systems. To build that capacity, both regional cooperation in knowledge production, and technology transfer from the EU are required.

Knowledge production through regional cooperation. Expertise is described as something the region's small research communities can only build together. A Bosnian respondent described working in "a laboratory formed two years ago with three people and some external collaborators," producing prototypes and connecting with counterparts regionally, because "none of us in the region can do anything alone" (Bosnia, PA2-1). Knowledge generation is collaborative and cross-border, drawing on shared scientific traditions to overcome the limits of any single national base.

Technology transfer from the EU is treated as a precondition for resilience and integration. At the same time, the findings highlight the importance of **regional and networked approaches to knowledge production**, as individual countries often turn to the EU for technology that cannot be domestically supplied. In Ukraine, the EU is asked to "provide technologies for balancing,

since RES alone do not guarantee stability" (Ukraine, SP-7), tying system resilience directly to transferred technology; market integration itself is held to be "impossible without technology transfer and decentralisation" (Ukraine, SP-1). Technology transfer is thus framed not as a supplement but as a condition for both a stable system and participation in integrated markets.

Conclusions and Policy Trajectories

Across the five case studies, focus groups' results showcase that the energy transition in the specific countries is a **deeply structural and multi-dimensional process**, shaped by the interaction between domestic constraints and EU-driven dynamics. The first set of themes and subthemes highlights that energy poverty and vulnerability are rooted in socio-economic inequality, weak institutional capacity, and governance deficits, which limit both reform implementation and societal legitimacy. The second set of themes and subthemes demonstrates that the transition is increasingly geopoliticised, with EU market access acting as a powerful driver of reform through regulatory standards and economic incentives. While this creates opportunities for integration and energy security, it also produces **asymmetries and tensions**, as externally driven policies often lack domestic ownership and generate uneven impacts.

The difficulty in defining the **level of concern in sentiment** about '**energy costs**' of stakeholders tied to **actual cost increases versus perceived cost increases** is important, since there is evidence²⁶ showcasing that a widespread disinformation tactic used by Russia (FIMI) is to spread exaggerated claims about costs of renewable energy in order to inflate dissatisfaction with sustainable sources of energy. **It is necessary to look at the countries on a case by case basis, since some case studies do not include 'energy prices' as a relevant component** (e.g. Kosovo) whereas other case studies allocate greater importance to this factor. However, what remains clear is that disinformation/FIMI campaigns concerning EU energy policies and infrastructure cannot be analysed in isolation of geopolitics, which - in turn - cannot be examined without taking into account subjective and volatile and heavily influenced online perceptions about types of energy and cost.

²⁶ EUvsDisinfo (2025b). *Weaponising climate change to undermine the West - EUvsDisinfo*. [online] EUvsDisinfo. Available at: <https://euvsdisinfo.eu/weaponising-climate-change-to-undermine-the-west/>.

Despite the fact that there is a growing literature suggesting a **direct correlation between energy poverty/vulnerability and gender**, such as **Energy Community governance and gendered vulnerability**²⁷, or **unequal gendered vulnerability to energy poverty**²⁸, gender features rarely in policies. Furthermore, it was evident from the focus groups discussions that the gender dimension was ignored as a parameter of energy poverty/vulnerability, despite the number of female participants in the discussions. This finding confirms the narrow perception of energy poverty being a product of economic deprivation, foregoing the socio-economic perplexities of the phenomenon.

The last two sets of themes and subthemes further show that successful transformation depends on the EU's ability to combine **financial support, capacity-building, and accessible funding mechanisms** with broader system change. Funding alone is insufficient without technical expertise, institutional capacity, and simplified bureaucratic procedures that allow local actors to participate. At the same time, enhancing energy security and resilience requires a **holistic approach**, including infrastructure modernisation, decentralisation, market integration, and investment in human capital and knowledge transfer.

Overall, the findings suggest that the energy transition is a **complex socio-technical and geopolitical process**, where effective outcomes depend on aligning EU support with domestic capacities, ensuring social inclusion, and balancing structural transformation with legitimacy and equity. In the light of recent geopolitical developments, with the emergence of tensions between US and EU energy policies, the West no longer speaks with a single voice on the energy transition. This factor further complicates both the process itself and the formulation of recommendations for its improvement.

Against this background, policy recommendations should be based on the following broader trajectories:

- 1. Integrate governance strengthening into the energy transition by addressing structural socio-economic vulnerabilities, enhancing institutional capacity, and improving governance effectiveness to support a fair, inclusive, and sustainable transition.**

²⁷Buzarovski, S. et al (2025). Energy poverty in the Energy Community region: Interrogating policy formulation and coverage, *European Urban and Regional Studies*, vol 31, issue 2, 184-199

²⁸ Petrova, S., & Simcock, N. (2021), 'Gender and energy: domestic inequities reconsidered', *Social and Cultural Geography*, vol 22, issue 6, 849–867.

Candidate Countries

- Review of current legislation to identify the gaps vis-à-vis the establishment of energy communities (legal entities through which citizens, local authorities, small businesses and other stakeholders can jointly produce, consume, store and share renewable energy) and the clear definition of rights and obligations for different collective self-consumption and community models;
- Proceed to initiating legislation as required;
- Clarify the division of competences between central and local administration, establish coordination mechanisms such as standing joint committees between national ministries and municipalities and establish dedicated energy units within local administrations, recruiting or increasing specialist staff.
- Ensure effective implementation, by removing regulatory barriers and allowing citizen cooperatives to sell energy back to the grid without prohibitive fees;
- Initiate comprehensive public information and awareness campaigns through regional, state or EU-funded programmes, aimed at countering energy related disinformation, improving public understanding of the energy transition, and strengthening trust in evidence-based policymaking, including through co-created local just transition narratives and direct involvement of municipalities and civil society in campaign design and delivery. These campaigns should be two-tiered: reactive (addressing specific false narratives that misrepresent renewable energy, energy prices or the transition's social consequences) and proactive (building durable energy literacy at the local level). They should be paired with transparency on energy prices, subsidies, and transition impacts. A useful tool is the European Digital Media Observatory (EDMO) (ibid the Environment Theme), which detects, analyses and tackles online disinformation, whose coverage can be expanded to CC (note: Moldova and Ukraine are already covered by EDMO).
- Turn community projects into the main tool for public information campaigns. Shift away from abstract marketing and use local, data-driven examples of real household savings to counter energy-related disinformation and build trust in the transition.
- Strengthen social conditionality within energy transition funding programmes by requiring the inclusion of no-upfront-cost participation mechanisms for vulnerable

households and the achievement of clearly defined inclusion targets for low-income and marginalised communities, based on multidimensional and experiential indicators of energy poverty and vulnerability, including parameters such as gender.

EU

- Provide technical assistance and ensure the access of CC to initiatives such as the Renewable Energy Community Prize (with a special Prize for CC), the Citizen Energy Advisory Hub, the European Energy Communities Facility (*Moldova, Ukraine and North Macedonia already participate*) and the Support Service for Citizen-led renovation.
 - Adopt NECP-style laws (National Energy & Climate Plans) with annual reporting and parliamentary checks; make any energy transition related funding conditional on measurable reforms: market liberalisation, grid upgrades, storage, and energy-efficiency delivery (e.g. from the Instrument of Pre-accession Assistance or Association Agreement, European Bank for Reconstruction and Development etc).
 - Promote the concept of Prosumers, whereby energy users both produce and consume energy, through renewable energy installations such as rooftop solar panels, and may generate, store, share, or sell surplus electricity.
 - Align energy sector procurement with EU procurement standards; make governance, transparency and anti-corruption safeguards (e.g. contract disclosure, independent audits, citizen and NGO consultation mechanisms, anti-corruption safeguards, and regular public reporting) a condition of energy-transition financing, new investments and strategic projects. Use EU Member States of comparable size and trajectory (e.g. Croatia, Bulgaria, Greece) as reform templates for the candidate countries
 - Support candidate countries to develop harmonised data systems and indicator frameworks to identify and monitor energy vulnerable households, feeding into the design and evaluation of these social conditionality mechanisms.
- 2. Strengthen resilience to the geopolitical challenges of the energy and green transition by enhancing energy security, leveraging access to the EU market as a driver of transformation, and advancing alignment with EU integration processes and standards.**

Candidate countries

- Establish dedicated regulatory frameworks and investment incentives for energy storage technologies in order to improve grid balancing, reduce reliance on energy imports during peak demand periods, and facilitate higher levels of renewable energy integration.
- Pursue regional energy cooperation as a stability mechanism, by deepening cross-border interconnection and joint crisis-response protocols with neighbouring countries so that the risk of energy as a source of regional tension is reduced based on expanding beyond single external suppliers

EU

- Develop a model legislative package for energy storage, drawing on the 2024 Electricity Market Regulation, that candidate countries can adapt rather than draft from scratch.
- Existing Enlargement and neighbourhood instruments should be used to mitigate adjustment costs related to the Carbon Border Adjustment Mechanism, such as the Reform and Growth Facility for the Western Balkans or European Bank for Regional Development, the Western Balkans Investment Framework or the European Investment Bank and the European Bank for Reconstruction and Development. The instruments should be matched to the affected sectors and related needs so that support faces the steepest CBAM-related adjustments.

3. Accelerate decarbonisation and energy sector reform in the Western Balkans and Eastern Partnership countries through enhanced financial support and targeted investment, strengthened capacity building and technical assistance, and improved accessibility and simplification of EU funding mechanisms.

Candidate countries

- Collaborate with the Energy Community to establish a fast-track mechanism granting priority access to regional market integration initiatives for countries that achieve

predefined milestones in market liberalisation, regulatory harmonisation as well as measurable progress on decarbonisation (e.g. Coal phaseout steps, renewable deployment) and energy poverty reduction. Eligibility should be explicitly tied to completion of key “soft measures” under Energy Community obligations, reducing investor risk and supporting an integrated, socially just transition.

- Offer, together with the EU, tailored support to smaller municipalities and under-resourced actors that struggle to access EU funding.

EU

- Design energy transition programmes around integrated funding cycles that combine infrastructure investments with targeted training and technical support, ensuring that capacity-building activities are directly linked to the planning, implementation, operation, and maintenance of specific energy projects and embedded in multilevel governance arrangements that foster coordination between national authorities, local governments, financiers and utilities.
- Reduce funding fragmentation: As opposed to the Western Balkans where funding comes from the Growth Plan, in Ukraine and Moldova, green transition is supported financially through different funding instruments, which also address other policies and strategies, such as post-war reconstruction in Ukraine. Reducing funding fragmentation should be a priority, as the proliferation of funding streams can increase administrative complexity, create coordination challenges, and reduce the effectiveness and visibility of energy transition interventions. Greater coherence across funding mechanisms would improve strategic planning, facilitate implementation, and enhance the overall impact of EU support. Increase financial injection of the candidate countries to close the gap with financial support provided to EU member states.
- Simplify application procedures, standardise reporting requirements, and assign technical experts for the development of grant applications.

4. Enhance energy security, energy system resilience, and market integration in the Western Balkans and Eastern Partnership countries through infrastructure

modernisation, decentralised energy solutions, human capital development, and strengthened knowledge transfer and regional cooperation.

Candidate countries

- Establish recurring training programmes for national and municipal staff covering renewable technologies, grid and storage planning, public procurement and EU funding rules, using certified curricula and accredited training providers. The training should be linked to long-term retention measures, such as mentoring schemes and clear career pathways, so that the acquired skills are not lost to staff turnover.
- Provide targeted training to SMEs regarding financing, permitting and legal requirements to strengthen the business sector alongside the local administration.

EU

- EU-supported investments should include skills development components from the initial design stage to avoid implementation delays caused by administrative and technical capacity gaps. While financial resources should focus on infrastructure investments, part of EU financial assistance should go towards institutional development (e.g. for independent regulators, project-preparation facilities, municipal support units, public procurement oversight, emissions-monitoring systems, stakeholder participation mechanisms).
- Pair WB/EaP energy regulators with established EU counterpart regulators through long-term twinning and peer-learning programmes so that candidate-country institutions can draw directly on the practical experience of EU regulator in market design, tariff setting and the integration of decarbonisation, consumer protection and energy poverty alleviation objectives into regulatory decisions. The emphasis should be on continuous institutional partnerships and the exchange of regulatory practice between peers rather than short-term projects.

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