

Importance of TANAP in Competition Between Russia and Central Asia

Tuğçe Varol Sevim

21st Century Turkey Institute, Head of Energy Security, Turkey.
Email: tugcevarol@hotmail.com

ABSTRACT: TANAP natural gas which was initiated by Azerbaijan's SOCAR and Turkey's BOTAŞ has altered the dynamics and strategies in the region. TANAP project not only formed new competition picture from Nabucco versus South Stream to TANAP versus South Stream but also triggered the competition between Russia and Central Asia in terms of pipeline strategies. Kazakhstan, Turkmenistan, and Uzbekistan are landlocked countries in the east Caspian region and Azerbaijan is the only post-Soviet state that had succeeded to reach world markets by non-Russian routes. In this sense if TANAP would establish until 2018-2019, it would have an impact as in the case of Baku-Tbilisi-Ceyhan oil pipeline which was considered as the "Contract of the Century" in the 1990s. In this paper, it is aimed to analyze how TANAP will affect upon Russian foreign energy policy strategy upon Central Asian states and Azerbaijan as well as emphasizing on the risks and opportunities of the project.

Keywords: Energy; Natural Gas

JEL Classifications: Q49; Q48; Q4

1. Introduction

Since the dissolution of the Soviet Union, Central Asian hydrocarbon reserves attracted main actors of world politics and big international energy companies. While the newly formed Russian Federation was suffering due to economic transitions in 1990s (Kura, 2001), by the support of Washington, Azerbaijan had managed to have the first direct oil pipeline from Caucasus to Mediterranean Sea which is named Baku-Tbilisi-Ceyhan oil pipeline (See Table 1). The oil revenues helped Azerbaijan to improve its energy sector and today Azerbaijan turned into an exporter of natural gas from an importer of natural gas in two decades. The famous Nabucco project which was the second pillar of the Washington energy strategy for the guarantee of European energy security and the breaking free of Caspian post-Soviet states finally withdrew from the energy game by the announcement of Trans-Anatolia Natural Gas Pipeline (TANAP) natural gas pipeline which was initiated by Azerbaijan and Turkey. TANAP project intends to carry the natural gas to be produced in Shah Deniz 2 field and other fields of Azerbaijan through Turkey to Europe. As it can be seen in Table 1, the pipeline will carry 16 bcm in the first phase and then 23 bcm in the second phase and finally 31 bcm in the third phase in 2026.¹ Due to reasons of Nabucco's failure, Azerbaijan chose to construct its own pipeline via passing Turkey to Europe in order to catch the production date of Shah Deniz II project. Therefore at the beginning of 2012 Azerbaijan and Turkey's TANAP and Russia's South Stream emerged as rival projects, although both sides stated that are not.

On the one hand South Stream has a 63 cm capacity that plans to carry some East Caspian or Central Asian gas resources to Southern Europe. On the other hand TANAP which has 16 bcm initial capacity plans to carry West Caspian resources to Southern Europe. The crossroads of both pipelines inevitably affect the geopolitical developments in the region. Regarding that Turkey and the US are actively demanding TANAP to carry Turkmen gas by the way of Trans-Caspian pipeline though the Caspian Sea conflict remains, it rang all the bells in the Kremlin as well as attracting three Central Asian countries. Despite the fact that there is no visible unity between three Central Asian states, they displayed a great energy infrastructure cooperation with the emergence of "new hope in East-China".

¹ TANAP, <http://www.tanap.com/en/what-is-tanap>

Therefore TANAP would be a new hope in the West not only for Azerbaijan also for Central Asia countries in the near future. Consequently TANAP and Trans-Caspian pipeline seems a long way to go as long as Russia actively pursues an energy diplomacy towards Central Asian countries in order to maintain its own energy security.

Table 1. Main oil and gas export pipelines in the South Caucasus

Route	Start of Operation	Oil/Gas	Capacity	Notes/Expansion Plans
BTC	2006	Oil	1 million b/d	Expansion to 1.2 mb/d by end 2008, possible up to 1.8 mb/d
Baku-Supsa	1999	Oil	100 kb/d	Opened summer 2008 following 18 months repair
Baku-Novorossiysk	1983	Oil	100 kb/d	Originally north-south line, since 1997 sporadic use south-north
Baku-Tbilisi-Erzurum	2007	Gas	8 bcm/y	Expansion to 16-20 bcm/y in line with increased Azeri gas output.
TANAP*	2019	Gas	16 bcm/y	Expansion is expected to reach 31 bcm in 2026.

Source: Perspectives on Caspian oil and Gas Development (2008), IEA Directorate of Global Energy Dialogue, December, p.47, http://www.iea.org/papers/2008/caspian_perspectives.pdf and contribution of the author.

*TANAP data has been added to the table by the author according to the official web page of the project.

2. Russian Foreign Energy Policy

Since the proclamation of the Russian Federation in 1991, Russia had pursued a foreign energy policy regarding to its urgent needs as a result of the dependency on hydrocarbon exports ratio on its economic structure. Furthermore since the mid-1990s, Russian foreign policy focused on supporting “Multipolarity” foreign policy concept that essentially based on counting China as a superpower and tried to stand far away from Cold War terminology. The year 2000 was a turning point for Russia, when Vladimir Putin became Russian President and began to design Russian foreign policy and energy strategy. President Putin has realized that if Russia does not improve itself both economically and socially and do not become a superpower again, and then it is condemned to be disappeared from world history. Hence, President Putin has integrated Russian foreign policy and energy policy and used energy card whenever it is necessary for Russian national interest (Varol Sevim, 2012). Therefore energy will remain the base of Russia's diplomacy tool in the future (Hill, 2004). Europe and Central Asia have different meanings in Russian foreign energy policy. On the one hand Russia is pursuing a comprehensive strategy that could increase Europe's political and economic dependence on Russian energy. On the other hand Russia aims to lock supply of energy resources by consolidating its control of strategic energy pipelines. Thus Moscow has actively opposed Western-controlled pipeline projects directly linking Central Asian energy-producing countries to European markets such as the BTC oil pipeline and the BTE gas pipeline (Cohen, 2007).

The Caspian and Central Asian oil and gas producers (Azerbaijan, Turkmenistan, Kazakhstan and Uzbekistan) were previously entirely exposed to a Russian monopoly due to their lack of independent export pipelines. However, the construction of new pipelines from Turkmenistan, Kazakhstan and Uzbekistan to China altered the energy game in the region. Still, Russia controls around 80% of Turkmenistan's gas exports, 80% of Kazakhstan's oil export and 75% of Uzbekistan's gas exports. For this reason Russia extends its influence with proposed new pipeline systems from the Caspian region in order to prevent Central Asian producers from exporting by non-Russian routes (Lough, 2011). Furthermore Azerbaijan is a growing concern for Kremlin by virtue of its oil and gas pipelines that gives Baku direct access to international markets. Therefore Kremlin is working to ensure that some of the production from Shah Deniz II field is sold to Russia not to Europe (Lough, 2011). In this context, one of the remarkable policy that Russia attaches increasing importance to such regional organizations as the CSTO, Eurasian Economic Community, SCO and Eurasian Union (Shadrina, 2010).

3. Central Asian States and Azerbaijan in the Game of Energy

Kazakhstan: Kazakhstan is a landlocked state and share borders with Russia, China, Uzbekistan, Kyrgyzstan and Turkmenistan. The country has declared a “multivectoral” foreign policy which means a willingness to develop and improve strategic, diplomatic and economic relations with the major geopolitical powers in the international arena, namely China, Russia, the United States and Europe (Saurbek, 2008). Since independence, Russia has remained Kazakhstan’s most important economic partner, especially for Kazakh energy exports, which are still heavily dependent on Russian controlled pipelines first constructed during the Soviet period (Weitz, 2008). President of Kazakhstan Narbayev who rules the country more than two decades supposes that Central Asia region is re-witnessing superpower rivalry and the only solution is to pursue genuine economic integration of the region (Blank, 2005). In addition to that, in March 2009, during the 2nd Astana Forum, Nazarbaev said that integration processes should continue under the aegis organizations which set the course for a Customs Union, a common currency, common energy, and transport markets, and collective security. He certainly underlines that Kazakhstan will make full use of the advantages its energy resources, while maintaining a balance between the interests of major powers (Vinokurov, 2010).

Turkmenistan: Turkmenistan became an independent country in December 1991 and former President Niyazov abandoned multilateral approaches with bilateral relations articulated though the concept of “Positive Neutrality”. In December 1995, the UN officially recognized Turkmenistan’s position (Sabol, 2010). Turkmenistan has cooperated with Russia in some areas while seemingly resisting other Russian influence. In 1992, the two states signed a Friendship and Cooperation Treaty containing security provisions. Although Turkmenistan joined the post-Soviet Commonwealth of Independent States, it did not sign the Collective Security Treaty and refused to sign other CIS agreements viewed as violating its sovereignty and neutrality (Nichol, 2009). The Russian government is interested in maintaining this significant flow of Turkmen gas and in trying to involve Gazprom significantly in the operation and transportation of the new Turkmen reserves discovered in the South Yolotan area (Martin, 2010). Since all the pipelines connecting the region to world markets were owned by Gazprom and routed through Russia, Turkmen natural gas became relatively uncompetitive in market terms and, consequently, Turkmenistan had little incentive for increasing its production of natural gas (Young and Winstone, 2005). Gazprom has developed a strategy to export Russian gas at high-cost to markets in Western Europe and leave Turkmenistan to supply gas at low-cost to former Soviet states such as Ukraine, which have fallen behind in their energy payments to Russia (Hill and Fee, 2002). Turkmenistan’s dependence on gas exports and the place of pipelines as the dominant mode of delivery mean that pipeline politics play a large role in Turkmenistan’s foreign policy. The government is aware of the benefits of a range of pipeline options, but the profitability of pipelines with their high construction costs depends critically on world energy prices (Pomfret, 2006).

Uzbekistan. Since 1991 the super-presidential regime of Islam Karimov in Uzbekistan has successfully defended the country’s new independence and his authoritarian rule by cleverly enlisting the aid of outside powers such as Russia, China and the USA (Spechler and Spechler, 2009). In addition to that, Uzbekistan has achieved independence and stability by exploiting its natural resources through a strategy of “staple globalism”, and by balancing the great powers against each other (Spechler and Spechler, 2009). Energy policy began to play an important role in Uzbekistan after the independence. It was correlated with the capital-intensive industrialization policy and overall macroeconomic policy on domestic stabilization (Djakhangir, 2005). While Uzbekistan is important for the Kremlin, as the region’s largest and most strategically located state, bordering on all four of the Central Asian states as well as Afghanistan (Paramonov and Stokov, 2007), Gazprom and Russia is also important for the Uzbekistan.

Azerbaijan: In the early 1990s, the Caspian Basin became the focus of the world oil industry for several reasons: The Caspian producing potential was judged to be world-class; this potential could not be realized within an acceptable time-frame without outside foreign participation; and the oil and gas to be produced would be in the export market (Raballand and Regis, 2008). Between 1988 and 1994 the war between Azerbaijan and Armenia was the cornerstone of Azerbaijan’s foreign policy in the future. Azerbaijan chose to follow a closer relationship with US and Europe rather than with Russia. When Elchibey refused to join the CIS, the Azeri oil industry was effectively cut off from its access to the oil Soviet pipeline system. This led Azerbaijan in 1992 to enter into discussion with Turkey for the construction of the BTC (Olcott, 2009). From its geographic location, Azerbaijan

naturally has come to play an intermediary role with Russia, Turkey, the US, the EU, and Central Asia. This role of Azerbaijan has been the often named “*Silk Road*” in the South Caucasus linking Europe and Central Asia due to the characteristics of its geographic location (Kim and Eom, 2008). In other words, Azerbaijan is a natural crossroads for the growing continental land – based trade and its geostrategic location is a key to connecting the transportation networks and markets of Europe, Asia, the Middle East and the Mediterranean region (Zizyadovi, 2007). Azerbaijan is one of the Caspian states that view the development of their hydrocarbon resources as a cornerstone to their economic prosperity. However, Azerbaijan is a landlocked country and cannot ship its resources without transferring neighboring states. Instead, they have to be transported to their target markets by pipelines, which cross multiple international boundaries (Bahgat, 2002). Azerbaijan is emerging as an important of oil and natural gas and as a transport corridor between Europe and Central Asia. Its strategic location bordering the Caspian Sea has attracted significant interest in developing its oil and natural gas reserves (Azerbaijan Energy Data, 2009).

Three principal objectives were guiding Azerbaijan’s pipeline diplomacy as well as its foreign policy in the early aftermath of its independence: retaining independence, restoring territorial integrity, and securing economic recovery and self-sufficiency (Ismayilov, 2010). Azerbaijan’s major natural gas production increases in the future are expected to come from the continuing development of the Shah Deniz field. The Shah Deniz offshore condensate and gas field PSA was signed in June 1996. Participants in the project include BP (25,5 %), Statoil (25%), SOCAR (10%), Total (10%), and TPAO (9%). It is estimated reserves are 1,2 Tcm of gas and 1,75 b/bbl of condensates. Phase I of the Shah Deniz field’s development was completed in 2007. Phase II of the Shah Deniz development is expected to have peaked capacity of 700 bcf (19,8 bcm) but its completion is being delayed from 2013-2014 to 2016 due to lack of a transit agreement between Turkey and Azerbaijan (Azerbaijan Energy Data, 2009).

Until 2006 when Shah Deniz first began production, Azerbaijan routinely relied on Russia for around 4,5 bcm of gas imports a year. However two years later, in June 2008 Russia offered to buy Shah Deniz 2 gas at “European-level” prices. From a Russian perspective, getting Azerbaijan to supply the northern Caucasus areas of Russia makes strategic sense; it would supplement the Russian gas balance for the South Stream project, and enable Azerbaijan to supply alternative routes, particularly Nabucco (IEA Directorate of Global Energy Dialogue, 2008). Since the beginning of 2010 Russia has been allowed a greater role in Baku’s energy export, a change reflected in a short-term contract with Russia’s Gazprom on export (for market prices) of no less than 500 mcm of Azerbaijani gas annually (News.Azerbaijan, 2010). The gas relations have developed in September 2010 and the two sides agreed on doubling the amount of the gas. So according to the latest contract between Azerbaijan and Russia, Azerbaijan will double gas exports to in 2011 and increase them further from 2012, that could undercut Europe’s drive to secure supplies for the Nabucco project. Gazprom CEO Alexei Miller said about the latest contract that “this means Azerbaijan is giving priority to Russia, when it comes to ramping up exploits of its natural gas suppliers”. He also added that Russia would like to secure even larger supplies for its planned pipeline known as South Stream, a rival to Nabucco Project (The Peninsula Qatar, 2010). According to Rzayeva (2009), in doing so, Azerbaijan not only weakens the Turkey’s position as a major transit state for delivering Azerbaijani and Central Asian gas to Europe but also undermines EU and US interests in reducing Europe’s dependence on Russian gas (Rzayeva, 2009).

4. The Birth of TANAP – End of Nabucco

Turkey controls the Bosphorus and the Dardanelle Straits, the only maritime “entrance” to the Black Sea region. They are strategically important for the entire region because the countries located in the Black Sea carry out either most or a very big part of their trade via this maritime route (Balcer, 2009). In terms of Nabucco pipeline Project Western countries support Turkey as an alternative route from the Caspian to create competition to Gazprom and Russia. Furthermore, some Caspian producers also perceive Turkey as a better transit country for their exports. This fuels the rivalry between Russia and Turkey in the energy field and forced Russia to take into consideration the importance of Turkey in the geopolitics of the region (Tekin and Walterova, 2007). Being the gas connection between Turkey and Azerbaijan, the Baku-Erzurum Pipeline (See Table 1) forms a main route from the Caspian Sea to Europe, but there is a missing link between Erzurum and European pipeline grids. Nabucco is

designed to fill the link via Turkey, in order to maintain diversification of reliable gas supply to the EU (Norling, 2007). Nonetheless, the South Stream project was announced to the world on June 23, 2007, when Italian ENI's CEO Paolo Scaroni and Russian Gazprom Vice-President Alexander Medvedev signed a memorandum of understanding (Baran, 2008). Afterwards in June 2009 Russia has signed the agreement for early gas purchases from Azerbaijan starting from 2010. This had diminished the European hopes of securing gas from Azerbaijan via Nabucco. In addition to the Azerbaijan deal with Russia, Turkmenistan's signing a 30 year agreement for supplying gas to China also narrowed the capacity of the Nabucco project (Ayman, 2009). As a result President Putin dismissed the notion of a competition between Nabucco and South Stream: "There can be no competition, when one project has the gas and the other does not" (Socor, 2008).

The lack of access to the upcoming production of Shah Deniz 2 consortia² led Azerbaijan SOCAR and BP to find solutions by their own selves (Yılmaz, and Kılavuz, 2012). The Shah Deniz gas field in Azerbaijan is estimated to have 1 Tcm³ of gas reserves which Europe is eager to buy in order to diversify its gas imports and decrease reliance on imported gas from Russia (Umback, 2012a). On September 2011, BP, one of the shareholders of the Shah Deniz II consortium, announced a plan to build its own pipeline which was the South-East Europe Pipeline (SEEP). Only two weeks after the announcement of BP, Azerbaijan and Turkey signed a new energy cooperation agreement for the carrying of Azeri gas to Europe via Turkish territory (Umback, 2012a). Afterwards, Turkey and Azerbaijan officially signed the memorandum of understanding for the Trans-Anatolia natural gas pipeline project on December 26, 2011. Thus the Nabucco project fell into disfavor. Interestingly, only two days after the signature of TANAP, Turkey signed a significant agreement with Russia which would allow the construction of South Stream in Turkish Black Sea exclusive economic zone (T-Pedersen, 2011).

The TANAP project has considered as the BTC of Caucasia which would give the region opportunity to reach European markets directly. The initial stage of TANAP will be completed in 2018-2019 with a capacity of 16 bcm, with 10 bcm for Europe and 6 bcm for Turkey (Umback, 2012b). TANAP is a historic project for Azerbaijan because it will enable to sell Azeri gas through its own pipeline without having to pay for the transit service which would then make Azeri gas price-competitive against Russian gas (Punsmann, 2012). On the 26th June 2012, President Aliyev and Prime Minister Erdogan signed the intergovernmental agreement of TANAP which would have a big impact on geopolitics in the Central Asia. The long-term strategy of Baku is to unite its field with other Caspian countries and increase its role as gas supplier and as a transit country, if they would achieve to build a pipeline across the seabed of the Caspian sea (Ruiz Gonzales, 2012). It was first announced that the Shah Deniz consortium will select the entrance route to Europe whether Nabucco West or TAP postponed to mid-2013 (Mehdiyeva and Evgrashina, 2013). Afterwards at the end of June 2013 when all the signs were showing Nabucco West, the consortium selected the TAP route which will carry natural gas from Greece-Turkey border to Italy and naturally defeated the rival Nabucco project (Geropoulos, 2013).

5. TANAP and New Competitions From Caspian to Black Sea

During the Soviet era, Moscow controlled Caspian energy reserves and the pipeline networks in accordance with the Kremlin's interest in design. After the dissolution of the Soviet Union, the Central Asian states introduced by external actors and their foreign companies. The newcomers wanted to invest in the region and construct alternative pipeline routes to transport gas and oil from the region to the international markets in security (Bodalyan, 2011). The emergence of TANAP altered the competition portray of the pipelines from the Caspian Sea to Adriatic Sea. The big challenge consisted between TANAP and South Stream and the additional continued between Nabucco West and TAP. The selection of TAP route not only served for the partition of the European market between South Stream and TANAP but also served for the realization of TANAP project. Therefore South Stream and TANAP managed to live together in Europe but the question is what will happen in the east? TANAP will also play a crucial role in European southern corridor energy policy which is actively being supported by Washington. Thus two high level US bureaucrats visited Azerbaijan, Turkey and

² BP and Statoil 25%, SOCAR, Total, Lukoil and Nico 10%, TPAO 9%.

³ BP, <http://www.bp.com/productlanding.do?categoryId=9006668&contentId=7078987>

Turkmenistan for convincing the parts for the Trans-Caspian pipeline in order to guarantee European energy security. According to the US Minority Staff Report; “*Energy is the economic lifeblood of many NATO allies and partners in the Europe and Eurasia region, and dependence on Russia and Iran for energy imports or exports remains a central detriment to those nations’ sovereign independence in policy making, economic development and security*” (US Minority Staff Report, 2012). However, another access to Turkmen energy resources means the losing control of the Caspian Sea from Kremlin’s point of view. In the case of Turkmen gas integration in TANAP pipeline, Turkmenistan will eventually turn into a competitor against Russian energy resources in the European market as well as the possibility of encouraging other Central Asian states will reveal. For this reason Russia follows three policies; (1) acceleration of regionalization, (2) postponing the resolution of Caspian Sea conflict, and (3) aims to buy entire Azeri gas export.

Russia, Belarus and Kazakhstan formed Custom Union among themselves and announced that the ultimate goal is the formation of Eurasian Union that is similar to the European Union. Hence Russia uses new regionalization aspect in order to emergence of Central Asian states to become a competitor instead cooperator. On August 2012, Russian Deputy Prime Minister Dmitry Rogozin visited Baku with proposals for Azerbaijan to join the Customs Union and Eurasian Union. On the other hand the littoral states of Caspian Sea attempt meetings in order to find a solution since the dissolution of the Soviet Union. Still, Russia is the dominant actor in the conflict and have a capacity to postpone the solution in accordance with its own foreign energy policy interests. And finally Russia will buy 3 bcm of Azeri gas in 2013 which Russia needed much more for the fulfilling of South Stream (Anishchuk, 2013). The Azeri gas became significant for Kremlin not only for prevention of TANAP but also for supplying resource for the South Stream gas pipeline. In 2007 Russia, Kazakhstan and Turkmenistan signed a treaty for the construction of the Pre-Caspian pipeline which would have a capacity of 40 bcm that contains more than half of the gas required for the South Stream. However all the information about the Pre-Caspian gas pipeline has disappeared from the Gazprom’s materials without explanation (Vestnik Kavkaz, 2012). In this sense Russia will have to find gas resources for the South Stream pipeline which will pump 63 bcm gas to southern Europe.

6. Conclusion

It should be noted that TANAP project has neither been launched nor completed. The signatures of protocols and MOU’s do not mean the realization of the construction process. Nobody knows the entire signature numbers that have been done for the Nabucco project but this did not help for the project to become real. Although TANAP has much more advantages than Nabucco project, it has also risks that are awaiting during the process. Firstly, TANAP is another typical project like Nabucco or BTC from Russian point of view. The silence of the Kremlin to developments on TANAP project does not mean that Russia will allow the project to be completed. Russia is highly dependent on energy incomes and for that reason it has to secure its market –Europe- and supply zone –Central Asia. The plans of construction of Trans-Caspian pipeline from the seabed of the Caspian Sea from Turkmenistan to Azerbaijan in order to carry Turkmen gas from TANAP pipeline directly targets Russian foreign energy policy. Therefore, TANAP carrying Turkmen gas is a nightmare scenario for Moscow. Moreover, the selection of the TAP route is a great progress in terms of realization of TANAP project. Although it seems that Russia and Azerbaijan targets the different parts of the European gas market, the extension of TANAP with Trans-Caspian pipeline is still an unwanted scenario from the Kremlin’s point of view.

Furthermore Russia is aware of the fact that once TANAP is established “new hope” will emerge for three Central Asian states as in the case of construction of pipelines through China. This means the reduction of the Russian monopoly pipeline system and the price superiority over hydrocarbon reserves. Finally new Russian foreign energy policy also concentrates on regionalization strategy by the third presidency of Vladimir Putin. Russia, Kazakhstan and Belarus established the Customs Union among themselves in 2012 for the initial stage of Eurasian Union. Hence the competition of TANAP and South Stream triggered the Russia's regionalization policy towards Central Asia countries and Azerbaijan. After all, if Russia would lose control of Central Asian countries’ energy access routes, these countries would rise as new competitors against Russia's superiority over European energy imports. Finally Russia considers that if TANAP would not establish, Azerbaijan would have

to sell its gas to Russia which then will reinforce the energy superiority of Russia from Caspian Sea to Europe.

References

- Anishchuk, A. (2013) *Gazprom Says to Increase Azeri Gas Buy to 3bcm/yr*, Reuters, 23 January, <http://www.reuters.com/article/2012/01/23/russia-azerbaijan-gas-idUSL5E8CN0US20120123>
- Ayman, G.S. (2009) *Turkey Courts Russia on Energy*, *Institute Thomas Moore*, September 8, http://www.institut-thomas-more.org/pdf/370_en_GAyman-Sept2009.pdf
- Azerbaijan Energy Data, Country Analysis Briefs* (2009) Energy Information Administration October, <http://www.eia.doe.gov/cabs/Azerbaijan/Background.html>
- Bahgat, G. (2002) *Pipeline Diplomacy: The Geopolitics of the Caspian Sea Region*, *International Studies Perspectives*, 3, 310-327.
- Balcer, A. (2009) *The Future of Turkish-Russian Relations: A Strategic Perspective*, *Turkish Policy Quarterly*, 8(1), Spring, 79-90.
- Baran, Z. (2008) *Security Aspects of the South Stream Project*, Hudson Institute, European Parliament, October, <http://www.hudson.org/files/publications/Baran-South%20Stream%20for%20EP.pdf>
- Blank, S. (2005) *China, Kazakh Energy, and Russia: An Unlikely Menage a Trois*, in: *Energy Security, Central Asia – Caucasus Institute & Silk Road Studies Program*, The China and Eurasia Forum Quarterly, 3(3), No.3, November.
- Bodalyan, L. (2011) *Interlinked Energy Supply and Security Changes in the South Caucasus*, *Caucasus Analytical Digest*, No.33, 12 December.
- BP, <http://www.bp.com/productlanding.do?categoryId=9006668&contentId=7078987>
- Cohen, A. (2007) *Europe's Strategic Dependence on Russian Energy*, *Backgrounder*, No.2083, 5 November.
- Djakhangir, S. (2005) *Energy Policy, Economic Cooperation, and Sustainable Development in Central Asia: The Case of Uzbekistan*, Dissertation in Justus-Liebig University, 15 April.
- Energy and Security From The Caspian to Europe* (2012), A Minority Staff Report, Prepared For The Use of the Committee on Foreign Relations of US Senate, 12 December.
- Geropoulos, K. (2013) *ShahDeniz's Pipeline of Choice is TAP*, *New Europe*, 28 June, <http://www.neurope.eu/article/shah-deniz%E2%80%99s-pipeline-choice-tap>
- Hill, F. (2004) *Energy Empire: Oil, Gas and Russia's Revival*, The Foreign Policy Centre, September.
- Hill, F., Fee, F. (2002) *Fueling The Future: The Prospects for Russian Oil and Gas*, *Demokratizatsiya*, 10(4), 462-487.
- Ismayilov, M. (2010) *Continuity and Change in Azerbaijan's Energy Diplomacy*, *Caucasian Analytical Digest*, No.16, 26 April.
- Kim, Y., Eom, G. (2008) *The Geopolitics of Caspian Oil: Rivalries of the US, Russia, and Turkey in the South Caucasus*, *Global Economic Review*, 37(1), 85-106.
- Kura, A. (2001) *Russia's Transition, International Help of Meddling*, Nova Science Publisher.
- Lough, J. (2011) *Russia's Energy Diplomacy*, Chatham House, Briefing Paper, May.
- Martin, M.A.P. (2010) *Geo-Economics in Central Asia and the Great Game of Natural Resources: Water, Oil, Gas, Uranium and Transportation Corridors*, *Central Asia Observatory, Working Paper* 59/2009, 19 April.
- Mehdiyeva, A., Evgrashina, L. (2013) *BP Targets 2018 For First Gas From Shah Deniz II*, Reuters, 23 January. Available at: <http://www.reuters.com/article/2013/01/23/bp-azerbaijan-idUSL6N0ASCJ720130123>
- News. Azerbaijan (2010) *Azerbaijan Supplies 618 m cubic meters of Gas to Russia*, 08 October <http://www.news.az/articles/economy/24252>
- Nichol, J. (2009) *Turkmenistan: Recent Developments and US Interests*, CRS Report For Congress, Order Code 97-1055, September 10.
- Norling, N. (2007) *Gazprom's Monopoly and Nabucco's Potentials: Strategic Decisions For Europe*, *Central Asia – Caucasus Institute-Silk Road Studies Program*, Silk Road Paper, November.
- Olcott, M.B. (2009) *Russia, Central Asia and the Caspian: How Important is the Energy and Security Trade-off?*, *Energy Forum*, James A. Baker III Institute for Public Policy, Rice University, May 6.

- Paramonov, V., Stokov, A. (2007) *Structural Independence of Russia & Central Asia in the Oil and Gas Sectors*, Conflict Studies Research Centre, Central Asian Series 07/16E, June.
- Perspectives on Caspian oil and Gas Development (2008), IEA Directorate of Global Energy Dialogue, December. http://www.iea.org/papers/2008/caspian_perspectives.pdf
- Pomfret, R.W.T. (2006) *The Central Asian Economies Since Independence*, Princeton University Press.
- Punsmann, B.G. (2012) *A Step Ahead Towards the Stage of Naturation in Azeri-Turkish Relations: The Trans-Anatolian Pipeline*, TEPAV, Evaluation Note, N.201236, June.
- Raballand, G., Regis, G. (2008) Oil in the Caspian Basin, facts and figures, in: B.Najman, R.Pomfret and G.Raballand (Ed.) *The Economics and Politics of Oil in the Caspian Basin*, Routledge, 9-29.
- Ruiz Gonzales, C.C.F.J. (2012) *The Gas Lybrinth in Eurasia: Projects, Facts and Geopolitic Consequences*, IIEES.ES, Analysis Document, 17 July.
- Rzayeva, G. (2009) *Azerbaijan 's Diversified Energy Security Strategy*, Central Asia- Caucasasia Institute-CACI, November 26, <http://www.cacianalyst.org/?q=node/5222>
- Sabol, S. (2010) *Turkmenistan: Permanent Transition or Elusive Stability*, The China and Eurasia Forum Quarterly, Central Asia and Caucasus & Silk Road Studies Program, Vol.8, No.3, Autumn, 5-26.
- Saurbek, Z. (2008) *Kazakh-Chinese Energy Relations: Economic Pragmatism or Political Cooperation?*, China and Eurasia Forum Quarterly, 6(1), 79-93.
- Shadrina, E. (2010) *Russia's Foreign Energy Policy: Norms, Ideas and Driving Dynamics*, Electronic Publications of Pan-European Institute, 18.
- Socor, V. (2008) *South Stream Gas Project Defeating Nabucco by Default*, Eurasia Daily Monitor, 5(42), March 4. Available at: http://www.jamestown.org/single/?no_cache=1&tx_ttnews%5Btt_news%5D=33432
- Spechler, D.R. and Spechler, M.C. (2009) *Uzbekistan Among the Great Powers*, Communist and Post-Communist Studies, 42, 353-373.
- Tekin, A., Walterova, I. (2007) *Turkey's Geopolitical Role: The Energy Angle*, Middle East Policy, XIV, No.1, Spring, 84-94.
- The Peninsula Qatar (2010) *Azerbaijan, Russia Seal Major Gas Deal* 4 September <http://www.thepeninsulaqatar.com/business-news/125348-azerbaijan-russia-seal-major-gas-deal.html>
- T-Pedersen, J.G. (2011) *Turkey Approves Russian Gas Plan*, The Walt Street Journal, 29 December, <http://online.wsj.com/article/SB10001424052970204632204577126220469891132.html>
- Umback, F. (2012a) *Energy: Eurasian Pipeline Competition Enters A New and Critical Phase*, GIS, 26 March.
- Umback, F. (2012b) *Energy: Why 'TANAP' is Changing the Eurasian Pipeline Competition*, GIS; 27 March.
- Varol Sevim, T. (2012) *Analysis of Russian Foreign Energy Strategy*, PhD Thesis Submitted in Yeditepe University.
- Vestnik Kavkaz (2012) *Gazprom Abandons Its Plans For Caspian Gas Pipeline*, 9 Jul, <http://vestnikkavkaza.net/news/economy/28773.html>
- Vinokurov, E. (2010) *The Evolution of Kazakhstan's Position on Relations with Russia in 1991-2010*, MPRA Paper No.22187, March, <http://mpra.ub.uni-muenchen.de/22187>
- Weitz, R. (2008) *Kazakhstan and the New International Politics of Eurasia*, Silk Road Paper, Central Asia-Caucasus Institute & Silk Road Studies Program, July.
- Yılmaz, S., Kilavuz, M.T. (2012) *Restoring Brotherly Bonds–Turkish-Azerbaijani Energy Relations*, PONARS Eurasia Policy Memo No.240, September.
- Young, R., Winstone, R. (2005) *The Caspian Basin, Energy Reserves and Potential Conflicts*, House of Commons Library, Research Paper 05/24, 16 March.
- Ziyadovi, T. (2007) Azerbaijan, in: S.Frederick Starr, (Ed.) "The New Silk Roads: Transport and Trade in Greater Central Asia", Central Asia-Caucasus Institute & Silk Road Studies Program, 303-334.