THE GEOPOLITICAL LANDSCAPE OF EURASIA UNDER THE PRESSURE OF CASPIAN AND CENTRAL ASIAN POWER PROJECTS

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ABSTRACT

In the last ten years, the geopolitical situation in the Caspian region and Central Asia has been changing rapidly under the pressure of several factors, the main of them being energy projects realized, in particular, by non-regional states. Oil and gas transportation routes have become a strong instrument of geopolitical impact on the Central Asian and Caspian countries. Through their active involvement, the non-regional states, namely, the U.S., China, and the EU countries, have rechanneled the flows of hydrocarbons and changed the Eurasian geopolitical landscape.

Having won this rivalry, China expanded the area of its geopolitical influence. The United States, which since the early 1990s has been working hard to turn the oil and gas flows away from Russia to the West came second. It changed the directions of Caspian hydrocarbon flows, while the greater part of Central Asian oil and gas is now moved to China.

Beijing has become the key partner of the Central Asian and Caspian countries; it determines the nature of their cooperation in the energy sphere and, to a great extent, their foreign policy priorities.

For geographical reasons, Central Asia and the Caspian are active on the regional energy market that comprises China, India and Russia. While the echo of the United States' "shale revolution" resounded all over the world and reached regional markets, the impact of Central Asian and Caspian fuels, extraction level and export routes is limited to Eurasia.

It is no secret that the new pipelines undermined Russia's monopoly on oil and gas import and transit from Central Asia and the Caspian region, and that the local states nevertheless remain dependent on the policy pursued by their neighbors. Russia, which has preserved its influence in the region, shares its role of a consumer and a transitory territory with China, Turkey and Iran. India may join them at a later time. This makes the Central Asian countries fully dependent on the energy interests of these states, which do not hesitate to exploit the mechanism of price-formation and the volume of hydrocarbons bought to channel the policies of these countries.

The local pipelines did not extinguish the fire of geopolitical rivalry and did not quench the interest of Russia, the U.S., China and Turkey, Iran and India in local hydrocarbon resources: they were used in the past and are used today as a powerful instrument of foreign policies. Another spiral of geopolitical rivalry in this part of the Eurasian space is coming closer: new pipelines have been practically completed, potential projects to be realized in the next few decades have been identified, while the regional states want to extract and sell the steadily increasing volumes of their hydrocarbons.

KEYWORDS: ***Central Asia, the Caspian Region, oil, gas, infrastructural geopolitics, Caspian Pipeline Consortium, Turkmenistan-Afghanistan-Pakistan-India Pipeline (TAPI).***

Introduction

The new geopolitical situation across the former Soviet space, which stirred up an interest in the newly independent states on the Caspian shores and in Central Asia and their hydrocarbons is steadily fanning the rivalry for export pipelines and export routes. The local countries, in their turn, intended to pour their future incomes into their economies[1] in general and geological prospecting for oil and gas in particular.[2]

In the majority of cases, however, pipelines presented geopolitical rather than technical or economic problems: the future of exports of hydrocarbon riches stirred up bitter rivalry among non-regional countries, first and foremost, Russia, China and the U.S.[3]

Azerbaijan and Turkmenistan, two gas-richest countries, and Kazakhstan with its huge oil reserves attracted a lot of attention of international consortiums. Their interest was encouraged by the

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[1] See: E.M. Kuzmina, "Modernizatsia ekonomiki prikaspiyskikh gosudarstv (na primere Kazakhstana)," *Problemy postsovetskogo prostranstva,* Vol. 5, No. 3, 2018, pp. 251-267, available at [https://doi.org/10.24975/2313–8920–2018–5–3–251–267].

[2] See: D. Bolekbaeva, I.F. Selivanova, "Osnovnye napravleniya vneshney politiki Kazakhstana (1991-2015)," in: *Vneshniaia politika nezavisimykh* gosudarst, Collection of articles, ed. by B.A. Shmelev, IE RAS, Moscow, 2015, p. 230.

[3] See: Hu Bin, "Oil and Gas Cooperation between China and Central Asia in an Environment of Political and Resource Competition," *Pet. Sci.,* No. 11, 2014, pp. 596-605.

Caspian and Central Asian countries that wanted to earn enough money to intensify geological prospecting and start selling their hydrocarbons outside the region.

Infrastructural Politics

In the 1990s, a new "energy ellipse" concept was coined to describe the hydrocarbon resources of Central Asia and the Caspian.[4] There was a lot of talk about the future directions of oil and gas pipelines; the local countries, fearing to remain in the cold, started thinking about alternative routes. The inevitable clash of interests developed into a fierce rivalry of associated pipeline projects, and with good reason, with the future of the entire region. The implemented projects positively affected the economic development of the Caspian and Central Asian countries and drew them into the sphere of interests of non-regional states. Assessments of the oil and gas reserves and their future extraction, likewise, strongly affected the foreign policy course of the region's states and, therefore, the involvement of oil and gas companies.[5]

Russia, China and the United States, which relied on infrastructural projects as their most efficient instruments, figured prominently in post-Soviet Central Asia and the Caspian region. As a result, the region acquired the Baku-Tbilisi-Ceyhan pipeline in 2006, the Caspian Pipeline Consortium (CPC) in 2001, the Baku-Tbilisi-Erzurum in 2007 and Turkmenistan-China pipeline in 2009 as visible results of the geopolitical rivalry among the big players. Each of them was persistently promoting its interests and spared no effort to engage all or at least some of the local countries in its infrastructure.[6]

Despite several attempts to bring the local pipelines together through the Trans-Caspian Energy Corridors, they do not form an integrated architecture: all new oil and gas pipelines are differently orientated and are, in fact, isolated systems. This is what geopolitical pluralism and the leading powers with different, or even opposing, foreign policy priorities have done to the region.[7]

The pipeline projects realized in Central Asia were a geopolitical compromise between Russia and China. Each country tried to arrive at the best possible position, from which it could realize its policy in the whirlpool of radical changes in the world after 2014.[8]

Hydrocarbons of Turkmenistan in the Center of Geopolitical Struggle

The up-and-coming TAPI (Turkmenistan, Afghanistan, Pakistan and India) pipeline project is the best confirmation of continued geopolitical balance in Central Asia. Back in September 2015, Turkmenistan conducted a feasibility study and started engineering works on the track of the future

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[4] See: G. Kemp, *Energy Superbowl: Strategic Politics in the Persian Gulf and Caspian Basin,* Washington, 1997, p. 26.

[5] See: S. Zhiltsov, "The Caspian Region at the Crossroads of Geopolitical Strategies," *Central Asia and the Caucasus*, Volume 15, Issue 1, 2014, pp. 33-43.

[6] See: N. Contessi, "Central Asia in Asia: Charting Growing Trans-Regional Linkages," *Journal of Eurasian Studies,* No. 7, 2016, pp. 3-13.

[7] See: P. Kubicek, "Energy Politics and Geopolitical Competition in the Caspian Basin," *Journal of Eurasian Studies,* No. 4, 2013, pp. 171-180.

[8] See: *Mirovaia politika v fokuse sovremennosti*, ed. by M.A. Neymark, Dashkov i Co., Moscow, 2019, 515 pp.

pipeline between the Galkynysh gas field (the world's second richest with 21.2 trillion cu m of gas) and the Afghan border. It will be 1,840 km long, with an annual capacity of 33 bcm. In December 2016, Turkmenistan completed its part of the pipeline and achieved a preliminary agreement with Afghanistan, expected to guarantee pipeline security. Despite the very obvious interests of all sides, the exact date of the project's completion has not yet been agreed upon. The talks with Afghanistan on the construction and protection of the future pipeline are still in the preliminary stage.

Turkmenistan expects that when completed, the pipeline will help it diversify its gas supplies to world markets, which explains its great interest in the project. So far, its export possibilities are very limited. In 2016, Russia and in 2017 Iran stopped buying Turkmenian hydrocarbons. In the last three years, Ashkhabad became practically totally dependent on China, which explains its pronounced interest in a pipeline to India. The above confirms that the Central Asian countries depend to a great extent on non-regional players.[9] Today, Ashkhabad was left with China as the only consumer of its hydrocarbons that emerged in the last fifteen years.

The Energy "Bridge" for Caspian Hydrocarbons

While pushing forward the TAPI project, Turkmenistan is discussing possible oil and gas export to the European Union. In June 2015, Turkmenistan, Azerbaijan, Turkey and the EU decided to set up a permanent workgroup to study all the possible options of bringing Turkmenian gas to Europe.[10] The preliminary dates of gas deliveries were coordinated: the Iranian territory and the Trans-Caspian pipeline were discussed as possible variants. The latter might be pushed aside for an indifferent time: Turkmenistan does not have enough gas to move it to Europe, while the pipeline across the Caspian should fit the provisions of the Convention on the Legal Status of the Caspian Sea adopted by the Fifth Summit of Heads of Caspian States that took place on 12 August, 2018, clarifying the future of the Caspian region.

As could be expected, the Convention elucidated the issues related to main pipelines laid on the seabed. Art 14 says, in particular: "The Parties may lay submarine cables and pipelines on the bed of the Caspian Sea. The Parties may lay trunk submarine pipelines on the bed of the Caspian Sea, on the condition that their projects comply with environmental standards and requirements embodied in the international agreements to which they are parties, including the Framework Convention for the Protection of the Marine Environment of the Caspian Sea and its relevant protocols." This means that the pipeline issue should be discussed in the context of the Protocol on Environmental Impact Assessment in a Transboundary Context of the Framework Convention for the Protection of the Marine Environment of the Caspian Sea (Tehran Convention signed on 4 November, 2003). The Protocol was signed on 20 July, 2018 and confirmed the right of each of the Caspian states to take part in ecological studies carried out to clarify the impact of any of the intended projects on the Caspian environment. This means that each of the Caspian states has the right to assess the possible effects of the planned pipeline. In full conformity with the Protocol, international assessment will be required for large-diameter pipes used for oil and gas exports. The same article specifies: "Submarine cables

[9] See: M.P. Amineh, W.H.J. Grijns-Graus, "The EU-Energy Security and Geopolitical Economy: The Persian Gulf, the Caspian Region and China," *African and Asian Studies,* Vol. 17, No. 1-2, 2018, pp. 145-187.

[10] See: S.S. Zhiltsov, "EU Policy in Shaping the Pipeline Architecture in the Caspian Region," *The Handbook of Environmental Chemistry,* Vol. 51, 2016, pp. 95-103.

and pipelines routes shall be determined by agreement with the Party the seabed sector of which is to be crossed by the cable or pipeline."[11]

This means that no breakthrough in laying cross-Caspian pipelines is anywhere in sight. Today, the Trans-Caspian pipeline has lost its importance. Expensive essential feasibility studies are required, which may take a lot of time.

On the whole, the Caspian states agreed to look at the Caspian Sea as a unique water basin. The seabed is divided into sectors, the same principle is applied to the lakes, whose coasts belong to several countries. Art 8 of the Convention says: "Delimitation of the Caspian Sea bed and subsoil into sectors shall be effected by agreement between States with adjacent and opposite coasts, with due regard for the generally recognized principles and norms of international law, to enable those States to exercise their sovereign rights to subsoil exploitation and other legitimate economic activities related to the development of resources of the seabed and subsoil"[12] The Caspian states used the provisions of the U.N. Convention on the Law of the Sea of 1982 and agreed that "Each Party shall establish the breadth of its territorial waters up to a limit not exceeding 15 nautical miles, measured from baselines determined in accordance with this Convention" and "Each Party shall establish a 10 nautical miles-wide fishery zone adjacent to the territorial waters"; the space outside the fishery zone can be used by all coastal states.

The Convention on the Legal Status of the Caspian Sea formulated the principles of cooperation among the Caspian states in many, including the energy, spheres. Some of the countries still have certain disagreements with their neighbors: Azerbaijan should come to an agreement with Iran and Turkmenistan, while Turkmenistan has certain problems with Iran. Not all issues related to the Caspian mineral reserves (which caused tension in the 1990s) have been settled. Today, however, we can say that a breakthrough has been achieved in the form of the Convention on the Legal Status of the Caspian Sea.

The Chinese "Energy Wave"

In the first place, China focused on the energy sector of Kazakhstan and Turkmenistan, hence its fairly impressive successes in selling equipment and servicing the oil and gas sector.[13]

Beijing overcame the considerable political resistance in the region's states where distrust of the Chinese was relatively widespread; it started by buying nearly exhausted oilfields; cheap loans were Beijing's another efficient argument when it came to promoting its interests in the region; it was ready to shoulder part of the costs of development of the Caspian region's infrastructure . This was a wise strategy that bore its fruits: Beijing could claim the right to develop new and much richer oil and gas fields. At first, China bought a share in the Kashagan oil and gas field; then became involved in the development of the Galkynysh (South Ilotan) gas field, the biggest in Turkmenistan.[14]

The first stage of China's infiltration of the Caspian Region and Central Asia ended in 2009 with the first string of the Turkmenian-Chinese gas pipeline. The third string was completed in 2015 and brought the pipeline's total annual capacity to 55 bcm. In view of the fact that the gas pipeline

[11] S.S. Zhiltsov, "Pravovoy status Kaspiyskogo moria: novye vozmozhnosti dlia regionalnogo sotrudnichestva," *Rossia i mir. Vestnik Diplomaticheskoy akademii MID Rossii,* No. 4, 2018, pp. 18-38.

[12] *Kaspiy: mezhdunarodno-pravovye dokumenty*, Compiled by S.S. Zhiltsov, I.S. Zonn, A.G. Kostianoy, A.V. Semenov, Mezhdunarodnye otnoshenia, Moscow, 2018, 568 pp.

[13] See: Z.A. Dadabaeva, E.M. Kuzmina, *Protsessy regionalizatsii v Tsentralnoy Azii: problemy i protivorechia*, Institute of Economics, RAS, Moscow, 2014, p. 33.

[14] See: S. Peyrouse *Turkmenistan: Strategies of Power, Dilemmas of Development*, Routledge, 2015, 264 pp.

crosses the territory of Kazakhstan, China could buy Kazakhstan resources. In this way, the pipeline guaranteed uninterrupted supply of gas from the eastern shores of the Caspian mainly to China. By the same token, this reduced the likelihood of the Caspian states' greater engagement in the West-oriented pipeline projects. So far, the volumes of oil and gas from the eastern Caspian shores lag far behind the planned and expected amounts. It should be said that the volumes of gas extracted in Turkmenistan are not sufficient to fill the Turkmenistan-China pipeline to capacity. In 2016, Ashghabad supplied only 35 bcm of gas, which made the project of the pipeline's fourth string look unlikely. On the other hand, in October 2017 Kazakhstan started selling 5 bcm of gas to China annually, which explains why in early 2017 China suspended the fourth string project.

By active crediting of the Caspian countries' economies and buying assets in the oil and gas sector China lowered the prices it was paying for exported fuels. By the same token, Beijing consolidated its geopolitical positions and acquired an argument used at the talks about the prices of fuels exported from Russia.[15] The Belt and Road strategic initiative is another instrument of promoting interest.[16] The "Silk" project, devised to build oil and gas pipelines of strategic importance to bring fuel to China and the already built pipelines, allows us to discuss the Great Oil and Gas Road.[17] Joint realization of the Energy Corridor (Belt) of the Great Silk Road on the basis of joint investments enlivened the contacts between Eurasian countries and organized them.

By widening the sphere of its influence in the region, China is pursuing not only commercial bur also geopolitical aims. It has focused on the eastern coast of the Caspian to resolve its strategic tasks and intensify its relations with Kazakhstan and Turkmenistan in the energy fuel sphere.[18] Beijing is determined to prevent reorientation of both countries towards the West and to limit the influence of Western oil companies in this region. It is closely following the dialog between the Caspian and Central Asian states, on the one hand, and the United States and the European Union, on the other. The latter, in their turn, rely on pipeline projects to weaken Russia's influence on these countries and limit the role of China.[19]

The Turkish Factor

Turkey, which demonstrated intensive activity in trying to penetrate the Southern Caucasus immediately after the Soviet Union's disintegration, profited from the geopolitical rivalry between the United States and Russia in the Caspian region.[20] Having engaged Azerbaijan in new pipeline projects that Georgia later joined made Turkey an active participant in energy-related Baku-Ceyhan and Baku-Erzurum projects that brought Caspian oil and gas to the European market.

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[15] See: S. Malle, "Russia and China in the 21st Century. Moving towards Cooperative Behavior," *Journal of Eurasian Studies,* No. 8, 2017, pp. 136-150.

[16] See: M. Gliants, "Kitayskaia initsiativa "Odin poias-odin put": chto mozhet sdelat brand," *Problemy postsovetskogo prostranstva,* Vol. 4, No. 1, 2017, pp. 8-19.

[17] See: I.S. Zonn, Yu. Tyan, "Novoe prochtenie Velikogo shelkovogo puti," *Problemy postsovetskogo prostranstva*, No. 3, 2015, pp. 5-18.

[18] See: M. de Haas, "Security Policy and Developments in Central Asia: Security Documents Compared with Security Challenges," *Journal of Slavic Military Studies,* Vol. 29, No. 2, 2016, pp. 203-226.

[19] See: E.M. Kuzmina, "Bolshaia Evrazia": interesy i vozmozhnosti Rossii pri vzaimodeystvii s Kitaem," *Problemy postsovetskogo prostranstva,* Vol. 4, No. 3, 2017, pp. 229-239 [DOI: 10.24975/2313-8920-2017-4-3-229-239].

[20] See: L.M. Aleksanyan, "Turetsko-gruzinskie otnoshenia v kontekste regionalnoy politiki Turtsii na sovremennom etape," *Problemy postsovetskogo prostranstva,* Vol. 4, No. 4, 2017, pp. 307-320 [DOI: 10.24975/2313-8920-2017-4-4-307-320].

Ankara was consistently realizing its own energy strategy since the EU-initiated pipeline projects (Nabucco being one of them) had failed. It involved Azerbaijan in its own projects: in 2011, Turkey and Azerbaijan signed the memorandum on the Trans-Anatolian Gas Pipeline (TANAP), which was expected to bring Azeri gas to the Turkish western border; in June 2018 the gas pipeline called the Energy Silk Road was built, which means that Azerbaijan will supply Turkey with additional 16 bcm of gas annually, of which 10 billion will be sent to Europe and the rest (6 billion) will be used in Turkey. Gas supplies to the hub on the Turkish-Greek border are slated to start in mid-2019.

There is the Trans-Adriatic Pipeline (TAP) 878 km-long project that will cross the territories of Greece, Albania, Adriatic Sea and Italy with an initial annual capacity of 10 bcm, to be later doubled to 20 billion. The project was established in 2003 and approved by the European commission in March 2016. Construction began in May of the same year; it is expected that it will be launched in 2019-2020. The South Gas Corridor will bring Caspian gas to Europe and consolidate the Turkey's positions. Since the final consumers of Azeri gas were not very much bothered by the diversification of the sources of exported fuels,[21] we can hardly expect that significant quantities of Azerbaijan's gas will reach the European market. This pipeline, however, is of a geopolitical importance for Turkey and Azerbaijan.[22]

The Iranian Vector

In the 1990s and until January 2016, Iran remained excluded from all new Caspian oil and gas projects,[23] leaving Russia alone to cope with the newly independent Caspian states and the West that seized this opportunity to promote their infrastructural projects.

The Iranian sanctions lifted in January 2016 created a new context in the Caspian region. Tehran announced that it was ready to move more gas to external markets. The extensive choice of directions and considerable oil and gas reserves make it easier for Iran to realize its plans. It might move to the West and build a pipeline leading to Europe. This looks all the more likely since Tehran repeatedly confirmed its intention to increase its share on the European market. Brussels, which is very much interested in Iranian gas, may reciprocate with new technologies very much needed to increase the quantities of extracted oil and gas; they may be used as an instrument in its talks with Iran. Indeed, without them Iran will find it hard to increase the amounts of extracted hydrocarbons, especially on the shelf.

Iran's involvement in the discussion of the wide range of problems related to oil and gas extraction and exports from the Caspian will offer new prospects of the functioning and, even to a greater extent, planned pipelines. Isolated for twenty years, Iran was unable to take part in the pipeline projects in which the political component was much stronger than their economic value. This explains why Iran, despite its highly advantageous geographic location, does not occupy an adequate place in the new Caspian pipeline geography.[24]

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[21] See: F. Umbach, S. Raszewski, *Strategic Perspectives for Bilateral Energy Cooperation between the EU and Kazakhstan: Geo-Economic and Geopolitical Dimensions in Competition with Russia and China's Central Asia Policies,* Konrad-Adenauer-Stiftung, 2016, 70 pp.

[22] See: L.M. Aleksanyan, "Rol publichnoy diplomatii vo vneshney politike Turtsii v otnoshenii Gruzii," *Problemy postsovetskogo prostranstva*, Vol. 5, No. 4, 2018, pp. 418-428 [DOI: https://doi.org/10.24975/2313–8920–2018–5–4–418–428].

[23] See: S.A. Mikheev, A.E. Chebotarev, G.S. Kovalev, "Problemy regiona nakanune IV Kaspiyskogo summita," *Problemy postsovetskogo prostranstva*, No. 2, 2014, pp. 31-69.

[24] See: V. Khosseynzadeh, "Politika Irana v Kaspiyskom regione na sovremennom etape: itogi i perspektivy," *Problemy postsovetskogo prostranstva,* Vol. 4, No. 3, 2017, pp. 221-228 [DOI: 10.24975/2313-8920-2017-4-3-221-228].

The United States played an important role in the pipeline architecture: Washington closed the southern "door" for the Caspian countries and made it much harder for them to look for and find new oil and gas export routes from the Caspian (the route across Iran being the most obvious and the cheapest). As a result, Caspian countries acquired considerable preferences for their hydrocarbon resources. Today we can expect that in the future the energy policy of Iran will strongly affect the export routes in the Caspian region. Tehran plans not only to widen the geography of its hydrocarbon exports but also to increase the volume of oil and gas sold to other countries. It is very much interested in a gas pipeline to India via Pakistan, which makes the planned Iran-Pakistan-India (IPI) project a competitor of TAPI. The Caspian states are not greatly concerned with the rivaling projects; they affect China, the EU and the United State to a much greater extent: the Caspian hydrocarbons were and still remain an instrument of influence in the region.

Conclusion

In the past twenty-five years, the energy projects have hugely affected the Caspian region and Central Asia. The new gas and oil pipelines, the result of uncompromising geopolitical competition in Eurasia, drew Russia, the United States and China into a bitter rivalry of geopolitical dimensions for control over the hydrocarbon resources. Turkey, the EU and Iran were pursuing their own policies and fought for their own interests behind the back of the leaders.

In its relations with the local countries Russia relies on the extensive common history. Moscow preserved its influence in the Central Asian and Caspian countries, yet these close economic and cultural ties did not keep non-regional powers away from the region. China has obviously come to stay: it applied its trade and economic instruments and later its energy projects and credit policies to the belt of states along its western borders to ensure security. Impressed with these activities, the Caspian and Central Asian states changed their policy and moved somewhat away from Russia, albeit with no chance of becoming free in their foreign policy maneuvers.

The realized and planned pipeline projects designed to export Caspian hydrocarbons have already divided the region and worsened the complicated relations between the Caspian and Central Asian countries. The United States and the EU, on the one hand, and China, on the other, have agreed that Brussels and Washington will operate on the western coast and China—on the eastern. In their sphere of influence, Brussels and Washington stake on the hydrocarbon reserves of Azerbaijan as the main alternative to Russian gas exported to European countries. The Europeans refuse to admit that the volumes of future gas supplies from Shakh Deniz cannot be compared with Europe's real demands, yet Brussels is insisting on a trans-Caspian pipeline to bring Turkmenistan gas to Europe.

The first stage of geopolitical rivalry for Central Asian hydrocarbon resources and transportation routes for additional oil and gas volumes extracted in the region has been completed. In 2017-2018, an interest in Central Asian hydrocarbon reserves was preserved, while the region's countries and their neighbors were involved in the discussions of new export pipelines. Nothing has been resolved so far: the funding and security issues remain pending. Western influence is another negative aspect. The forecasted oil and gas reserves that the Central Asian countries plan to extract are strongly politicized. In the context of the dynamics of oil and gas extraction in the last few decades and the objective problems that interfere with the transit of gas and oil, we can expect that new pipelines will be commissioned and new energy flows will emerge. By that time, the question of the extraction level of the Central Asian countries will be elucidated; it will become clear whether they have enough oil and gas to fill the planned export pipelines to capacity.

If the volume of exports increases considerably, we will see a new stage in the development of Central Asia and the Caspian region, and a radically transformed geopolitical landscape of Eurasia.