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EURASIAN REALIGNMENT: CENTRAL ASIA AS A KEY PLAYER IN EUROPEAN ENERGY SECURITY[**]

INTRODUCTION

Hydrocarbon energy resources like oil and gas have shaped global power dynamics. Their immense influence on geopolitics and economics has made them virtually synonymous with power. Since their discovery and widespread use, these resources have been intricately linked to national strategies, international relations, and the struggle for dominance. Historically, control over oil and gas has been a decisive factor in wars and territorial expansion. For instance, the European colonial era was partly fuelled by the search for these resources. Beyond military and territorial gains, oil and gas have become indispensable to modern life. The transition from coal to these fuels in the early 20th century marked the beginning of the "Hydrocarbon Age," a period characterised by rapid societal development.

The ongoing Russia-Ukraine war and unrest in the Red Sea due to Israel-Palestine have disrupted supply chains and escalated geopolitical tension among the major global powers. Interruptions, disruptions, and congestion along the traditional routes have resulted in unprecedented energy and food shortages, impacting the European Union's (EU) energy-import-driven economies. However, the EU has not been passive in the

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face of these challenges. It has taken proactive steps to establish resilient, reliable, and, most importantly, diversified supply chains and sustainable transportation connections. This diversification and sustainability are vital to mitigating disruptions and shortages, demonstrating the EU's commitment to ensuring European energy security.

With their vast hydrocarbon resources and strategic locations, the Caucasus and Central Asia have emerged as pivotal players in the EU's quest for energy security. Europe's heavy reliance on Russian energy imports has become a significant vulnerability, particularly in the face of geopolitical tensions. The continent proactively seeks alternative energy sources to strengthen security and reduce dependence on a single supplier. Central Asia presents an attractive opportunity with its abundant natural gas and oil resources. The Russian aggression on Ukraine has forced Central Asian Countries to rethink their security dependence on Moscow. Moscow, after 2022, is now seen as a threat to sovereignty, stability, territorial integrity, and security. In Kazakhstan, the majority of people now blame Russia for the ongoing war. Similarly, in Kyrgyzstan, among younger generations, the sentiment is identical: more people blame Russia for the war in Ukraine and far fewer blame the US. The prolonged disturbances have also prevented European goods from reaching Central Asia via Russia and cut Central Asia's direct access to European markets. These geopolitical contestations, geoeconomic challenges, and security dilemmas have necessitated the EU and Central Asia reassess their foreign policy, particularly concerning strategic autonomy, sovereignty, safety, and stability in greater Eurasia.

Consequently, countries across Eurasia have been compelled to explore alternative and more resilient connectivity corridors to facilitate new trade routes and sustainable transport methods. The paper examines the evolving dynamics of recent trends in EU-Central Asia relations in the context of the ongoing Russia-Ukraine conflict and disruptions. It explains how the EU Central Asia can emerge as a key player in European energy security and what needs to be done to curtail infrastructure gaps.

EU-CENTRAL ASIA ENERGY RELATIONS

Soon after the breakup of the former Soviet Union in 1991, five Central Asian Republics (CARs) – Kazakhstan, Kyrgyzstan, Turkmenistan, Tajikistan, and Uzbekistan – had to deal with their lack of governance structures and economic issues like Inflation and low GDP.

However, these newly independent states possess abundant hydrocarbon resources, which hold immense potential for the future of European energy security. Kazakhstan is ranked 12th in the world for oil reserves and has significant gas resources. Additionally, Kazakhstan holds the second-largest uranium reserves, and Uzbekistan ranks fifth in uranium production. Turkmenistan has the fourth-largest gas reserves globally, with 13.4 trillion cubic meters and 20 billion tons of oil. Tajikistan and Kyrgyzstan have significant hydropower potential.

The EU's policy towards Central Asia began modestly, focusing on cultural ties and energy cooperation. The slow progress was due to the lack of direct security challenges from Central Asian countries. The Technical Aid to the Commonwealth of Independent States (TACIS) program aimed to aid in the political and economic transformation of the newly independent countries. However, most funding went to transnational projects benefiting Ukraine and Russia. Despite this, TACIS contributed to poverty alleviation and institution-building in Central Asia. Other EU initiatives included programs for energy cooperation, infrastructure development, and partnership and cooperation agreements (PCA) at the bilateral level. These agreements aimed to enhance trade, economic relations, and political dialogue while emphasising compliance with EU regulations and standards, human rights, and the rule of law.

The EU's primary objective regarding Central Asia was to diversify energy resources, reducing reliance on Russia due to concerns about its reliability, particularly after the crises of 2006 and 2009 (Kramer 2009). The INOGATE initiative was launched in 1995 to achieve energy security goals, focusing on energy cooperation between the EU, CARs, and the Caucasus. This involved a meeting in Astana, Kazakhstan, in December 2006, where energy ministers discussed implementing the ' Baku Initiative – 2004.' The Baku Initiative – 2004 was a significant step in energy cooperation, as it emphasised energy supply security and compliance with EU and international energy market standards. Furthermore, the EU engaged in bilateral dialogues with CA countries such as Turkmenistan (gas), Kazakhstan (oil and gas), and Azerbaijan for energy supplies. "This led to high-profile EU officials visiting these countries for energy deals. In 2007, Russian President Putin convinced Turkmenistan and Kazakhstan to support Moscow's plan for constructing a gas pipeline from these two countries along the Caspian shore to Russia rather than towards the South Caucasus, which was favoured by the EU" (Dave 2008). Moscow's strategic move was to keep a monopoly over the EU's energy security.

“The Southern Corridor pipeline project (Nabucco) was a high priority for the EU, aiming to reduce dependence on Russia. The project involved private firms backed by political and financial support from the EU to transport gas from Turkmenistan, Azerbaijan, and Kazakhstan to the EU. Turkmen gas was planned to be delivered through a sub-sea Caspian extension to the new Baku–Tbilisi Erzerum (BTE). It will be further connected to a major European gas junction” (Dave 2008).

However, the EU cancelled the Nabucco and reduced its length from the original 3,900 km to 1,300 km because of disagreements and divergences within the participating states and finances within the EU (Weiss 2013). Additionally, alternative gas sources, like liquefied natural gas (LNG) shipments from the Middle East, were preferred (Jozwiak and Recknagel 2013). Furthermore, countries’ increased shale and liquified gas production decreased the EU’s natural gas demand. Moscow also responded to Nabucco with the construction of the North Stream pipeline and started exporting gas to Germany in 2011. Russia began working on a stream gas pipeline to maintain its monopoly over the EU’s energy supplies in 2012 (Dave 2008).

RUSSIA PREFERRED CHINA OVER THE EU IN CENTRAL ASIA

Russia adamantly considered CARs its “backyard” and was determined to prevent the countries from developing close ties with the US and Europe. The primary goal was to control regional energy politics, maintain a monopoly over Europe’s energy supplies, and block the European Union from accessing Central Asia’s extensive hydrocarbon reserves (Kaczmarski 2019). Russia struggled economically in the post-Soviet era, forcing it to create a “division of influence” with China over the region through ‘cooperative hegemony’ (Pedersen 2002, 677–696). Moscow and Beijing established the Shanghai Cooperation Organisation in 2001 as part of their cooperative hegemony. It has become a key platform for defence and security cooperation for both countries in the region.

China has also invested heavily in the hydrocarbon sector of CARs in the last three decades. China has constructed cross-country pipelines connecting Central Asia to Xinjiang to import gas from Turkmenistan and gas and oil from Kazakhstan and other Central Asian countries. President Xi Jinping has prioritised investments in Central Asia since taking office. China’s involvement in the Central Asian oil and gas sector dates back to

1997, when a $9 billion deal was signed with Kazakhstan and the China National Petroleum Corporation (CNPC). Since then, CNPC has been a significant investor in the oil and gas sector of Central Asian countries, facilitating the entry of other Chinese state-owned and private firms in the energy sector. Following the 1997 deal, CNPC secured exploration licenses for various fields in Kazakhstan, Turkmenistan, and Uzbekistan. The 3,666 km-long Central Asia-China gas pipeline, which starts from Gedaim on the Uzbekistan/Turkmenistan border and offloads gas at Xinjiang, was completed for US$7.3 billion (Wani 2020). The pipeline transported 4.38 billion cubic meters of natural gas to China, and its capacity was increased to 36.3 billion cubic meters in 2017 (Putz 2018). China has become a major importer of the region's hydrocarbon energy resources after Moscow curtailed its gas imports from Turkmenistan in 2017 (Lelyveld 2018). Additionally, Beijing has invested over US$45 billion in Kazakhstan's oil and gas sector (Kumenov and Liu 2022). In 2021, Turkmenistan supplied 34 bcm (Business Turkmenistan 2022) of natural gas to China, and gas imports from that country were valued at US$9.2 billion (Sarymbetova and Bayramli 2023). China imports 30 percent of its natural gas through pipelines connecting Shanghai and Beijing with the region.

GEOPOLITICAL SHIFTS AND REALIGNMENT FOR THE EU'S ENERGY SECURITY

The EU s influence over the region's hydrocarbon resources remained minimal compared to China and Russia. The growing influence forced the EU to reassess its policy towards Central Asia. In 2019, the EU started the "New Opportunities for a Stronger Partnership" initiative, focusing on comprehensive, sustainable, and rule-based connectivity for regional integration (European Council 2019). Central Asian countries also prioritised strategic autonomy in connectivity, trade, and security for independent foreign policy (Wani 2022). The Ukraine War and harsher sanctions on Russia imposed by the EU and the USA led to a severe energy crisis in Europe. Also, sanctions against Russia have led cargo companies to abandon the Northern Corridor, resulting in a 51 percent decrease in westbound shipping volumes and a 44 percent decrease in eastbound shipping volumes in 2023 (Zhang and Dumont 2023).

The sanctions compliance issues forced the EU to look for other regional energy suppliers, mainly Central Asia and the Caucasus. The rising demand for alternative energy supplies forced the EU to start a more vigorous policy and strategic reach out to Central Asia. In October 2022, the President of the European Council, Charles Michel, attended a high-level meeting with heads of state of Central Asian countries in Astana (European Council 2022). The leaders stressed the importance of developing a regional vision and cooperation to develop sustainable connectivity between the EU and Central Asia in line with the EU Global Gateway initiative. In June 2023, the leaders held their second regional high-level meeting and reviewed the EU-Central Asia cooperation. Since 2022, the number of high-level visits to the region by EU officials, including the High Representative, multiple commissioners, and the defence, foreign, and prime ministers of EU countries such as Germany, France, and Italy, has doubled (Wani 2023).

As CARs became crucial partners for the EU regarding connectivity, energy, and resource diversification, an Investors Forum for EU-Central Transport Connectivity under the Global Gateway was held in Brussels in January 2024 (European Commission 2024). The Global Gateway initiative, launched in 2021 with a budget of US$450 billion until 2027, aims to shape global governance and secure the EU's geoeconomic and geopolitical interests in a contesting multipolar world (European Commission 2024). International and EU financial institutions supported the EU-Central Asia forum. They pledged to invest US$11 billion in sustainable connectivity and the development of the Middle Corridor, also known as the Trans-Caspian International Transport Corridor (TITR).

Initiated in 2014, the TITR, a multimodal connectivity route consisting of rail lines and seaports, is gaining traction among CARs, Azerbaijan, Georgia, Europe, and Türkiye (Wani and Vesterbye 2023). In March 2022, Georgia, Azerbaijan, Türkiye, and Kazakhstan jointly issued a statement emphasising the importance of advancing the TITR as an alternative route over Eurasia for trade and connectivity (Avdaliani 2023). The TITR passes through Central Asia, the Caspian Sea, and the South Caucasus and is the fastest and shortest reliable route despite comprising over 4,250 km of rail lines and 500 km of seaway (Ozat and Nelson 2023). In September 2017, the fully modernised Baku–Tbilisi–Kars railway opened, providing a rail link to Türkiye and Europe (Hampel-Milagrosa et al. 2020). The TITR is 2000 km shorter than Russia's Northern Corridor, making it an ideal solution to sanction-compliance issues (Wani 2024a).

In September 2023, the President of the United States, Joe Biden, met with the Presidents of Kazakhstan, the Kyrgyz Republic, the Republic of Tajikistan, Turkmenistan, and Uzbekistan for the first-ever C5+1 summit on the sidelines of the United Nations General Assembly in New York City (The White House 2023). The United States reaffirmed its support for the region's security, enhanced economic resilience, and supported sustainable development. The US also supported the development of TITR, energy infrastructure, and transport networks. The US president suggested that the "Partnership for Global Infrastructure and Investment (PGI) will evaluate opportunities to scale infrastructure investments to accelerate economic development and energy security" (The White House 2023). Thus, it marked a pivotal step towards realising the security of resilient and reliable routes. In addition, much of the stress was placed on regional economic integration and development, which needs to be oriented towards Europe rather than Russia or China.

European Bank for Reconstruction and Development (EBRD) and Asthana also joined hands to develop and modernise Kazakhstan's mining sector. Under the agreement, EBRD and Kazakhstan will cooperate to ensure better governance, transparency, and regulation of the critical mineral sector in line with global standards. The EBRD has planned to increase investments in the crucial raw materials prerequisite for green transition, such as solar panels, lithium-ion, and electric car batteries, for sustainable economic development (Usov 2024).

INCREASED ENERGY IMPORTS, BUT RUSSIA STILL HAS THE UPPER HAND

Until the third quarter of 2022, Russia had been the EU's primary oil supplier for decades, accounting for approximately 25 percent of its hydrocarbons and serving as Germany's largest energy supplier. Since 2022, the EU has been forced to work hard for new, resilient, reliable, and sustainable alternative energy supplies. Kazakhstan's oil exports to the EU, which account for eight percent, increased by nearly 900 percent between 2000 and 2021 (Nakhale 2023). Kazakhstan supplies an approximately 8 percent share of the EU's oil imports, which increased to 10.9 percent in the first quarter of 2024. Today, Kazakhstan has become the largest oil exporter in the EU after the USA and Norway (Eurostat 2024).

Then again, Kazakh oil is mainly exported through the Caspian Pipeline Consortium (CPC), and around two-thirds of the oil crosses Russia before reaching the market. The CPC links Kazakh oil fields with the Russian port of Novorossiysk in the Black Sea and is forwarded to EU markets. The Russian government has a 24 percent stake in the CPC, with other Russian companies like Lukoil and Rosneft also having stakes. Though using Russian infrastructure and pipelines is not subject to sanctions, it still exposes Moscow's influence on Kazakh oil going to Europe. In 2022, the President of Kazakhstan stated that the country is prepared to utilise its hydrocarbon resources to help stabilise the global and European markets. However, within two days, a Russian court issued an order to suspend CPC operations for 30 days due to concerns about oil spill management (Nakhale 2023). Kazakhstan has attempted to transport oil via the Middle Corridor to Baku for further export to the EU through the Baku–Tbilisi–Ceyhan pipeline. This involves multiple transhipment steps, resulting in significant delays and technical difficulties compared to CPC. Kazakhstan aims to increase oil deliveries via the Middle Corridor route to 1.5 million tonnes, 1.4 times the amount in 2023 (Kumenov 2024).

In 2023, Kazakhstan produced 1.8 million barrels daily, two percent of the global output. It plans to ramp up production to 2 million barrels daily by 2024. The growth will pump more oil into the Western market. The EU is already a primary buyer of Kazakh oil and gas, accounting for US$32 billion in total exports to the bloc in 2022. With mineral products, oil, gas, and uranium represent 90 percent of Kazak exports to the EU, and there is room to increase (European Commission 2024). Kazakhstan has attempted to transport oil via the Middle Corridor to Baku for further export to the EU through the Baku-Tbilisi-Ceyhan pipeline. This involves multiple transhipment steps, resulting in significant delays and technical difficulties compared to CPC. Kazakhstan aims to increase oil deliveries via the Middle Corridor route to 1.5 million tonnes, 1.4 times the amount in 2023 (Kumenov 2024).

Similarly, there are enormous gas reserves in the Central Asian countries of Turkmenistan, Kazakhstan, and Azerbaijan in the Caucasus. The EU is trying to get more supplies from these countries after the Russia–Ukraine war. In 2022, the EU signed a deal with Azerbaijan to increase gas imports from the Southern Gas Corridor. The Corridor consists of four projects: South Caucasus Pipeline (SCP), the Shah Deniz natural gas condensate field (SD1), the Trans-Anatolian Natural

Gas Pipeline ("TANAP"), and the Trans Adriatic Pipeline ("TAP"). The total length of the newly constructed SCPX, TANAP, and TAP pipelines is more than 3,2oo km, and SD1 production capacity is increasing from 11 bcma to 16 bcma.

While the volume is insufficient to replace Russian gas supplies, the agreement is still considered strategic. Azerbaijan and the European Commission made a significant stride by signing a deal to double the natural gas exports to Europe by 2027. Turkmenistan's gas was transferred to Azerbaijan through a swap agreement with Iran in 2021. Despite the US ambassador to Turkmenistan saying a "swap through Iran does not violate sanctions", Baku and Ashgabat could not reach an agreement on gas pricing for 2024, leading to the discontinuation of the arrangement (Huseynov 2024). In 2023, the revenue from this corridor amounted to US$3.1 billion, with an increase of 15.7 percent compared to 2022. In the first quarter of 2024, Azerbaijan exports 7.7 percent of the total natural gas imports of the EU, and there is room to increase (Eurostat 2024).

With its vast gas reserves, Turkmenistan can be a viable option for the EU. It has around 13.4 trillion cubic meters of gas and 20 billion tons of oil and has the fourth-largest gas reserves globally (Olcott 2013). The 2008 Memorandum of Understanding governs the energy cooperation between the EU and Turkmenistan. Following the Russia-Ukraine war, the EU is trying to gain access to Turkmenistan' s gas and oil resources. They are working on a new gas deal as the EU and Turkmenistan want diversification for reliable and resilient energy supply chains under the 2014 agreement. In November 2014, Turkmenistan signed a contract with Turkey to deliver its gas through the Trans-Anatolian gas pipeline. This pipeline will receive gas from Azerbaijan's Shah Deniz field in the Caspian Sea. In 2021, Trans Caspian Resources launched its project for the Trans-Caspian Interconnector, a smaller gas pipeline from Turkmenistan to Azerbaijan. It will supply between 10 and 12 billion cubic meters of natural gas annually upon completion (European Parliament 2024).

Though Turkmenistan has considered a Trans-Caspian gas pipeline to Azerbaijan for decades, it has forwarded it to the EU, and Türkiye, Iran, and Russia have opposed the proposed pipeline. In May 2024, Azerbaijan and Türkiye struck a significant agreement to transfer natural gas from Turkmenistan. However, Azerbaijan supports the export of gas from Turkmenistan to Europe. Baku is ready to provide technical resources and access to the Sangachal terminal, but does not want to finance the pipeline.

INFRASTRUCTURE DEVELOPMENT AND GEOPOLITICAL COMPETITION

The Nabucco pipeline was initially estimated to transport around 13 bcm to the EU's gas hub at Baumgarten, Austria. Azerbaijan only provided 10 bcm, and most of the gas was on the other side of the Caspian Sea, particularly in Turkmenistan. The EU mainly sponsored the Nabucco West and the Trans-Adriatic pipeline, and there were cracks in EU members' cooperation on this strategic gas pipeline. Many individual countries signed agreements with the Russian South Stream project and thus prioritised the Russian ventures of pipelines for energy supply. Additionally, the EU failed diplomatically to persuade Azerbaijan and other potential gas exporters like Turkmenistan to sell to European clients (Thomas 2023). Russia also safeguarded its dominant EU energy market by pressurising most Central Asian countries to support Gazprom's South Stream pipeline, a rival to Nabucco, to bring Russian gas to Eastern and Southern Europe (Reuters 2014). Even countries like Azerbaijan, Turkmenistan, and Kazakhstan were concerned about geopolitical and security considerations. Given the Russian impact on the region's geopolitics, these countries were wary of the effects if they made the pipelines towards Europe without the assertive support of the United States and the EU (Wani 2024b).

With the constant new investment by the EU under the Global Gateway Initiative on TITR and the strategic support of the USA, Central Asian countries are increasing their energy exports to Europe. The TITR allows for the transportation of various energy resources, aiding the EU's green transition and facilitating the transport of critical minerals to European markets. Despite progress, significant investments are still required to develop the infrastructure for efficient energy transportation, especially in gas and oil pipelines across the Caspian Sea. Investments in these pipelines will facilitate more energy flows towards Europe, as the EU's emphasis on the Green Deal on energy diversification can create a more favourable environment for Central Asian exports.

The region faces intraregional disputes, border demarcation issues, and political instability. Central Asia has border disagreements and territorial disputes. Efforts have been made to resolve these conflicts, but permanent solutions are needed for economic and regional integration. The relationship between Azerbaijan and Armenia has been strained since 1991. Both countries attempt to establish a peace treaty, but issues such as enclaves, border delimitation, and transport links remain unresolved. The meeting was part of the USA's efforts to prevent further conflict between the two countries. Normalising relations between Armenia and Azerbaijan through a peace agreement would create new regional opportunities for energy connectivity (Wani 2024c).

Finally, following the Russia–Ukraine war, Central Asian countries seek new security, economic partners, and connectivity routes. China has heavily invested in the region's oil and gas sector, with significant natural gas imports from Turkmenistan. The EU and the USA have limited regional options due to China's geoeconomic and geostrategic engagement. Russia and China have increased diplomatic visits and regional engagements to counter the influence of the EU and the USA in the region. Under such competition and influence, the EU needs a coherent rather than divergent policy towards energy diversification and greater integration with the area (Wani 2023).

CONCLUSION

The Eurasian realignment, with Central Asia as a key player, is a complex and dynamic process with far-reaching implications. While challenges persist, the potential benefits for Europe and Central Asia are substantial. This partnership can contribute to a more secure, stable, and sustainable global energy future by addressing the existing hurdles and building on the opportunities. However, the infrastructure gaps in constructing new pipelines must be addressed with the USA's strategic, economic, and tactical support. Last but not least, the EU has made significant strides in developing a unified external voice, but achieving complete coherence remains a formidable challenge. The EU needs to look at the energy resources from its perspective and not from the Central Asian perspective. Central Asia will get new markets if the EU needs to diversify away from Russia; Europe has to come as one.

This presents a complex and multifaceted entity when it comes to foreign policy. While it has made significant strides in developing a unified external voice, achieving complete coherence remains a formidable challenge.

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