



The Trans-Caspian Gas Pipeline for Peace-building in the South Caucasus

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The Trans-Caspian Gas Pipeline for Peace-building in the South Caucasus

Robert M. Cutler*

1. Executive Summary

Key Points:

- The EU should emphasise the three main successful points of its bilateral cooperation with the countries in the South Caucasus region: energy, security and transportation.
- This includes construction and extension of the Trans-Caspian Gas Pipeline (TCGP, often called 'TCP', and which is already a Project of Common Interest), gas from which, in the new geopolitical situation, could transit through Armenia from Azerbaijan to Turkey.
- This pipeline, which can be designed to be hydrogen-ready, would satisfy the EU's energy requirements at the lowest cost possible and without contravening the principles of the European Green Deal.
- The TCP's first string would enable Armenia to buy gas from Turkmenistan; alternatively, Armenia could be supplied through the Georgian pipeline system if the TCP is constructed through the established Azerbaijan-Georgia-Turkey route.
- Along with the complementary White Stream pipeline for the TCP's second string, it would enhance (1) security of supply by diversifying routes, (2) sustainability and (3) competition.
- The White Stream (WS) pipeline, under the Black Sea, would feed the Bulgaria-Romania-Hungary-Austria (BRUA) pipeline and other connectors, bringing competitively priced gas from new sources to Baumgarten via the lowest-cost transportation routes.
- The WS pipeline would thereby enable increased competition, increase market integration and facilitate the deployment of renewable energy sources at larger scales, in both the EU and the Energy Community.
- Joint efforts should now be further encouraged on the basis of the new realities in the South Caucasus and Caspian Sea regions, in particular their significant potential to supply blue hydrogen.
- The mid-January 2021 agreement between Azerbaijan and Turkmenistan to develop jointly the mid-Caspian Dostlug oil field, over which they have disagreed for over two decades, erases the last obstacle to constructing the TCP.
- Turkmenistan is the only available non-Russian source of natural gas (and of blue hydrogen) that has the potential to make the transition more efficient and less expensive while at the same time enhancing the security of supply.
- The project's success will improve the humanitarian situation in the South Caucasus, further enhance EU prestige in the region, and create the basis for establishing a genuine South Caucasus Community with transnational institutions, as Brussels envisioned 20 years ago.

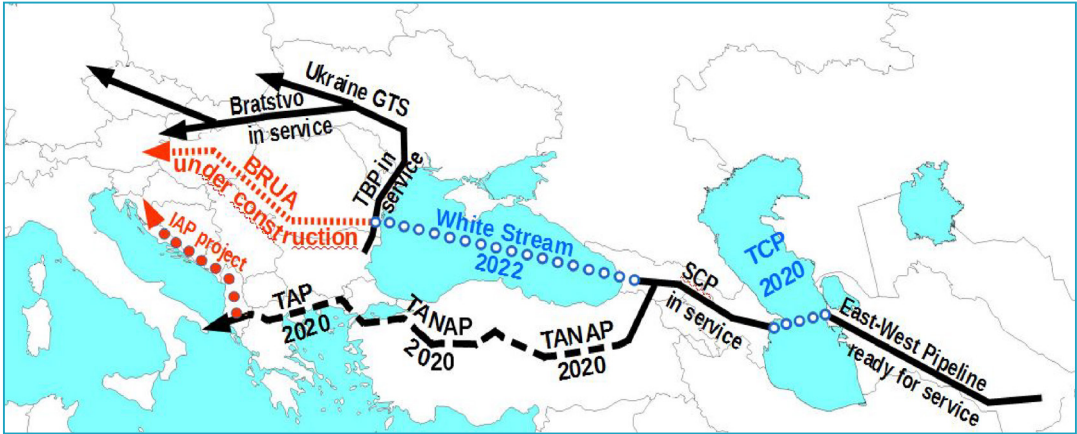
2. Background

The Eastern Neighbourhood has definitively changed with the end of the Second Karabakh War. A 30-year-old constraint on genuine security and cooperation amongst the countries in the region, and with their neighbours and the EU, has disappeared. Real possibilities for the EU to help securitize the region have now opened.

The terms on which the Second Karabakh War was concluded, eliminate the possibility that Armenia may threaten the Azerbaijan-Georgia energy corridor. Those terms also establish the basis for recon-

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struction and peace-building in the South Caucasus. Such a breakthrough finds expression in two tri-lateral (Armenia, Azerbaijan and Russia) declarations. The first of these (10 November 2020) contains nine important provisions, and the second (11 January 2021) aims at implementing the ninth of them in particular. This provision concerns the unblocking of all communications in the re-gion including transportation infrastructure. The work is proceeding swiftly. (For details, see Jafarova, 2021.



Map 1. The Trans - Caspian and White Stream Pipelines Complement The Southern Gas Corridor (Source: [Trans - Caspian Pipeline](#))

In the late 1990s, political leaders in the South Caucasus and some surrounding states concluded that it was desirable to establish a pact for stability and cooperation. Such a pact, they thought, could achieve peace and security in the region as well as unleash its full potential for economic development and transformation. The proposal, originally made by President Heydar Aliyev of Azerbaijan at the November 1999 Istanbul Summit of the OSCE, was subsequently supported and extended by President Suleiman Demirel of Turkey, then endorsed by President Robert Kocharyan of Armenia and President Eduard Shevardnadze of Georgia.

It eventually became a proposal for a '3+3+2' agreement (i.e., Armenia, Azerbaijan and Georgia; plus Russia, Iran and Turkey; plus the EU and the US) to address not just security and conflict-resolution issues but also economic cooperation and democratic reforms. The Centre for European Policy Studies (CEPS) further elaborated this idea into a proposal for a 'Stability Pact for the Caucasus', at the time including the North Caucasus, which was in the throes of the Chechen Wars and their aftermath and spillover to neighbouring regions. (Full disclosure: The author of the present Policy Brief was an 'External Collaborator' with the CEPS Working Group on the Caucasus.)

The best point of departure for this Policy Brief is to revisit briefly the CEPS proposals, in order to evaluate what worked and what did not work. That assessment will assist in guiding the evaluation of the present situation and how, on the basis of established successes, to proceed in the new circumstances following the end of the Second Karabakh War.

The CEPS proposal comprised six 'chapters' with detailed policy initiatives. These are not present in the originally published version (Celac, Emerson & Tocci, 2000) but only in the 'Working Document' redaction that had limited circulation several months later (Celac & Emerson, 2000). Those six chapters were divided into two groups of three: (1) the creation of an OSCE-backed Southern Caucasus Community (SCC) with a relatively elaborate institutional framework, focussed on the resolution and prevention of conflict; and (2) the SCC's expansion into a 'wider Southern Dimension' comprising Russia-EU-US cooperation, including an expanded platform for Black Sea-Caucasus-Caspian cooperation plus the promotion of investment in oil and gas and related infrastructure.

MEP Per Gahrton's (2002) subsequent report, to the European Parliament committee considering such questions, cited the CEPS Working Document's recommendations and specifically '[called] for a conference on investment and economic development in the Southern Caucasus by European institutions

engaged in the region and in cooperation with banks and firms in the European Union with special emphasis on energy'. This idea to promote the EU's energy cooperation with the Caspian Sea region took the form of the 2004 Baku Initiative and its follow-up 2006 Astana Energy Roadmap. These developments represent the origin for everything that followed, including the whole Southern Gas Corridor. Only the very last of these ideas, concerning the promotion of energy infrastructure, has had any success in the last 20 years. Indeed, its success has been very remarkable. It is by extending further this basis of established success, that new possibilities may be unlocked. Azerbaijan's President Ilham Aliyev proposed on 10 December 2020 a 'six-party platform' (Armenia, Azerbaijan, Georgia, Iran, Russia and Turkey; see Huseynov, 2021, for details), on the basis of several sets of existing trilateral cooperation frameworks. Such a platform, with the addition of the EU and the US, would resemble the framework of the EU's suggested '3+3+2' framework from 20 years ago. Any EU co-operation in the region, whether multilateral or bilateral, should focus and build on the three main points of past successes. These are energy, security and transportation.

3. The Eu's Options In The South Caucasus Today And In Future

This part of the Policy Brief comprises two sections: (1) humanitarian assistance and economic development and (2) the Trans-Caspian Gas Pipeline (TCGP, also called the TCP). The latter is divided into four sub-sections: (1) the essentials of the TCP, (2) why to build the TCP, (3) how the TCP may promote decarbonisation and (4) peace-building and the geopolitics of Turkmen gas. The last of these sub-sections addresses two geopolitical aspects in particular, these being the Armenian connection and how the TCP can bring gas (and hydrogen) to Central Europe.

3.1 Humanitarian Assistance and Economic Development

The Head of the Mission of the Azerbaijani Republic to the European Union, Fuad Isgandarov, hopes for the EU to participate actively in the region in future. He notes its basis in economic co-operation already established, notably the Southern Gas Corridor and Azerbaijan's contribution to the EU's energy security through it (Stanciu, 2020).

At present, the EU has no mandate for peace-building in the South Caucasus. It cannot engage there directly now. The EU Commissioner for Enlargement and Neighbourhood Oliver Varhelyi nevertheless stated, a month after the military hostilities ended, that the EU plans to provide 10 million euros in additional humanitarian aid to victims of the war and to 'work towards more comprehensive conflict transformation and longer-term socio-economic development' (Caucasus Watch, 2020).

In addition, experts from the European Commission are discussing humanitarian cooperation with Azerbaijan. Both sides are seeking to determine what forms assistance for reconstruction in the Nagorno-Karabakh region are most appropriate. They are also examining the needs of internally displaced persons (IDPs) in order to determine the best way to support them (Lmahamad, 2020).

In the opinion of the Armenian political scientist Andrias Ghukasyan, 'the most important task for Armenia is to achieve independence from Russia in matters of its national security' (Martirosyan, 2021). Here too, the EU can achieve great potential benefit with relatively small leverage. Observation of the upcoming elections in Armenia (scheduled by December 2023 but widely anticipated to take place before then) can be one key, but not the only one.

During the attempted Turkish-Armenian diplomatic rapprochement of 10–12 years ago, Turkey and Azerbaijan offered detailed plans for economic cooperation and development to Armenia, including at the project level. Armenia, however, refused. The EU could promote the adoption of those previous transnational offers for regional cooperation, which would still be on the table. Several EU Member States are already participating in the economic reconstruction and development of Azerbaijan's formerly occupied territories.

3.2 The Trans-Caspian Gas Pipeline

Significant interest has been returning to the Trans-Caspian Gas Pipeline (TCGP, also called the TCP) infrastructure project since the signing, in August 2018 in Aktau (Kazakhstan), of the Convention on the Legal Status of the Caspian Sea ('Aktau Treaty'). The end of the Second Karabakh War in the South Caucasus accelerated that interest, which has further intensified following the recent signature of a Memorandum of Understanding (MoU) between Azerbaijan and Turkmenistan to develop jointly the mid-Caspian Dostlug oil and gas field, over which they had disputed for 30 years (Trend, 2020; BT, 2021).

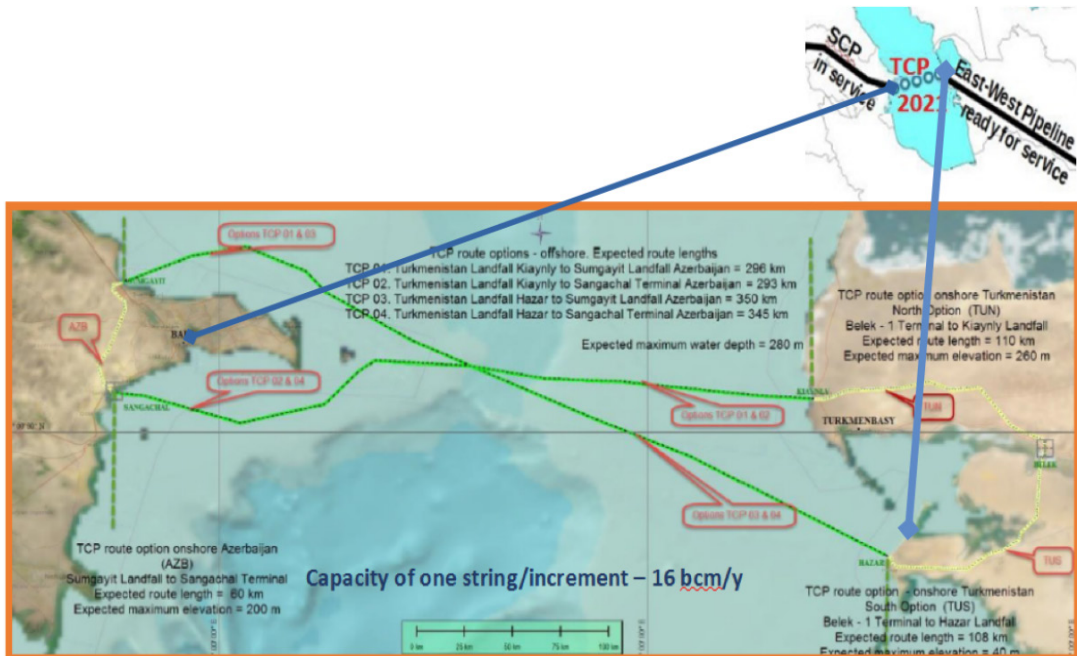
The TCP project holds extremely important potential for promoting peace, security and economic cooperation and development in the South Caucasus. At the same time, it can satisfy the EU's energy requirements in the most economical way, and without contravening the principles of the European Green Deal.

This part of the Policy Brief sets out (1) the essential facts of the TCP, (2) why it is a good idea from the security and cooperation standpoint for both the South Caucasus and the EU, (3) how the TCP promotes and satisfies the EU's foreseen decarbonisation norms and programmes, and (4) how the overall geopolitics of energy and peace-building should include the facilitating role of the complementary White Stream (WS) pipeline for TCP gas under the Black Sea from Georgia to Romania.

3.2.1 Essentials of the Trans-Caspian Pipeline

The TCP is planned to branch off from a connection with Turkmenistan's domestic on-shore East-West Pipeline. It would cross under the Caspian Sea, feeding into Azerbaijan's Sangachal terminal. From there, the gas would enter the South Caucasus Pipeline (SCP).

The TCP's step-by-step expansion has several economically justified scenarios. The first stage, associated with a single pipeline string, is intended to transport up to 15 billion cubic metres per annum (bcma) towards Turkey via the TANAP pipeline as from 2022. The second stage, projected for 2023, would increase total capacity up to 30 bcma, by feeding the WS pipeline from Georgia's Black Sea coast to Constanta, Romania. From Constanta, the gas would flow towards Baumgarten.



Map 2. The Trans-Caspian Pipeline -TCP (Source: Ministry of Energy of Georgia)

The Trans Caspian Pipeline System will thus consist of two strings. The first string would feed the TAP/TANAP system, thus ensuring supply for the second phase of Trans-Adriatic Pipeline. It would enable the TCP's second string, which would feed the WS pipeline. This latter will branch off from the SCP, head towards the shore of the Black Sea (with a compressor station located in Georgia near Supsa), and land in Romania.

In this way, the TCP would not only improve the economics of Azerbaijani gas transportation via TANAP, on which the TANAP owners are very keen, but also enable the WS pipeline, leading to increased market integration and competition and better gas-supply security.

No new investments in exploration or development are required. That is because gas from Turkmenistan is readily available through existing shut-in wells that have established production. Turkmenistan would become the most competitively-priced gas on the market in the European Union and the Energy Community. Volumes transiting the Southern Gas Corridor (SGC) would open this corridor to its fullest extent.

3.2.2 Why Build the Trans-Caspian Pipeline?

Turkmen gas is the most viable source for diversification on a significant scale that can increase competition. It is readily available through existing wells having already-established production potential, including shut-in wells that are already connected to the 30-bcma East-West Pipeline within Turkmenistan, which terminates at the shore of the Caspian Sea. The overall transportation scheme maximises the use of pipelines already in operation or pipelines already planned for construction. This, together with exceptionally low production costs, ensures competitive gas prices for shippers.

The TCP's two strings will contribute to a material reduction of the share of Russian supplies in the affected countries. The WS pipeline's receiving facilities would be located on the territory of an EU Member State, and the project overall would have a significant cross-border impact. It was conceived as, and remains, an essential part complementing the full Southern Gas Corridor system as originally envisioned. It enables the further material diversification of EU gas supply, without obliging EU customers to pay more for this diversification, and eventually also for low-carbon blue hydrogen.

By increasing competition, the TCP's positive effects will be fully present in the Energy Community Contracting Parties as well. These effects include the further development of a mature competitive market there and its knock-on triggering of significant investments in other industrial sectors in those geographic regions.

The TCP project thus enhances (1) security of supply, (2) sustainability and (3) competition. First, it enhances security of supply, including through the diversification of routes through appropriate connections. Second, it enhances sustainability, including through reducing emissions, supporting intermittent renewable generation and enhancing the deployment of renewable gas. Third, it enhances competition, including through diversification of supply sources. In all these ways it also stimulates market integration.

3.2.3 The Trans-Caspian Pipeline and Decarbonisation

It is assumed that successful decarbonisation requires both blue and green hydrogen. Taking into account the objectives of the EU's hydrogen transition, Turkmen gas will remain the only available non-Russian source of natural gas (and of blue hydrogen) that has potential to make this transition more efficient and less expensive, while at the same time enhancing the security of supply.

The TCP can be designed as a hydrogen-ready pipeline, but does not even need to be hydrogen-ready in order to be useful for the EU for the near- and long-term energy transition. The possibility of hydrogen-ready design emerges from the fact that the pipelines connecting with the TCP will, before they reach the EU Member States, pass through several areas that are rich with depleted hydrocarbon production fields. These depleted fields are advantageous for the purpose of carbon storage. Romania, which has recently expressed interest in Turkmen gas, can also implement hydrogen production ac-

accompanied by carbon capture and storage. (Trend, 2020; BT, 2021)

It is increasingly recognised that green hydrogen fails to be deployed fast enough. In the longer term, Central Asian countries will produce affordable hydrogen from renewable technologies (solar and wind), and the TCP can become a part of the network conducting green hydrogen to Europe. Customers in the EU would get blue hydrogen produced from gas from Turkmenistan as well as from other Central Asian producers.

In view of this, A failure to extend the SGC to Central Asia would mainly eliminate the possibility to diversify significantly from Russian energy supplies. In such a case, Europe would lose the only source of gas that (1) is not linked to world prices, (2) has production and delivery costs comparable or lower than Russian gas, (3) can deliver sufficient quantities that would affect the market dominance of Russian gas, and (4) can compete with hydrogen that Russia says it plans to supply to the EU via its pipelines. These four criteria characterise gas from Central Asia, and from nowhere else.

3.2.4 Peace-Building and the Geopolitics of Turkmen Gas

- **The Armenian Connection.** Energy supply has a special connection with Armenia's problems. The country is a client state of Russia that some in Moscow would like now to turn into a vassal state. Provision of gas via the TCP would help to break that stranglehold. Indeed, the extension of the first string of the TCP could even pass through the Meghri Corridor, between the main body of Azerbaijan and its Nakhchivan exclave. The Moscow ceasefire agreements provide for creating such direct connections for transportation, although the details are still to be worked out. Security there would be assured by the Border Service of Russia's Federal Security Service (FSB).

Even if, for reasons of domestic political stasis and/or Russian pressure, Armenia does not accept that the TCP passes through its territory, still the EU for its own interests as set out above, should facilitate the TCP's construction through the established Baku-Tbilisi-Erzurum corridor. This would entail the further expansion of the South Caucasus Pipeline, which has been planned for some time in connection with the ramping-up of volumes through the SGC.

Armenia would then be able to buy Turkmen gas via the Georgian gas trunk-line system, which is connected to Armenia, and avoid the delicate political matter of buying energy supplies directly from Azerbaijan. This development would not only help to break the Russian stranglehold on the Armenian economy, but also promote the final shutting-down of Armenia's nuclear power plant at Metsamor, which has long been a preoccupation for reasons of environmental security due to its design.

- **Gas for Central Europe from the TCP.** The formerly unclear legal status of the Caspian Sea delayed progress of the two-string Trans-Caspian Pipeline. Perceived risks have decreased since the mid-2018 signature of the Aktau Treaty. Investor interest in the Trans-Caspian Pipeline system has correspondingly increased since then. Confidence in the project has returned.



Map 3. Meghri Corridor (Source: [Wikimedia](#))

The main project driver for the TCP is the diversification of delivery routes: two entry points to the EU, which will result in the reduction of perceived risk. This is important for so sizeable a supply source as Turkmenistan, to which Kazakhstan and Uzbekistan may potentially be added. For Germany and Austria, the WS pipeline also affords lower transportation costs than the route via Turkey.

The unpredictability of political developments in Europe and Eurasia requires further efforts towards diversification of supplies. This fact increases the TCP's cross-border impact yet further. Recent events, not excluding Gazprom's efforts to maintain control of reverse gas-flow in Bulgaria, increase the significance of the WS project to the point where it should exceptionally be considered as a Project of Common Interest.

Like the first string of the TCP, which feeds the TANAP and TAP pipelines, the WS also provides for security of supply, sustainability and competition (in the same manners as described above) for Central and Eastern Europe. This is an especially imperative issue insofar as chances for the successful completion and entry into service of the NordStream Two pipeline continue to decrease day by day.

The WS pipeline would transport gas produced in Turkmenistan and elsewhere in the Caspian Sea region. This gas would be destined for Baumgarten and surrounding markets. It would branch off from the SCP, which runs from Azerbaijan to Georgian-Turkish border. It would include an onshore pipeline from the SCP connection-point to the Georgian Black Sea coast, where a major compressor station will provide the high pressure required to transmit gas to Constanta, Romania, across the Black Sea.

The WS pipeline will be connected to the Bulgaria-Romania-Hungary-Austria (BRUA) pipeline and possibly with other connectors. In this way, it will bring competitively priced gas from new sources to Baumgarten via the lowest-cost transportation routes.

The WS pipeline provides for the internal diversification of routes, but advantages to the EU do not stop there. Further benefits from the WS pipeline include increased competition, since Turkmenistan's highly price-competitive gas provides a new source and a new route, which likewise improve the security of gas supply. Moreover, the greater competition also enables further market integration, while facilitating the deployment of renewable energy sources at larger scales in the EU as well as in the Energy Community.

4. Policy Recommendations

Recommendation 1. The EU should therefore take steps to realize the construction of both strings of the TCP, even if Armenia declines the opportunity for the extension of the first string to cross its territory, because this is in the EU's own energy-transition interest, as discussed in detail above.

Central Asian gas has four remarkable advantages for Europe that are found nowhere else. First, it is Europe's only source for gas that is not linked to world prices. Second, its production and delivery costs are comparable to or lower than those of Russian gas. Third, it can deliver quantities sufficient to affect Russia's market dominance. Fourth, it can compete with the hydrogen that Russia says it plans to supply to the EU via its pipelines.

The TCP project enhances (1) security of supply, for example by diversifying of routes through appropriate connections; (2) sustainability, for example by reducing emissions, supporting intermittent renewable generation and enhancing the deployment of renewable gas; and (3) competition, for example by diversifying supply sources. In all these ways, it also stimulates market integration.

The EU's strategic partnership with Georgia was extended to a new level when Georgia agreed in 2017 to co-finance, within the PCI framework, the critical Front-End Engineering Design (FEED) study necessary to advance the implementation of the transportation infrastructure for Turkmen gas, i.e. the TCP and the WS pipeline. In 2018, the Council of the European Union (2018, emphasis supplied) 'reiterated Georgia's key role as a partner for European energy security and stressed the country's transit role' for Caspian energy, 'notably via the Southern Gas Corridor, including its extension to Central Asia, and the Black Sea.' The 'extension to Central Asia' meant the TCP, and 'the Black Sea' meant the WS

pipeline. At the same time, the EU ‘welcomed the fact’ that the Georgian Oil and Gas Company became ‘a shareholder in the Trans-Caspian Pipeline project company’.

The TCP is already a Project of Common Interest, and its Estonian-domiciled project promoter company W-Stream Caspian Pipeline Company Ltd is recipient of an INEA Grant (INEA, 2021). The Pre-FEED and FEED studies need to be completed as soon as possible. Since the EU needs gas diversification as soon as possible, interim solutions such as the shorter, smaller ‘platform option’ pipeline (which Turkmenistan has never accepted and will never accept) need to be discarded in favour of the fully-fledged, shore-to-shore, large-volume pipeline.

Recommendation 2. Joint efforts should now be further encouraged on the basis of the new realities in the South Caucasus and Caspian Sea regions, in particular their significant potential to supply blue hydrogen.

Meanwhile, recent political events in Georgia have only strengthened the country’s European direction. Prime Minister Giorgi Gakharia (Interpress, 2021) stated earlier this year that amongst the country’s ‘top foreign policy goals’, as reflected in newly-adopted legislation, ‘Georgia is preparing to apply for full EU membership in 2024.’

The next five years will be crucial for the South Caucasus. Transportation and other communications links are being established between Armenia and Russia through Azerbaijan’s existing infra-structure. There is a chance for increasing prosperity in Armenia.

Crucial is Armenian domestic public opinion, reflected and inflamed by the country’s political class and diaspora. Armenia is 99.9 percent ethnic Armenian since the 1987 ethnic cleansing and forced expulsion of roughly 250,000 Azerbaijanis living mainly in Yerevan and southern Armenia. This took place well before the First Karabakh War, which resulted in the Armenian military seizure of the Nagorno-Karabakh region and surrounding districts, and which is the origin of the region’s present-day ills.

Recommendation 3. The EU should find ways to moderate the hyper-nationalism that has characterised Armenian political life for the last three decades.

As Jirair Libaridian, once advisor to former Armenian President Levon Ter-Petrosyan, has noted, for well over 20 years, Armenian domestic political life has been characterised by a certain hyper-nationalism that led to the recent disaster. The recently-created quasi-official cult of personality around Garegin Nzhdeh is both a symbol and a symptom of that political malaise.

Libaridian (2020) has described how the Armenian government behaviour ‘relie[d] on dreams rather than hard facts and started by the conclusion that corresponded to our dreams, and then asked only those questions that confirmed our conclusions.’ In perhaps the most acute indictment, he diagnosed: ‘We adjust political strategy to our wishes, to what will make us feel good about ourselves rather than take into consideration the simple facts that collectively make up the reality around us.’

This world-view, Libaridian wrote, still imprisons Armenian society, which remains unable to recognise how or why the defeat occurred, and is, in his words, ‘incapable even of formulating questions that might lead to real answers.’ The EU could make a real contribution to regional security and peace-building by inducing the Armenian political class to see their own neighbourhood as it really is. Can the EU offer Armenia any strategic vision? This is difficult to say, but there is one major contribution that perhaps only the EU can make. It is the following.

Recommendation 4. The EU should play a most constructive role by convincing the Armenian political class and Armenian society fully to recognise Azerbaijan’s territorial integrity.

For even the pro-EU parties in Armenia were uncompromising advocates for the independence of the so-called ‘Nagorno-Karabakh Republic’ during the Second Karabakh War. The EU can promote this evolution of the Armenian perspective not only through its own humanitarian activities, but also by encouraging economic cooperation with Azerbaijan, especially over energy. Only this sort of ‘reality therapy’ hold the promise for transforming peace-building in the South Caucasus into lasting security and prosperity (Cutler, 2020).

The conjuncture is propitious for the EU to play such a role. As the Azerbaijani Head of Mission to the EU remarked (Stanciu 2020), Baku hopes for the more active engagement of European partners. The EU itself, he observed, was a post-World War II peace-making process based first upon the recognition of physical borders and then the progressive transcendence of these borders to create a common space. 'This is best model for the South Caucasus, where we can do same; and this model should be used by all South Caucasus countries.'

Recommendation 5. Just as the EU started with coal and steel through the European Coal and Steel Community, so also the South Caucasus has in fact started with natural gas through the Southern Gas Corridor. The EU should continue to build upon this success with the crowning jewel of the Trans-Caspian Pipeline, including the White Stream connection under the Black Sea, with a view towards hydrogen. This project unites the EU's energy-security interest with the political and economic interests of the South Caucasus region.

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