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A delicate dance of power

By Robert M Cutler
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MONTREAL - China's emergence as an important player in the development and use of energy resources found in the Caspian Sea basin, alongside longer established interests emanating from Russia, Europe and the United States, is a reminder of the ever-changing dynamics of the region, too easily overlooked during periods of apparent stasis, such as during the late Soviet era.

Yet the appearance of this new power in the region also confirms the essential stability of a core group of relationships about which others wax and wane, with a periodicity of possible future importance that China's presence can help us to identify.

Two bilateral energy relations, Kazakhstan-Russia and Turkmenistan-Russia, are of such import and duration that we can justifiably speak of the Kazakhstan-Russia-Turkmenistan triangle as [the foundation](#) for the evolution of Central Eurasian energy geo-economics. That is the case, even though the third leg of that [triangle](#), the relations between [Kazakhstan](#) and [Turkmenistan](#), is only beginning to manifest itself through cooperation over the gas pipeline to China.

[Development](#) of hydrocarbon [energy resources](#) in Central Asia and the South Caucasus began independently of each other, although they share the same chronology. Yet despite the apparent disorder of everyday life in the region over the past decade and a half, [patterns](#), if not a "logic", that recur and recombine in different and ever newer ways are detectable.

In particular, it is possible to detect three [phases](#) over the past 16 years in Caspian/Central Asia energy development and its connection with the South Caucasus. The first, from 1993 to 1998, we can term the "bubbling up" phase; the second, from 1999 to 2004, "settling down" phase; and the third, from 2005 to 2010, as the "running deep" period.

The Kazakhstan-Russia-Turkmenistan triangle is the fundamental fact, and here it is worth noting that network sociologists in the 1990s demonstrated that the dynamic of triangular, or triadic, relations are qualitatively different from any aggregation of bilateral, or dyadic, relations. [1]

By circumstance, a different strategic player - a "fourth vertex" - became the principal motor of developments during each of the three phases identified above. From 1993 to 1998, this was the United States; from 1999 to 2004, it was [the European Union](#) or at least several of its member-states and their "national champions" such as BP for the [United Kingdom](#) and Eni for Italy; from 2005 to 2010, it has been China. Each of these fourth players has interacted in different pairs from the initial three, setting up their own triangles of development.

During the first phase, in addition to the basic Kazakhstan-Russia-Turkmenistan triangle, the US was the fourth player - creating a Kazakhstan-Russia-US triangle, immediately in evidence over the question of an export pipeline for Tengiz crude.

American offshore terminals in the Gulf of Mexico were the first intended targets of Kazakhstani oil shipments. Also during these years, the US embassy in Almaty (then Kazakhstan's [capital](#)) proved essential to Russia and Kazakhstan for the restructuring of the Caspian Pipeline Consortium, enabling the CPC's pipeline to be subsequently in fact built.

Western interest in Turkmenistan at this time was exclusively US interest, concentrated on ameliorating Ukraine's payments situation as an importer from Turkmenistan and also promoting the first attempt to negotiate a Turkmenistan-Azerbaijan Trans-Caspian Gas Pipeline (TCGP). In the 1990s, US companies GE Capital, Bechtel and PSG were the driving forces behind this pipeline. The US-Kazakhstan-Turkmenistan triangle remained undeveloped.

From 1999 to 2004, the EU became the fourth vertex associated with the fundamental Central Asian energy triangle, with EU interest in gas from Turkmenistan in the early part of the present decade after the American project had failed. The EU's latest initiative, led by the [German company](#) RWE, is for a Turkmenistan-Azerbaijan gas link descending from that failed project.

The EU-Russia-Kazakhstan triangle was manifested in European and Russian interest in developing the Kashagan deposit and other North Caspian fields in Kazakhstan's offshore, though the European interest was from EU member states and their national champions, rather than from the EU itself.

The EU-Turkmenistan-Kazakhstan triangle was manifested also in the failed Trans-Caspian Gas Pipeline project and other designs still on the drawing-board, with more or less direct successors being the idea to pipe Kashagan's associated gas to Azerbaijan, and

the proposed Kazakhstan-Caspian Transportation System (KCTS), also for Kashagan if not Tengiz oil.

Finally in the third phase, from 2005 to 2010, China comes into a prominence as the fourth vertex.

The China-Turkmenistan-Russia triangle is animated by contradiction between China and Russia over Turkmenistan's natural gas, as in the competition between Russia's unrealized project for a refurbished Caspian Coastal (*Prikaspii*) Pipeline on the one hand and, on the other, the Turkmenistan-China gas pipeline now under construction.

The China-Kazakhstan-Russia triangle is also animated by a China-Russia contradiction, in for example the China-Russia competition to buy out the Canadian firm Petrokazakhstan (previously Hurricane Hydrocarbons).

Petrokazakhstan owned a piece of the pipeline that China needed to put together its Tengiz-Xinjiang oil pipeline, a westward extension of the pipeline from eastern Kazakhstan to China agreed to in the late 1990s and which entered into service after long negotiations over implementation.

Finally, the China-Kazakhstan-Turkmenistan triangle is manifest in the gas pipeline, negotiated on the basis of a bilateral China-Kazakhstan project, now being built from Turkmenistan, through Uzbekistan, and then through Kazakhstan to western China. There, it will join up with the "West-East" Pipeline in China running to the coast, which Beijing constructed earlier this decade, and for precisely this reason, at a financial loss.

We can identify, therefore, three periods of "epigenetic" development (that is, each period building out or "accreting" from what went before), starting from the basis of the Russia-Turkmenistan-Kazakhstan triangle, then successively adding on the US, then the EU, then China, as fourth vertices, consecutively driving the evolution of the network as a whole.

The terms "bubbling up," "settling down," and "running deep" characterize these phases. To put flesh on this skeleton, "bubbling up" refers to how, after the Soviet state disestablished itself, new possibilities for patterns of international relations began to percolate from events on the ground, relatively free from the hierarchical constraints that characterized the bipolar Cold War system.

In the realm of Eurasian energy development, this means that the years 1993-1998 were marked principally by proposals for new exploration for and development of resources, and pipeline construction. "Settling down", referring to the 1999-2004 period, identifies the fact that it was during these years that some of those projects acquired a life of their own and moved toward physical realization. Others died, or perhaps entered a state of suspended animation. "Running deep" designates those years (2005-2010) when such projects that had acquired life began to operate and thrive. Put another way, the three phases can be considered periods of, successively, emergence, self-produced development, and coherence.

If we now look ahead, an increasing body of work, involving independently conducted studies that use distinctively different methods for prediction and forecast, strongly suggests that international relations as a network will begin to undergo another radical transformation beginning in about the early 2040s - that is, about 32 years hence, or about twice the overall length of time considered above. [2]

That then raises the question of whether the period just considered is, then, itself only the initial, or "bubbling up", phase of the transformation forecast to start in the early 2040s.

If that is so, then we are now at the start of a "settling down" metaphase of the present international system, including international energy geo-economics, that is, in turn, likely to be followed, if the present metaphase lasts more or less 16 years, by a third, "running-deep" metaphase of similar duration, bringing us to the early 2040s - and the possible transformational turmoil equivalent in quality and extent to the end of the Cold War. This change, clearly, cannot yet be described, as its nature will depend upon the system's evolution, including energy geo-economics, in the interim.

This is a perspective from which the coming "settling-down metaphase" of Eurasian energy geo-economics can, and possibly must, be seen, for it offers a broader, and valuable context for considering issues and decisions of present importance regarding the vital resources of the region and their use far further afield - from the Nabucco and South Stream gas pipelines, to White Stream, to the broader significance of the "Trans-Anatolian" (Sansum-Ceyhan) oil pipeline, and other others. Stay tuned.

Notes

1. For examples, see: Ronald L. Breiger, *Explorations in Structural Analysis: Dual and Multiple Networks of Social Structure* (New York: Garland Press, 1991); Phillipa E. Pattison, *Algebraic Models for Social Networks* (Cambridge: Cambridge University Press, 1993); Stanley Wasserman and Katherine Faust, *Social Network Analysis*, (Cambridge: Cambridge University Press, 1994).
2. See literature review in Robert Denemark, "World System History: From Traditional International Politics to the Study of Global Relations," *International Studies Review*, Vol. 1, No.2 (1999), pp 167-199.