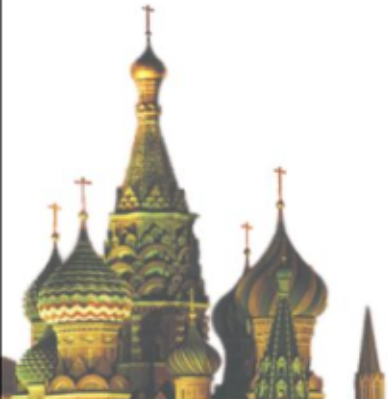


Southern Pipe Dreams

A Rivalry of Distrust

ao. Univ.Prof. Dr. Gerhard Mangott
www.gerhard-mangott.at





Russian strategic objectives

- Diversification of gas export routes**
- abandoning Ukrainian transit dominance**
- Access to Central Asian gas at sufficient volumes and reasonable prices**
- Central Asian gas must remain cheaper than exploration and development of northern Russian gas fields**
- Geopolitical and geoconomic preponderance in the Caspian Basin**

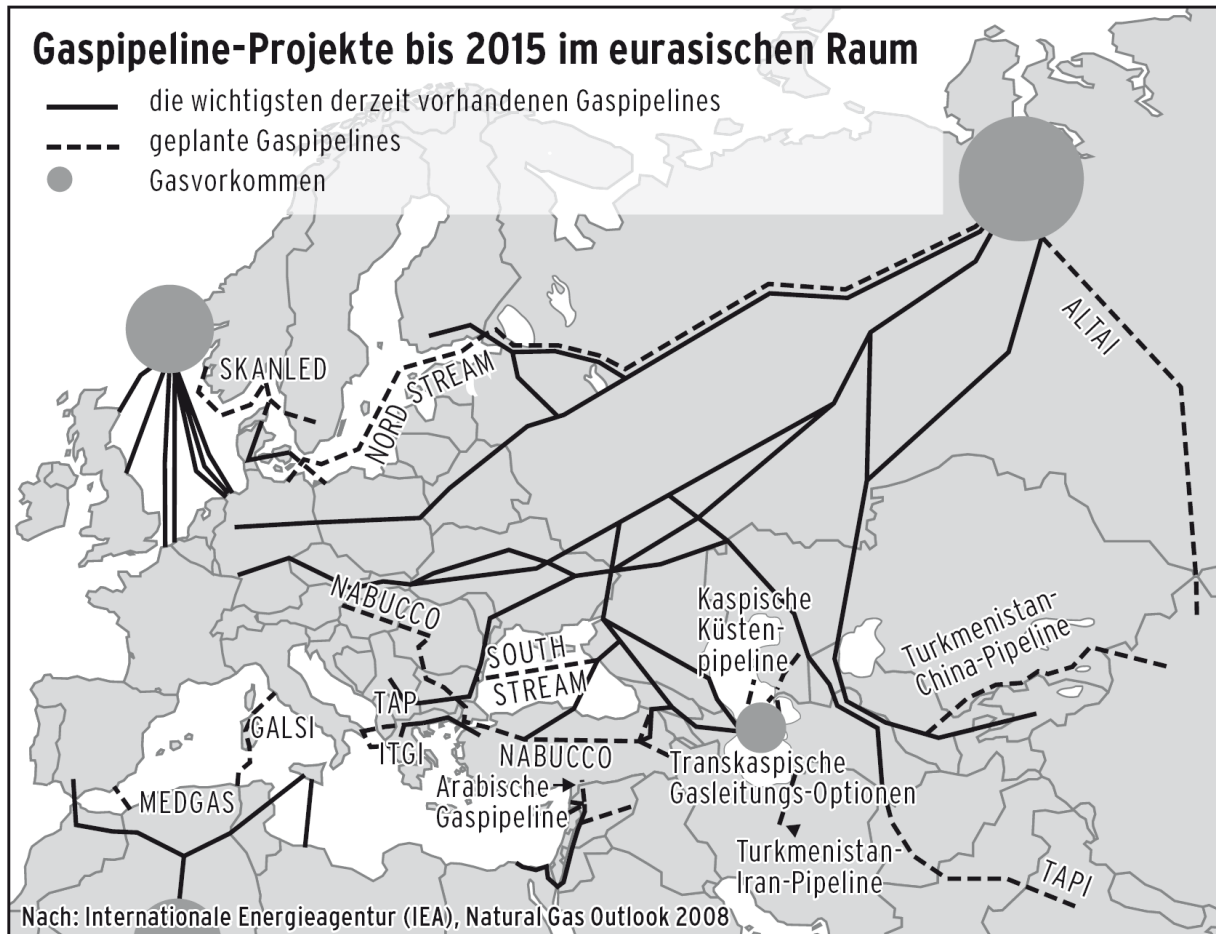


EU strategic objectives and liabilities

- **diversification of gas suppliers and supply routes** (due to Russian and Ukrainian liabilities amidst gas consumption growth prospects)
- **geostrategic inroads opened by the US**

but

- reliability of supplies untested
- **suppliers are politically and socially unstable**
- **authoritarian or rogue suppliers**



Grafik: Werner Berghofer



Southern Gas Corridor

—**Nabucco** (up to 31 bcm)





Southern Gas Corridor

- Nabucco** (up to 31 bcm)
- Interconnector Turkey-Greece-Italy (ITGI, a.k.a. South European Gas Ring)** (up to 12 bcm)





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- White Stream Pipeline** (up to 32 bcm)



White Stream Route Options

**Option 1:
Georgia/Crimea/
Romania**

**Option 2:
Georgia to
Romania Direct**

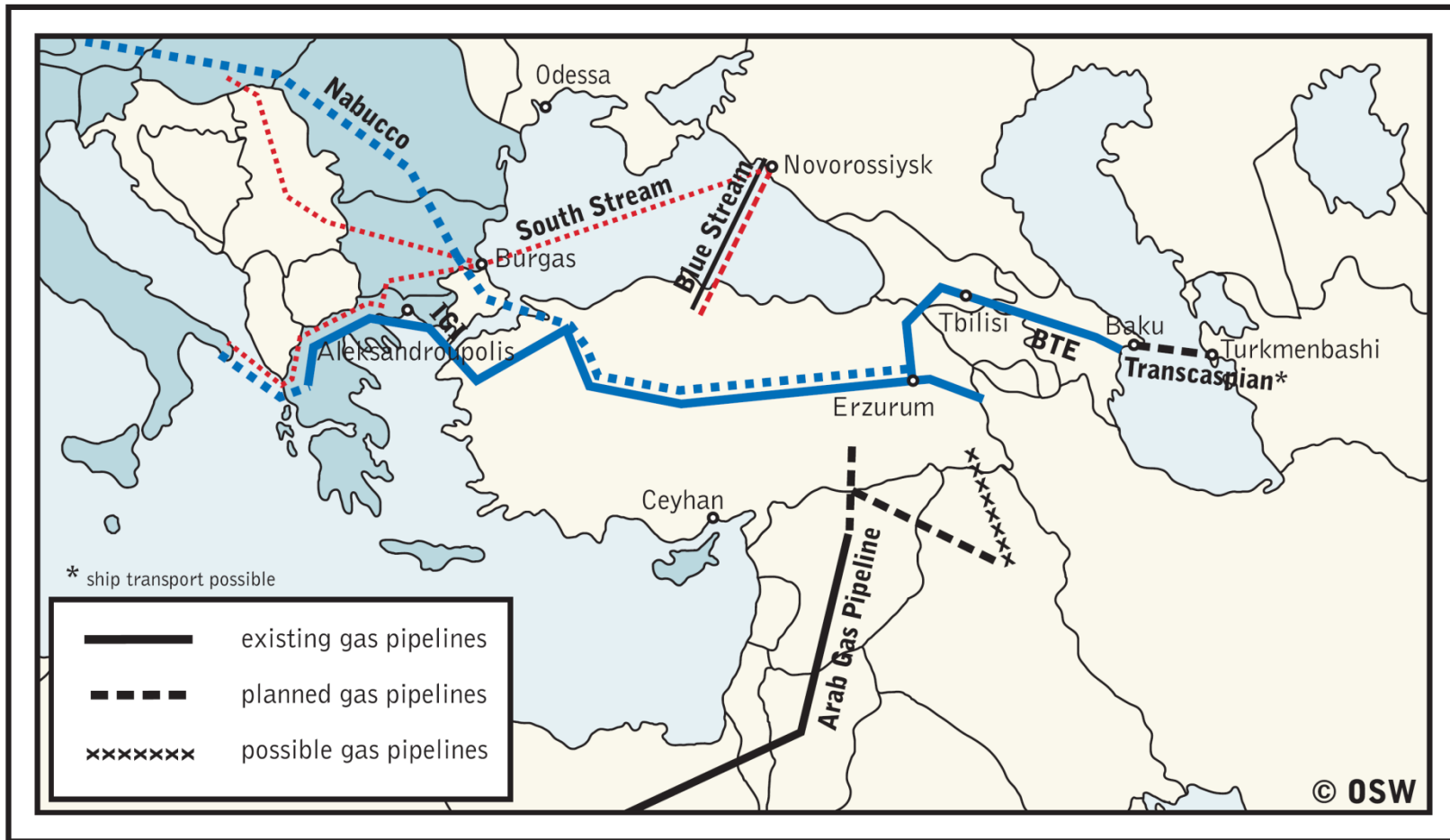




Southern Gas Corridor

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- Interconnector Turkey-Greece-Italy (ITGI, a.k.a. South European Gas Ring)** (up to 12 bcm)
- Trans-Adriatic Pipeline (TAP)** (10 bcm initial stage)
- White Stream Pipeline** (up to 32 bcm)
- Azerbaijan-Georgia-Romania Interconnector (AGRI)**





Source: Central European Weekly, Issue 25 (37), July 15th, 2009



Source:
<http://en.wikipedia.org/wiki/File:Southstream.png>



United Nations Convention on the Law of the Sea

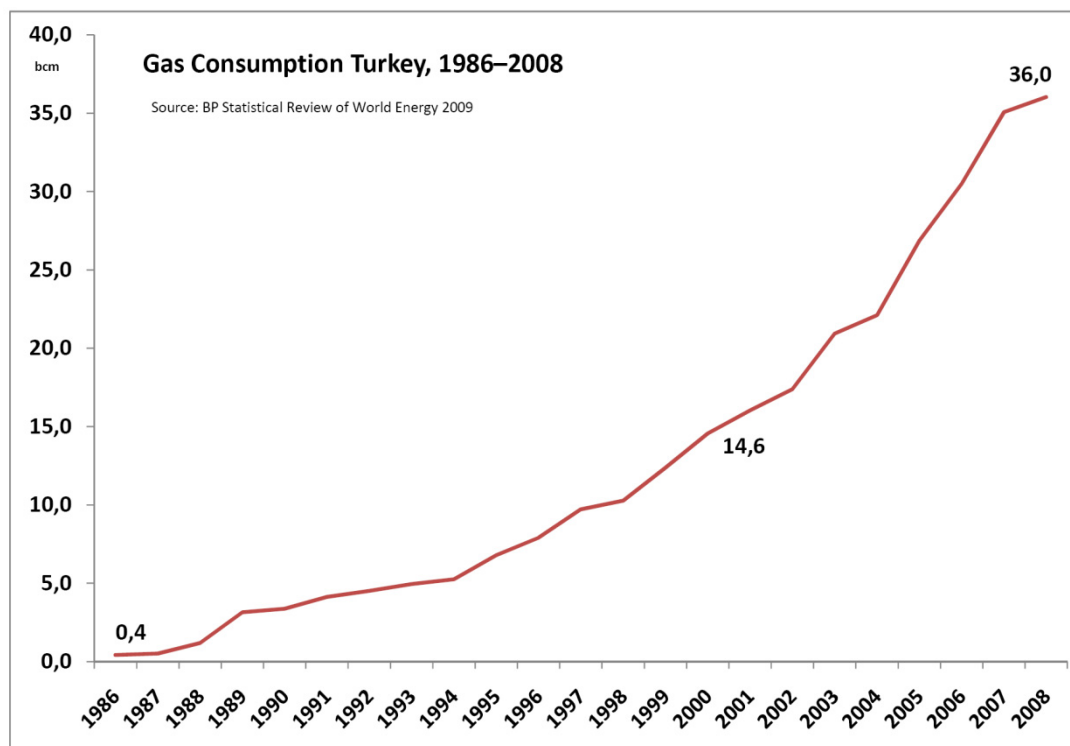
Article 79

Submarine cables and pipelines on the continental shelf

3. The delineation of the course for the laying of such pipelines on the continental shelf is subject to the consent of the coastal State.

Source: <http://www.eegas.com/southstream.htm>







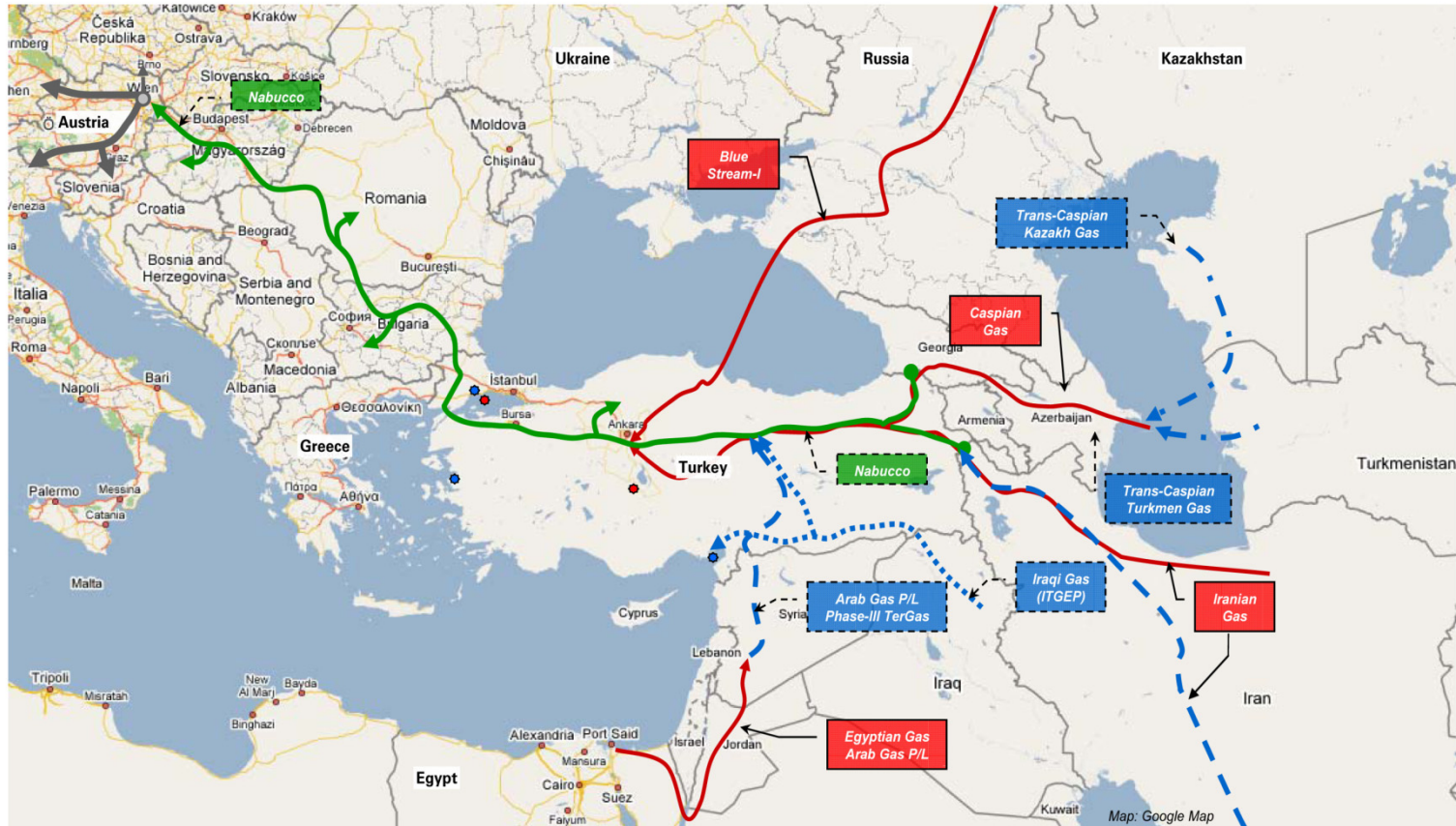
Nabucco







Existing/Possible Supply Routes to Nabucco Gas Pipeline



Source: SETA (Turkey), July 2009



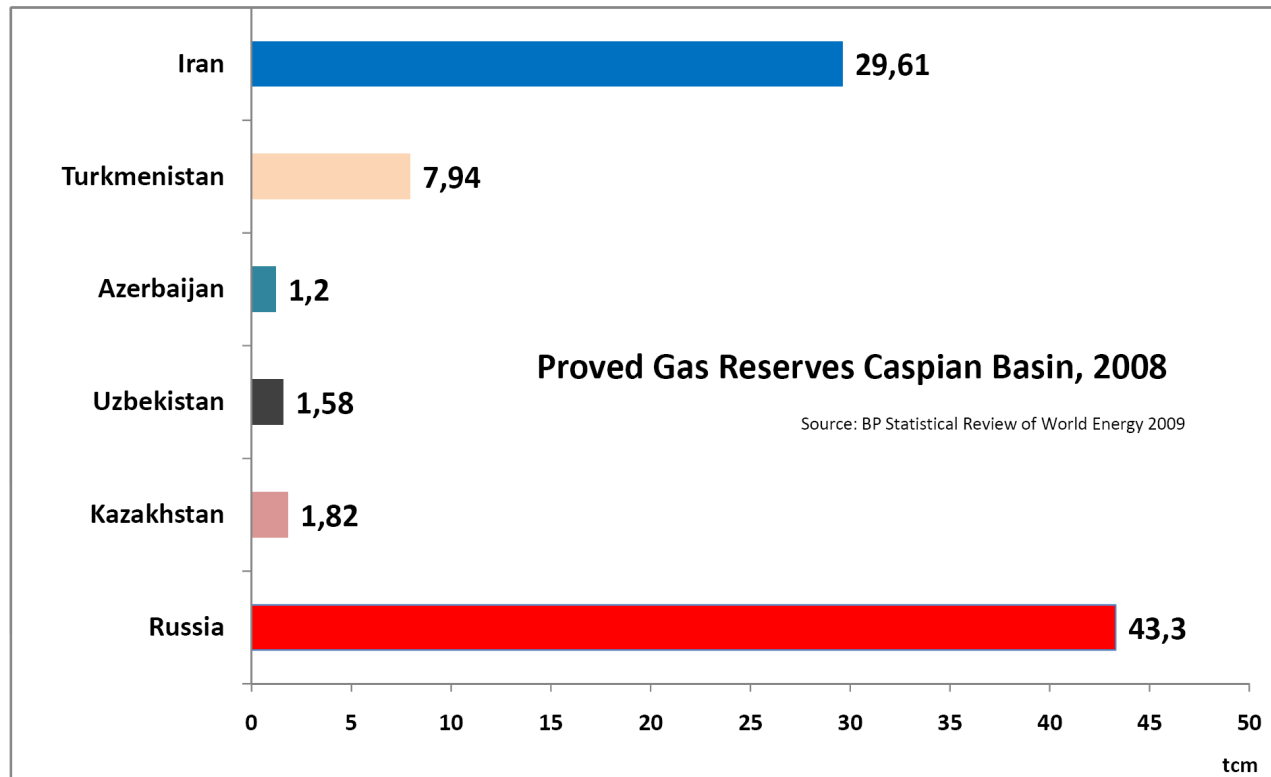
Source:
<http://en.wikipedia.org/wiki/File:Southstream.png>

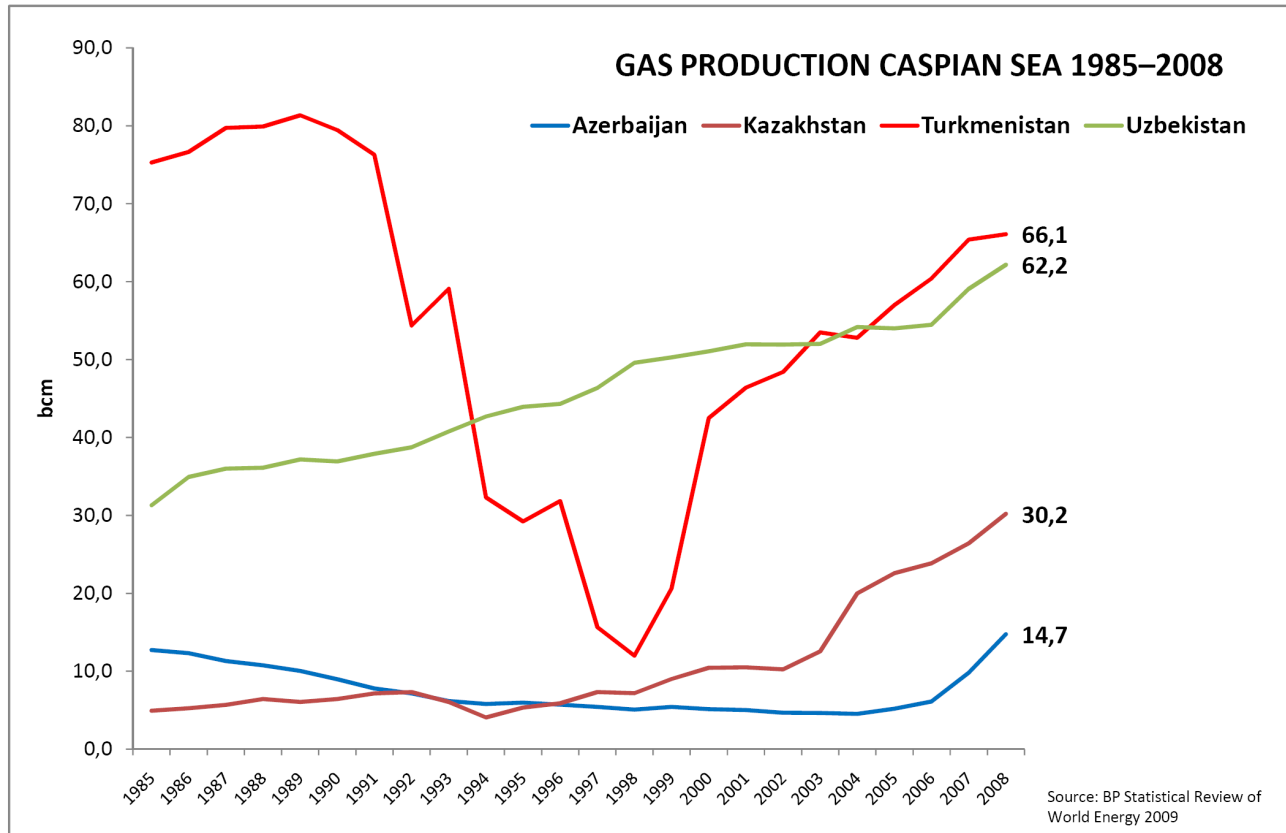


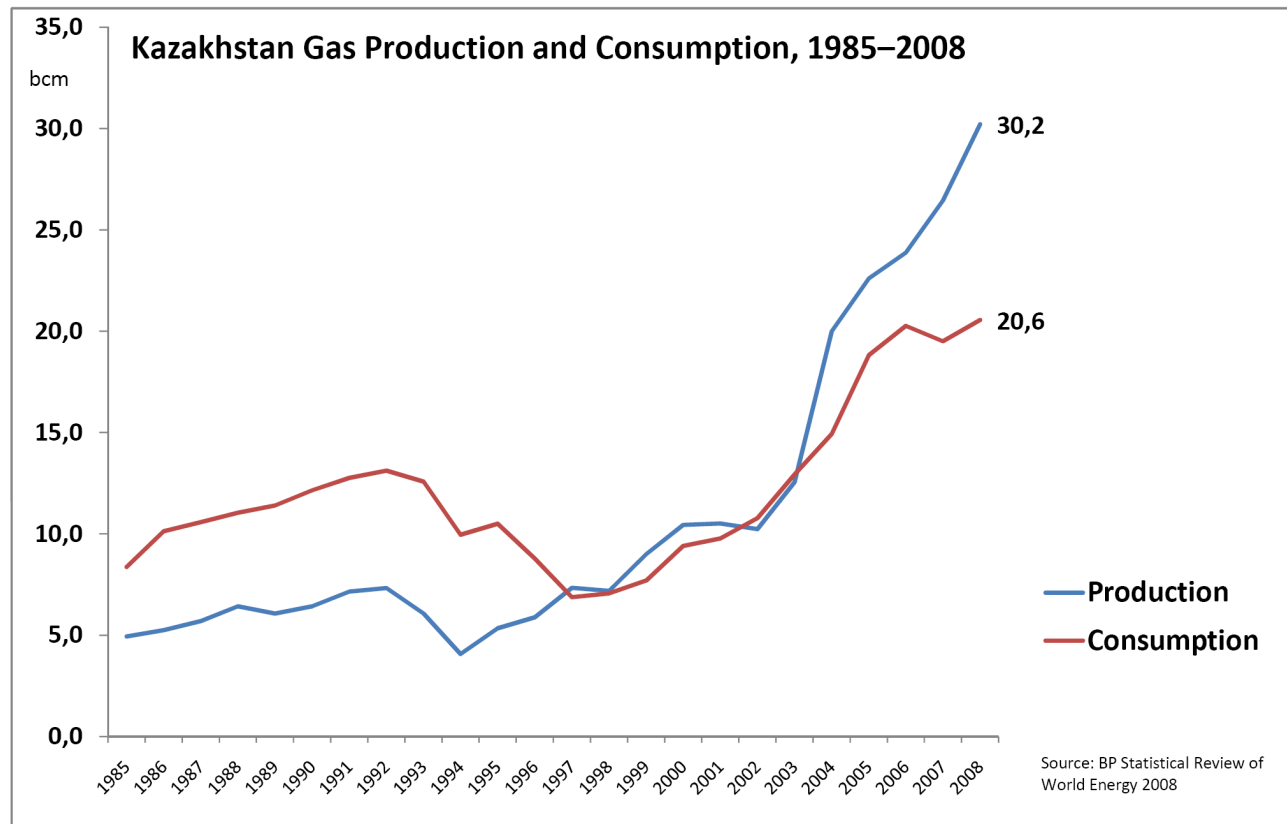


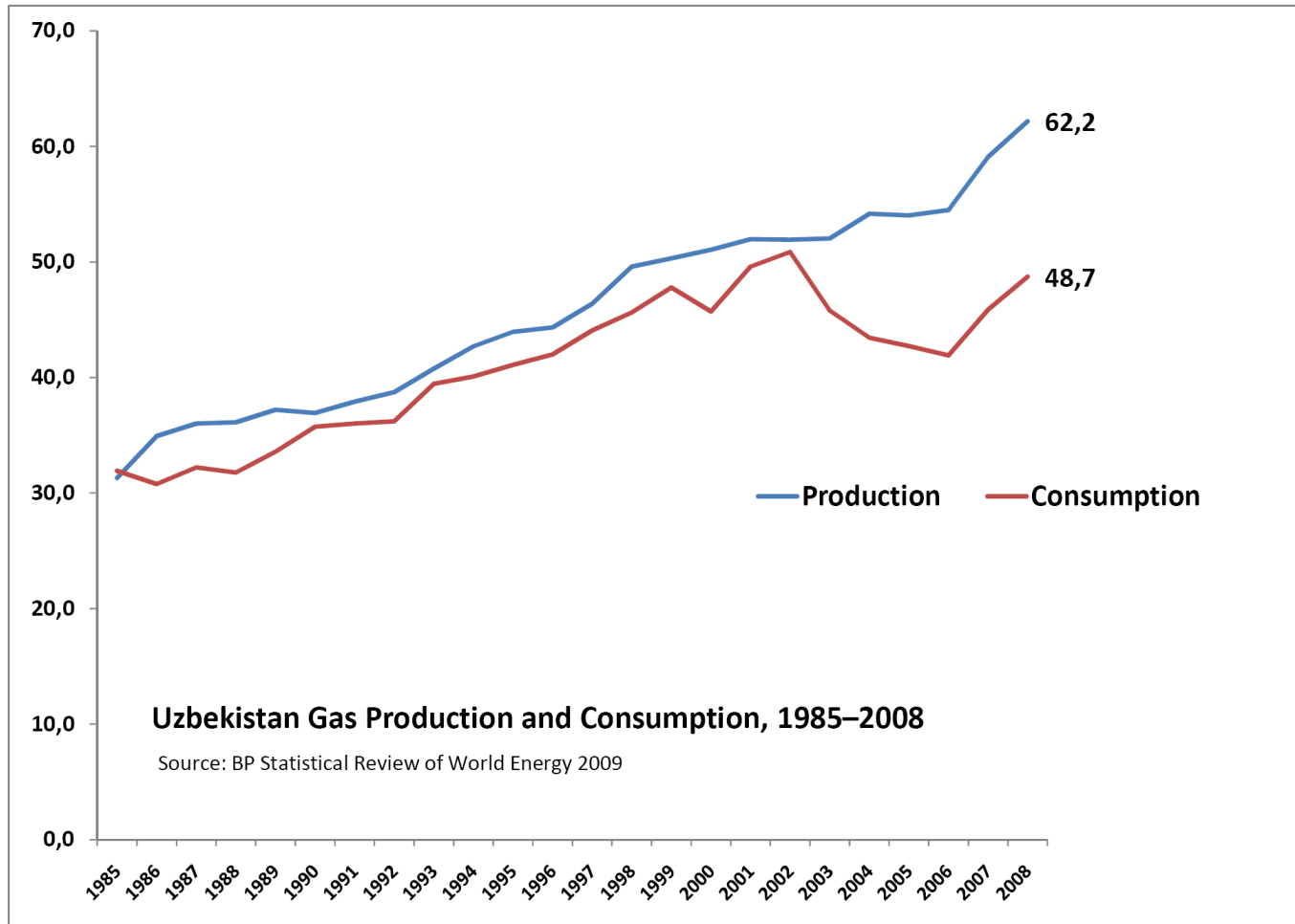
Situation in Georgia after the end of the military phase of the conflict (as of 20 August 2008)

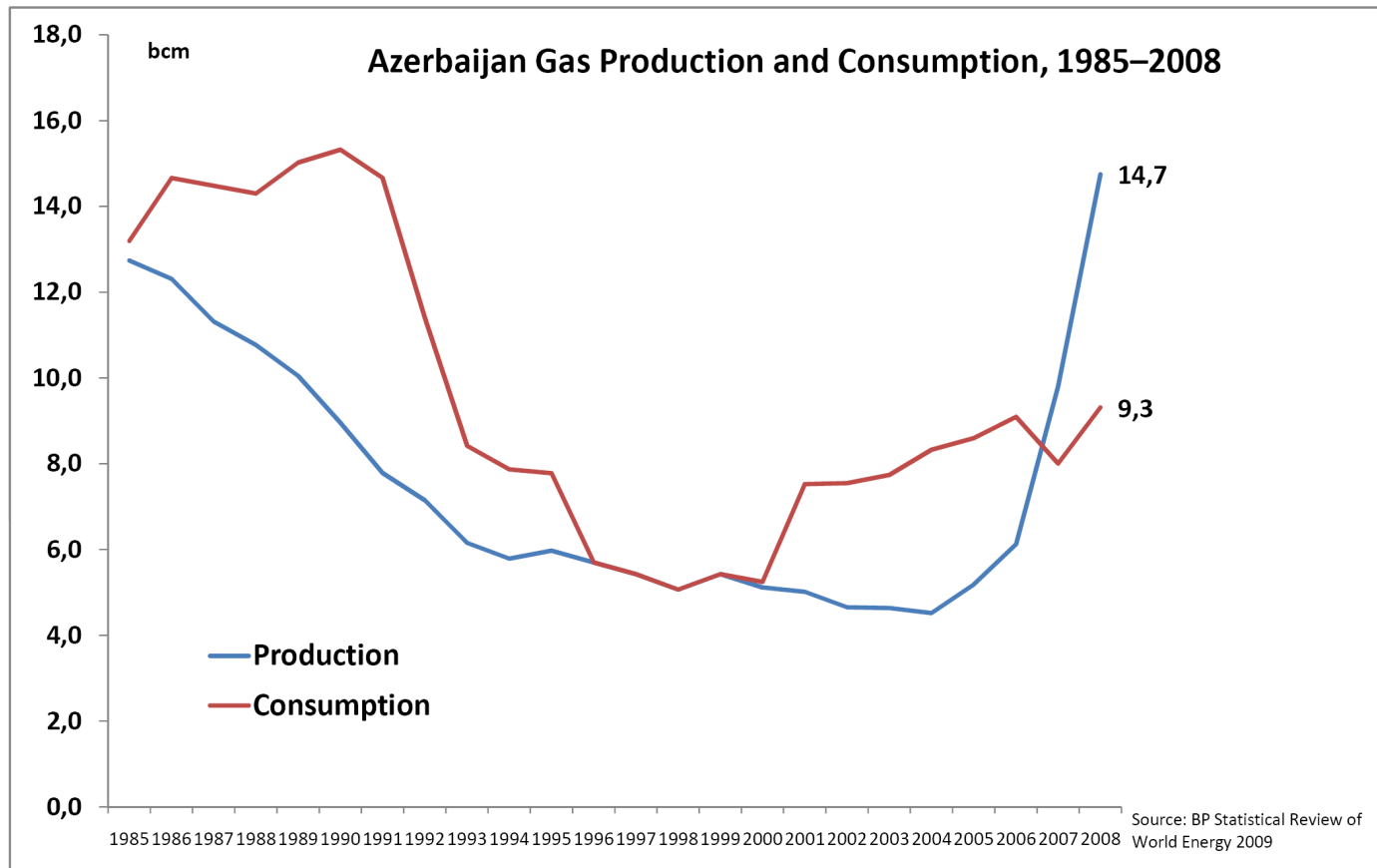


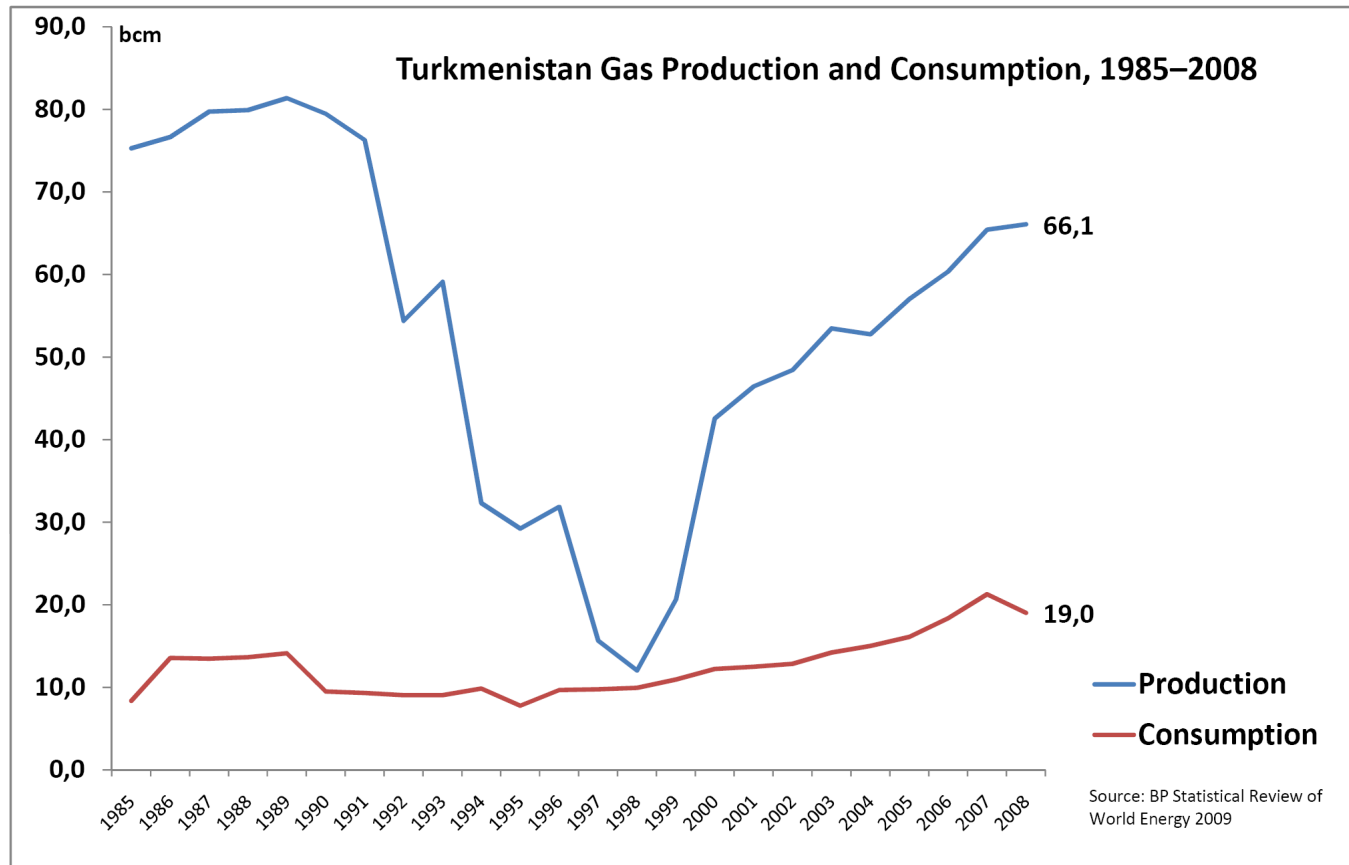














Gas export pipelines Caspian Sea

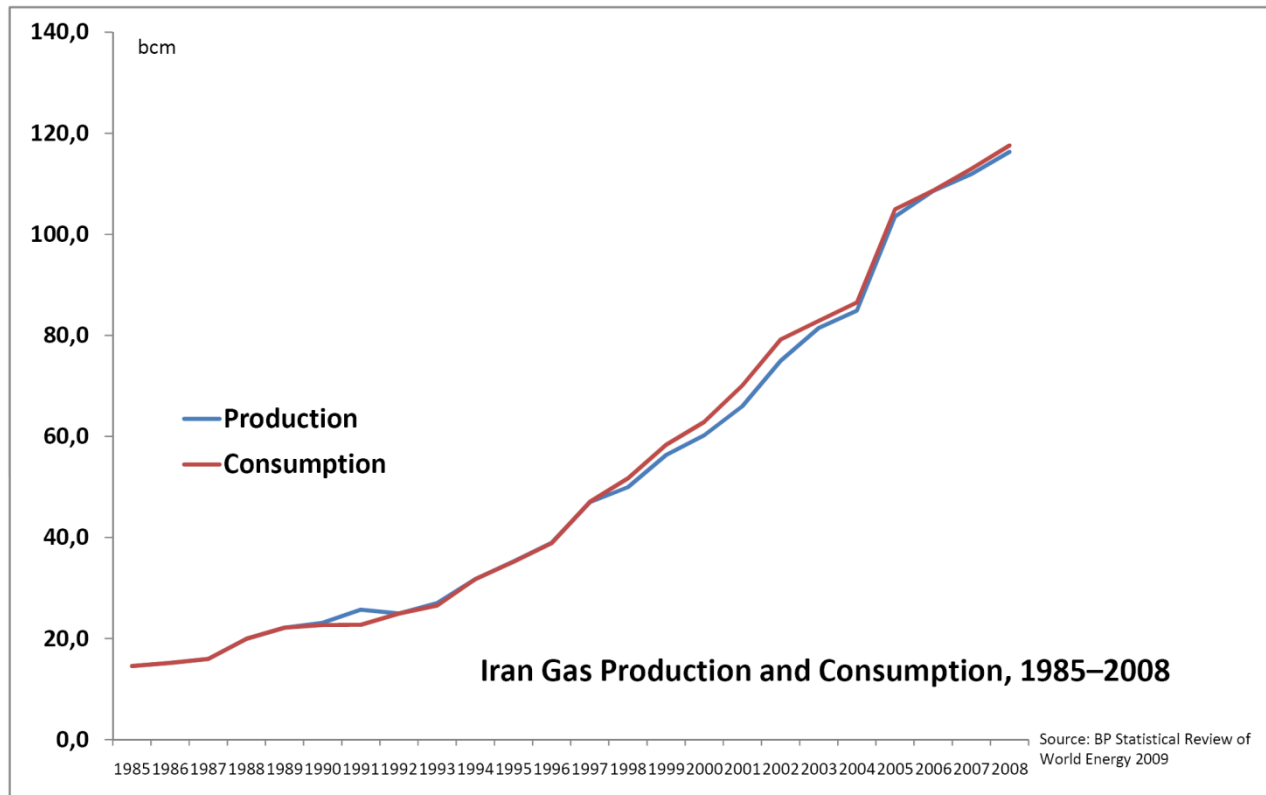


Source: East Week 19 (84)/2007



Source: OSW, East Week 43 (193), December 16th, 2009,
p. 5.











Two Proposed Pipelines in South Asia



Map 1 • B 2139 heritage.org

