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**Central Asia's Pipelines:
Field of Dreams and Realities
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CSIS

CENTER FOR STRATEGIC &
INTERNATIONAL STUDIES

Energy & National
Security Program

Dawning of new pipeline era?



Twenty Year Journey

- **Russia squandered lead after 1991**
- ***Temporary* U.S. advantage mid '90s to '00s**
- **Return of regional players last decade**
- **Rise of local governments and elites**
- **East and South Asia's turn?**
- **Wherefore Europe?**

Multi-vector game

Central Asia's Oil Pipelines



Central Asia's Gas Pipelines



Ingredients for success

- Major dedicated volumes of oil or gas
- A capable commercial champion with sufficient economic stake
- Economic viability and superiority over alternatives
- Political support

Diversity costs and someone has to pay.

Realized

- Baku-Supsa
- Caspian Pipeline Consortium
- Blue Stream
- Baku-Tbilisi-Ceyhan
- South Caucasus Gas Pipeline
- Kazakhstan-China oil
- Turkmenistan-China gas
- Turkmenistan-Iran gas

Failures

- Upgrade of Atyrau-Samara
- Tikhoretsk to Novorossiysk debottlenecking
- Promoter-led Caucasus pipelines
- Odesa-Brody, other Bosphorus bypasses
- Trans-Caspian Gas Pipeline
- Turkmenistan-Afghanistan-Pakistan-India (?)

Gas Pipeline Proposals

- Central-Asia-Center upgrade
- South Stream
- Pre-Caspian gas pipeline
- Nabucco
- Turkey-Greece-Italy
- Turkmenistan-Afghanistan-Pakistan-India (?)
- Iran-Turkey, Iran-Pakistan-India

Oil Transportation

- Direction of Kashagan flows?

Key Factors:

Who's the Commercial Champion?

Who pays for diversity?