



Pipeline Politics

An analysis of the EU's actorness in the case of the Southern Gas Corridor



Bachelor's Thesis, Faculty of Humanities, International Studies

Name:	Daphne Anna Maria Korsman - S1676032
Place and date:	Limmen, 11/01/2019
E-mail:	d.a.m.korsman@umail.leidenuniv.nl
Thesis supervisor:	Dr. Vera Scepanovic
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Cover page photo: *A ceremonial section of the Southern Gas Corridor in Baku, Azerbaijan.* 2015. Radio Free Europe/ Radio Liberty, derived from <https://www.rferl.org>, accessed on January 6, 2019.

Abstract

The purpose of this thesis is to answer the question ‘to what extent can the EU act geopolitically in the context of energy security and should it?’ through the case study of the Southern Gas Corridor. The academic debate on the EU’s actorness in international politics has been ongoing and the unique structure of the EU seems to still puzzle scholars. This has especially been the case in the field of energy policy, as energy is a strategic and public good and thus subject to a geopolitical dimension. By analyzing previous research in the field of EU energy policy, four possible answers to the research question were found. These are that the EU can or cannot and that the EU should or should not act geopolitically in the context of energy security. The four answers make up the spine of this thesis and guides the research into finding that the EU can act geopolitically to a certain extent, but still lacks full-fledged policy tools due to the nature of the energy policy area, and should act geopolitically to advance its strategic energy security agenda. The EU is essentially no less geopolitical than other actors but attempts to hide this within its rule-based regulatory framework.

Keywords: European Union, Power, Energy Security, the Southern Gas Corridor

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1. Introduction

The European Union (EU) and its role as a global actor has been largely debated (e.g. Smith 2011, Hyde-Price 2006, Siddi 2017). The EU's growing presence as a global actor in international politics as a non-sovereign state has arguably changed the way we think about conceptualizing global actors in international relations theory.

Previously the scholarly literature has focused on conceptualizing strong global actors in the context of sovereign states. However, the EU shows the difficulties in these conceptualizations as it is not a sovereign state, but a highly advanced international organization, as the EU has more competences than most other international organizations. The impact of such form of international cooperation is thus difficult to measure. This is mainly because decision-making is dependent on the EU Member States and their willingness to give up on their sovereignty in certain areas to the EU level. Even though the European Commission has exclusive competences in trade and competition policy, the competences at the EU level in the field of foreign, security and defense policy are restrictive and dependent on the consensus of Member States (Smith 2011, 160).

The academic literature also indicates that the dominant view on the EU as an actor in international relations is that the EU is a liberal-idealist power which mainly tries to advance its goals in terms of market liberalism and advancing its goals beyond the EU borders by spreading its liberal ideas, norms and values. This can mainly be attributed to the idea that it lacks the tools, competences, and political consensus to be a military or realist power. It is thus often argued that the EU prioritizes markets over geopolitical goals (Siddi 2017, 1-2).

However, current trends in international politics suggest a changing world with increasing geopolitical approaches. Great power politics and assertiveness such as the re-rise of China and regional power politics in the South China Sea, as well as the increasing focus on resource nationalism combined with growing trade barriers in the world, and Russian assertive foreign policies towards its neighborhood, may demand the EU to undertake a more realist approach in international politics (Winrow 2007, 219-222; Correljé and van der Linde 2006, 533). The EU has already timidly started to increase its military competences through changes and additions to the CFSP¹ and the CSDP² (Hyde-Price 2006, 218-219; Smith 2011, 155-156). The demand for realist power in international politics becomes especially relevant in the field of energy policy. In the context of the EU, energy policy in particular has acquired

¹ The Common Foreign and Security Policy.

² The Common Security and Defence Policy.

a high position on the political agenda recently, especially since the supply shocks of 2006 and 2009 in Ukraine³ and the 2014 Ukraine crisis (Winzer 2012, 36; Hoogeveen and Perlot 2007, 486-488; Ermida and Fernandes 2013, 547-548).

When it comes to external energy supply, we may find some evidence which contradicts the EU's actorness as liberal. As energy is not solely a public good, but also a strategic good, most scholarly literature approaches external energy supply from a realist perspective (Siddi 2017, 2). In this regard, securing energy supply is perceived as more important than market competitiveness and needs to be achieved through strategic and political pipeline infrastructure and supply routes. This way of securing energy supply overrules the market approach towards energy policy (Siddi 2017, 2-3).

In terms of energy supply, the EU is largely dependent on gas imports from other countries and will continue to be dependent on other sources in the near future. Currently, gas remains one of the main types of fossil fuels consumed in the EU. Due to the depletion of natural gas fields in the North Sea, the EU has become more dependent on gas imports. Even though the number of renewable energy sources are increasing, this will not be able to supply most households in the EU. Therefore, gas remains important as an energy source as it is less environmentally polluting than oil and coal, but still available on a large scale (Siddi 2017, 4-5; Kropatcheva 2011, 553; Van Der Meulen 2009, 833-834).

The main countries from which the EU imports its natural gas are Norway, Russia and Northern Africa. Russia remains the largest supplier of natural gas to the EU, and therefore is an important factor in the EU's energy policy (Siddi 2017, 5; Butler 2011, 627). However, the recent situation in Ukraine has highlighted the volatility of energy supply and the realization that there is an increasing need to secure energy supply to European countries (Siddi 2017, 4; Bosse and Schmidt-Felzmann 2011, 479; Kropatcheva 2011, 564). These crises have mostly been interpreted as examples of Russia's power politics. They have also fueled the perception of intransparent relations with Russia and Russia's ability to use its energy weapon as leverage over the EU (Hoogeveen and Perlot 2007, 488; Ciută 2010, 129).

The European Commission has recently started identifying geographical strategic regions to diversify and secure EU energy imports. It has become clear from the European Commission's 2008 Green Paper, and the proposals for the Energy Action Plans of 2010 and 2014, that there will be an increased focus on external energy supply instead the EU internal energy market and decarbonization (Bosse and Schmidt-Felzmann 2011, 480). The second

³ Ukraine as a transit country for Russian gas supply to the EU. This crisis is often also referred to as the Russia-Ukraine gas crisis.

Strategic Energy Review published in November 2008, addressed the establishment and development of the Southern Gas Corridor as one of the priorities in gas infrastructure. The main aim of the Southern Gas Corridor is to transport gas from the Caspian Region to Europe by using Turkey as a main transit country (Amineh and Crijns-Graus 2018, 148).

The Caspian Sea region can be an important source of energy diversification and securing energy supply for the EU. This region is rich in oil and gas reserves and provides potential for the EU to diversify its energy supply away from Russia and unreliable transit countries such as the Ukraine (Amineh and Crijns-Graus 2018, 145-146).

Mainly after the 2014 Ukraine Crisis, the European Commission has increasingly focused on developing and supporting a Southern Gas Corridor. Scholars have argued that the Southern Gas Corridor is seemingly economically unviable (e.g. Siddi 2017). Yet, in practice, the support for securing energy supply through the Southern Gas Corridor remains large. The Commission has marked this project as a key priority in the Energy Security Strategy of 2014 and the Energy Union Strategy of 2015 (Siddi 2017, 6). Many of the projects seem to be focused on developing a strategic way of bypassing Russian energy supply (Siddi 2017, 6; Pardo Sierra 2010, 644). The political support the EU shows towards the project, may arguably demonstrate the EU's greater willingness to act geopolitically in the field of energy policy (Siddi 2017, 6-8).

It thus seems that the European Commission's aim to secure energy supply is not necessarily based on market objectives, but may actually involve a strategic approach towards securing energy supply.

Therefore, the research question this thesis will try to answer is: 'to what extent can the EU act geopolitically in the context of energy security and should it?'. This will be analyzed by the Southern Gas Corridor Project launched by the European Commission (Kropatcheva 2011, 565). The Southern Gas Corridor is arguably a clear example of geostrategic action that downplays market-logic (Siddi 2017). Furthermore, in the scholarly literature it is debated whether the Southern Gas Corridor is a promising venture or not. Namely, the project seems to be focusing on seemingly economically unviable projects and doing so may also result in undermining the EU's liberal-normative credentials (Siddi 2017). Nevertheless, the increasing demand for realist action in the field of energy policy may require the EU to undertake such projects and manifest itself as a stronger geopolitical actor (Ciută 2010, 130; Goldthau and Sitter 2014, 1454). Building upon this debate, this thesis will try to analyze if the EU can act geopolitically and if it should in this case.

Importantly, this thesis will focus specifically on the European Commission as this is the body that can govern fully or partially, depending on the policy area. In certain policy areas, the European Commission has exclusive competences, such as in trade and competition policy. In the field of energy policy, however, this is more ambiguous as the competences are shared among the European Council and the European Commission, but this nevertheless remains blurry (Sperling and Webber 2018, 23-24). Especially, since energy policy overlaps with the fields of trade and competition policy, the European Commission is an interesting body to examine, and in which it is clearer to examine whether the EU is acting geopolitically or not because this is a coherent body in contrast to the European Council in which all EU Member States reflect different national interests.

In order to answer the research question, this research will be structured as follows. First, the literature review will be divided into two sections. The first will provide an overview of the current debate on the EU's actorness in international relations. The second will be an overview on the debate on whether the EU can act geopolitically in the field of energy policy and if it should. Furthermore, these sections will clearly define what is meant by a geopolitical approach and explain the link between geopolitics and energy security.

Second, this thesis will provide an analysis of the arguments identified from the literature review tested against the Southern Gas Corridor project. This will be structured in three different sections. The first will outline the scope and context of the Southern Gas Corridor project, the second will analyze if the EU can act geopolitically, and the third will analyze whether this project is a promising venture and thus if the EU should act geopolitically. Lastly, the conclusion will provide an overview of the main findings of this research upon which the answer to the research question will be presented.

2. Literature review

There are two main schools in the scholarly literature on the role of the EU as a global actor that should be distinguished: those that argue that the EU is a liberal actor and those that argue that the EU is a realist actor in international relations. For this research, both perspectives are necessary to underline in order to understand the ongoing debate on this topic. The following two sections will be structured according to the debates on the EU as a liberal or realist power.⁴ The latter two sections will be structured according to if the EU can act as a realist actor in international relations in energy policy and if this is promising.

⁴ These perspectives are based on International Relations literature.

2.1 Debates on the EU's actorness in international relations

2.1.1 The EU as a liberal actor

The scholarly literature on the EU's actorness in international relations has mostly focused on liberal-idealist explanations, such as Europe as an ethical normative power (Manners 2002; Hyde-Price 2006, 217; Wagner 2017).

Normative Power Europe focuses on understanding the EU's power in which its normative identity plays an important role in portraying the EU's norms externally (Damro 2012, 682-684; Wagner 2017, 1399-1400). Normative -and civilian power conceptualizations of the EU's actorness in the international system largely focus on soft power instruments and non-coercive measures that make up the EU's power (Hyde-Price 2006, 217).

In contrast, Damro (2012) underlines that understanding the EU as a normative power overlooks coercive measures with which the EU can intentionally or unintentionally exercise power in the international system (684). He argues instead that the EU's power can be best understood in terms of Market Power Europe. This refers to, in contrast to focusing on collective normativity as the basis of the EU, taking the relatively large European Single Market as the core of the EU's power that can either work to exercise power in terms of the attractiveness of the market or by persuading or coercively targeting third-parties to comply to EU-market policies (Damro 2012, 697).

This is further underlined by Goldthau and Sitter (2015) who argue similarly that the EU's power as a liberal actor mainly results from its comparatively large market-size, which generates attractiveness for third-parties to alter their behavior, and that through the EU's regulatory policy tools third-parties can be persuaded to adhere to the Single European Market's (SEM) policies (945-949).

This indicates the difficulty in conceptualizing the EU either as a soft or hard power or civilian or military in the international system. Nevertheless, Smith argued that the EU remains a liberal power at heart with the main goal of marketization abroad (Smith 2011, 144-145).

2.1.2 The EU as a realist actor

As seen in the previous section, the scholarly literature on the EU's nature mostly focus on liberal-idealist explanations. Yet, several scholars argue that these theorizations of the EU's actorness tend to overlook the role of power in the international system. As such, theories of

(neo)realism have often not been used to explain the EU's foreign policy tools (Hyde-Price 2006, 217-218).

More specifically, realism would suggest that the EU can only act normatively in the international system as long as it does not overrule the core national interests of the EU Member States. For example, EU arms export to China can indicate the limitations of understanding the EU as a Normative Power (Hyde-Price 2006, 217-223).

Hyde-Price (2006) argues that the EU's actorness in the context of the CFSP and the CSDP, as the most explicit cases of 'hard power', could be explained through neorealist theory. The EU is currently increasing its military competences through the expansion of the CSDP, a policy which is mostly concerned with conducting foreign military operations. However, through the expansion of the EU's military competences, the EU may arguably be undermining its ethical goals as an ethical normative power (Hyde-Price 2006, 218).

Smith (2011) also argues that the EU's competences and power have increased over the years. But he mainly acknowledges this to be as a result of greater cooperation and integration in the field of foreign and security policy. Yet, Hyde-Price (2006) attributes these developments to neorealist theory as explanatory of the systematic pressures that shape the increased cooperation of EU Member States within the foreign and security policies (219).

Smith (2011) further emphasizes that the EU's ambitions have shifted somewhat from internally oriented (e.g. in the field of economics) towards more externally oriented (e.g. in the field of foreign policy). Rather than mostly focusing on the internal market and economic integration internally, the EU has employed a more political ambition externally by involving in defense and security beyond the EU borders. Many of these more politically-oriented policies and strategies may demonstrate that the EU is manifesting itself towards a stronger global actor in international politics.

The demand for a growing EU 'hard power' may come from a rise of realist tensions in international politics. Namely, Russia's foreign policy assertiveness and the re-rise of China are important aspects to take into account. For example, not only has Russia been increasingly assertive towards the Western world and attempted to expand its sphere of influence towards the Caspian and Black Sea region aimed at controlling resources available in the area, it has also been involved in various conflicts in the Caucasus area, such as in South-Ossetia and Chechnya. Furthermore, the re-rise of China and its geopolitical approaches towards the South China Sea and its backyard, and an increasing amount of trade barriers in the world may require a stronger stance of the EU as a global power in the international system (Winrow 2007, 219-222; Correljé and van der Linde 2006, 533).

Nevertheless, these factors may vary depending on the policy area. Various policy areas may very well not require the EU to act as a realist power. Yet, there are areas which are ambiguous. As Stoddard (2013) argued, in the field of energy policy, many approaches can be applicable to understand and explain energy affairs in international politics. As energy resources are not only a tradeable private commodity, it is also very important as a strategic good and for power in international relations. For the EU, this situation is particularly ambiguous because the EU is mostly using the regulatory market policy tools in the energy policy area, but the discourse in which it operates can be argued to be geopolitically/realist-oriented, that is to say, focused on advancing the EU's geopolitical goals in the field on energy policy. Siddi (2017) also emphasizes that the diplomatically backing and political-economically supporting the policy agenda can indicate the geopolitical dimension of EU external energy policy. This can then demonstrate a realist approach towards a policy goal (6-7). Furthermore, as energy policy is mostly formulated based on geopolitical trends in the international system, energy policy-making cannot be isolated from the political dimension (Correljé and van der Linde 2006, 533).

2.2 Should and can the EU act as a realist power in energy security?

2.2.1 Should the EU act geopolitically in energy security?

The geopolitical dimension of energy

The current scholarly literature on energy security is mostly divided among different approaches to energy as a resource. Currently, the predominant scholarly literature on international energy affairs and energy security distinguishes either between geopolitical or market-liberal approaches (Stoddard 2013, 437-442).

Energy security is often a loosely defined term (Löschel, Moslener, and Rübhelke 2010; Winzer 2012, 36; Ciută 2010, 126; Mammadov 2010, 24). Often, energy security is defined as the security of supply of energy resources at an adequate price level. Importantly, in this sense, energy is not only a tradable commodity but it is necessary for the functioning of a society and state (Ciută 2010, 126, 131; Winzer 2012, 38).

The definition of energy security can vary, based on different assumptions on international relations and trade that can thus also reflect itself on different policy outcomes (e.g. policies based on a market-logic or geopolitics) (Mammadov 2010, 24; Ciută 2010, 127-128; Winzer 2012, 36).

Market-liberal approaches stress that securing energy is necessary to avoid the dysfunction of a state, society or economy. Energy security in this sense can be seen in forms of preventing market failure or supply and demand shocks or dependency on one supplier (Ciută 2010, 132). An ideal-type liberal-market based policy regarding energy security may be a focus on liberalizing (external) markets to remove trade barriers so that more equal opportunities may arise. This includes ensuring competition in the internal market through a regulatory framework so that energy supplies are guaranteed to be competitive and at an adequate price level. From this perspective, energy security can be best guaranteed (Herranz-Surrallés 2016, 1388; Thaler 2016, 573).

In contrast, geopolitical approaches towards energy relations stress the importance of power, competition and conflict over energy resources (Stoddard 2013, 443; Ciută 2010, 129-130). Geopolitical approaches towards energy security are often (neo)realist in nature. They emphasize that energy is a strategic resource that can constitute power in the international system. Namely, it can create leverage for those who have sufficient access to energy resources over those that do not. From this perspective, energy security is highly important politically, as they can contribute to survival and the balance of power in an anarchical system (Stoddard 2013, 444; Ciută 2010, 129-130).

As such, political factors (e.g. the core national interests of states such as power and security) are always more important than market-liberal factors (Stoddard 2013, 444; Correljé and van der Linde 2006, 541). In contrast, market approaches have been argued to be ontologically founded on neoclassical economic principles and so the debate on energy security largely remains economic and excludes the idea that energy can be a strategic good that distributes power in the international system (Stoddard 2013, 445-446). An ideal type of 'strategic' policy may be focused on resource nationalism and decreasing dependence on supplier states. Rather than focusing on matching supply and demand to equilibrium and facilitating a competitive environment, a strategic policy would focus on the threats that are posed by powers that have control over energy supplies and can thus also control who can have access to them. Such responses could include the use of diplomatic and political power to advance strategic goals while possibly undermining market logic (Stoddard 2013, 443-444).

However, the distinction between the two perspectives on energy security are empirically muddy. Namely, one can have essentially liberal-market tools to its disposal, but it can still be employed strategically instead of solely facilitating an open and competitive market. Instead, such policies could be employed for different and perhaps 'strategic'

intentions. This is precisely why this analysis could prove useful; to understand how such policies can translate into practice, and that employing a certain type of policy does not necessarily reflect the same intentions.

The demand for a growing EU realist power is therefore particularly highlighted in the area of energy security (Goldthau and Sitter 2015, 943; Kuzemko 2013, 64-65). Various scholars argued that geopolitical approaches towards energy in international politics are increasing (Correljé and van der Linde 2006, 537). For example, Russia is currently increasingly shifting towards approaching energy as a strategic good. Russia and other states have monopolized important energy companies and sectors, China has adopted an increasingly mercantilist stance towards energy and more states are engaging in energy diplomacy to secure energy (Goldthau and Sitter 2014, 1453-1454). Geopolitical understandings of international relations would suggest that the EU is threatened by large supplier states such as Russia and their possibility to use its energy weapon when the EU becomes increasingly dependent on such large supplier states (Ciută 2010, 130).

More importantly, the EU has already been challenged by the 2006 Russian-Ukrainian gas supply shocks and the 2014 Ukraine crisis. The 2006 and 2009 Russian-Ukrainian gas supply shocks have arguably been a way of Russia to exercise its leverage over the Ukraine so that the Ukraine would accept Russia's terms to use Ukraine as a transit state. These gas crises as well as the 2014 Ukraine crisis, have mostly been regarded as a clear example of Russian power politics. Consequently, it resulted in increasing distrust towards Russia as a major supplier of gas to the EU and it fueled the debate on diverting away from major suppliers such as Russia to decrease vulnerability (Stoddard 2013, 444; Hoogeveen and Perlot 2007, 488; Umbach 2010, 1230). Furthermore, after the dissolution of the Soviet Union, new transit countries emerged, increasing instability in the region. The infrastructure of gas in this region is explicitly complex due to the pipeline infrastructure involved. Namely, the pipeline infrastructure needed to supply gas to the EU will need to pass numerous countries, including instable regions (Correljé and van der Linde 2006, 535).

This can then imply that changing notions on how to secure energy in international politics, from securing energy through marketization towards strategically achieving it, might need the EU to reconsider its approaches towards energy security to successfully respond to these trends (Goldthau and Sitter 2014, 1454; Kuzemko 2013, 64-66; Umbach 2010, 1239).

Economic unviability and undermining normative credentials

If the EU would thus approach energy security geopolitically, an important implication of downplaying market logic by pursuing strategic goals is that such policy-making may lead to economical unviability. Namely, in the context of energy security, Siddi (2017) argues that the Commission has undertaken a geopolitical approach to securing external energy supply by fostering the Southern Gas Corridor. Siddi focuses on the economic challenges that arise from this way of geopolitical thinking. Accordingly, he argues that the project undermines the rule-based market approach towards energy, as the Southern Gas Corridor will only provide 3% of EU gas imports. This means that by not being economically viable, this undermines the EU's characterization of being aimed at market liberalism.

Consequently, undermining such market-mechanisms may lead to violating the EU's normative-liberal credentials when strategic influence is exerted externally. This will especially be the case when the EU's policy tools would be used in a coercive manner to advance strategic interests other than those that are economically viable or normative (Howorth 2010, 465).

2.2.2 Can the EU act as a realist power?

The extent to which the EU can employ such policy tools remains largely debated. Many scholars have continuously argued that the EU lacks the necessary hard power policy tools to act as a realist power. Additionally, most important decisions are still made by consensus among Member States, which is often difficult to achieve considering the different national interests on the table. Yet, several scholars emphasize that the EU's policy tools can be used coercively and strategically to advance geopolitical goals. The ability of the EU to employ such policy tools and their effectiveness also depend on the 'strategic context' the tools are deployed in (Newman and Posner 2015, 1321-1322; Young 2015, 1244, 1248).

The EU lacks hard power tools

Lavenex and Schimmelfennig (2009) emphasize that analyses on the EU's actorness in international politics conclude that the EU lacks the tools, competences, internal coherence and power resources to exert hard power on the world stage in foreign policy issues. Instead, focusing on the EU's external governance (the extension of its internal norms, policies and regulations) capabilities and policy diffusion are better suitable for determining the EU's power, thereby underlining its essence as a rules-based actor (794).

Other scholars have argued that the EU lacks formal competences on the EU-level (e.g. Van Der Meulen 2009, Thaler 2016). In the field of energy policy, the EU is commonly

argued to only be a provider of a regulatory framework and institutions that facilitate free markets and an environment where competition can flourish to guarantee energy at an adequate price level (Prontera 2017, 287).

In the field of energy policy, the Commission needs intensive cooperation with the European Council, due to the fact that it is a shared policy area, and is thus increasingly using the community-method⁵. This is especially the case in the security of supply area as part of energy policy (Van Der Meulen 2009, 842; Thaler 2016, 571-572). In this sense, the EU's regulatory power and rules-based power instruments are not effective if the Commission cannot fully act as a supranational power in this policy area. Instead, the involvement of the European Council in the field of energy policy may lead to competing and contrasting national interests of Member States, making it difficult to form a concrete external energy policy (Thaler 2016, 571-572).

Furthermore, in order to exercise 'hard power' that goes beyond regulating markets (e.g. military power and or foreign and security policy competences) it is necessary to have sufficient political will and consensus among Member States to implement such policies (Goldthau and Sitter 2015, 944; Ginsberg 1999, 448; Howorth 2010, 457, 464; Wagner 2017, 1404). Others have underlined that due to different national interests of EU Member States, it seems highly unlikely that there will be any chance of pooling sovereignty in the areas of foreign and security policy, including in external energy supply (Ginsberg 1999, 449; Pardo Sierra 2010, 644-645).

The EU can engage diplomatically, but this will mostly be focused on setting up multilateral agreements to facilitate a competitive market environments and to prevent market failures. Examples of these multilateral agreements are several EU legislative packages introduced in 1998, 2003 and 2009, which were focused on rule-based market mechanisms to facilitate competitive third-party access to pipeline infrastructures and more liberalization measures for the internal energy market. The EU is mostly powerful in doing so in its internal market as the Commission has secured exclusive competences in this area. Externally, this will prove to be more difficult as third-parties do not necessarily comply with EU rules if it is not in their direct interest. EU Member States can create their own bilateral deals with suppliers and determine the constitution of their energy supply (Van Der Meulen 2009, 842, 851; Prontera 2017, 279, 283). Such bilateral relations between Member States and third-parties could undermine the EU's policies. For example, where the Commission was opposed

⁵ Decision-making based on qualified majority.

to Nord Stream 2 by arguing that it undermines EU internal market regulation, Germany and several other EU Member States were in favor of this pipeline (Hofmann and Staeger 2018, 14; Lussac 2010, 620; Goldthau and Sitter 2018, 36-37). In such cases, it becomes difficult for the Commission to pursue its policy agenda if Member States defend their own national interests (Prontera 2018, 283).

In short, the capabilities on the EU-level remain limited to making and enforcing its regulatory framework, in which it has most power within the EU internal market. Externally, the EU mostly relies on diffusion of its internal regulation outwards due to a lack of competences, and engages in multilateral institutional agreements aimed at preventing market failure.

Liberal tools can be used for coercion

Broadly speaking, the academic literature on the EU as a regulatory power and its external effectiveness underline the importance of having secured exclusive authority over a policy area. Since the Lisbon Treaty, these areas include trade policy, competition policy, and the internal market (Lavenex and Schimmelfennig 2009, 791-794; Da Conceição-Heldt and Meunier 2014, 964-967).

Even though, as argued above, energy policy is a more ambiguous policy area as not every aspect is regulated at the EU-level, many aspects of energy policy are merged with other policy areas, such as trade and competition policy. In these policy areas, consensus is not always necessary and liberal tools can be used in a geopolitical way more effectively (Da Conceição-Heldt and Meunier 2014, 964-967; Lavenex and Schimmelfennig 2009, 791-794). Furthermore, due to the Commission's exclusive competences in trade and competition policy, it has acquired a highly influential role in the formation of (external) energy policy. Even in Council meetings, the Commission often takes the leading role (Thaler 2016, 572).

Other scholars have stressed that the EU has several tools to its disposal which it can indeed use to coercively or persuasively target third-parties (e.g. Hyde-Price (2006), Goldthau and Sitter (2014, 2015), Damro (2012)).

Hyde-Price (2006) argues that the EU can shape its milieu based on both soft and hard power. Namely, based on soft power by diplomatically persuading others to compel or deter others or through compromise. Based on hard power by economic coercion and conditionality clauses. More specifically, he stresses that the EU can use its regulatory policy tools in shaping its external milieu, by using economic carrot and stick measures such as promising membership accession or exclusion from the Single European Market (SEM) (227-228).

Several other scholars have also argued that although the EU is primarily a liberal power, the Commission can use its regulatory toolbox to advance its strategic goals, especially in policy areas in which it has secured exclusive competences. The relative size of the SEM is argued to partly constitute this power. Most of these scholars focus on how the Commission can foster its strategic goals by intentionally (but also unintentionally through policy diffusion) targeting third-parties to participate in the SEM (Goldthau and Sitter 2015; Damro 2012; Goldthau and Sitter 2014).

Goldthau and Sitter (2014) argue that the Commission mainly uses its regulatory policy tools for the establishment and extension of rule-based free markets. However, when the liberal approach does not provide the Commission with the necessary means to achieve its goals, non-liberal tools are used. Namely, when it comes to energy pipeline infrastructure, the liberal approach towards energy trade is often complemented with non-liberal policy tools such as diplomacy and several exemptions to free market trade (Goldthau and Sitter 2014).

In a later study, they argued that the EU is a 'soft power with a hard edge'. They argued that there are several 'hard' measures that the European Commission uses as part of their regulatory policy tools. Namely, the Commission can target third-country firms to alternate their behavior in the energy market if these are to participate in the SEM. This indicates that the EU's regulatory power goes beyond just the 'soft – attractive- power' of the EU (Goldthau and Sitter 2015). This is what Goldthau and Sitter (2015) name 'soft power with a hard edge'.

Other scholars have pointed to the capability of the Commission to persuade or coerce third-parties through conditionality. In extreme cases this could be with the prospect of exclusion from the SEM or with the prospect of future accession to the EU (Young 2015, 1240; Newman and Posner 2015, 1326; Lavenex 2014, 887).

Damro (2012) also attributes the EU's regulatory power to its relative market size. Similarly, to Goldthau and Sitter (2015) he argues the EU to be a 'Market Power'. Even though the EU is lacking the absence of military hard power, the EU has the ability to use threats such as denying market access. By externalizing the regulatory power of the EU, the EU has the power to foster its strategic interests by precisely using these policy tools to advance its interests beyond its borders. Importantly, merely the existence of the EU's large market already adds to the EU's (bargaining) power (Lavenex 2014, 895). This is what Damro (2012) also refers to as the unintentional power arising from the EU's SEM.

Lavenex (2014) further adds that extraterritorial provisions in EU regulation can hinder market access to third-country parties if these do not converge to EU regulation. In

doing so, the EU can promote internal standards and regulation externally. This gives the EU leverage over third-party firms. She argues that especially in the case of possible exclusion from the SEM, the EU's leverage over third-parties is most powerful (895). Namely, for most third-parties (e.g. governments and firms) participation in the SEM is crucial and not adapting to EU regulation either leads to a denial of market access or increases costs for third-parties of not complying with EU regulatory standard (Newman and Posner 2015, 1326; Young 2015, 1240-1242, 1245; Lavenex 2014, 887, 891; Lavenex and Schimmelfennig 2009, 799).

Importantly, even though the EU lacks a traditional unified army – similar to those of a state – the continuous expansion of the CSDP and the CFSP since the Lisbon Treaty has resulted in an attribution of more exclusive competences to the EU-level that can be employed in a strategic manner. This has also been the case in the field of energy policy, in which especially Eastern European Member States have encouraged the Commission to take on a stronger role in formulating external energy policy (Howorth 2010, 465-466; Prontera 2017, 278).

However, the scope of strategic use of liberal tools remains limited if third-party firms are not willing to suffer the costs from converging to EU standards and regulation. This is most often the case when the third-party government has a large market size itself and thus acquires increased leverage compared to a smaller country, or when a third-party firm already has sufficient alternatives (Young 2015, 1242-1244; Goldthau and Sitter 2015, 960-961). Especially in areas in which direct exclusion from the SEM is not possible, the EU's leverage and capability to coerce decreases. In such cases, the EU's market size only remains important through attractiveness (Young 2015, 1242-1243; Da Conceição-Heldt and Meunier 2014, 973-974).

Non-liberal tools can be used to advance policy goals

In energy policy, scholars have argued that the EU can not only rely on its liberal policy tools such as market access through conditionality, due to the geopolitical context in which energy suppliers and importers operate. The inclusion of strategic bargaining, exemptions from EU regulation as well as direct political support has been argued to be a necessary component when liberal tools have been proven not sufficient to advance a policy goal (Lavenex 2014, 895-896; Siddi 2017, 8-9).

The academic literature suggests that rules and regulations can be applied in a more discretionary manner as well as that possible exemptions from such rules could be awarded. Examples of these are exemptions from third party access-rules (TPA) (Correljé and van der

Linde 2006, 540; Commission 2018). TPA's are established to prevent monopoly on energy infrastructure. It requires a certain number of firms to share ownership of energy infrastructure (Prontera 2017, 282; Commission 2018; Siddi 2017, 8).

Exemptions from regulations such as TPA's require a strong political stance of the Commission in the decision and suggests its involvement in the establishment of energy infrastructure (Correljé and van der Linde 2006, 540).

Moreover, the Commission can complement its regulatory capacity by creating strategic partnerships and agreements with third-parties. Often, parties that share similar dependence on energy suppliers as the EU are willing to converge and adapt to EU standards and regulations. An example of this cooperation is the Energy Community Treaty⁶. Its bargaining power also becomes visible in this example as most of its members are already accession candidates or aspire to become EU Member States. One can thus argue that there is an aspect of conditionality visible in such agreement (Lavenex 2014, 895-896).

The usage of EU budget (which is public funding instead of private funding) is also a way of demonstrating political support towards a specific policy agenda and illustrates the strategic use of market intervention capabilities to advance geopolitical objectives (Siddi 2017, 8).

These examples of non-liberal tools, the exemptions from EU rules as well as the engagement in diplomatic efforts and political support through funding would undermine set EU market-regulations by pursuing a strategic policy agenda. This shows how rules can be bent or undermined when desired or deemed necessary by the Commission.

Pipeline politics always has a realist dimension

In the case of energy supply, especially in gas supply, supply is reduced to pipeline infrastructure projects. The control of pipelines then becomes of crucial importance, because pipelines can be strategically used to exert political leverage over the importer of energy through that pipeline or it can strategically be used to bypass a specific territory (Ciută 2010, 130-131). Acquiring such strategic leverage by controlling pipeline infrastructure may become perceived as a security threat by others (Stulberg 2012, 812-813). As pipelines are also subject to geopolitical contestation due to its traverse through different territories, pipeline politics can be argued to acquire a geopolitical-realist dimension (Prontera 2017, 283; Stulberg 2012, 810-811)..

⁶ The Energy Community is an extension of EU regulation in the fields on energy, competition and decarbonization, including the Western Balkans, the Ukraine and Moldova (Siddi 2017, 14).

Siddi (2017) argued that essentially the EU may follow market-liberal approaches towards energy diversification and external energy supply, but this may acquire a political dimension as states and international organizations are often diplomatically and financially involved in pipeline projects to advance geopolitical goals. (Siddi 2017, 4-5). In this sense, market-logic is subordinated to the national security and power concerns of a state or international organization such as the EU (Hyde-Price 2006).

Can	Cannot
Liberal tools can be used for persuasion and coercion	The Commission lacks full-fledged tools
Non-liberal tools can complement liberal-tools	
Pipeline politics always has a realist dimension	
Should	Should not
Energy has a geopolitical dimension	A geopolitical approach will be economically unviable
	A geopolitical approach may undermine the EU's normative credentials

Table 1: Indicators of what the EU can/cannot do and should/should not do in energy policy.

2.3 Conclusions

Concluding from these sections, it can be argued that the on the one side, the EU still lacks a full-fledged range of tools for a realist foreign policy and that if it would act as a realist power in international relations this might undermine the EU's normative power. On the other side, scholars have argued that the EU is developing new tools with realist aspects to it (e.g. increasing competences on the EU-level, also in foreign policy) and that these mostly liberal tools can be used to advance realist policy (e.g. strategically able to use these tools to advance geopolitical goals) and that there is a growing demand for the EU to act as a realist power in the international system.

Scholarly literature has not sufficiently tried to explain the EU's nature as a global actor in the context of external energy supply through realist theory. Rather, most contributions on this subject have focused on energy in the context of economic liberalism

rather than as a geopolitical good. Yet, certain contributions to the scholarly debate provide the argument that the EU can use its regulatory policy tools strategically and thus foster its strategic interests beyond the SEM by targeting third-parties. It can do so intentionally or unintentionally and by persuasive or coercive means. This means that even though the EU has often been labeled as a liberal power in international politics, the EU can advance its interests in non-liberal ways. Whether the EU should act geopolitically is a relatively unexplored field in the academic literature. Most of the debates on this topic focus on why it should not. Yet, there are scholars that argue that the EU should manifest itself as a stronger actor in international relations in general. Since energy is often approached as being a geopolitical and strategic good necessary for the functioning of a state or society and as a resource that plays a large role in power politics in international politics, energy has acquired a strong political dimension that should not be overlooked. Arguably, in order to properly react to the geopolitical approaches around the EU, the EU might have to respond to these trends in the same manner. The Southern Gas Corridor already suggests a geopolitical approach towards external energy supply (Siddi 2017).

Therefore, if the EU is approaching energy security geopolitically, to what extent can the EU do so and should it? This makes it interesting to research as it may have larger implications on how other countries perceive the EU as an international actor in the international system.

The literature review has allowed for a derivation of four main arguments from the literature. First, the EU can and should act as a realist power in energy policy. Second, the EU should but cannot act as a realist power in energy policy, because it should not become duped by Russia, but it does not have sufficient policy tools to do so. Third, the EU can but should not act as a realist power in energy policy, because it is economically unviable, it may cause discord among Member States or the EU might lose its normative credentials. Fourth, the EU cannot and should not act as a realist power in energy policy, because it should focus on market-logic instead.

Accordingly, the analysis focus on identifying which one of these four categories corresponds best to the case study of the Southern Gas Corridor. Thus, the analysis of this thesis will be focusing on identifying whether the EU can act geopolitically in the field of energy security and if it should. Importantly, the limitation to this operationalization is that there are various arguments in all corners, which may vary from case to case. This thesis will analyze one specific case, the Southern Gas Corridor, which is a recent and controversial

case. The thesis will assess the relative merits of each argument in light of the available evidence in the context of this case study.

3. Analysis: The Southern Gas Corridor

3.1 Context

The Southern Gas Corridor project (*see fig. 1 for main pipeline infrastructure*) originated shortly after the first supply shock dispute between Russia and the Ukraine in 2006. The idea of this project was firstly mentioned in the Second Strategic Review presented by the European Commission in 2008. The Southern Gas Corridor initially started with the Nabucco pipeline project, including a combination of other pipeline network infrastructures, the intra-EU Trans Adriatic Pipeline (TAP), the Interconnector Turkey-Greece-Italy (ITGI), and the Trans Caspian Pipeline (TCP) (Prontera 2017, 286).

The Southern Gas Corridor is aimed at diversifying the EU's gas supply routes by bypassing the EU's largest supplier of gas, Russia. The Southern Gas Corridor will be composed of several different pipeline routes that will pass through Azerbaijan, Turkey, Georgia, and will supply Caspian gas to Europe (Commission 2014, 15-16; Koukoudakis 2017, 112). In this project, Turkey will become a key transit country as it is the gateway to Azerbaijan, Turkmenistan, Iran, Iraq and eventually to Europe (Koukoudakis 2017, 112).

However, the Nabucco pipeline project (*see fig. 2 for planned route*) failed in 2013 due to various political and economic obstacles. This included difficulties in EU-Iranian trade due to UNSC sanctions on Teheran and difficulties in securing sufficient suppliers to reach economic viability. Nevertheless, after the 2014 Ukraine Crisis, a revival of political support by the European Commission in developing the Southern Gas Corridor has taken place. The Commission has marked this project as a key priority in the Energy Security Strategy of 2014 and the Energy Union Strategy of 2015 (Siddi 2017, 6; Commission 2014; Hofmann and Staeger 2018, 13). Even though the Nabucco pipeline failed to manifest, it is still an important illustration of how the EU has been able to use its policy tools strategically and its failure may demonstrate the limitations to this approach. Therefore, this pipeline will not be excluded from the analysis.

After the Nabucco's cancellation, the Southern Gas Corridor has been planned to mainly exist out of three crucial pipelines, the Trans Anatolian Pipeline (TANAP), the TAP, and the South Caucasus Pipeline (Expansion) (SCP(X)) (Koukoudakis 2017, 113). The TANAP will carry Caspian gas to Europe via Turkey. The TAP is expected to connect the

TANAP to Europe by connecting Greece, Albania, and Italy. This connection will form a crucial part in opening up and expanding the Southern Gas Corridor. The TANAP is expected to be connected to the SCP(X) (Commission 2014, 23; Ruble 2017, 351).



Fig 1. The Southern Gas Corridor pipeline infrastructure TAP, TANAP and SCPX (AG 2019)

The Proposed Nabucco Gas Pipeline



Fig 2. Nabucco planned route, including the options of SCP, TCP and Tabriz-Ankara Gas Pipeline (Dialogue 2018).

3.2 Is the Southern Gas Corridor a promising venture?

Securing external energy supply through diversification

The EU is currently mainly dependent on its largest supplier of gas Russia. Several Eastern European countries are almost completely dependent on Russian gas. Vice-versa, the EU is the largest importer of Russian gas, which means that there is a mutual dependency

(Koukoudakis 2017, 109-110; Correljé and van der Linde 2006, 535; Baev and Øverland 2010, 1082).

Nevertheless, there are several disagreements between the EU and Russia. The most important one concerns the Russian-Ukrainian dispute over pricing, which led to large disruptions of gas supply to the EU in 2006 and 2009. The EU and Russia also have disagreements over competition policies and regulations, such as policies that prevent Gazprom (or any other firms) from having monopoly over pipeline infrastructure. The EU also has security concerns, mainly caused by the Russian-Georgian War in 2008. Not least important, several large gas fields in Russia are depleting slowly. All of these concerns have led to a growing EU demand for gas from different suppliers (Ermida and Fernandes 2013, 549-550; Correljé and van der Linde 2006, 535; Koukoudakis 2017, 110-111).

In order to meet the growing demand for gas, the Caspian Sea region has often been identified as a region with an abundance of natural gas, sufficient for EU gas supply diversification. The Caspian Sea region seems the most promising, because gas supply from other regions such as the Middle East remain too complex and economically difficult to rely upon. This is mainly due to the security and economic concerns that arise when constructing new pipeline infrastructure towards this region (Correljé and van der Linde 2006, 535; Koukoudakis 2017, 110-111; Baev and Øverland 2010, 1082; Erdogdu 2010, 2940).

Next to investing and supporting new pipeline projects that bypass Russia, the EU is focusing on the import of liquefied natural gas (LNG) and shale gas as an alternative and extra buffer when more supply shocks occur. Nevertheless, solely relying upon LNG and shale gas is currently too expensive and complicated to account for a rapid and sufficient diversification of EU gas imports (Pardo Sierra 2010, 650; Correljé and van der Linde 2006, 535).

Namely, shale gas is unlikely to account for enough diversification due to strict regulation on exploration options to prevent the risk of chemicals contaminating soil and the EU currently lacks the necessary infrastructure to transport shale gas from upstream⁷ to downstream⁸. The environmental risks of shale gas production are especially problematic, because EU shale gas reserves are often in populated areas which leads to protests (e.g. Groningen shale gas exploration in The Netherlands). Building new infrastructure will likely increase production costs and thus will not be favorable to account for sufficient diversification. This is because the EU currently lacks the sufficient infrastructure to import

⁷ Upstream refers to the extraction of gas (Van Der Meulen 2009, 837).

⁸ Downstream refers to the refining and distribution of energy resources to consumers (Van Der Meulen 2009, 838-839).

LNG by sea and the production and transport costs of LNG are substantially higher than conventional production and transportation of gas through pipelines. In this regard, economic viability is highly dependent on the distance needed for transport and the capacity that can be carried once at a time (Ermida and Fernandes 2013, 550-553).

Even though LNG does not require pipeline infrastructure, as it is reliant on maritime transportation, the transportation of LNG does not completely eliminate transport risks as the transportation of LNG poses some risk with regard to terrorism and piracy (Umbach 2010, 1237; Ermida and Fernandes 2013, 550-553).

As the Southern Gas Corridor seems to be the best option currently available, the EU has identified this Corridor as the main way of diversifying supply routes away from Russia. The 2014 Energy Security Strategy is the most recent and concrete example of this highlighted importance strengthen the EU's energy security (Commission 2014).

Most scholars have used the Southern Gas Corridor as a case illustrative of the limitations of the EU to act geopolitically and cohesively. It has commonly been argued that a geopolitical approach will be economically unviable and may undermine the EU's market-logic as well as its normative credentials (Prontera 2017, 267; Siddi 2017). The following two sections will test these arguments against the case of the Southern Gas Corridor.

The Southern Gas Corridor and the EU's normative credentials

If the EU focuses mostly on securing external energy supply geopolitically through the Southern Gas Corridor and integrates this effectively into common foreign policies as indicated in the 2015 Energy Union Strategy (Commission 2015, 6), a dilemma between the EU's normative credentials and the security of energy supply might arise. More specifically, if the EU manifests itself as a stronger power on the world stage, this may eventually contribute to the development of an EU 'hard' power which may undermine its 'soft' power manifestation and its normative ideals upon which the EU initially had been founded (Abbasov 2014, 34).

It is arguable that several great powers, such as the US, China, India or Russia may not be welcoming towards the EU developing itself towards a more military or strategic power that deviates from solely ambitioning normative goals. Mainly because normative power in itself does not exert much power or influence on the world stage as to threaten the power positions of these important and large actors. However, this does not necessarily mean that when the EU employs its tools to advance strategic goals, that it undermines its liberal credentials. It will most probably keep focusing on its normative goals such as promoting

human rights, global peace, multilateralism, and free-markets. Instead, it can be argued that achieving such normative goals also needs policy tools with hard power elements for the EU to be more efficient in achieving these. A prominent case of such hard power tool is the already existing ESDP which underpins the EU's normative policy goals and helps the EU achieve them (Howorth 2010, 466).

The economic viability of the Southern Gas Corridor

Several scholars have argued that the Southern Gas Corridor will not become a promising venture due to its economic unviability as it downplays EU market-logic (Siddi 2017; Baev and Øverland 2010). However, as gas demand is expected to rise in the future, the Southern Gas Corridor project may acquire a stronger economic rationale as expected (Erdogdu 2010)

The failure of the Nabucco pipeline was largely to be blamed on its weak economic rationale. In the end, the project arguably only served as a strategic way of bypassing Russian energy supply (Siddi 2017, 6; Pardo Sierra 2010, 644). The economic unviability which deemed unfavorable to many investors and third-party firms was demonstrated by the announced TANAP pipeline project as a better alternative to Nabucco, which would cross a similar path and would cost approximately 3 billion euros less than the Nabucco project. The capacity of the TANAP would also be substantially higher than the Nabucco pipeline, because as the Nabucco pipeline only have had access to gas supplied from Azerbaijan. The TANAP could now have access to more countries as it would cross Turkey, but would result in more control of Turkey's state-owned energy firms (Prontera 2017, 287). The Nabucco pipeline was expected to deliver no more than five percent of the total EU-demand of gas (Baev and Øverland 2010, 1082).

However, even after Nabucco's cancellation, scholars have argued that the current planned pipeline projects for the Southern Gas Corridor seem to be economically unviable due to the limited capacity of gas it can supply to Europe. As such, the Southern Gas Corridor is argued to not be completely economically sound and mostly a political battle (Siddi 2017, 9; Baev and Øverland 2010, 1088-1089). Arguably, one of the other options would be to transit gas through the Ukraine and remain reliant upon the Ukraine as a transit country between Russia and Europe. However, only relying upon the Ukraine as a transit country and subjecting to Russian terms has been commonly perceived as a security threat to EU gas supply as well as to supply at an adequate price-level (Baev and Øverland 2010, 1088-1089).

It is also important to illustrate that gas prices are expected to rise in the future. This is mainly due to the growing demand for gas as it currently remains the most environmentally-

friendly fossil fuel to meet energy needs. If gas prices rise, the Southern Gas Corridor may acquire a stronger economic rationale over time. As the Corridor continues to expand, by connecting to large gas fields in Iran or Turkmenistan, the capacity will also increase (Erdogdu 2010, 2940). These pipeline infrastructures are currently already planned, however, it remains to be seen if these would actually manifest as the construction of such pipeline infrastructure carries many significant political and security risks and requires a strong stance from the EU (Siddi 2017, 9).

3.3 Geostrategic action in the Southern Gas Corridor Project

The European Commission has already taken a leading role in the development of the Southern Gas Corridor, which has arguably been accompanied by a shift from the Commission as a market-liberal actor to one that has demonstrated its capability of non-liberal action. Namely, it can be argued that the Commission has used several policy tools to pursue its strategic agenda, by using liberal tools, in which it has secured exclusive competences, in a non-liberal manner as well as using non-liberal tools such as engaging in direct diplomatic efforts and applying EU rules in a discretionary manner (Prontera 2017, 274). The Southern Gas Corridor project has arguably also demonstrated several limitations to the Commission's approach. Namely, the project is perhaps unreachable due to differences in the interests of the Member States as the Commission lacks exclusive competences, and that the EU is subject to competition from Russia which cannot be countered due to the limited reach of EU's regulatory framework.

This section will therefore analyze the development of the Southern Gas Corridor to understand whether the EU has acted geostrategically in this case. The first subsection will focus on the Commission's liberal policy tools and how they have been applied to the Southern Gas Corridor. The second subsection will focus on non-liberal tools, such as exemptions from EU rules and competition policies and diplomatic and political support. The third subsection will focus on pipeline politics and illustrate how the Southern Gas Corridor cannot be separated from geopolitical contestation.

Liberal tools can be used for persuasion and coercion

As discussed above, the Commission essentially has authority over market-liberal tools within its regulatory framework. The development of the Southern Gas Corridor, however, arguably demonstrates a shift away from the Commission's sole reliance on the use of these policy tools to prevent market failures and enhance the competitive environment (Prontera 2017,

286). Instead, the Commission has shown that it can use its market-liberal tools strategically to combat energy dependence on Russia (Hofmann and Staeger 2018, 15).

Importantly, the development of the Southern Gas Corridor may arguably also demonstrate that the EU is not a traditional ‘hard power’ with strong military capabilities, but that the Commission can use its policy tools according to a realist discourse. This is to say that the Commission mostly has market tools to achieve its policy objectives, but it can nevertheless make use of these market tools to advance geopolitical goals (Prontera 2017, 286)

The main focus of EU policies regarding external energy supply, has been ‘external energy governance’ rather than ‘energy diplomacy’, also pointing to the EU’s most common characterization, that of a market-liberal actor (Prontera 2017, 273-274). The Commission has used its regulatory capabilities in an attempt to integrate other states beyond the EU borders into its internal energy market. The Energy Community is part of such an approach (Pardo Sierra 2010, 645-646; Goldthau and Sitter 2014, 1463).

The Commission’s intentional and strategic export of its regulatory framework through the Energy Community (in which many signed Members would take part in the development of the Southern Gas Corridor), and the incorporation of the Ukraine and Georgia in the Energy Community, is an important step towards the development of the Southern Gas Corridor. Subjecting Ukraine (as a main transit country of Russian gas) to EU competition and market policies would prove useful in the EU’s quest of securing energy supply and lessen Russia’s leverage over the EU. Furthermore, exporting EU rules to Georgia (as a main transit country for the Southern Gas Corridor) would increase the EU’s influence respectively as the EU would become increasingly able to set the terms in the development of the Southern Gas Corridor (Goldthau and Sitter 2015, 957; Abbasov 2014, 32).

The Nabucco pipeline project was also based on the EU’s regulatory framework even though Turkey is not a signed member to the Energy Community. The Nabucco pipeline was nevertheless expected to facilitate equal regulatory conditions throughout the entire pipeline network crossing multiple countries, as well as third-party access for half of the total capacity of the pipeline. As such, these conditions seem to demonstrate the EU’s market approach to energy security (Abbasov 2014, 32-33). Nonetheless, this approach to EU rule export seems strategically promising, as many third-party energy companies that are involved with the development of the Southern Gas Corridor have to comply with EU regulation and competition policies as well as those established in the Energy Community Treaty and Energy Packages (especially the Third Energy Package). This shows that the EU’s internal market

policies have an externalized effect when third-parties want to take part in energy infrastructure projects which involve the EU as well as suppliers that want to export gas to the EU (Goldthau and Sitter 2015, 953-954). As discussed in the literature, the ‘hard edge’ of the EU’s regulatory policy tools arrives from its ability to target energy companies and governments (in the case of state-owned companies) beyond the EU’s borders (Goldthau and Sitter 2015, 953, 955).

The Commission further demonstrated its regulatory power by cancelling the South Stream project in 2014 (Pardo Sierra 2010, 655-656; Proedrou 2018, 413). The South Stream pipeline was initiated by Gazprom to form a part of the Southern Gas Corridor as a reaction to this project and especially the Nabucco pipeline. In contrast to the Commission’s idea to bypass Russia, this pipeline would supply Southeastern Europe with Russian gas and bypass Ukraine. The project was to be constructed by Gazprom and ENI (an Italian semi-state-owned firm) in 2007 (Erdogdu 2010, 2941-2942).

However, the Commission showed firm opposition to the project. Namely, the project was argued not to comply with EU market regulation and competition policies as established in the Third Energy Package⁹. It was also argued to be non-compliant with energy infrastructure procurement rules (Prontera 2017, 290; Hofmann and Staeger 2018, 14-15; Stulberg 2015, 118). Due to the Commission’s use of its regulatory power capabilities, the South Stream pipeline was cancelled.

As argued in the literature above, the Commission has the capability to regulate with conditionality, that is, to refrain third-parties from market access if there is non-compliance with the EU’s competition and/or market policies. This regulatory tool proves to be a powerful one in cases of diminishing Russian power over EU energy supply. It also shows that the application of this policy tool can be targeted and intentional. As such, the Commission can deter and compel third actors, depending on the EU’s interest (Goldthau and Sitter 2015, 955, 958).

However, it is important to note that EU Member States were not always backing the Commission and its decisions. Namely, several EU Member States supported the South Stream pipeline, especially after the second round of supply shocks in Ukraine in 2009. These EU Member States wanted to advance their national security agendas by decreasing reliance upon Ukraine (Prontera 2017, 290; Baev and Øverland 2010). Several EU Member States also made efforts to block EU-funding to the Nabucco pipeline (Erdogdu 2010, 2942; Lussac

⁹ The Third Energy Package and the third-country access provision was arguably mainly aimed at preventing Gazprom from having monopolized control over pipeline infrastructure (Baev and Øverland 2010, 1081; Goldthau and Sitter 2018, 36).

2010, 620) and Germany and Italy closed bilateral deals with Russia itself (Erdogdu 2010, 2942). This shows that in the field of energy policy, policy-making is not always coherent, which can undermine the Commission's policy agenda (Pardo Sierra 2010, 651). Indeed, as the literature review suggested, an effective EU external energy policy often needs coordination between the European Council and the Commission.

Importantly though, there are multiple examples in which this coordination was effective. Namely, during the development of the Nabucco pipeline, the Commission took part in international summits to politically support the development of this energy infrastructure project during 2009. Barroso¹⁰ was also on site during the time when the final agreement on the Nabucco pipeline project was signed in 2009 between Turkey, Romania, Bulgaria, Hungary and Austria. Importantly, the European Council agreed to mandate the Commission with the task of negotiating an international agreement for the TCP project with Azerbaijan and Turkmenistan. The attribution of this mandate to the Commission shows how more competences are awarded to the EU-level, and illustrates that consensus among Member States was not needed to reach a final agreement on the TCP project. Instead, the Commission took the leading role in which was previously an intergovernmental area (Prontera 2017, 287; Maltby 2013, 440). Such integration of more competences to the EU-level indicates the willingness of the EU Member States to give up some part of their sovereignty in foreign policy issues (Umbach 2010, 1237; Prontera 2017, 287). Not least important, if EU Member States do wish to pursue its own bilateral deals by diversifying from the EU energy security agenda, funding becomes more difficult to obtain. This would require new interstate agreements as EU institutions do not fund projects that are different from the established EU energy security agenda (Prontera 2017, 283).

Yet, the reach of the Commission's liberal policy tools remains limited. The Turkish Stream pipeline, shortly announced by Russia and Gazprom after the cancellation of the South Stream pipeline illustrates such limitation to the Commission's regulatory capabilities. Namely, that Russia (or anyone else for that matter) can still strengthen its grip over Europe by proposing new energy infrastructure that does comply with EU rules and so limit the probability of the Commission to cancel it (Proedrou 2018, 413; Goldthau and Sitter 2015, 956; Siddi 2017, 12).

Rules can be applied in a discretionary manner

¹⁰ Jose Manuel Barroso was the President of the European Commission from november 2004 until november 2014.

In the case of the Southern Gas Corridor, the Commission complements its liberal policy tools with diplomatic and financial support as well as exemptions from EU rules when the liberal toolbox fails to advance its strategic policy agenda (Goldthau and Sitter 2014, 1468). More specifically, the Commission has been able to exempt several pipeline infrastructures of the Corridor from its internal market rules, it has shown its abilities to engage in direct diplomacy by backing energy companies involved in its development, it has politically supported the project openly, as well as secured funding (Bank 2018; Goldthau and Sitter 2015, 958; Prontera 2017, 286).

The Commission marked the Nabucco pipeline project as a priority in its Projects of Common Interest (PCI) and used its competition policy tools by exempting the Nabucco pipeline project from TPA requirements (third-party access to prevent monopoly and increase competition) for 25 years (Commission 2019a; Siddi 2017, 8; Pardo Sierra 2010, 652). PCI's are prioritized cross-border energy infrastructure projects intended for the EU to reach its energy policy goals as marked in the Energy Security Strategy. If marked as a PCI, an infrastructure project can benefit from easier access to funding, enhanced regulatory conditions (including exemptions such as TPAs), and due to its political support the project becomes easier to access for investors (Commission 2019b). The ITGI has also been included in the PCI's, and can thus also expect less strict regulation to increase the likelihood of the development and construction of the pipeline (Siddi 2017, 12).

Nevertheless, the EU faces more complexities with the development of the TANAP pipeline, which replaced Nabucco after its failure. Granting the TANAP exemptions from TPA requirements becomes difficult because it is not completely independent from Turkey (Prontera 2017, 287). Another pipeline however, the TAP, has been granted a TPA exemption for 10 bcm/y of gas capacity by the Commission, which means that the Azeri Shah Deniz consortium¹¹ can fully supply the pipeline with gas (Siddi 2017, 12). Nevertheless, if the TAP increases its bcm/y of gas capacity in the future, the rest of the capacity needs to be granted TPA exemption to prevent that Gazprom could make use of this extra capacity to supply Russian gas either way (Siddi 2017, 12-13). The Commission has also already engaged in investigating Gazprom for possible violations of TPA rules and uncompetitive pricing (Stulberg 2015, 118).

Furthermore, the Commission engages in political support and energy diplomacy to pipeline projects (Prontera 2017, 283). The Commission politically supported the Southern

¹¹ The Azeri Shah Deniz is a large gas field in the Caspian region operated by a joint venture run by BP (Azerbaijan 2019).

Gas Corridor in several policy documents such as the 2014 Energy Security Strategy, several Green Papers and in the 2015 Energy Union Strategy. The latter stating the need for integrating energy security consistently into EU foreign policy as well as employing all available (foreign) policy measures vis-à-vis the realization of the Southern Gas Corridor (Siddi 2017, 7; Commission 2014; 2015, 6). In an aim to accelerate the Southern Gas Corridor project, the Commission granted 50 percent of the total estimated costs of the Nabucco pipeline from the EU-budget and secured funding from the EIB for the further development of the Corridor (Erdogdu 2010, 2941; Bank 2018). The Commission also initiated the idea of the Caspian Development Cooperation, which would semi-privately operate. The main idea of this Cooperation was assisting upstream and downstream European energy firms with investing in the Southern Gas Corridor so that a sufficient amount of bcm/y of gas would flow through the pipelines to make the project worthwhile and subject to EU rules (Prontera 2017, 287; Goldthau and Sitter 2015, 958-959; Maltby 2013, 440).

During the Nabucco pipeline project, the Commission increased its direct diplomatic efforts with countries in the Caspian region and Central Asia, through which the pipeline was supposed to cross (Prontera 2017, 287; Goldthau and Sitter 2014, 1467). The Commission also facilitated the diplomatic communication between the Member States and the energy firms involved in the development of the Nabucco pipeline (Prontera 2017, 287).

All of these approaches suggest political and diplomatic engagement in the project. This large amount of political support also illustrates the downplaying of EU market logic (Siddi 2017, 9; Goldthau and Sitter 2014, 1467).

Pipeline politics always has a realist dimension

Drawing from the theoretical section discussed above, pipelines are always subject to a political dimension as they need government's support to be constructed due to the crossing of multiple territories (Prontera 2017, 285). Most importantly, the transfer of gas from the Caspian region proves to be subject to various geopolitical contestations, especially because this region is landlocked, pipeline infrastructure here is subject to several security challenges and thus acquires a political dimension when it has to cover large territories (Pardo Sierra 2010, 649-650).

Interestingly, Maros Sefcovic, vice president of the European Commission and in charge of leading the Energy Union stated in an interview:

“We are trying to learn lessons from the Nabucco project, where it was quite clear that lack of political attention was one of the reasons why we have seen the problems piling up and in the end led to the disinterest of the business community in supporting this project” (Ovozi 2015).

Sefcovic (and arguably the Commission itself) thus attributes the failure of the Nabucco project to a lack of ‘political attention’. The lack of political attention as a reason for the failure of the Nabucco pipeline (or any pipeline for that matter) also becomes evident in the academic literature on pipeline politics, because it was crossing too many territories which enhanced the complexity of the construction of the pipeline (Prontera 2017, 287). Without a strong political stance, the project was deemed to fail due to an inability to secure investors and suppliers (Proedrou 2018, 414). As pipeline diversification is most often a crucial political goal rather than an economic one (arguably especially in the case of the Southern Gas Corridor), a strong political stance is required for success (Proedrou 2018, 414-415; Siddi 2017, 8).

4. Conclusion

4.1 Discussion

This thesis has aimed to answer the question ‘to what extent can the EU act geopolitically in the context of energy security and should it?’, looked at through the case study of the Southern Gas Corridor. This has been done through a thorough literature review on the EU’s actorness in international relations where several indicators were identified throughout the literature. These indicators were then applied upon the case study in two steps, namely if the EU can act geopolitically and if it should.

It has become clear that to a certain extent the Commission can make use of its liberal and non-liberal tools to advance its geopolitical agenda. Namely, EU’s external governance approach has been a necessary precondition for the Southern Gas Corridor to develop. In order for the Commission to push its political and economic policy agenda forward, it has needed to make use of its liberal policy tools intentionally and unintentionally. Its relatively large market size and its ‘existence’ have enhanced the EU’s regulatory power and attractiveness. The EU has complemented its liberal policy tools with non-liberal tools by engaging diplomatically and politically when its liberal policy tools’ reach was limited. The EU’s strong regulatory power to coerce third-parties in complying with EU regulation have thus helped with the prevalence of the Southern Gas Corridor and the cancellation of its main rival project South Stream.

However, the Commission arguably still lacks several policy tools to fully implement and pursue its strategic agenda. Namely, it does not have full-fledged competences in the energy-related foreign policy domain, which would essentially require the consensus of the EU Member States. Close cooperation with the European Council to pursue the EU's energy security agenda would thus still be necessary.

Importantly, the way in which the Commission can be able to use its regulatory policy tools geopolitically remains in a very concrete legal and rules-based context however. It can target intentionally, but only to a certain extent is it able to do so consistently. It will mostly be in a market-making context framed in the way to prevent market failure and facilitate a competitive environment.

The extent to which such an approach can be successful (thus, if it should act geopolitically) has been debated in the academic literature. Several scholars (e.g. Siddi (2017)) have argued that the Southern Gas Corridor will not be a promising venture due to its economic unviability and the possibility of undermining the EU's normative basis. However, even though it may currently seem that the project lacks economic rationale, the Southern Gas Corridor will probably expand in the future, increasing its capacity of gas flow. Furthermore, it seems hasty to conclude that the Commission's strategic approach towards the Southern Gas Corridor will undermine the EU's normative credentials. Instead, its normative basis might be strengthened if more competences will be awarded to the EU-level. Moreover, the growing demand for gas and a lack of alternatives, as well as a growing 'hard' power in international politics, especially in the field of energy policy, may suggest that the Southern Gas Corridor is a promising venture (at least politically).

All in all, it seems that the Commission justifies its approach to energy security in market-liberal terms such as competitive and efficient. However, the Commission seems to have similar geopolitical aspirations as other actors in international politics. Yet, it seeks to frame its geopolitical intentions in a regulatory market-based discourse. Namely, through the extension of its own regulatory rules and policies beyond its borders, the EU is attempting to affect the international balance of power in energy asymmetrically in favor of those complying to EU regulation and market policies, which will give these countries a structural advantage in overcoming energy dependence.

Therefore, development of the Southern Gas Corridor would ultimately be a political victory than anything else, which would also demonstrate the Commission's political capabilities and might set the tone for the future.

4.2 Further research

It has become clear that currently, most academic literature still approaches energy security and EU actorness from a liberal-market or a realist-geopolitical perspective. This creates a fault line between the two disciplines. Instead, the EU combines the two approaches into one to pursue its strategic agenda, which exists out of economic viability and facilitating open and fair markets and competition as well as diminishing high political risk from relying on a small number of large suppliers. The current dichotomous divide between either a market-liberal actor or a realist-geopolitical actor is not sufficient to explain the EU's ambiguous situation in which the competences in the energy policy area are shared between the MS and the Commission. The two overlap and continuous cooperation is needed in this policy area, leading to difficulties in comparing it to a traditional state.

Instead, a new conceptualization of EU energy security politics should be evaluated, so that its external governance approach as well as the Commission's ability to use 'hard' power tools, such as strategic diplomacy and its 'soft power tools', such as its liberal-regulatory capabilities are combined into looking at the EU's actorness. Not least important, special attention should be paid to the empirically muddy distinction between what it means to act geopolitical or market-liberal.

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