

## **ПОЛІТИЧНІ ПРОБЛЕМИ МІЖНАРОДНИХ ВІДНОСИН**

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### **THE POLICY OF THE CENTRAL ASIAN COUNTRIES (KAZAKHSTAN, TURKMENISTAN AND UZBEKISTAN) IN THE ENERGY SECTOR**

### **ПОЛІТИКА ЦЕНТРАЛЬНОАЗІАТСЬКИХ ДЕРЖАВ (КАЗАХСТАНУ, ТУРКМЕНИСТАНУ І УЗБЕКІСТАНУ) В ЕНЕРГЕТИЧНОМУ СЕКТОРІ**

### **ПОЛИТИКА ЦЕНТРАЛЬНОАЗИАТСКИХ ГОСУДАРСТВ (КАЗАХСТАНА, ТУРКМЕНИСТАНА И УЗБЕКИСТАНА) В ЭНЕРГЕТИЧЕСКОМ СЕКТОРЕ**

#### **Doroshko M. S.**

Doctor of science, professor, Head of the Department of Regional Studies of the Institute of International Relations of Kyiv National Taras Shevchenko University. doroshko7@ukr.net

#### **Voloshenko I. O.**

Assistant Professor of the Department of Regional Studies of the Institute of International Relations of Kyiv National Taras Shevchenko University. voloshenkoinna@gmail.com

#### **Дорошко М. С.**

Доктор історичних наук, професор, завідувач кафедри країнознавства Інституту міжнародних відносин Київського національного університету імені Тараса Шевченка. doroshko7@ukr.net

#### **Волошенко І. О.**

Асистент кафедри країнознавства Інституту міжнародних відносин Київського національного університету імені Тараса Шевченка. voloshenkoinna@gmail.com

#### **Дорошко Н. С.**

Доктор исторических наук, профессор, заведующий кафедрой страноведения Института международных отношений Киевского национального университета имени Тараса Шевченко. doroshko7@ukr.net

#### **Волошенко И. А.**

Ассистент кафедры страноведения Института международных отношений Киевского национального университета имени Тараса Шевченко. voloshenkoinna@gmail.com

**Abstract.** *An important component of the ensuring the security of the states of the Central Asian region is the energy security because the energy resources are critically significant for the improving the quality of life and the expanding the opportunities for all countries in this region. Kazakhstan, Turkmenistan and Uzbekistan are those countries which energy resources is an area of deep interest of extra-regional forces. In fact, energy security is a priority area of foreign policy of countries in the region that are trying to get the maximum benefit from the sale of their own oil and gas reserves. The energy resources Central Asia, primarily Turkmenistan and Kazakhstan, step up cooperation with countries such as China, Russia, USA and many others. Authors considers the peculiarities of energy policy of Kazakhstan, Turkmenistan and Uzbekistan, peculiarities of cooperation with external partners, as well as the problems that exist in the energy sector.*

**Key words:** *Central Asia, Kazakhstan, Turkmenistan, Uzbekistan, energy security, energy policy, energy resources.*

**Анотація.** *Важливим компонентом забезпечення економічної безпеки держав Центральної Азії є енергетична безпека, адже енергетичні ресурси мають критично важливе значення для поліпшення якості життя населення і розширення можливостей для всіх держав регіону.*

*Казахстан, Туркменістан і Узбекистан є тими країнами, де енергетичні ресурси є сферою глибокою зацікавленості позарегіональних сил. По суті, енергетична безпека є пріоритетним напрямком зовнішньої політики усіх країн регіону, які намагаються отримати максимальну вигоду від продажу власних запасів нафти і газу. Енергетичні ресурси Туркменістану і Казахстану сприяли розширенню співробітництва з такими країнами, як Китай, Росія, США та багато інших. Автори аналізують особливості енергетичної політики Казахстану, Туркменістану і Узбекистану, особливості співпраці із зовнішніми партнерами, а також проблеми, що існують в енергетичному секторі.*

**Ключові слова:** *Центральна Азія, Казахстан, Туркменістан, Узбекистан, енергетична безпека, енергетична політика, енергетичні ресурси.*

**Аннотация.** *Важным компонентом обеспечения экономической безопасности государств Центральной Азии является энергетическая безопасность, поскольку энергетические ресурсы являются критически значимыми для повышения качества жизни и расширения возможностей для всех стран в этом регионе. Казахстан, Туркменистан и Узбекистан являются теми странами, где энергетические ресурсы являются сферой глубокой заинтересованности внерегиональных сил. По сути, энергетическая безопасность является приоритетным направлением внешней политики всех стран в регионе, которые пытаются получить максимальную выгоду от продажи собственных запасов нефти и газа. Энергетические ресурсы Центральной Азии, в первую очередь, Туркменистана и Казахстана, позволяют расширять сотрудничество с такими странами, как Китай, Россия, США и многие другие. Авторы исследуют особенности энергетической политики Казахстана, Туркменистана и Узбекистана, особенности сотрудничества с внешними партнерами, а также проблемы, существующие в энергетическом секторе.*

**Ключевые слова:** *Центральная Азия, Казахстан, Туркменистан, Узбекистан, энергетическая безопасность, энергетическая политика, энергетические ресурсы.*

**Current problems.** The modern interpretation of the energy security involves not only the stable supply of the hydrocarbon resources to the consumers but also includes the production, transportation and the sales in the world of energy markets. That's why not only the supplying countries but also the transit states, the consumers and the transnational energy corporations, namely, the representatives of all links in the energy chain must bear their share joint responsibility for the energy security.

The whole Central Asian region is characterized by a high level of the energy resources. However, in the region there are countries with a high level of energy security (Turkmenistan, Kazakhstan and Uzbekistan) and the countries (Kyrgyzstan and Tajikistan) which are experiencing difficulties in energy sector.

**The purpose of this article** is to analyze the energy policy of Kazakhstan, Turkmenistan and Uzbekistan, because this sector is the main for the economic development not only for Central Asia, but also for the nearest regions.

**Important research results.** About half of the total energy accounts of this region is connected with natural gas, the main reserves of which are concentrated in Turkmenistan, Uzbek-

istan and Kazakhstan [1]. Of the total proved reserves of natural gas Turkmenistan has at its disposal 2,252 trillion cubic meters; Kazakhstan – 1500; Uzbekistan – 1476 trillion cubic m [*Мезоран*, 2011:51]. Oil takes the second place in the structure of the energy states of the CAR, up to 80% of its production accounts for Kazakhstan. According to the World Bank Kazakhstan has the “lion’s” share of the region’s oil reserves – 1 100 million tons of the oil equivalent among the proved 1264, 2 million tons [3]. For all that the Kazakhstan’s major oil and gas resources are associated with the shelf of the Caspian Sea. So the proved reserves of hydrocarbons on the land are 4 billion tons of oil but the potential of the shelf is 17 billion tons [1]. More than 20% of the proved world reserves of uranium are situated in Kazakhstan and Uzbekistan [1]. The share of the CA region in the structure of the global proved reserves of coal is about 2%. The coal deposits of the CA are also located mainly in Kazakhstan (24 300 million tons among 28231).

In general Kazakhstan has 77.4% of fossil fuels of the region, Uzbekistan – 12.7; Turkmenistan – 6.7 while the parts of Kyrgyzstan and Tajikistan are less than 2% [4]. By the way the hydro potential of Tajikistan is 27.3 million tons per year but in Kyrgyzstan –14 million tons among the total volume of 45,1million tons for the region as a whole [1]. This somewhat compensates the lack of the energy reserves of the two previous countries. However, in the total fuel and energy balance of the region the share of the hydroelectric power at this time is negligible – about 2% [*Петров*, 2010:60].

Thus, the CA countries have the large and diversified resource base which is although unevenly distributed in the region. First of all by the increasing of the production of oil and natural gas from 2004 to 2012 the countries of the region increased their GDP on average in 4.5 times. The most marked growth is in the economy of Turkmenistan, the least – in Kyrgyzstan and Tajikistan [*Linn*, 2012:98].

During the years of independence the exchange of energy between the CA countries was reduced. Kazakhstan supplied coal and gas to Kyrgyzstan. Uzbekistan both as consumes so produces a lot of oil, gas and electricity. However, only natural gas is an essential article of its export. Uzbekistan replaced Turkmenistan as the main supplier of natural gas to the countries in the region. Kazakhstan, Kyrgyzstan and Tajikistan are dependent on the Uzbek’s gas supplies. From time to time the neighbor countries accuse Tashkent in using gas export for the political and economic press [*Дадабаева*, 2014:17].

The elites of Kazakhstan, Turkmenistan and Uzbekistan are seeking to convert the increased attention of the west countries, Russia, China and other players to the energy sector in the more favorable terms of the political and economic dialogue, to the supporting of their policy, the legitimizing of their regimes, and the increasing of the investment, etc. Despite the large number of the foreign activities the energy transportation projects have the key importance for the countries in the region: the creation of the new infrastructure (the pipelines and the port systems) for the oil and gas exports from CA and the Caspian Sea. The "pipeline boom" observed since 2002-2003 was the result of this tendency.

Resource-rich Kazakhstan and Turkmenistan extract much more oil and gas than they use at present and they have sufficiently developed pipeline transport that makes them natural exporters [4]. Being built in the years of the USSR the system of the transportation of hydrocarbons from CA was closed for the supplies to Europe and did not provide the other routes except the transit through Russia. This situation continues to affect the export volumes of major oil and gas from CA but it does not satisfy the political leaderships of Turkmenistan and Kazakhstan who are trying all possible ways to diversify their supplies. However, their policy to ensure their own energy interests significantly differs from each other [*Омаров*, 2008:145].

Since gaining the independence the Kazakhstan's oil and gas industry has become the guarantor of its economic growth. The foreign policy of the country is aimed to meet the challenges of providing the stable and secure export routes for oil and gas as the Kazakhstan's geopolitical situation necessitates the construction of the export pipeline's network through the territories of the adjacent states [Бабак, 2009:105].

The development of the Kazakhstan's economy cannot be viewed from the point of view of the isolation of its cautious multi-vector foreign policy to the economic cooperation with the maximum number of the external partners. Kazakhstan supports all the integrational initiatives in the region which are often contradictory and the President Nazarbayev often acts as the initiator of such kinds of projects [Шайхутдинов, 2009:164-165].

In the oil and gas sector of Kazakhstan there is a great number of the largest energy companies from the USA, Europe, Russia and China and this fact suggests the broad international cooperation of the state in the energy sector.

In the 1990s Kazakhstan exported oil through the bulk pipeline "Atyrau – Samara". Russia continued to be the main economic partner of Kazakhstan in the transportation of the energy resources [Олкотт, 2000:72-80]. In 2001 the pipeline "Tengiz–Novorossiysk" was put into operation. It was built by the Caspian Pipeline Consortium (CPC), the shareholders of which were the governments of Russia, Kazakhstan, Oman and several multinational oil companies.

Kazakhstan uses the participation in the political and economic projects of Moscow on the post-soviet territories of CIS, EurAsEC etc. for the improvement its own supplies of hydrocarbons, the economic support and the military-technical cooperation. The Russian company "Gazprom" greatly influences the Kazakh – Russian relation and jealously guards its interests in Kazakhstan [Томберг, 2012:19]. The Concern began the reconstruction of the gas pipeline "Central Asia – Center" which would bring its capacity from 45 to 90 billion cubic m [13]. In 2002 the Russian–Kazakh company "KazRosGas" was created and it exported the Kazakh gas to Russia which after the processing was partially returned to Kazakhstan and was partly re-exported. In October 2006 Russia and Kazakhstan reached an agreement to found the joint enterprise of the processing of the Kazakh gas on the basis of the Orenburg gas processing plant [Петерсен, 2012:35].

The global economic crisis of 2008-2009 painfully stroke the economy of Kazakhstan and forced the leaders of Kazakhstan to seek the support of Moscow. But they didn't receive it. This fact made Kazakhstan radically revise the relations with RF. Except the export to the European markets using the pipelines through Russia and passing it (using trans-shipment) the going out of Kazakhstan to the East Asian oil market has become promising. However, it should be noted that Kazakhstan's dependence on the oil transit through Russia is still high [Бабак, 2009:92-93].

An important role in the integration of Kazakhstan to the international energy infrastructure in the 1990s is played by the US – Kazakh cooperation. At that time the commercial relations with the US international oil companies (MNCs) were registered and very often it was done with a considerable diplomatic support. The companies from the United States were the first Kazakh oil and gas investors and the third part of the investments to the Kazakh economy mainly in the oil and gas sector was American [15].

In 2003 the effort of China to buy 16% of stakes in the giant Kashagan consortium which had developed the largest field on the Caspian shelf of Kazakhstan was broken down by the US company "Ekson Mobil" which could intercept the contract [Султанов, 2009:32].

The US administration made great efforts to achieve the joining of Kazakhstan the oil pipeline "Baku – Jeyhan" from Azerbaijan to Turkey through Georgia. It was built in 2005 without the participation of Russia and was aimed at the eliminating its monopoly on the transporting of the Caspian oil in the western direction [Казанцев, 2009:113].



The Kazakhstan and the US joint action plan on the energy cooperation signed on the 14<sup>th</sup> of October 2011 was the confirmation of the closed energy cooperation [18]. However, after 2005 the share of the USA in the energy sector of Kazakhstan has started to decline and its place in the terms of lending and participation in the energy projects was occupied by China. The choice of the Chinese company to develop the Kashagan field despite a better offer from a company in India and a sharp increase of the overall share of Chinese companies in the oil and gas sector was the proof of this fact [Кучук, 2009:52].

From the point of view of the safety of supplies the Kazakh oil is considered to be attractive in Beijing because it can be delivered to China by land and it will reduce the dependency of China on the marine transport. Back in 1997 the Chinese National Petroleum Company (CNNK) acquired the Kazakh companies "Aktobemunaygaz" and "Uzenmunaygaz" and in 2003 – the deposit called Northern Buzachi [Жуков, 2009:27].

In June 2003 during the state visit to Kazakhstan CNNK the Head of China Hu Tsintao signed the agreement with the government of Kazakhstan about the construction of the Kazakh – Chinese pipeline Atas – Alashankou for the smuggling of 400 thousand barrels of crude oil per day [Жуков, 2009:34]. At the same time Kazakhstan could cover only 200 thousand barrels of crude oil per day and that's why in 2003 at the meeting with N. Nazarbayev Hu Tsintao raised the possibility of the connecting of Russia to this project [Парамонов, 2010:45]. In 2004 CNNK and KazMunaiGaz signed the agreement on the joint investment on the equal terms in the construction of the pipeline Atas – Alashankou, the length of which is 962.2 km and the carrying capacity – 10 mln. tons of oil a year. The joint venture – KazTransOil – was made with the equal parts of both companies [Сыроежкин, 2010:47].

The cooperation of states in the field of nuclear energy is being done according to the agreement on the mining and the processing of uranium signed on the 6-th of November 2004 in Beijing between NAC "Kazatomprom" and the China National Nuclear Corporation (CNNC) for the period up to 2020. The Chinese nuclear market is important for Kazakhstan in the terms of guarantees of its uranium supplies [Кучук, 2009:50].

The beginning of the Kazakh–Chinese cooperation in the electricity sector began in July 2005 when the agreement on the mutually beneficial cooperation between the Kazakhstan JSC Management Company in the electric networks (KEGOK) and the Chinese state electric grid corporation StateGRID (Corporation of China) was signed. According to the part of this agreement Kazakhstan and China agreed on a joint project in the electricity sector the price of which was about 9,5-10 billion dollars [Жуков, 2009:55-56].

In 2005 the company "PetroKazakhstan which was the owner of the Kumkolskym deposit was taken under the Chinese control. In 2005 the construction of the pipeline "Atas – Alashankou" from Kazakhstan to the Chinese border with a carrying capacity of 10 million tons was completed. Then in 2006 the Chinese state investment corporation "CITIC Group" bought the Karazhanbas deposit in the west of Kazakhstan [Кучук, 2009:50].

In April 2009 CNNK acquired 50% of stakes of the Kazakh company "Manhistaumunaygaz" which produced about 5 million tons of oil a year on the 15 deposits. At the same time China gave Kazakhstan which faced the financial difficulties the interest-free loan of \$10 billion dollars 5 billion of which were appointed to the national oil company "KazMunaiGas" and 5 billion- to the Bank of the development of Kazakhstan [Турарбекова, 2010:20]. Following the talks between the Prime Minister of Kazakhstan K. Masymov and the Prime Minister of China Li Keqiang the agreements for 14 billion dollars were signed [24]. The terms of the agreements of the sides were not disclosed. However, due to the role which the Chinese companies play in Kazakhstan today we can assume that Astana received the financial assistance in exchange for the MFN Chinese business in the energy sector of Kazakhstan.

In October 2009 the second phase of the Kazakh – Chinese pipeline Kenkayak – Kumkol came into operation. It was partly used for the deliveries to China the limited volumes of the Russian oil but in December 2009 the Chinese side rejected the proposal of the Russian company "TNK–BP" to continue the practice. It is important to note that this pipeline is not on the Russian territory and it is the first independent channel of the oil exports from Kazakhstan.

The large-scale project of the pipeline "Kazakhstan – Western China" can be considered to be implemented. This project became a part of the Chinese energy corridor East – West and a real example of the diversification of the Kazakh oil.

In 2010 the Kazakh KazMunaiGaz and the CNNK formed a joint venture with the building of the gas pipeline Beineu–Shymkent (Kazakhstan's western regions) the carrying capacity of which was 10 bln m<sup>3</sup> per year for the connection to the gas pipeline Central Asia–China and the provision with gas the southern areas of Kazakhstan. The construction of this unit began in 2010.

On the 7<sup>th</sup> of September 2013 China and Kazakhstan signed an agreement under which China bought a stake in the deposit "Kashagan. This fact allowed China to be ahead of India and put an end the dominance of the Western countries on the Caspian Sea shelf [Petersen, 2013:39].

The cooperation with China was in the framework of the SCO too. N. Nazarbayev initiated the creation of the energy agency and the energy exchange within SCO at the SCO summit in Bishkek in August 2007 [Маркетос, 2012:59].

Such close relationship with China can be interpreted as the refusal from the multi-vector foreign policy of Kazakhstan as it is indicated by some Kazakh analytics [Малашенко, 2012:102-103]. From the perspective of the economists we can agree with the following statements. However, the political relations of Russia and Kazakhstan remain to be very close and the multi-vector policy of Astana is not completed.

An importantly special role in the improving of the investment image of Kazakhstan is played by the annual Eurasian forum Kazenergy which invites the representatives of the world's largest energy multinationals.

The Turkmenistan's energy policy can not be viewed outside the context of its security strategy related to the preservation of the official status of "the positive neutrality" and, therefore, the non-participation in the military blocs. This policy is considered as the most favorable for contacts with all buyers of gas.

The features of the political regime in Turkmenistan do not allow to separate the political and economic factors associated with the operation of its energy system. Under the President S. Niyazov the revenues from the oil and gas exports were controlled personally by him and were used primarily to strengthen the regime of his own power. The same purpose was in the export policy in the field of energy. Its main objectives were connected with the maximum distance from other states (through their support of the competition for the resources of Turkmenistan) and the complete isolation of the country from all possible external influences. The last feature contributed the president's control over the situation in the country even more [Казанцев, 2008:13].

The technical state of the transit infrastructure and the monopoly position of Russia, which continued to be the main buyer and the transporter of the Turkmen energy resources, dictated the prices and the shipment prevented an active export policy of Turkmenistan in the early 1990s. The differences between Turkmenistan and "Gazprom" repeatedly led to the complete cessation of the gas supplies by the northern direction [Чуфрин, 2010:176].

In order to reduce the dependence on Russia and to bring the gas prices to the world levels Turkmenistan's attitude towards the economic integration projects on the post-soviet areas that could create the limitations for the cooperation with the potential buyers of natural resources was

very cautious. This policy affected the refusal of the country's participation in the EurAsEC, CSTO, GUAM, CACO and other integration structures, the folding of the cooperation within the CIS up to the going to the associated membership. Another way of the pressure on the Russian side in the gas negotiations was the abolition of dual citizenship from the RT [Парамонов, 2008:64].

However, in April 2003 Russia and Turkmenistan signed a framework intergovernmental agreement on the cooperation in the gas sector for a period of 25 years. This agreement included the increase in the exports of the Turkmen gas to Russia from 5.6 billion m<sup>3</sup> in 2004 to 60-70 billion in 2007 and 70-80 billion m<sup>3</sup> in 2009-2028 m<sup>3</sup> [Парамонов, 2008:179].

The export of gas from Turkmenistan arrived to the west direction through the old Soviet pipeline systems "Central Asia – Center" and "Bukhara – Ural". While exporting gas Uzbekistan and Kazakhstan are the transit countries for Turkmenistan. For this reason Turkmenistan can not realize its own export potential: Uzbekistan and Kazakhstan are interested in the exporting of its own gas but not in the pumping of the Turkmenistan's gas [31]. To overcome the difficulties in May 2007 the Presidents of Kazakhstan, Turkmenistan and Russia agreed on the construction of the Caspian gas pipeline with a capacity of 30 billion m<sup>3</sup> per a year. In 2008 Moscow and Ashgabat reached a preliminary agreement on the construction of the gas pipeline "East – West" in Turkmenistan by "Gazprom". It had to link the largest deposit Yolotan with the future Caspian pipeline. However, Turkmenistan demanded to exclude from the draft agreement the clause that provided its binding to the Caspian routes. In addition, Ashgabat insisted on the full funding of the construction by the Russian side. The arrangements were disrupted and the construction of the Caspian gas pipeline did not begin on time [32]. Thus, Turkmenistan evaded the obligation to export through the Caspian route the resources of one of the largest deposits – Yolotan.

As in the case with Kazakhstan the model of the interaction of "Gazprom" and Turkmenistan didn't stand the test of the economic crisis of 2008-2009. In 2009 by the reducing of the volume of gas purchased by Ukraine and the fall of the demand from other European consumers, the conditions of the re-export of the Turkmen gas to "Gazprom" were unprofitable. In April 2009 on the pipeline Dauletabad – Dariyalyk that was a part of the system "Central Asia – Center" there was an explosion the cause of which according to the Turkmen side was the decline of pressure in the pipe caused by a sharp reduction in the volume of gas which was taken by "Gazprom" [Парамонов, 2010:65]. The Ministry of Foreign Affairs of Turkmenistan said that "Gazprom" had acted without the consent with Ashgabat and accused the Russian side in the violating of the contract [Бозамуров, 2010:82-88]. The problem that seemed purely technical demonstrated the existence of the significant differences in the Russian-Turkmen energy cooperation.

With the change of the political leadership in the country the energy policy of Turkmenistan began to be more active in the concept of the diversification of the supply and the finding the new markets for hydrocarbons. In 2012 the share of Russia which until 2000 was the only buyer of Turkmen gas was less than half of all gas exports of Turkmenistan [1].

Back in April 2006 Turkmenistan signed a deal with China about natural gas exports amounting to 30 billion m<sup>3</sup> per year since 2009. The agreement envisaged the construction of a gas pipeline from the deposits of Turkmenistan to Shanhai. In addition, China pledged to consult independently about the construction of the pipeline on the territory of the transit countries – Uzbekistan and Kazakhstan. At the same time as China signed an agreement on the purchase of gas to Kazakhstan there was a need to build a gas pipeline along the pipeline "Atas – Alashankou".

In July 2007 during the state visit of the President of Turkmenistan H. Berdimuhamedov to China CNNK signed an agreement with the State Concern "Turkmengas" on the buying – sale

of natural gas, a production sharing agreement and using of the hydrocarbon resources with the State Agency on management under the President of Turkmenistan. The arrangements provided the full-scale work on the exploration and the production of natural gas on the field of Bahtyyarlyk on the right bank of the Amudarya [Жуков, 2009:33] and in August 2007 Turkmenistan conveyed CNNK the license. In December 2009 the first stage of the pipeline Turkmenistan – Uzbekistan – Kazakhstan – China with a capacity of 13 billion m<sup>3</sup> per a year was put into the operation [Султанов, 2010:136].

On the 3-d of September, 2013 China and Turkmenistan signed an agreement on the financing of the second stage of the development of the gas field "Galkin" and the construction of the fourth gas pipeline Turkmenistan–China through Uzbekistan. By the volume of natural gas the deposit "Galkin" takes the second place in the world [35]. It is noteworthy that for a long time the countries of the European Union negotiated with Turkmenistan on the development of this deposit.

Except Russia and China, Turkmenistan and Kazakhstan have the possibilities of the cooperation with IRI for a potential widening of the seller's markets. In 1997 the pipeline "Korpedzhe – Kurt – Cui" combined Turkmenistan and Iran. As its capacity is small it does not completely solve the problem of the diversification of the Turkmen gas exports. In addition, the project of the supply of the Turkmen gas to Virmeniya through the Iranian territory was worked out. But as Iran itself is a gas exporter and competes with Turkmenistan for the markets of the Transcaucasian states, the cooperation between states is more experimental [Казанцев, 2008:194-198].

As for the cooperation in the oil industry in the early 2000s Kazakhstan and Turkmenistan established the export of oil through the Iranian territory by the method of "substitution". The oil was delivered to the Iranian ports on the Caspian Sea by the tankers for the internal needs of the North of Iran. Instead the Iranian companies shipped the equivalent amount of oil from its deposits on the shores of the Persian Gulf to those consumers of the Kazakh and Turkmen oil who had concluded the appropriated contracts with Kazakhstan and Turkmenistan. In 2003 Iran completed the construction of the oil pipeline from the Caspian port of Neka to Tehran which opened an additional opportunity to export Central Asian oil through Iran [Жуков, 2014:95-103]. However, these projects encountered the resistance of the United States which were the initiators of the imposing of the economic sanctions on Iran and opposed the participation of this country in any schemes of the exporting of oil from CA for a long time. Thus, for example, the American companies in Kazakhstan and Turkmenistan were not allowed to work with the Iranian corporations [37]. Out of the country from the economic isolation suggests the high probability of the intensifying of the cooperation of Central Asian republics with Iran and the construction of the new energy corridors in the western direction.

The maximizing of the export potential became very important for Turkmenistan in the field of foreign policy. Official Ashgabat established the relations with Iran and Afghanistan (including the "Taliban" until 2001) [Лаумулин, 2011:128], Russia and the Transcaucasian republics. However, China was the most important partner in the energy sector for the country. It became not only the main market of selling of Turkmen natural resources but also it received the preferential concessions for the extraction and the supply of large volumes of Turkmen gas via the gas pipeline complex Central Asia–China.

The energy policy of Uzbekistan is connected with the feature of it's adoption of the economic model and the specific political system. Tashkent has made a conscious choice in favor of the maintaining of the state control over enterprises pursuing actively the export policy [Жуков, 2014 : 76]. As the country hasn't such number of surpluses of oil and gas as the neighboring Kazakhstan and Turkmenistan and at the same time it has a much larger population, the



export potential of Uzbekistan is limited. In general the energy security of Uzbekistan is, with no doubt, of such kind that the country completely provides itself with the energy resources [1]. It is being done by the extensive way, namely by the increasing of the volume of oil and gas. For the gas production Uzbekistan ranks 3<sup>rd</sup> in the CIS after Russia and Turkmenistan [1].

Uzbekistan's foreign policy strategy in the energy sector involves attracting the largest amount of foreign investment to modernize the energy industry while maintaining strong control of the state. Although foreign firms have shown interest in the business in this country, its gas sector remains largely closed to all except Russia [Парамонов, 2009:130]. Uzbekneftegaz signed an agreement on production sharing with the British company Trinity Energy, but broke it in 2005, claiming that the other party does not fulfill its conditions contract [15]. This policy was related to the cooling of relations of Uzbekistan with the West after the 2005. Russia, which supported the Uzbek position on the Andijan events received real economic benefits – in January 2006, the Gazprom CEO Miller signed a contract with Uzbek President I. Karimov on transfer the three largest gas fields in Uzbekistan – USU, and Akchhalak Quan – "Gazprom", which received a monopoly on the export of Uzbek gas [Парамонов, 2009:130]. Since Uzbekistan is working closely with "Gazprom" signed an agreement on the annual supply to Russia 350 billion cubic meters of gas.

However, the rapprochement with Russia that by "Gazprom" has the opportunity to influence the political decisions of the Uzbek leadership, offset by active economic relations with China. That line of Chinese foreign policy has become the most promising for Uzbekistan, especially after 2009-2010.

Back in April 2007 Uzbekistan and China signed an intergovernmental agreement on principles of construction and operation of the pipeline length of 530 km and a capacity of 30 bln m<sup>3</sup> per year for the transit of Turkmen gas. The operator of the project area was Uzbek–Chinese joint venture AsiaTransGas, created national holding company and Uzbekneftegaz CNNK [Жуков, 2009:72].

In June 2010 Uzbekistan and China have agreed on the construction by December 2011. the second stage of the pipeline from Uzbekistan to China, in which China will receive Uzbek gas at \$10 billion m<sup>3</sup> per year.

In April 2011 Tashkent and Beijing in the framework of the state visit of President of Uzbekistan I. Karimov in China signed an agreement on construction of the third stage, the capacity of which will amount to 25 billion m<sup>3</sup> per year.

**Conclusions.** Since the collapse of the Soviet Union in 1991 the energy potential of Central Asia was an integral part of the geopolitical and geo-economic interest in the region of the leading actors in world politics and international business. The privileged position of Russia, which before the 2000 s. Maintained a virtual monopoly on the transportation of Central Asian energy resources, the Kremlin used to determine the final consumers, categorically excluding direct deliveries to Western markets. With the expansion of the circle of foreign partners in the energy sector of Central Asian countries Russia stopped to play a strategic importance for the region, giving way to the east. An example of reducing the role of Russia in the energy sector CA is the abandonment of implementation of the Caspian pipeline, a project that aimed to implement the "Gazprom".

For the EU Central Asian region is to diversify sources of energy. In this context, the importance of the project was Nabucco (Nabucco) – transportation of gas from Turkmenistan and Azerbaijan in the long term from Russia, bypassing Russian territory. The project could compete with the Russian South Stream and the end of June 2013 it was announced that a consortium of companies involved in the development of gas fields in Azerbaijan, decided to transport

gas through the Trans Adriatic Pipeline (TAP). The failure of the Nabucco project is related to the need of huge investment, and Central Asian states insisted that the financial obligations it took on the European side. Another stumbling block was the uncertain status of the Caspian Sea. Today, Europe is trying to update projects the transportation of Turkmen gas through Azerbaijan.

Energy Strategy of the United States in the Central Asian region aims to reduce dependence on Middle Eastern energy resources and therefore influence of Russia and China on the country's Civil Aviation. In this connection the Caspian Central Asian states – Kazakhstan and Turkmenistan official Washington views as a zone of vital interests USA. In the second half of the 1990s. US initiated the creation of "energy corridor East-West", which involved the construction of Trans Caspian oil and gas pipelines bottom of the Caspian Sea from Turkmenistan to Azerbaijan and Kazakhstan. Also, the US and Kazakhstan December 26, 2001 signed a declaration on strategic partnership in energy, transport and nuclear safety.

The active energy policy of China in Central Asia determine factors such as geographical proximity to the region, the need for China in maintaining high economic growth and the need to diversify energy sources, as half the country's oil imports from the Middle East. China is also interested in developing their northern provinces, primarily Xinjiang population traditionally has strong ethnic and religious ties with the CA. Overall, China's energy policy to attract Central Asian hydrocarbon resources to serve its energy needs in the medium and long prospects. Considerable interest in the hydrocarbon CA show also Turkey, Iran, Pakistan and India. Turkey, with US support, seeks to become the main transit country for Uzbek, Kazakh and Turkmen energy resources to world markets.

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