

# Energy Supply Security and Trade Routes Competition between European and Asian Countries: The Geoeconomic Importance of Azerbaijan

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## Abstract

Azerbaijan's abundant energy resources and its role as a key transit hub for pipelines have made it a focal point in the geoeconomic policies of its energy-rich neighbors and European countries with significant energy demand. This study aims to conduct a geoeconomic evaluation of the energy sector and trade routes, which have been central to the Europe-Asia competition for centuries, focusing on regional economic policies centered around Azerbaijan. It has analyzed the existing and planned potential route projects for trade and energy supply between the two continents, providing an assessment of possible gains and losses on regional and global levels. This analysis has been presented in the form of geoeconomic parameters derived from numerical and descriptive content analysis.

*Key Words:* Geoeconomics of Azerbaijan, International Competition, Silk Road, Natural Gas, Trade

## Avrupa-Asya Ülkeleri Arasında Enerji Arz Güvenliđi ve Ticaret Yollarının Rekabeti: Azerbaycan'ın Jeoekonomik Önemi

### Öz

Asya kıtasının zengin enerji kaynaklarına ve boru hatlarının transit geçiş güzergahlarına sahip olan Azerbaycan özellikle enerji zengini komşuları ile jeoekonomi politikalarında enerji talebi yüksek olan Avrupa ülkelerinin dikkatini çekmektedir. Bu çalışmada Avrupa-Asya rekabetinde 21. yüzyıl gündemini asırlardır meşgul eden enerji sektörünü ve ticaret yollarını Azerbaycan merkezli bölgesel ekonomi politikaları ile jeoekonomik olarak değerlendirmek amaçlanmıştır. İki kıta arasında hem ticaret yolları hem de enerji arzının mevcut ve planlanan potansiyel güzergâh projelerinden hareket ile bölgesel/küresel bazda doğacak kazanç ve kayıpların gelecekte olasılıkları, elde edilen rakamsal ve betimsel içerik analizine dayanarak jeoekonomik parametreler şeklinde sunulmuştur.

*Anahtar Kelimeler:* Azerbaycan Jeoekonomisi, Uluslararası Rekabet, İpek Yolu, Doğal Gaz, Ticaret

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## Introduction

In today's world, many parameters like economic, military, political, and geographical location determine a country's level of development. The geographical location of countries creates a strategic equation in the global/regional context for their past, present, and future. Consequently, a country's advantages and disadvantages in terms of location generate political, sociological, and economic dynamics on the international stage, both externally and internally. When this resulting dynamism combines with the rapid policy changes driven by geographical location, international interests steer world politics.

Developed countries, in addition to their need for underground resources, aspire to dominate trade routes to export their surplus products from high technology and economies of scale. These developed nations, often pioneers in international competition, establish policies based on national interests at a global scale, specifically revolving around the energy and trade dilemma. In this regard, developed countries without significant energy resources, such as oil and natural gas, which can be catalysts for regional and global conflicts, rely on countries thousands of kilometers away that possess these resources or act as intermediaries in energy resource transportation. Furthermore, countries on major trade and transit routes, which have historically influenced global welfare and economic development, are again capturing attention. The concept of geo-economics, bolstered by the amalgamation of energy and trade policies, is becoming increasingly important for countries actively involved in world politics.

In the 21st century, with the growing demands of high-tech manufacturing industries, the focus is on energy resources and cost-effective trade routes. From a geo-economic standpoint, the Asian continent, covering approximately one-third of the world's landmass, is home to strategic trade routes, energy pipelines, abundant underground resources, and geopolitical conflicts (Worldometer, 2024). Its possession of 3/4 of the world's energy resources and serving the demand for goods and services of 2/3 of the world's population draws global powers to this continent (BP, 2022a).

The ongoing intense competition between the developed economies of Europe and Asia, spanning centuries, is expected to persist for centuries. Therefore, Azerbaijan, serving as a transit point from Asia to Europe, holds immense geostrategic significance due to its trade routes, abundant energy resources, and location on the transit path of energy transmission lines. The energy crisis in Europe that emerged with the outbreak of the Russia-Ukraine war in 2022 has spurred developed countries, in particular, to explore new alternatives, and Azerbaijan has emerged as a key player in this context. Furthermore, Azerbaijan, benefiting from its gains in the Second Karabakh War and the emergence of the Zangezur Corridor on the agenda, can play a crucial geo-economic and geo-strategic role if the shortest alternative route to the New Silk Road project becomes a reality.

This study aims to conduct a geo-economic evaluation of the energy sector and trade routes, which have been at the forefront of the Europe-Asia competition for centuries focusing on Azerbaijan-centered regional economic policies. Therefore, considering existing and planned potential route projects for both trade routes and energy supplies between the two continents has presented future possibilities of gains and losses that may have regional and global implications, using numerical and descriptive content analysis as our basis. The first part of the study has explained the conceptual framework of geo-economics and emphasized the qualities of this concept. The subsequent section delved into Azerbaijan's bilateral developments with Armenia, its gains in the Second Karabakh War, the geo-economic benefits that could arise from the potential opening of the Zangezur Corridor and its strategic importance within the Turkish world. Subsections examined the energy transmission lines and transit routes in which Azerbaijan serves as a critical bridge. The final section explored the regional geo-economic implications of potential geo-economic parameters. This included assessing the possibilities of opening new routes within the Central Corridor for addressing the region's energy-trade dilemma and examining the integration of Turkmenistan's gas into Azerbaijan, along with the developments this integration may trigger in terms of Türkiye, Russia, Iran, and Europe.

## Strategic Importance of Geoeconomics

International trade policy has maintained its importance throughout history and has consistently been at the forefront of strategic policy-making. Its economic policies continue to influence many areas, from military structure to culture, and from art to sports. From this perspective, the geographical location of countries holds immense value in terms of trade routes and energy pipelines. This value amplifies the strategic and economic importance of countries in their respective regions, bringing the concept of geo-

economics, which has earned recognition in today's scientific world, to the forefront. Geoeconomics is defined as the use of economic motives by states for geostrategic purposes in foreign policy for their strategic objectives (Şahin and Okur, 2021a).

Geoeconomics was initially introduced into the literature by Luttwak after the Cold War period, and the shifting economic world order following this period brought about changes in countries' policies (Jaeger and Pedro, 2020). In this context, geo-economics, as a concept, is a discipline in which human and natural resources are optimally utilized to maximize the development of nations and the economic prosperity of countries and large capital groups. It implies leveraging countries effectively as economic powers rather than expanding their borders or reinforcing regional dominance, giving greater importance to economic geography and technology over political ambitions and division (İnan, 2011). In the face of globalization, the geo-economic approach aids nation-states in redefining themselves politically and economically within the evolving landscape of politics and in adopting new strategies (İnan, 2004). On the other hand, the geo-economic strategy arises from the consistent and systematic utilization of all available opportunities for countries to convert their geographical advantage into an economic instrument in their dealings with other nations. In contemporary international politics, investment, trade, energy policy, economic sanctions, economic aid, and financial and monetary policies are the most frequently employed tools by actors in geoeconomic strategies (Şahin and Okur, 2021b). Some characteristics for states to possess geoeconomic power are listed below (Ateş, 2021; Baru, 2011):

- Ensuring easy access for the country's people to basic services like education and healthcare is essential for countries operating at a certain level of geoeconomic power.
- The production of raw materials, energy, and fundamental products and services for industry holds great importance in the country's welfare and growth.
- Having entrepreneurial citizens, pioneer new business ventures, possess a growing portfolio, and have convenient access to investment channels helps countries bolster their geoeconomic power.
- For countries aiming to adapt to the current conjuncture and maintain a robust economic infrastructure, there must be a government presence that supports economic actors.

From a geo-economic perspective, the issues mentioned above hold significant value for countries engaged in strategic power struggles. In this context, recent trade tensions between the US and China have brought the concept of geoeconomics to the forefront. Another example is the economic sanctions imposed by Europe and America on Russia following its annexation of Crimea, a strategically located territory belonging to Ukraine. Additionally, exchange rate fluctuations, economic integration, and the granting of privileges in bilateral economic relations or disputes stemming from economic interests are some of the enduring effects of geoeconomic parameters. It's important to note that countries do not always utilize their geo-economic power negatively, such as through embargoes and sanctions. For instance, a state with geographical advantages can leverage its geoeconomic power by implementing policies that facilitate mutual trade through investments aimed at enhancing economic cooperation with other nations (Ateş, 2021, p. 140).

Countries should strive to maximize the utility of their geographical locations to achieve broad economic, political, and social development goals, ultimately enhancing social welfare. When evaluating recent economic and political developments within the Organisation of Turkish States (OTS) from a geographical perspective, member countries, such as those with significant energy resource potential (Azerbaijan, Kazakhstan, Turkmenistan, Uzbekistan) and strategic geographical locations (Azerbaijan, Türkiye), play pivotal roles in the political economy of Europe and Asia. Azerbaijan, in particular, benefits from its strategic location, serving as a transit route between the two continents, in addition to its abundant energy resources and regional trade routes in economic markets.

### **Azerbaijan's Strategic Location**

International organizations play a catalytic role in regional and global markets, with the European Union (EU) model being the most prominent worldwide. While this model has served as an inspiration for other communities across the globe, the Turkic Republics, striving for economic development for over three decades, have recently rallied around the OTS based on cultural and historical unity. They continue to bolster their position in the international arena, capitalizing on their strategic location and underground resources.

The Organisation of Turkic States, of which Azerbaijan is a founding member, was established to foster comprehensive cooperation among observer and full-member countries. In recent years, as Hungary and the Turkish Republic of Northern Cyprus joined the organization, geo-economic policies have extended their reach to a broader geographic scope. Azerbaijan and Türkiye, situated centrally within a vast region, serve as vital conduits at the heart of the flow of commercial goods and services from East to West, as well as for the transit of energy resources and supplies. Societal and public mobility keeps Azerbaijan, the middle corridor of the Silk Road and an essential nation for the West due to its natural gas reserves, actively engaged in global economic politics.

Azerbaijan faced a significant geo-economic setback in the First Karabakh War with Armenia in 1988, which severed its land connection with Türkiye, the shortest and safest gateway to the West. During the subsequent years, most of the revenues were directed towards defense spending, disrupting the country's economic development. In 2020, the conflict reignited in the mentioned region, and as Azerbaijan seized strategic territories, the prospect of shortening the central corridor gained prominence on the world stage. Consequently, from a geopolitical perspective, Azerbaijan has fortified its existing position and gained advantages in its relations with neighboring countries.



**Figure 1.** *New Geographical Map of Azerbaijan*

Source: BBC News, 2023.

When examining Figure 1, it becomes evident that Azerbaijan shares its borders with Russia and Georgia to the north, Iran to the south, Armenia to the west, and Türkiye to the east. It also has Kazakhstan and Turkmenistan as neighbors in the Caspian basin. One of the tangible outcomes of these geographical advantages is the potential opening of the Zangezur corridor, connecting Nakhchivan and Azerbaijan through the Nagorno-Karabakh region. If this corridor were to open, the benefits could be summarized as follows:

- Establishing regional and global significance through an East-West energy transmission line and trade route.
- Converting centuries-old cultural and historical ties into concrete actions by creating a direct land link between Türkiye and the Turkestan region.
- Shortening the existing middle corridor route for China's 'One Belt One Road' project, resulting in time and cost savings and generating income through contributions to global energy and goods trade.
- As Turkic countries evolve into logistics and transportation hubs, they become centers of attraction for economies of scale, fostering the development of technology-oriented production centers and improving macroeconomic indicators.

Azerbaijan, positioned at the heart of the Zangezur corridor, has established new diplomatic ties with international organizations it is a member of. This could potentially weaken the strategic leverage of Russia and Iran, both historically influential in world politics due to their roles in trade routes and energy resources, particularly in their interactions with Western powers. Russia, a prominent regional power, is

currently embroiled in a conflict with Ukraine and has occasionally used its energy resources as a diplomatic tool against the West. This situation has led to the exploration of new trade and energy alternatives. Developed European nations, with substantial energy needs, may reduce their dependence on Russia by developing secure energy and trade transmission lines.

### **Oil and Natural Gas Infrastructure in Azerbaijan**

The Caspian Basin, a maritime neighbor to Azerbaijan, Turkmenistan, Kazakhstan, and Russia, holds approximately 10% of the world's oil reserves due to its current location. Azerbaijan, boasting a 955 km coastline along the Caspian Sea, wields significant geoeconomic influence through its energy and trade routes traversing the Caucasus region (Gökay, 2007, p. 424). Despite its regional energy infrastructure and reserves, Azerbaijan's geopolitical advantage requires technological investments from developed countries with a high foreign energy dependency to effectively extract and distribute these energy resources.

As per Table 1, among the Central Asian countries with oil deposits, Kazakhstan leads with a production of 1.8 million barrels daily, followed by Azerbaijan at 722 thousand barrels per day, with Turkmenistan ranking third at 252 thousand barrels per day. Russia's substantial daily oil production of 10.9 million barrels in the region establishes it as a dominant player on the continent. This underscores the need for energy investments in Turkic countries, given the presence of outdated oil production systems dating back to the USSR period, which lags behind advanced technologies.

It's worth noting that when excluding the domestic daily consumption of the Turkic states, their collective daily production (3,145 million barrels) satisfies one-third of the European Union's daily consumption. The European Commission's Energy Efficiency Report, which targets a 39% reduction in primary energy consumption by 2030 and aims to decrease fossil fuel imports from Russia as part of energy-saving efforts, (European Commission, 2022) is poised to steer the European Union toward new energy policies. Therefore, long-term energy investments in the Central Asian continent, coupled with the expansion of oil pipelines and increased oil production in Turkic countries, could emerge as crucial alternatives for the European Union while reducing its dependence on Russia.

**Table 1.** *Daily Oil Production-Consumption amounts of Regional Countries (Thousand Barrels, 2022)*

<i>Countries</i>	<i>Daily Production</i>	<i>World Ration</i>	<i>Production</i>	<i>Daily Consumption</i>	<i>World Production Ration</i>
Azerbaijan	722	0.8%		95	0.1%
Kazakhstan	1811	2.0%		327	0.3%
Russia	10944	12.2%		3407	3.6%
Turkmenistan	252	0.3%		146	0.2%
Uzbekistan	60	0.1%		90	0.1%
European Union	366	0.4%		10421	11.1%

Source: British Petroleum (BP), 2022a.

The utilization of the natural gas sector for household and industrial electricity production, which significantly influences world energy markets and security of supply, has made the European Union, which faces reserve shortages, reliant on foreign sources. In terms of geographical location, the energy crisis between Russia and European nations poses a threat to supply security, shifting global energy competition toward Central Asia, abundant in gas reserves. In this context, as asserted, the countries of the Asian continent have the potential to actively engage in global politics, elevate social welfare levels, and diversify into non-energy sectors (Özsoy, 2022). However, these countries, being relatively young, facing economic challenges, and lagging regionally within the security framework, find themselves in a vulnerable position in global competition.

The European continent serves as both a global and regional market, largely reliant on the energy resources of Turkish countries. Yet, the most crucial route to alleviate political pressure from Russia, China, India, and Iran is through the European continent. As the data in the table below indicates, the European Union, with an annual gas demand of 396 billion m<sup>3</sup>, becomes energy-dependent on Russia, which produces 701 billion m<sup>3</sup> annually. The Europe-Russia conflict will probably keep global energy policies in the spotlight for many years. European nations seeking to ensure energy supply security should foster close relationships with Turkmenistan and Azerbaijan, particularly through new projects. Despite Turkmenistan's abundant reserves, its lack of refining capacity and Azerbaijan's strategic geographical position can serve as leverage in global energy markets with European capital and advanced technology support.

**Table 2.** *Natural Gas Production-Consumption amounts of Regional Countries (2022)*

<i>Countries</i>	<i>Reserve (Trillion m<sup>3</sup>)</i>	<i>World Reserve Ratio</i>	<i>Yearly Production (Billion m<sup>3</sup>)</i>	<i>World Production Ratio</i>	<i>Yearly Consumption (Billion m<sup>3</sup>)</i>	<i>World Consumption Ratio</i>
Azerbaijan	1,70	2.5%	31	0.7%	13	0.3%
Kazakhstan	2,40	2.3%	32	0.8%	15	0.4%
Russia	47,80	37.4%	701	16.6%	474	10.8%
Turkmenistan	11,32	13.6%	79	1.5%	37	0.8%
Uzbekistan	1,84	0.6%	50	1.2%	46	1.1%
European Union	2.5	0.4%	44	1.2%	396	9.9%

Source: BP Statistical Review, 2022a; Energy Information Administration [EIA], 2022.

While countries in the table, except for Russia, possess substantial regional reserve areas, they face physical limitations in extracting underground resources and marketing them globally due to insufficient production capacity. Furthermore, the Central Asian countries, lacking access to high seas coastlines, find the Azerbaijan-Türkiye corridor as a secure option for commercial transportation and an energy route opening to the West. Realizing energy projects that require investments, particularly channeling Azerbaijan's vast energy reserves from the Caspian region to new markets, becomes pivotal in this context.

One of the notable reserves within Azerbaijan's continental shelf is the Shah Deniz basin, discovered in 1999. Research suggests this basin may contain 1 trillion m<sup>3</sup> of natural gas and 2 billion barrels of condensate reserves. Azerbaijan exports 10 billion m<sup>3</sup> of gas annually from this field to Georgia and Türkiye. The newly planned Azeri-Middle East project anticipates producing 100,000 barrels of oil per day, with an eventual goal of 300 million barrels annually. The Baku-Tbilisi-Ceyhan (BTC) pipeline transports Turkmenistan's crude oil from the Sangachal production facility through Azerbaijan, Georgia, and Türkiye, ultimately reaching the terminal in Adana Ceyhan. With a daily production capacity of 1.2 million barrels and a total length of 1768 km, this pipeline plays a crucial role in energy transportation. The South Caucasus Pipeline (SPC) carries natural gas from the Shah Deniz basin to Türkiye and Georgia, boasting a daily production capacity of 48.5 million m<sup>3</sup>. The Western Export Pipeline (BIB) conveys crude oil from the Caspian Sea through tankers, exporting it to Europe via the Bosphorus Straits and the Black Sea. This pipeline spans 829 km and exported 31 million barrels of oil in 2021. The Sangachal terminal, in the same year, shipped approximately 231 million barrels of oil and condensate, including 200 million barrels via the Baku-Tbilisi-Ceyhan route and roughly 31 million barrels via the BIB route. The Ceyhan terminal, situated in Türkiye's Mediterranean region, facilitates the transfer of oil from BTC to the world through tankers, contributing to the global supply of 50 million tons of oil annually (BP, 2022b). The Republic of Azerbaijan Oil Company (SOCAR) has initiated projects to receive Kazakh oil on the BTC line and enhance capacity utilization. Recent efforts led to the first shipment of Kazakh oil by tanker from Aktau port to the Sangachal terminal on March 23, 2023, with a planned annual transport of 1.5 million tons of oil (SOCAR, 2023).

The Trans Adriatic Pipeline project (TAP), extending from Azerbaijan through Georgia, Türkiye, Greece, Albania, and connecting to Italy via the Adriatic Sea, spans a total length of 878 kilometers (TANAP, 2023). This project holds significance for Balkan countries and Italy, both significant importers of Russian gas. In 2021, the project successfully transported 8.1 billion m<sup>3</sup> of gas, delivering it to Southeastern Europe and furthering regional energy security (Bayramov, 2023). As the project becomes operational, it takes its place among the priority energy security projects of the European Commission. Increased investments by European countries in Azerbaijan's energy supply are poised to augment gas flow and enhance the strategic importance of the Sangachal terminal. Connecting Turkmen gas from Turkmenbashi port to the Caspian Sea and Sangachal terminal has the potential to reduce Europe's reliance on Russian gas in the long term. Additionally, this could diminish Russia's influence in energy trade, where it purchases oil and natural gas inexpensively from Turkic Republics and resells them to European nations at higher prices.

In the Common Interest Project report by the European Commission, technical definitions were provided for the Trans-Caspian Gas Pipeline (TCP), designed to transport Turkmen gas to Europe through Georgia, Türkiye, and Greece, feeding it into the Azerbaijan Sangachal terminal via an open pipeline from the Caspian Sea (European Commission, 2023). The optimal way to establish the TCP and

transport Turkmen gas to Europe involves connecting it to the Southern Gas Corridor alongside TANAP and TAP (Kanapiyanova, 2021).

As evident, trade routes are a vital component of geoeconomic policies that have the potential to significantly increase economic activity for Azerbaijan, given its substantial energy resources and strategic location as a resource transit hub. The Silk Road, the historical land route for commodity trade between Asia and Europe, maintains its relevance in the 21st-century global system. Given that energy and commodity trade consistently dominate the world's agenda, the positive aspects of Azerbaijan's geographical location can effectively transform into a geoeconomic asset.

### **Transit Trade Routes**

Azerbaijan, serving as a crucial land transportation bridge for Turkish countries in Central Asia to connect with the European continent, plays a pivotal role in the passage of commercial corridors shaped by the historical Silk Road, even without direct access to open seas. Azerbaijan emerges as a secure choice, particularly for integrating Turkish countries with the West within the framework of commodity trade.

China's 'One Belt One Road' project, aimed at connecting Europe and Asia through trade flows, is anticipated to reinvigorate the economies of the countries along the planned route and contribute to the well-being of the region's people (Taghiyev, 2019). However, the atmosphere of distrust in Iran poses a threat to the security of the Silk Road. The northern corridor is influenced by Russia, which has ongoing conflicts with Europe, while the southern corridor invites embargoes and conflicts in the Middle East. In this context, the central corridor appears as one of the most ideal options for the One Belt One Road project in terms of shortening the route and ensuring trade supply security. The opening of the Zangezur corridor via Azerbaijan after the Karabakh War could further shorten the distance of the central corridor from China to Europe, reducing the commercial dependence of countries in the region affected by political and economic crises involving Russia and Iran.

The Azerbaijan-based Europe Caucasus Asia Transport Corridor (TRACECA), established under the leadership of the European Union in 1993, aims to connect the Commonwealth of Independent States to Europe via the Caucasus and the Black Sea (Türkiye Cumhuriyeti Dışişleri Bakanlığı 2023a). This initiative seeks to enhance commercial and political activities in the region and establish a 'Silk Road of the Century' aiming to facilitate the EU's access and influence in the area (Üzümcü and Akdeniz, 2014, p. 177).

The Baku-Tbilisi-Ceyhan Railway, part of the 'Iron Silk Road' project designed to reestablish the historical Silk Road, provides reliable transportation from China to Europe, serving logistics and human transportation. It is planned to become a major transit route (Türkiye Cumhuriyeti Dışişleri Bakanlığı, 2023b). President of Azerbaijan Ilham Aliyev highlighted that this transportation route is the most efficient one connecting Europe to Asia, offering a shorter and safer distance compared to other routes. The Iron Silk Road has the potential to carry 1 million passengers and 6.5 million tons of cargo. Future investments are expected to boost its capacity to 3 million passengers and 17 million tons of shipment by 2034 (Amirova-Memmedova, 2017). In line with its global One Belt One Road Project, China seeks to deepen commercial ties with Europe and gain commercial depth. Consequently, it is geoeconomically essential to incorporate Azerbaijan into this project to facilitate logistics between China and Europe, minimize costs, and shorten distances along the most favorable routes (21. Yüzyıl Türkiye Enstitüsü, 2022).

In terms of trade routes, energy resources, and transportation/transit, Azerbaijan emerges as a pivotal geo-economic hub due to its abundant underground resources and its strategic position in the East-West equation. It's strategically located between the European continent and Türkiye to the west and neighboring countries rich in energy resources to the east. Given this context, potential geoeconomic factors centered around Azerbaijan are poised to guide policymakers in the years ahead.

### **Possible Geoeconomics Parameters**

The geopolitical position of countries encompasses a complex interplay of strategic, political, economic, and other factors that shape their current situations and influence their futures. In Central Asia, rich energy resources and international trade networks play a significant role in shaping the region's trajectory. Moreover, the ongoing 'Hot/Political Wars' in global politics offer valuable clues about the region's future and open up new possibilities.

The Russia-Ukraine War, which persisted for more than a year, triggered a severe energy crisis for countries in the region, especially in Europe. Russia's use of energy as a weapon against states opposing the war has prompted European nations reliant on Russian energy to explore alternative sources. Consequently, concrete steps have been taken to transfer Azerbaijani and Turkmenistan gas to Europe. To this end, President Recep Tayyip Erdoğan of Türkiye, President Ilham Aliyev of Azerbaijan, and President Berdimuhamedov of Turkmenistan convened at the 1st Summit of the Heads of State of Türkiye-Azerbaijan-Turkmenistan. At this summit, a 'Memorandum of Understanding on the Development of Cooperation in the Energy Field' was signed, facilitating the transportation of Turkmen gas to Europe via the Trans-Anatolian Pipeline (TANAP) (Anadolu Ajansı, 2023b). This agreement creates a new avenue for Turkmenistan's gas, which has been confined between China, Russia, and Iran until now.

Additionally, by connecting Turkmen gas to the Caucasus pipeline, Azerbaijan will enhance its strategic position and derive economic benefits from its existing energy assets. Consequently, Türkiye's role as a key energy transit and storage hub will strengthen. In line with Belet's observations, energy hubs typically possess characteristics such as the 'collection and processing of resources, provision of transmission, storage capacity, market and trade opportunities, and a wide distribution network,' which align with the shared policy objectives of the three countries (Belet, 2016).

For Europe, reducing dependence on Russia and expanding the number of energy partners represents a significant step toward international security by diminishing reliance on a single energy center. The decision to utilize Turkmen gas through Azerbaijan instead of Iran serves to prevent Iran from leveraging this energy route as a political weapon, much like Russia does in its tensions with the West and the United States. It's worth noting that although Iran boasts substantial gas reserves, it imports Turkmen gas and converts it into electricity, maintaining gas trade despite disruptions caused by the U.S. sanctions (Türkiye Cumhuriyeti Tahran Büyükelçiliđi Ticaret Müşavirliđi, 2023). Russia, one of the principal purchasers of Turkmen gas, faced challenges in making payments, creating unease in Turkmenistan and pushing it to explore new markets (İNSAMER, 2023). Consequently, Turkmenistan is actively considering its options with the European Union in the backdrop of the Asian energy landscape. Despite the geopolitical complexities, Turkmenistan seeks to foster connections with European nations through transit routes spanning Azerbaijan, Georgia, and Türkiye.

The transportation of Turkmenistan gas through Azerbaijan holds significant benefits for Azerbaijan and Turkmenistan. It enables Turkmenistan to steer clear of political turmoil in its relations with Iran, which pursues an aggressive foreign policy toward its neighbors, and Russia, which poses a military threat and exerts political pressure. Turkmenistan can foster more reliable commercial partnerships as a result. However, this development may not sit well with Russia, which commands a substantial share of the world's natural gas market, and Iran, which harbors concerns that regional development poses a direct threat. By connecting Turkmenistan's gas to Azerbaijan, this initiative contributes to Azerbaijan's existing strength, significance, and development. Simultaneously, it challenges Iran, given the presence of Southern Azerbaijani territory along its borders. This move is also expected to unsettle the Moscow administration, which still views former Soviet Republics as areas of hegemony, facing potential economic losses in the global gas market and the bolstering of Azerbaijan and Turkmenistan.

The potential for transporting Turkmen and Azerbaijani gas to Europe through the most direct route, reducing the cost of commercial transportation by shortening the Silk Road, will give the Zangezur corridor an international dimension. The 9th article of the ceasefire agreement signed between Azerbaijan and Armenia after the Second Karabakh War stipulates, 'Transportation connections between the western regions of the Republic of Azerbaijan and the Nakhchivan Autonomous Republic will be re-established' (Azərbaycan Respublikasının Prezidenti, 2022). In addition to the geopolitical significance of these two countries, geoeconomics will introduce new policy dynamics. The prospect of Turkish communities in the northern region of Iran seeking independence, Russia's dominant influence in the Caucasus and Central Asia, Armenia's shift from a buffer state to an active player in international energy politics and trade, and the latent rivalries in regional politics involving China and Russia could potentially escalate conflicts, thereby increasing the security risks to European energy supplies.

In the initial stages of the potential win-win policy of the Zangezur Corridor, Azerbaijan, Turkmenistan, Armenia, and Türkiye would benefit. In the subsequent stages, China and European countries would gain. Türkiye and Azerbaijan, as geoeconomic proponents of the corridor, have expressed



willingness to establish friendly relations with Armenia (İndependent Türkçe, 2022). The corridor's opening would make it easier for Armenia, which is in a state of isolation, to integrate into the global economy. Furthermore, it presents an opportunity for Armenia, heavily influenced by diaspora communities and Russia, to reduce these influences.

The role of Georgia, a key stakeholder in these potential developments in the North Caucasus, should be analyzed comprehensively. Recent conflicts stemming from the Ossetian War between Georgia and Russia led to Georgia's unilateral declaration of independence in the Abkhazia and South Ossetia regions, with support from Russia (Anadolu Ajansı, 2023a). The Tbilisi administration views Moscow as a military threat and fears potential interference in its internal affairs in the North Caucasus, an area prone to intermittent conflicts.

These concerns may drive Georgia toward new economic and political initiatives that minimize Russian influence. The Moscow administration's readiness to employ military force heightens Georgia's political anxieties. Consequently, Georgia has pursued EU membership, applying for full membership in 2022 (Euronews, 2023). Georgia's EU membership will provide the EU with new opportunities in the energy sector. Energy flows from Azerbaijan to Tbilisi, under EU guarantees, and onward to Europe via energy transmission lines will diversify regional geoeconomic strategies. As a result, Russia may adopt an adversarial stance toward the Tbilisi administration as it pursues anti-Russian international actions.

Currently, the TRACECA project within the EU will enable the Caucasian states and the Asian region to access European and global markets. The Europe-Caucasus-Asia transportation corridor will also integrate countries by offering an alternative transportation and logistics route (Hüseynov, 2011). Consequently, transit projects funded by European capital will create a robust route, possibly leading to a shift in power from large states with influence in the region to smaller states.

### **Conclusion**

Geoeconomic policies focusing on the energy and trade dilemma have a profound impact on global economic mobility. A country's geographical location gains significance, particularly when developed mass-production economies, with geoeconomically restricted locations, need to channel their surplus production through trade routes. This is coupled with the high demand for energy resources, essential for electricity production. Consequently, countries cannot afford to disregard geoeconomic parameters, as they play a pivotal role in ensuring social welfare levels and preventing negative impacts on global producers within the economic cycle.

In the current context, European countries heavily reliant on Russian energy resources are grappling with unease, especially as diplomatic crises arise from Russia's assertive use of natural gas reserves and commercial transportation as leverage in foreign policy. As a result, the Caucasus route emerged as a viable alternative for capital-rich, developed European nations.

When regional factors affecting energy transportation and supply security are considered, Azerbaijan occupies a central position in geoeconomic policies. It acts as a buffer state between Asia and Europe, serves as a transit passage, and shares borders with energy-rich countries. Therefore, Azerbaijan becomes the linchpin that connects capital-rich, technologically advanced European nations and resource-limited, less-developed Asian countries at the nexus of shared interests.

The Second Karabakh War strengthened Azerbaijan's territorial integrity and geoeconomic position, expanding its scope of influence in regional politics. As a result of the ceasefire agreement, Azerbaijan is likely to secure a diplomatic victory and increase pressure on Armenia in the coming years to open the Zangezur corridor. This highlights the prospect of the shortest route for the One Belt One Road project and underscores the importance of geoeconomics in diversifying energy resources through new transmission lines. Moreover, the highway connecting the Turkish countries to the Zangezur corridor is expected to rejuvenate the Turkic world and foster economic development. This step may also become a key factor in the global geopolitical landscape in the coming years. Balancing politics is essential for these countries to advance further on the world stage.

The Silk Road's middle corridor, serving as the safest route for supply security of Turkmen gas and Kazakh oil, empowers the Azerbaijan-Georgia-Türkiye triple consortium to deliver these resources to the world, particularly European nations. In the Asia-Europe dilemma, this stands as an opportunity for

underdeveloped countries to transition to a high-value-added production economy through the domino effect of energy and trade-based relations.

In addition to sharing energy resources within Central Asia under the geoeconomic framework, one must not forget that the race to control the transmission lines and international trade routes of these resources faces obstacles from Russia, Iran, and China. Underdeveloped countries find themselves at a disadvantage due to strategic pressures exerted by these powerful nations. Hence, it makes more sense for the developed countries of Europe to pursue sustainable development through win-win policies, especially in the context of regional impasses and conflicting interests.

Finally, considering the depletion of non-renewable energy resources, Azerbaijan and the Turkish countries in Asia must optimize their geopolitical and geoeconomic strengths for a transition to a production-based economy in the long term. Failure to do so might leave them with limited options: they could persist as small countries with balanced foreign policies or, under duress, become pawns of larger powers, potentially fading from the historical stage.

### Ethical Declaration

During the writing process of the study “*Energy Supply Security and Trade Routes Competition between European and Asian Countries: The Geoeconomic Importance of Azerbaijan*” scientific rules, ethical and citation rules were followed. No falsification was made on the collected data and this study was not sent to any other academic publication medium for evaluation.

### Statement of Contribution Rate of Researchers

The contribution rates of the authors in the study are equal.

### Declaration of Conflict

There is no potential conflict of interest in the study. There is no potential conflict of interest in the study.

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## GENİŞLETİLMİŞ ÖZET

Günümüzde ülkelerin gelişmişlik düzeylerini iktisadi, askeri, siyasi, coğrafi konum gibi birçok parametreler belirlemektedir. Ülkelerin coğrafi konumları ise o ülkelerin geçmişi, bugünü ve geleceği için küresel/bölgesel

bağlamda stratejik denklem oluşturmaktadır. Dolayısıyla bir ülkenin bulunduğu konumun sağladığı avantaj ve dezavantajlar dışsal veya içsel olarak uluslararası arenada politik, sosyolojik ve ekonomik dinamizm katmaktadır. Toplum refahının ve kitlesel üretim sistemlerinin istikrarlı şekilde sürdürülebilmesi için enerji kaynaklarına sahip olması önem arz etmektedir. Doğalgaz gibi yakın ikamesi olmayan başta enerji talebi yüksek olan ülkeler için kısa dönemde vazgeçilmez bir kaynak haline gelmektedir. Özellikle 21. yüzyılda küresel ve bölgesel çatışmaların merkezine yerleşen bu kaynakların talebi ve arz güvenliği ülkelerin stratejik politikalarını belirlemektedir. Gelişmiş ülkeler yeraltı kaynaklarına olan ihtiyacına ek olarak yüksek teknoloji ile ölçek ekonomilerinden oluşan arz fazlasını dış dünyaya tedarik edebilmek için ticaret yollarına hâkim olmak istemektedir. Bu ihtiyaçlara binaen uluslararası rekabette öncü olan gelişmiş ülkeler global çapta oluşturduğu ulusal çıkarlara dayalı politikalar enerji ve ticaret ikilemine göre kurulmaktadır. Bu kapsamda enerji kaynaklarının taşınması ve ticaret yollarının alternatiflerinin oluşması açısından jeoekonomi kavramı ön plana çıkmaktadır. Azerbaycan, Sovyet döneminin sona ermesi ile 90'lı yılların başlarında uluslararası konjonktürdeki değişimlerle ulus devlet prensiplerine uyumlu bir yeni dış politikanın kurulmasını ve bunun hayata geçirilmesini en önemli noktalardan biri olarak belirlemiştir (Hasanov, 2005: 211). Asya kıtasının zengin enerji kaynaklarına ve boru hatlarının transit geçiş güzergahlarına sahip olan Azerbaycan coğrafi olarak da enerji zengini komşulara sahip olması hasebiyle enerji parametresi göz önüne alındığında stratejik bir konumda yer almaktadır. Bu özellikler dikkate alındığında enerji talebi yüksek olan Avrupa ülkelerinin ilgilerinin Azerbaycan'a kaymasına neden olmuştur. Geniş coğrafyadaki merkezi konumu ile köprü görevi üstlenen Azerbaycan doğudan batıya ticari mal ve hizmetlerin akışkanlığı, enerji kaynaklarının transit geçişi ve arzının odak noktasındadır. İpek Yolunun orta koridoru ve doğalgaz rezervleri açısından Batı için vazgeçilmez ülke olan Azerbaycan bu bağlamda sosyolojik ve kamusal mobilite küresel iktisadi politikaları canlı tutmaktadır. Diğer yandan toprak bütünlüğünü sağlayarak 2. Karabağ Zaferi ile jeoekonomik konumunu güçlendirmiş ve bölge siyasetinde hareket alanını genişletmiştir. Ateşkes anlaşması neticesinde diplomatik zafer de elde ederek Zengezur koridorunun açılması için gelecek yıllarda Ermenistan'a baskılarını yoğunlaştıracağı güçlü olasılıklardan biridir. Böylece Bir Kuşak Bir Yol projesinin en kısa rotasının oluşma ihtimali ve enerji kaynaklarının yeni iletim hatları ile çeşitlendirilmesi jeoekonominin artan önemini gözler önüne sermektedir. Enerji taşımacılığını ve arz güvenliğini etkileyecek bölgesel faktörler bir araya getirildiğinde Azerbaycan, Asya-Avrupa arasında tampon konumu ile transit geçişinin yanında zengin enerji kaynaklarına sahip olan ülkelere komşu olması nedeniyle jeoekonomik politikaların merkezine yerleşmektedir. Dolayısıyla zengin sermaye ve teknolojik olarak ileri düzeyde olan Avrupa ülkeleri ile kırlgan ve gelişmişlik düzeyi istenilen düzeyde olmayan, enerji kaynaklarını elinde bulduran Asya ülkelerini ortak çıkar noktasında buluşturacak ülke Azerbaycan olabilir. Mevcut konjonktürde Rus enerji kaynaklarına bağımlı olan Avrupa ülkeleri ikame çözümler aramakta ve oluşan diplomatik krizler politika yapıcılara zor durumlar yaşatmaktadır. Üstelik doğalgaz rezervleri ve ticaret taşımacılığını dış politikada koz olarak kullanan Rusya'nın komşularına saldırgan yaklaşımları işgalci sonuçlar doğurmaktadır. Böylece sermaye zengini gelişmiş Avrupa ülkeleri için Kafkasya rotası alternatif olarak öne çıkmaktadır. İpek Yolunun orta koridoru ve Türkmen gazı ile Kazak petrolünün arz güvenliğinde en güvenli rotanın Azerbaycan-Gürcistan-Türkiye'nin üçlü konsorsiyum sayesinde yeni coğrafyalara ulaştırılabilen olanakları doğabilecektir. Hali hazırda yeni projeler ile Kafkas devletlerinin ve Asya bölgesinin başta Avrupa ve dünya pazarına açılmasını sağlayarak alternatif ulaşım/lojistik rotasıyla bölgeye nüfus etme seçeneği (Hüseynov, 2002: 64) ile Avrupa-Kafkasya-Asya ulaşım koridoru da ülkeleri bütünlendirecektir. Nitekim Asya-Avrupa dilemmasında enerji ve ticari bazlı gelişen çoklu ilişkilerin domino etkisi ile az gelişmiş ülkelerin katma değeri yüksek üretim ekonomisine geçmesi için fırsat olarak değerlendirilecektir. Zengezur Koridorunun olası kazan-kazan politikasının ilk basamağında Azerbaycan, Türkmenistan, Ermenistan ve Türkiye; ikinci basamağında Çin ve Avrupa ülkeleri fayda görecektir. Nitekim koridorun jeoekonomik olarak destekçileri Türkiye ve Azerbaycan, Ermenistan ile dostane ilişkiler kurulmasına karşı değildir. Ayrıca Zengezur koridoru ile tarihsel bağları olan Türk ülkelerini doğrudan bağlaması ve Türkiye ve Asya'da ki Türk devletleri ile kara yolu ulaşımının direkt sağlanması TDT organizasyonuna canlılık getirerek stratejik politik ve ekonomik olarak elinin güçlenmesine de olanak sağlayacaktır. Yaşanılması muhtemel bu gelişmeler jeoekonomik çerçevede Merkezi Asya'yı içerisine alan enerji kaynaklarını paylaşmaya ek olarak bu kaynakların iletim hatlarını ve uluslararası ticaret yollarını kontrol etme yarışının Rusya, İran ve Çin tarafından engellenmesi ihtimali unutulmamalıdır. Dolayısıyla üçlü ülke grubunun Merkezi Asya'daki ülkelerin bağımsız ekonomi modelleri ile kapasite artırımına geçmesi ve toplum refahının üst seviyelere çıkması halinde asırlık emelleri sekteye uğrayacaktır. Özellikle bölgesel açmazlar ve çıkar çatışmaları düşünüldüğünde kazan-kazan politikasında sürdürülebilir kalkınma için Avrupa'nın gelişmiş ülkeleriyle iş birliği daha mantıklı gözükmektedir. Son olarak yenilenemeyen enerji kaynaklarının tükenmesini göz önüne alındığında Azerbaycan ve Asya'daki Türk Devletlerinin jeopolitik ve jeoekonomik güçlerini optimum düzeyde kullanmadığı takdirde uzun dönemde üretim ekonomisine geçmesi zayıf bir ihtimaldir. Bu bağlamda kalkınamayacak olan bu ülkeler uygulayacağı dengeli dış siyaset ile küçük ülke statüsünde yaşamlarını sürdürecektir ya da tarih sahnesinden silinerek büyük devletlerin himayesine girmek zorunda kalacaktır.