



Fueling Instability: European Foreign and Energy Policies in the Wider Black Sea Area

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Abstract: The European market relies on various gas and oil pipelines, energy projects, and undersea cables in and around the Black Sea. Relations with key regional actors strongly impact Europe's energy security. Consequently, the EU's Common Foreign and Security Policy plays a significant role in the Black Sea regional security, as EU partnerships and investments can fuel rivalries among competing actors. Since the first attempts in 2009 to bring the Black Sea region closer to European values and markets through the Eastern Partnership Policy, the European Union has sought to engage states like Azerbaijan and Georgia to secure energy transit to Western Europe. The Russo-Ukrainian war has heightened tensions between key players in the region, while Russia's gas embargo has exacerbated the shortage of energy resources in Europe. In July 2022, the European Union reached an agreement with Azerbaijan to increase gas exports. Fourteen months later, Azerbaijan launched a military operation in Nagorno-Karabakh, reigniting the 2020 border conflict with Armenia, taking full control of the entire territory and further altering the regional dynamics. This article examines how the war in Ukraine has alienated most Black Sea states from Russia after it cut off its energy exports to EU and NATO countries, leading them to source energy from states in the wider Black Sea region. It will also discuss the ensuing policy vacuum and the opportunities and challenges it creates for the European Union and the region.

Keywords: Black Sea, energy security, geostrategic competition, Russia-Ukraine war, South Caucasus, EU foreign policy, human rights.

Introduction

With its 300 million citizens and a GDP of \$ 3 trillion,¹ the wider Black Sea area is an economically and geostrategically important region at the crossroads of Europe, Asia, and the Middle East. The region extends beyond the littoral states—Russia, Ukraine, Bulgaria, Romania, and Türkiye—to include the Southern Caucasus states of Georgia, Armenia, and Azerbaijan. Due to their strategic relations with the littoral states, Moldova, Iran, and Greece can also be considered part of the wider Black Sea area. The Black Sea is a crucial energy hub, with its states functioning simultaneously as producers, transit routes, and consumers of energy. The wider Black Sea area provides key oil and gas exports through Turkstream, the Baku-Tbilisi-Ceyhan (BTC) pipeline, and the South Caucasus pipeline, which transport energy to EU member states. Most states in the region have historically been dependent on Russian energy imports, which has created vulnerabilities in their critical infrastructure.

Over the last 20 years, the European Union has pursued diverse foreign policy approaches toward the wider Black Sea area, with limited success. Its engagement in the region has always been a balancing act between promoting values such as democracy, equality, and human rights,² on one hand, and securing an affordable energy supply through imports from resource-rich states, on the other. The EU's political and economic priorities in the region include strengthening partnerships and advancing the EU integration process for Ukraine, Georgia, and Moldova. At the same time, the European Union seeks to minimize Russian influence and disinformation and, most importantly, foster peace and regional stability, as evidenced by the EU's civilian mission in Armenia. Despite these efforts, the region remains a sea of conflict, economic hardship, and democratic backsliding.

The European Neighborhood Policy (ENP) towards the Southern Caucasus

After the Russo-Georgian War in 2008 and the preceding Georgian political crisis, the European Union found renewed impetus to update its security planning. In 2009, the European Union published its first security strategy and, for the first time, explicitly mentioned a plan for the wider Black Sea area as a complement to bilateral agreements with its littoral states, highlighting the region's strategic importance.³ Shortly thereafter, the main instrument of the EU's Common For-

¹ Atlantic Council Task Force on Black Sea Security & Richard D. Hooker, Jr., "A Security Strategy for the Black Sea," Atlantic Council, Scowcroft Center for Strategy and Security, December 15, 2023, <https://www.atlanticcouncil.org/in-depth-research-reports/report/a-security-strategy-for-the-black-sea/>.

² "Aims and Values," European Union, https://european-union.europa.eu/principles-countries-history/principles-and-values/aims-and-values_en.

³ "Communication from the Commission to the Council and the European Parliament 'Black Sea Synergy – A New Regional Cooperation Initiative'," Commission of the

eign and Security Policy (CFSP) for the wider Black Sea area—the European Neighborhood Policy (ENP)—was adopted. Aimed at states in its Southern and Eastern neighborhoods, the ENP’s objective was to extend the EU’s liberal norms and democratic values while fostering partnerships with its Eastern neighbors, including those in the wider Black Sea area, without offering them EU accession. The European Union perceives the Black Sea as a “stability zone” between Western Europe, Central Europe, and Russia,⁴ which contributes greatly to its (in-)security. In turn, Russia viewed the ENP launch as confrontational and a Western encroachment on its sphere of influence in the so-called “Near Abroad.”⁵

Russia’s swift takeover of Abkhazia and South Ossetia (in a matter of days) served as a wake-up call for the European Union and its allies, prompting a shift in its foreign policy toward the region.⁶ This turning point in Russia’s relations with the West was a driving force behind the creation of the ENP and led to the inclusion of all three South Caucasus states within its policy framework. However, these states were not prioritized within the ENP, as more strategically significant foreign policy concerns took precedence over economic and political relations with Armenia, Georgia, and Azerbaijan.⁷

Following a change in Georgian leadership, the new, more moderate, and less confrontational president maintained his predecessor’s pro-EU stance while also advocating for greater economic integration with Russia. This led to a period of rapprochement.⁸ Still, the main aim of the ENP is to foster good relations and trade, although it has often been misinterpreted as an EU enlargement tool due to its emphasis on economic, social, and political reforms in partner states. This is why the push for economic integration reached a stalemate, which only gained momentum after Russia’s invasion of Ukraine.

The Eastern Partnership Framework, in turn, focuses on common relations with the EU’s Eastern neighbors, including states like Azerbaijan, Georgia, Mol-

European Communities, April 11, 2007, <https://op.europa.eu/en/publication-detail/-/publication/44826ffe-e808-40c5-968f-5eade2aadf3f>.

⁴ Dan Dungaciu, ed., *The Geopolitical Black Sea Encyclopaedia* (Cambridge Scholars Publishing, September 2020), 154, <https://www.cambridgescholars.com/product/978-1-5275-5703-1>.

⁵ Vladislav Inozemtsev, “The ‘Near Abroad’ – a Key Explanatory Concept in Russian Foreign Policy,” *Inquiry & Analysis Series* No. 1545, Middle East Media Research Institute, January 7, 2021, <https://www.memri.org/reports/near-abroad-%e2%80%93-key-explanatory-concept-russian-foreign-policy>.

⁶ Peter Dickinson, “The 2008 Russo-Georgian War: Putin’s Green Light,” Atlantic Council, August 7, 2021, <https://www.atlanticcouncil.org/blogs/ukrainealert/the-2008-russo-georgian-war-putins-green-light/>.

⁷ “Report on the Need for an EU Strategy for the South Caucasus,” Report A7-0123/2010, Committee on Foreign Affairs, European Parliament, April 23, 2010, https://www.europarl.europa.eu/doceo/document/A-7-2010-0123_EN.html.

⁸ “Georgian President: Russia Gains More from Working with Europe than from Attacking Its Neighbours,” *De Nederlandse Grondwet*, May 13, 2015, www.denederlandsegrondwet.nl/id/vjtvdukqdozr/nieuws/georgian_president_russia_gains_more.

dova, Ukraine, and Armenia. Its political objectives include promoting democracy, good governance, and stability and fostering economic integration and convergence with EU sectoral policies.⁹ The economic component of the framework addresses the establishment of secure energy routes from the wider Black Sea area to EU member states.

However, the framework has faced several political pitfalls and created tensions with some partner states. Georgia and Ukraine voiced concerns that the partnership agreement did not sufficiently consider their European aspirations, while Azerbaijan criticized the absence of provisions regarding territorial integrity.¹⁰ Azerbaijan also serves as an example of the EU's transport and energy cooperation within the Eastern Partnership framework. Arguably, the strengthening of institutions and good governance in the wider Black Sea area has had limited success, while economic development and market opportunities supported by the European Union have flourished.

Following the outbreak of the Russo-Ukrainian war, Moldova, Ukraine, and Georgia became central to the EU's Eastern Neighborhood Policy, accelerating their push for EU candidate status as their geostrategic importance increased. After the war began in 2022, all three states significantly intensified their efforts toward European integration.¹¹ Moldova and Ukraine were granted candidate status on June 23, 2023, while the European Council recognized Georgia's European perspective, promising candidate status provided that specific conditions were met.¹² However, considering that the Georgian parliament recently passed its controversial "foreign agents law," this prospect now appears less realistic.

Russia's War and Its Ripple Effect on the Energy Markets

The Russo-Ukrainian war immediately affected hydrocarbon markets, leading to a sharp spike in crude oil prices that fundamentally altered the EU's energy policy approach. The average German import price for natural gas rose from 8.94 % in 2021 to 24.17 % in 2022. On one hand, EU pipeline imports decreased by 35 %, while LNG imports increased by 58.4 %. On the other hand, Russia lost 37 % of its

⁹ "Georgian President: Russia Gains More from Working with Europe than from Attacking Its Neighbours."

¹⁰ Iulia Joja, "Strategic Partnerships and Great Power Competition in the Black Sea," *Emerging Europe*, July 1, 2020, <https://emerging-europe.com/opinion/strategic-partnerships-and-great-power-competition-in-the-black-sea/>.

¹¹ "European Neighbourhood Policy and Enlargement Negotiations – Ukraine Report 2023," Directorate-General for Neighbourhood and Enlargement Negotiations, European Commission, November 8, 2023, https://neighbourhood-enlargement.ec.europa.eu/ukraine-report-2023_en.

¹² European Parliament, "Candidate Status of Ukraine, the Republic of Moldova and Georgia, 23 June 2022," EP Resolution, June 23, 2022, www.europarl.europa.eu/delegations/en/candidate-status-of-ukraine-the-republic/product-details/20240606_DPU38969.

pipeline exports in 2022.¹³

Even before the war, Russian energy exports were non-transparent, highly unpredictable, and lacked reciprocity. When Russia completely cut off energy supplies to EU member states, the European Union introduced severe economic sanctions in response to Russia's invasion of Ukraine. As a result, the EU's imports of Russian gas dropped from 45 % in 2021 to 15 % just two years later.¹⁴ After Russia halted energy exports to most countries in the region and certain EU member states for ideological reasons, the affected countries sought to diversify their energy sources, shifting toward alternative suppliers.

Global instability, manifesting in the war in Ukraine, increasingly hostile relations with Russia, and conflict in the Middle East, boosted the importance of other states within the wider Black Sea area as energy providers and transit countries. However, economic and political challenges persist, including fragile governance systems, uneven economic performance, continued energy dependence on Russia, the ongoing war in Ukraine, and frozen conflicts. In the current state of geopolitical poly-crisis, regional actors face uncertainty about their strategic alignments, creating an opportunity for the European Union to offer alternatives beyond siding with Russia or allowing Chinese investment in critical transport and energy infrastructure. At the same time, the European Union must balance its political objectives with the need to secure its energy supply.

Today, a power shift is observable in the wider Black Sea region, as more states redirect their energy imports toward Azerbaijan following Gazprom's pipeline shutdowns in 2022.¹⁵ The European Parliament views this deal as an opportunity to minimize Russian influence in the region, foster a reliable energy partnership, and advance the Green Deal's objectives.¹⁶

In the following sections, this article will examine the degree of diversification in the latest EU energy policy and explore potential policy options for the EU's future foreign and energy policies in the wider Black Sea area.

Regional Dynamics

The European Parliament has passed a resolution – urging the European Union to reduce its reliance on gas imports from Azerbaijan. In the event of another military aggression against Armenia, the Parliament calls for a complete cessation of

¹³ "Statistical Review of World Energy," Energy Institute, 15, 27, www.energyinst.org/statistical-review/resources-and-data-downloads.

¹⁴ "In Focus: EU Energy Security and Gas Supplies," Directorate General for Energy, European Commission, February 15, 2024, https://energy.ec.europa.eu/news/focus-eu-energy-security-and-gas-supplies-2024-02-15_en.

¹⁵ Aura Sabadus, "The EU's Dilemma with Azerbaijan – Natural Gas or Moral Purity," Center for European Policy Analysis (CEPA), October 4, 2023, <https://cepa.org/article/the-eu-dilemma-with-azerbaijan-natural-gas-or-moral-purity/>.

¹⁶ "Texts Adopted – EU-Azerbaijan Relations – Wednesday, 15 March 2023," European Parliament, March 15, 2023, https://www.europarl.europa.eu/doceo/document/TA-9-2023-0082_EN.html.

EU imports of Azeri oil and gas.¹⁷ As a temporary measure, the Parliament calls for suspending the current Memorandum of Understanding on a Strategic Partnership in the Field of Energy between the European Union and Azerbaijan. Furthermore, the resolution urges decisive action against Azerbaijan in response to multiple ceasefire violations and human rights abuses in Nagorno-Karabakh, including the imposition of targeted sanctions.¹⁸

The EU's interests in the South Caucasus have been growing due to geopolitical shifts and the region's increasing strategic importance. However, there are various complexities in the EU's policy in the region, making it challenging to pursue its strategic interests effectively.

Southern Gas Corridor

The Southern Gas Corridor is of immense strategic significance to the West, as it is the only existing gas export route from east to west that circumvents Russia.¹⁹ The EU's pursuit of diversification through this corridor overlooked human rights violations by welcoming gas imports from Azerbaijan.²⁰ This approach underestimated Azerbaijan's military aspirations, as evidenced by the 2020 Nagorno-Karabakh War.

Azerbaijan is known for its neutrality policy, being the only South Caucasus state that has managed to maintain relatively balanced relations with both the West and Russia. In pursuit of its strategic goals, Azerbaijan has increasingly partnered with Türkiye, receiving public support from Türkiye in its strategic moves, including during the second Nagorno-Karabakh War.²¹ On September 27, 2020, Azerbaijan launched a full-scale military offensive against Nagorno-Karabakh, engaging in a 44-day war against Armenian forces. The conflict resulted in the deaths of more than 6,000 combatants and an estimated 150 civilians on both sides.²² The war ended in Azerbaijan's favor, reversing Armenia's 30-year control over the territory and shifting the power dynamics of the region.

¹⁷ "Nagorno-Karabakh: MEPs Demand Review of EU Relations with Azerbaijan," *Press Release*, European Parliament, October 5, 2023, <https://www.europarl.europa.eu/news/en/press-room/20230929IPR06132/nagorno-karabakh-meps-demand-review-of-eu-relations-with-azerbaijan>.

¹⁸ "Nagorno-Karabakh: MEPs Demand Review of EU Relations with Azerbaijan."

¹⁹ Jeronimo Delgado-Caicedo, ed., *Handbook of Regional Conflict Resolution Initiatives in the Global South* (London: Routledge, 2022), <https://doi.org/10.4324/9781003287018>.

²⁰ Moniek de Jong, "Uncovering Uncomfortable Truths: The Geopolitics of EU Gas Imports in the Aftermath of the Invasion of Ukraine," *Egmont – Royal Institute for International Relations, Egmont Security Policy Briefs*, May 25, 2023, <http://hdl.handle.net/1854/LU-01H2Q6EM6B0G341PG9WPVP8MX0>.

²¹ de Jong, "Uncovering Uncomfortable Truths: The Geopolitics of EU Gas Imports in the Aftermath of the Invasion of Ukraine."

²² Seth G. Jones, Jake Harrington, Christopher K. Reid, and Matthew Strohmeier, "Nagorno-Karabakh War," in *Combined Arms Warfare and Unmanned Aircraft Systems: A New Era of Strategic Competition*, Chapter 3, Center for Strategic and International

At the same time, Azerbaijan further consolidated its diplomatic and military ties with Türkiye, guided by the “one nation-two states” principle.²³ Türkiye provided substantial military, intelligence, and political support to Azerbaijan throughout the conflict, notably through the provision of high-tech Bayraktar drones and the deployment of around 4,000 Syrian mercenaries to the battlefield, which further contributed to Azerbaijan’s victory.²⁴ This outcome was highly beneficial for Türkiye, enabling it to expand its influence in the region. Meanwhile, the war also presented a strategic opportunity for Russia, which brokered the ceasefire agreement between Azerbaijan and Armenia and deployed its “peacekeeping” troops, thus maintaining a military presence in the region.²⁵

Azerbaijan, on the other hand, has become a more advantageous partner not only for the West but also for Russia. Increased European demand for Azerbaijani gas has helped Azerbaijan bolster its military capabilities by 40 % since 2020, introducing new specialized forces and acquiring advanced weaponry, such as loitering munition systems, long-range surface-to-surface precision missiles, and cutting-edge drones from Israel and Türkiye.²⁶ The war signaled that Azerbaijan’s military and strategic pursuits are becoming a concern for peace initiatives in the region.

The EU’s deployment of a civilian mission in Armenia was not well received by the Azerbaijani government, with President Aliyev calling it a “covert military-intelligence operation.”²⁹ In 2021, European Council President Charles Michel brokered an agreement to reinstate a direct military communication link between Armenia and Azerbaijan, making the European Union an active player in the process. This was followed by a summit in December 2021 between Armenian Prime Minister Pashinyan and Azerbaijani President Aliyev in Brussels.²⁷ However, since the European Union lacks a military presence in the region and access to strategic maps and documents, unlike Russia and Türkiye, there has been limited progress toward peace. Meanwhile, Armenia’s efforts to form a

Studies (CSIS), 2022, 9-15, <https://www.csis.org/analysis/combined-arms-warfare-and-unmanned-aircraft-systems>.

²³ Jones, Harrington, Reid, and Strohmeyer, “Nagorno-Karabakh War.”

²⁴ Jones, Harrington, Reid, and Strohmeyer, “Nagorno-Karabakh War.”

²⁵ András Rác, “In Russia’s Hands: Nagorno-Karabakh after the Ceasefire Agreement,” *Policy Brief* No. 8, European Union Institute for Security Studies, April 2021, https://www.iss.europa.eu/sites/default/files/EUISSFiles/Brief_8_2021.pdf.

²⁶ International Crisis Group, “Averting a New War between Armenia and Azerbaijan New Flashpoints,” Section III “New Flashpoints,” Europe Report No. 266, January 30, 2023, <https://www.crisisgroup.org/europe-central-asia/caucasus/nagorno-karabakh-conflict/266-averting-new-war-between-armenia-and-azerbaijan>.

²⁷ Bob Deen, Wouter Zweers, and Camille Linder, “The EU and the Elusive Peace Agreement between Armenia and Azerbaijan,” Chapter 4 in *The EU in the South Caucasus: Navigating a Geopolitical Labyrinth in Turmoil*, Clingendael Report, Netherlands Institute of International Relations “Clingendael,” March 2023, www.clingendael.org/pub/2023/the-eu-in-the-south-caucasus/4-the-eu-and-the-elusive-peace-agreement-between-armenia-and-azerbaijan/.

strategic alliance with the West have increased significantly. Its diplomatic approach and willingness to make concessions to resolve the conflict and achieve lasting peace have been recognized and appreciated by other democratic nations.

Tehran and Its Interests in the Region

Iran is also involved in the negotiation processes, and despite its shared cultural and religious similarities with Azerbaijan, it supports Armenia in these talks for several reasons. Specifically, it is in Tehran's interest that the Zangezur corridor is not established and that interstate borders remain unchanged, as this could compromise the flow of goods from Iran to Armenia,²⁸ potentially diminishing Iran's regional influence. Iran and Armenia have long-standing relations involving various trade sectors and, more importantly, the "gas for electricity exchange."²⁹ The agreement, originally signed in 2006 and recently extended until 2030, stipulates that Armenia receives one cubic meter of gas in exchange for three kilowatt-hours of electricity supplied to Iran.³⁰ While neither country is the other's largest trade partner, both governments have been actively investing in and promoting trade in recent years.

The Zangezur Corridor: Opportunities and Challenges

Azerbaijan is advocating for the Zangezur Corridor, a new transport link through Armenian territory that would connect Azerbaijan proper with its exclave Nakhchivan and Türkiye, with Russia as a security guarantor.³¹ While this corridor presents trade opportunities between East and West, it also poses a security threat to Armenia, as Azerbaijan demands that there be no border checks. The corridor promises economic benefits for the countries in the region. If established, it would enhance regional connectivity across greater Eurasia, linking Russian, Turkish, Central Asian, Armenian, and Iranian territories while also connecting Europe to Asia. While the corridor is largely viewed as a positive initiative by both the West and Russia, some concerns remain.

²⁸ Elaheh Koolae, Alexander Yeo, George Sanikidze, and Nareg Seferian, "Iran and the South Caucasus after the Second Karabakh War," *Caucasus Analytical Digest* 136 (Center for Security Studies, ETH Zürich, February 2024), <https://css.ethz.ch/content/dam/ethz/special-interest/gess/cis/center-for-securities-studies/pdfs/CaucasusAnalyticalDigest136.pdf>.

²⁹ Koolae, Yeo, Sanikidze, and Seferian, "Iran and the South Caucasus after the Second Karabakh War."

³⁰ Syed Zafar Mehdi, "Iran, Armenia Extend, Expand Energy Swap Deal until 2030," *Anadolu Agency*, August 11, 2023, <https://www.aa.com.tr/en/asia-pacific/iran-armenia-extend-expand-energy-swap-deal-until-2030/2966020>.

³¹ Piotr Gawliczek and Khayal Iskandarov, "The Zangezur Corridor as Part of the Global Transport Route (against the Backdrop of Power Games in the South Caucasus Region)," *Security and Defence Quarterly* 41, no. 1 (2023): 36-53, <https://doi.org/10.35467/sdq/161993>.

Iran, on the other hand, fears that the construction of the Zangezur Corridor will block its land border with Armenia, leading to a major shift in power dynamics, with Azerbaijan and Türkiye gaining greater influence over the region.³² Following the siege of Nagorno-Karabakh, Azerbaijan has seized approximately 140 square kilometers of Armenian territory, including areas near Jermuk, a top tourist destination and a vital road leading to Nakhchivan. This gives Azerbaijan the ability to isolate Armenia's southern region of Syunik within days. Syunik is notable for its strategic location and abundant natural resources, including copper, molybdenum, and precious metals.³³ President Aliyev has emphasized the vast potential for solar power in Eastern Zangezur (Syunik), estimated at 9,200 megawatts, and wind power in the Caspian Sea, estimated at 157 gigawatts.³⁴

Aliyev has also employed aggressive rhetoric, referring to southern Armenia as "Western Azerbaijan" and making it clear that Azerbaijan's interests extend beyond the establishment of the Zangezur Corridor. This is the primary reason why Armenia remains hesitant in these negotiations, as it seeks security guarantees before signing an agreement that could undermine its sovereignty. Were Armenia and Azerbaijan able to reach a sustainable peace agreement, ending decades of conflict, the region could benefit from enhanced diplomatic, trade, and economic cooperation.

Russia's Strategic Maneuvering in the Wider Black Sea Area

Russia's interests in the region remain ambiguous. While it has been a military ally of Armenia for decades, it has recently begun publicly supporting Azerbaijan's strategic aspirations in the region. Furthermore, Russia has significantly increased its partnerships with Azerbaijan across various sectors. Meanwhile, Armenia's shift in foreign policy toward the West and its aspirations to align with Western values are viewed negatively by Russia, leading to a deterioration in their relationship.³⁵ Russia has even declared that if Armenia aligns itself with the West, it will essentially become "Western Azerbaijan."³⁶

In February 2024, Armenia froze its participation in the Russian-led Collective Security Treaty Organization (CSTO), arguing that the alliance had failed to fulfill

³² Gawliczek and Iskandarov, "The Zangezur Corridor as Part of the Global Transport Route."

³³ Integrated Biodiversity Management, South Caucasus, "Baseline Study for Sisian District of Syunik Region, RA," Report, BSC Business Support Center, 2017, <https://biodivers-southcaucasus.org/uploads/files/5b6c35289a6d4.pdf>.

³⁴ Integrated Biodiversity Management, South Caucasus, "Baseline Study for Sisian District of Syunik Region."

³⁵ "France to Provide Military Equipment to Armenia. Unexpected Statement in Yerevan," *JAMnews*, October 4, 2023, <https://jam-news.net/france-to-provide-armenia-with-military-equipment/>.

³⁶ "War in the South Caucasus: Who Is for, and Who Is Against? A View from Baku," *JAMnews*, February 29, 2024, <https://jam-news.net/farhad-mammadov-on-the-potential-war/>.

its role in maintaining peace in the region.³⁷ Armenia's pivot toward the West is largely seen as a positive move by both its population and the West, although its continued economic and military dependence on Russia remains a significant challenge. Russia maintains a significant military presence in Armenia, with approximately 4,000 troops stationed at a base in Gyumri. Additionally, as of 2021, Russia has expanded its operational reach to the southern regions of Armenia.³⁸

Moreover, Armenia's economic well-being remains heavily dependent on its trade relationship with Russia, which continues to be Armenia's largest trading partner. While Armenia's trade with the European Union is growing, one-third of its overall foreign trade is still conducted with Russia. Moscow also controls vital infrastructure such as railways, energy facilities, and supplies. In fact, 85% of Armenia's gas consumption is sourced from Russia's Gazprom.³⁹ Consequently, Armenia's ability to distance itself from Russia is limited without significant support from the West. However, Armenia's efforts to strengthen ties with the West appear to be accelerating, signaling a potential new democratic chapter.

EU Energy Policies Towards the Black Sea Area

Article 194 of the Treaty on the Functioning of the European Union designates energy as a shared responsibility between the European Union and its member states.⁴⁰ The main goals of the EU's energy policy are to ensure the proper functioning of the energy market, guarantee energy supply security, and promote energy efficiency, energy saving, and the development of new and renewable energy sources.⁴¹ Environmental concerns also drive the EU's energy policy. Under the framework of the 2020 European Green Deal, the European Union is pursuing a clean energy transition away from fossil fuels and has recently set a new climate target, committing to a 90% reduction in net emissions by 2040.⁴²

In 2022, the European Commission introduced the EU Energy Platform to coordinate energy demand within the Union, enhance market transparency, and secure gas supplies to member states. A key component of this platform is the

³⁷ "Armenia Freezes Participation in Russia-Led Security Bloc – Prime Minister," *Reuters*, February 23, 2024, <https://www.reuters.com/world/asia-pacific/armenia-freezes-participation-russia-led-security-bloc-prime-minister-2024-02-23/>.

³⁸ "Armenia Freezes Participation in Russia-Led Security Bloc."

³⁹ "Armenia Freezes Participation in Russia-Led Security Bloc."

⁴⁰ European Union, "Consolidated version of the Treaty on the Functioning of the European Union, Part Three – Union Policies and Internal Actions, Title XXI – Energy, Article 194," *EUR-Lex*, *Official Journal of the European Union*, June 7, 2016, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A12016E194>.

⁴¹ "EU Energy Policy," *EUR-Lex*, accessed February 22, 2024, <https://eur-lex.europa.eu/EN/legal-content/glossary/eu-energy-policy.html>.

⁴² "2040 Climate Target: Reducing Net Emissions by 90% by 2040," European Commission, Climate Action, February 6, 2024, https://climate.ec.europa.eu/eu-action/climate-strategies-targets/2040-climate-target_en.

REPowerEU initiative, launched the following year under the European Green Deal framework. REPowerEU aims to diversify energy sources, reduce dependence on Russian oil and gas, and facilitate the green transition toward sustainable energy. Its overarching goal is to “achieve a more resilient energy system and a true Energy Union.”⁴³

The wider Black Sea region is involved in this initiative through the Regional Group for Southeast Europe including Bulgaria, Greece, Romania, Serbia, North Macedonia, Moldova, and Ukraine. This group is tasked with identifying infrastructure needs, exploring opportunities for shared energy use, and pinpointing potential new and clean energy suppliers in the wider Black Sea region.⁴⁴

The EU’s new energy policy seeks to replace its current suppliers with more reliable and less geopolitically aggressive energy cooperation partners, focusing on clean energy sources such as LNG and hydrogen to prevent future energy crises. Thus, the REPowerEU initiative aims to fundamentally transform the EU’s energy import system and reconfigure energy flows by, among other measures, increasing domestic energy production.⁴⁵ However, the policy does not provide specific details on how this ambitious goal will be achieved.

Another EU program under the umbrella of the EU Energy Platform, also launched in 2022, is AggregateEU. Its goal is to aggregate the demand for gas purchases within EU member states to lower prices, save energy, and diversify the economy. The AggregateEU program operates as part of a mid-term tender system, allowing buyers to submit their gas demand for seasonal six-month periods. It enables gas sellers to offer their products under a pseudonym, according to market demand, without revealing their identity or background information.⁴⁶ This allows buyers to purchase gas without knowing the seller’s identity, theoretically enabling transactions with a “clear conscience.” However, this method raises concerns about the potential emergence of new dependencies on suppliers whose reliability is questionable and who may not share European values.

In 2022, the European Union signed a gas deal with Azerbaijan⁴⁷ as an alternative supplier to Russian gas and a transit country through the BTC pipeline and the Southern Gas Corridor. On July 18, 2022, European Commission President Ursula von der Leyen and Azerbaijani President Ilham Aliyev signed a Memorandum of Understanding on a Strategic Partnership in the Field of Energy in Baku.

⁴³ “REPowerEU Plan,” Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the Regions, COM/2022/230 final, May 18, 2022, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2022%3A230%3AFIN>.

⁴⁴ “REPowerEU Plan.”

⁴⁵ “REPowerEU Plan.”

⁴⁶ “EU Energy Platform,” European Commission, accessed February 21, 2024, https://energy.ec.europa.eu/topics/energy-security/eu-energy-platform_en.

⁴⁷ “EU Signs Deal with Azerbaijan to Double Gas Imports by 2027,” *Reuters*, July 18, 2022, <https://www.reuters.com/business/energy/eu-signs-deal-with-azerbaijan-double-gas-imports-by-2027-2022-07-18/>.

Under this agreement, gas imports from Azerbaijan are expected to increase by 20 bcm by 2027.⁴⁸ Azerbaijan is rapidly modernizing its transport infrastructure, participating in transnational projects like the Europe-Asia Interconnector,⁴⁹ making energy deals with the European Union, and attracting new investors such as India, which imported 17% of its crude oil from Azerbaijan in 2022.⁵⁰

While the memorandum marks the beginning of a deeper cooperation between the European Union and Azerbaijan, it also presents a range of complex challenges. To understand the intricate security dynamics, it is essential to assess Azerbaijan's history in meeting its obligations and promises to the European Union. While von der Leyen emphasized the EU's long-term alliance with Azerbaijan, calling it "a reliable partner" in contrast to "aggressive" and "untrustworthy" Russia, experts argue that Azerbaijan's reliability is not guaranteed.⁵¹ The country has a history of authoritarian governance, human rights violations, and systemic corruption.⁵² Despite being perceived as a reliable business partner, Azerbaijan has failed to meet its obligations under human rights treaties and has not fulfilled its political commitments to the European Union. As a result, public promises alone do not suffice to establish Azerbaijan as a trustworthy investment partner.⁵³ Local activists have even accused EU officials of selling democracy's interests to energy interests, criticizing them for not meeting with opposition parties and civil society representatives during their visits to Azerbaijan.⁵⁴

Energy Security versus Democratic Values

Azerbaijan's nine-month blockade of the Lachin Corridor, the only link between Nagorno-Karabakh and Armenia at the beginning of 2023, resulted in a dire hu-

⁴⁸ Vasif Huseynov, "Charting the Future of EU-Azerbaijani Relations: Beyond Energy Policy and Security," *Horizons: Journal of International Relations and Sustainable Development*, no. 22 (2023): 142-51, <https://www.cirsd.org/en/horizons/horizons-winter-2023--issue-no22/charting-the-future-of-eu---azerbaijani-relations>.

⁴⁹ "Longest Subsea Power Cable to Be Operational by 2025," *Deutsche Welle*, September 3, 2021, <https://www.dw.com/en/longest-and-deepest-subsea-power-cable-to-be-connected-between-cyprus-greece-and-israel/a-56809996>.

⁵⁰ Atlantic Council Task Force on Black Sea Security, "A Security Strategy for the Black Sea."

⁵¹ Murad Muradov, "Europe Turns to Azerbaijan for Gas: How Big Could This Be?" RUSI – Royal United Services Institute for Defence and Security Studies, October 5, 2022, <https://www.rusi.org/explore-our-research/publications/commentary/europe-turns-azerbaijan-gas-how-big-could-be>.

⁵² Gubad Ibadoghlu and Zhala Bayramova, "New Gas Deal with Azerbaijan for Europe's Energy Security: Aspiration and Reality," Social Science Research Network, May 8, 2023, <https://doi.org/10.2139/ssrn.4441513>.

⁵³ Ibadoghlu and Bayramova, "New Gas Deal with Azerbaijan for Europe's Energy Security."

⁵⁴ Gubad Ibadoghlu, "What the EU's New Gas Deal with Azerbaijan Could Mean for Europe's Energy Security," *European Politics and Policy (EUROPP) Blog*, London School of Economics, August 3, 2022, <https://blogs.lse.ac.uk/europpblog/2022/08/03/what-the-eus-new-gas-deal-with-azerbaijan-could-mean-for-europes-energy-security/>.

humanitarian crisis. The blockade caused severe shortages of food, medicine, and hygiene products while cutting off natural gas supplies essential for heating homes and schools.⁵⁵

In September of the same year, just three months after signing the gas deal with the European Union, Azerbaijan launched a military operation in Nagorno-Karabakh, calling it anti-terrorism measures. The primary objective of the operation was to gain full territorial control of the region, leading to the displacement of 120,000 ethnic Armenians.⁵⁶ This constituted yet another major violation of human rights within international law and international humanitarian law.

For Azerbaijan, the siege of Nagorno-Karabakh was crucial in establishing itself as a prominent regional actor. Moreover, the region is rich in natural resources that can further bolster Azerbaijan's growing role as an energy provider to the West. Nagorno-Karabakh contains a total of 150 known deposits of gold, copper, mercury, lead, and zinc.⁵⁷ More importantly, the Araks Valley holds three hydrocarbon reserves totaling 150 million tons of oil and up to 250 billion cubic meters of gas.⁵⁸ This resource wealth was another key reason why Azerbaijan sought full control over the territory – to expand its hydrocarbon supplies.

Can Azerbaijan Meet the Demands?

While Azerbaijan has become a key player in helping the European Union address its energy security crisis, experts question whether Azerbaijani natural gas resources are sufficient to meet demand. Firstly, Azerbaijan is currently facing challenges in exploring new offshore deposits located in border regions.⁵⁹ The volume of liquid fuel extraction is expected to decline significantly—by 2.5 to 3 times—by 2030, which could lead to a considerable reduction in exports. As a result, Azerbaijan will likely need to prioritize meeting increased domestic demand over exports.⁶⁰ Furthermore, Azerbaijan will be forced to address its oil deficit through imports, ultimately leading to greater reliance on external supplies.

⁵⁵ “Humanitarian Consequences of the Blockade in Nagorno-Karabakh,” European Parliament, January 19, 2023, https://www.europarl.europa.eu/doceo/document/TA-9-2023-0012_EN.html.

⁵⁶ “Humanitarian Consequences of the Blockade in Nagorno-Karabakh.”

⁵⁷ Galim R. Basharov et al., “Ecological Dimension of Conflict in Nagorno-Karabakh,” International Conference “Ecological Paradigms of Sustainable Development: Political, Economic and Technological Dimension of Biosphere Problems” (EPSD 2021), ed. S. G. Ereemeev, *E3S Web of Conferences* 311 (2021): 04006, <https://doi.org/10.1051/e3sconf/202131104006>.

⁵⁸ Basharov et al., “Ecological Dimension of Conflict in Nagorno-Karabakh.”

⁵⁹ Jeyhun Rzayev and Farhad Aliyev, “Role of Azerbaijan in Maintaining Energy Security of Europe,” special issue “Azerbaijan, Its Impact on Europe’s Energy Security and Relations with Poland – Yesterday and Today,” *Studia Wschodnioeuropejskie*, no. 18 (2023): 57-67, 57, <https://swe.uw.edu.pl/Nr%2018.pdf>.

⁶⁰ Rzayev and Aliyev, “Role of Azerbaijan in Maintaining Energy Security of Europe.”

Secondly, Azerbaijan is struggling to meet both internal and external energy demands. In November 2022, Azerbaijan signed an agreement with Russia's Gazprom to receive a total of 1 billion cubic meters of gas until March 2023.⁶¹ Currently, 90 % of Azerbaijan's energy exports consist of oil and gas. As a result, the country has experienced a boom in power plants and significant investments in the energy sector in recent years. However, Azerbaijan's oil production has decreased substantially over the last decade, while gas production, which is approximately 300 % higher than domestic demand, doubled between 2010 and 2021. At the same time, renewable energy sources accounted for only 1.5 % of Azerbaijan's total energy supply in 2022, indicating that Azerbaijan is not a significant energy partner in the green transition.⁶² Yet, Azerbaijan produced only 0.7 % of global oil in 2022, while the European Union accounted for 0.4 % of global oil production.⁶³

Additionally, Azerbaijan signed a swap agreement with Turkmenistan, facilitated through Iran, under which 1.5 to 2 billion cubic meters of gas would be supplied from Turkmenistan to Iran and an equivalent volume from Iran to Azerbaijan.⁶⁴ However, Turkmenistan and Azerbaijan were unable to reach an agreement on continuing the swap arrangement with Iran in 2024,⁶⁵ suggesting that Azerbaijan will likely increase its imports of Russian gas. While it is in Russia's interest to prevent the emergence of energy-related actors or projects outside its control, it is directly involved in this deal.

Lastly, Azeri gas remains relatively expensive for the European Union compared to other options. Yet, it remains one of the EU's key import choices.⁶⁶ Regarding global natural gas production, Azerbaijan accounted for 0.8 % in 2022, while the EU's total natural gas production amounted to 1 %, and Russian gas exports represented 15.3 %.⁶⁷ Meanwhile, natural gas consumption in 2022 stood at 8.7 % for the European Union, 10.4 % for Russia, and Azerbaijan only consumed 0.3 % of global natural gas. The European Union was responsible for 23.9 % of global natural gas imports that year. LNG exports from Europe and the CIS grew by approximately 105 % in 2022. Europe primarily imported its gas from

⁶¹ William Howey, "Azerbaijan's Gas Exports to the EU Face Challenges," *Economist Intelligence Unit*, July 10, 2023, <https://www.eiu.com/n/azerbaijans-gas-exports-to-the-eu-face-challenges/>.

⁶² "Azerbaijan Energy Profile," International Energy Agency, August 2023, https://iea.blob.core.windows.net/assets/0528affc-d2ba-49c9-ac25-17fc4e8724f7/AzerbaijanEnergyProfile_2023.pdf.

⁶³ Energy Institute, "Statistical Review of World Energy," 15, 27.

⁶⁴ Energy Institute, "Statistical Review of World Energy," 15, 27.

⁶⁵ Akhal-Teke: A Turkmenistan Bulletin, "Turkmenistan: Swap Stop," *Eurasianet*, January 9, 2024, <https://eurasianet.org/turkmenistan-swap-stop>.

⁶⁶ Fakhri J. Hasanov et al., "The Role of Azeri Natural Gas in Meeting European Union Energy Security Needs," *Energy Strategy Reviews* 28 (March 2020): 100464, <https://doi.org/10.1016/j.esr.2020.100464>.

⁶⁷ Unfortunately, the shift in global energy trade from 2022 to 2023 cannot be compared as the 2023 report is only going to be published in June 2024.

Russia and Norway, with smaller contributions from Africa, CIS states, and the Middle East.⁶⁸ In the same year, Europe's oil imports were highly diversified, with the largest suppliers being Russia, the Middle East, the United States, and North Africa.

Conclusion

Since 2022, there has been a shift in regional power dynamics in the wider Black Sea area. Russia has been losing its grip on its “near abroad,” particularly in Moldova, Ukraine, Georgia, and Armenia. This shift presents an opportunity for other actors, such as Türkiye, Iran, and the European Union, to increase their influence in this geo-strategically important region. Consequently, any instability in the wider Black Sea area poses challenges for the European Union because of its geographic proximity, economic interdependence, and geopolitical position. Unfortunately, the European Union has not achieved the objectives set out in its policy initiatives targeting its Eastern Neighborhood. Its cooperation efforts with Black Sea states have failed to make them more democratic, promote European values, or stabilize their economies. Additionally, these efforts did not contribute to the diversification of gas supply sources. On the contrary, EU member states continued fostering dependence on a “single untrustworthy supplier,” which contributed to the recent energy crisis.

All EU foreign policies directed toward the Black Sea area can thus far be considered unsuccessful as the security situation in the region continues to worsen. Tensions persist due to the absence of a regional security architecture and the persistence of frozen and active conflicts. EU member states have also contributed to their energy insecurity by becoming overly dependent on Russian state-owned companies for gas and electricity. This reliance has weakened critical infrastructure and left it vulnerable to political manipulation. Only after the onset of the Ukraine war EU decision-makers began critically reassessing their policy options. They are now attempting to find more reliable energy suppliers and align diversification efforts with the green energy transition.

Furthermore, the European Union has assumed a pivotal role in the ongoing peace negotiations between Armenia and Azerbaijan. Its energy deal could contribute to the establishment of a sustainable peace agreement. Consequently, to achieve one of its long-term goals—diminishing Russia's influence over the South Caucasus region—the European Union could deploy a peacekeeping mission under its Common Security and Defense Policy and lay the foundation for normalizing relations between Armenia and Azerbaijan. Finally, the European Union must carefully select its partners for future long-term cooperation. There are far more reliable options than Azerbaijan or Russia. For example, in 2023, Norway and the United States became the EU's main natural gas suppliers, accounting for 30 % and 19 % of total EU gas imports, respectively. Therefore, the European

⁶⁸ Hasanov et al., “The Role of Azeri Natural Gas in Meeting European Union Energy Security Needs.”

Union could focus on strengthening its partnerships with these countries instead, which would be more sustainable in the long term and could help the European Union address its energy crisis.^{69,70}

Despite the EU's "transformation efforts," democracy and human rights are in decline across the wider Black Sea region.⁷¹ The integration of Georgia, Moldova, and Ukraine is strategically significant for EU foreign policy. However, their prospects of joining the EU remain uncertain, given the stalled enlargement process in the Balkans and the extensive reforms they must undertake to meet the conditions for membership. The Economist Intelligence Unit's Democracy Index 2023 classifies Azerbaijan as an authoritarian regime,⁷² and none of the other states in the wider Black Sea region are considered full democracies; six are classified as flawed democracies, two as hybrid regimes, and two as authoritarian regimes. Overall, the wider Black Sea region has a Democracy Index score of 5.11 out of 10, making it one of the lowest-scoring subregions in the world.⁷³ This is primarily due to a weak political culture and deficiencies in government functioning.

Other persistent issues include the depletion and diversification of gas and oil reserves. In this regard, enhanced energy cooperation among EU member states could be beneficial. The exploration of new offshore deposits is complicated by maritime border disputes, which could lead to renewed dependence on Russian oil to meet demands in the Black Sea region and beyond. Furthermore, no significant economic improvements have been achieved in the Black Sea region in recent years; on the contrary, the region is experiencing economic decline.⁷⁴

In conclusion, the EU's efforts to secure alternative gas sources, which involve purchasing Russian gas from Azerbaijan and supplying it to the European Union under an Azerbaijani label, as well as the possibility of selling gas under a pseudonym via the AggregateEU program, contradict the EU's goal of reducing dependence on Russian gas. Exporting gas from authoritarian states like Azerbaijan

⁶⁹ Hasanov et al., "The Role of Azeri Natural Gas in Meeting European Union Energy Security Needs."

⁷⁰ "In Focus: EU Energy Security and Gas Supplies."

⁷¹ Eske van Gils, "Differentiation through Bargaining Power in EU-Azerbaijan Relations: Baku as a Tough Negotiator," *East European Politics* 33, no. 3 (2017): 388-405, <https://doi.org/10.1080/21599165.2017.1322957>.

⁷² Economist Intelligence Unit, "Democracy Index 2022: Frontline Democracy and the Battle for Ukraine," February 2023, accessed June 17, 2023, <https://www.eiu.com/n/campaigns/democracy-index-2022/>.

⁷³ Economist Intelligence Unit, "Democracy Index 2022: Frontline Democracy and the Battle for Ukraine," 50.

⁷⁴ Elena-Iulia Chita and Silvia Dumitrescu-Popa, "Black Sea and East Mediterranean Approach on Sustainable Development," *Theoretical and Applied Economics* 30, no. 1 (Spring 2023): 205-214, [https://econpapers.repec.org/article/agrjournl/v_3a1\(634\)_3ay_3a2023_3ai_3a1\(634\)_3ap_3a205-214.htm](https://econpapers.repec.org/article/agrjournl/v_3a1(634)_3ay_3a2023_3ai_3a1(634)_3ap_3a205-214.htm).

does not necessarily alter the security climate for the European Union, as Azerbaijan's political aspirations do not pose a direct threat to its member states, unlike Russia's.⁷⁵

However, there is a significant risk of underestimating Azerbaijan's military power and geopolitical ambitions, particularly given the influence of its staunch supporter, Türkiye, which, unlike Azerbaijan, wields considerably more power on the international stage. Ultimately, the repeated failures of the EU's foreign and energy policies in the region have created a policy vacuum, providing an opportunity for key regional players, including the European Union, to advance their interests and promote more stable and diversified energy cooperation with states that are willing and able to disengage from Russia.

Disclaimer

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⁷⁵ Martin Jirušek, "The EU's Decoupling from Russian Gas: What's the 'New Normal' and How Sustainable Is It?" *Russian Analytical Digest*, no. 308 (January 2024): 18-21, <https://doi.org/10.3929/ethz-b-000658789>.

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