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THE GEOPOLITICS OF GAZPROM'S PIPELINES

1. INTRODUCTION

The natural gas market over the years has been strongly dependent on pipeline transport and based on it a gas market was created and functioned. It was connected with the properties of the fuel, including, inter alia, compressibility and relatively low energy per unit volume.

It caused that transport using other methods was ineffective in terms of technical aspects and not very profitable. For this reason, unlikely to the oil market, the global gas market was not created and did not function, but only national, regional and continental markets separated from the others functioned. The situation began to change in recent years due to the fast technological development of liquefied natural gas (LNG) technology and the rise of the global natural gas market seems now unavoidable. Currently though, markets still operate mainly based on transmission pipelines. The consequence of this situation is the fact that the key importers of Russian gas abroad are the CIS countries and European countries.

The Russian transmission infrastructure was built in the Soviet times to deliver gas to key industrial centres of the Soviet Union and other socialist countries of Eastern Europe. In the 70's and 80's of the XXth century two first main lines for transferring Russian gas to Western Europe were opened. One of the pipelines – Brotherhood (Братство) – transporting gas from the Western-Siberian Basin, the second – Soyuz (Союз) – from the Orenburg deposits.

At the turn of the twentieth / twenty-first century Russian natural gas reached Europe via three major land routes:

1. Pipeline Brotherhood and Soyuz – running through Ukraine (handle about 90% of Russian gas exports to Europe), Slovakia, and further branching to Hungary and Austria and the Czech Republic and Germany.

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2. Yamal pipeline (Ямал) – Yamal-Western Europe, running from Western Siberia through Belarus to Poland and then to Germany.
3. Blue Stream pipeline – leading to Turkey and further to the countries of Southern Europe.

Operating and planned transmission pipelines are presented in Table 1 and Figure 1.

Table 1
Russian gas pipelines

| Specification | Fields | Direction of delivery | The length of system | Year of construction | Annual capacity |
|---|--|--------------------------------------|----------------------|-----------------------|---------------------------|
| Existing gas pipelines | | | | | |
| Brotherhood (Братство) | Western Siberia Basin | Europe | 4.5 thousand km | 1982–1984 | 32 billion m ³ |
| Soyuz (Союз) | The reservoirs of Orenburg(Ural) | Countries of western Europe | 4.6 thousand km | 1975–1976 | 72 billion m ³ |
| Yamal – Europe (Ямал-Европа) | Western Siberia Basin | Countries of western Europe | 2.0 thousand km | 1997–2001 | 33 billion m ³ |
| Nord Stream (Северный поток) | Western Siberia Basin. Pipelines run along the bottom of Baltic Sea | Countries of western Europe | 1.1 thousand km | 2010–2012 | 55 billion m ³ |
| Blue Stream (Голубой поток) | The reservoirs of the Caspian, Pipeline runs along the bottom of the Black Sea | Turkey, countries of southern Europe | 1,2 thousand km | 2000–2003 | 16 billion m ³ |
| Planned (and abandoned) gas pipelines(direction: Russia – Europe) | | | | | |
| South Stream (Южный поток) | pipeline runs along the bottom of the Black Sea | Southern Europe countries | 3,6 thousand km | 2013–2018 (abandoned) | 63 billion m ³ |
| Turkish Stream (Турецкий поток) | | Turkey, southern Europe countries | 0,9 thousand km | 2015–2019 | 63 billion m ³ |
| Nord Stream-2 Северный поток-2 | Western Siberia Basin | Western Europe countries | 1,1 thousand km | 2016–2019 | 55 billion m ³ |

Source: own elaboration

One consequence of the USSR collapse was the loss of the gas assets, which were on the territories of former Soviet republics – about 25% of the total amount of compressor stations, more than 30% of gas pipelines and 30% of fields and underground gas storage facilities [15]. Thus, part of the transmission pipelines that previously worked within one Soviet system came under control of neighbouring countries and in order to further export deliveries to EU countries, Russia had to come to an agreement with transit countries.

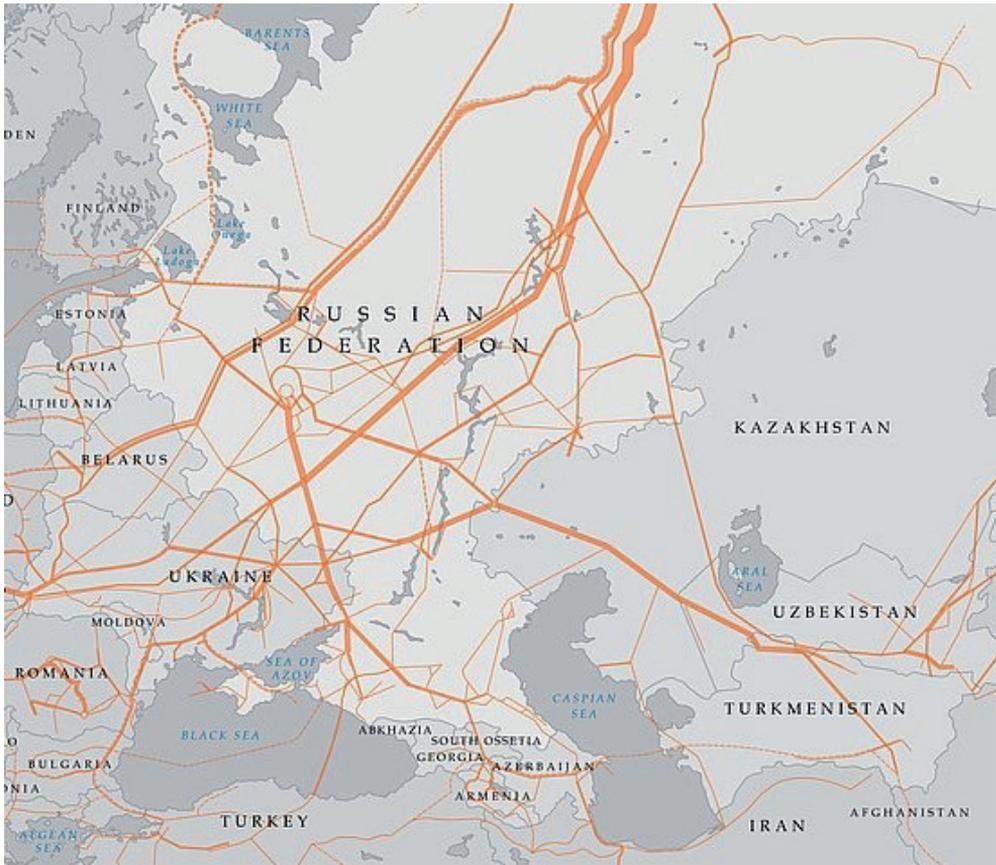


Fig. 1. A map of Russian gas transmission system

Source: <http://www.gazpromquestions.ru>

In new circumstances Gazprom set itself two aims:

1. taking over control of Belarusian and Ukrainian transmission systems,
2. maintaining advantage of logistics over Ukraine and Belarus, which resulted in the reduction of the transit role of these countries.

2. ATTEMPTS TO TAKE CONTROL OF THE TRANSMISSION SYSTEMS OF TRANSIT COUNTRIES

Since the mid 90-ties Gazprom has undertaken another, not always successful, attempts to take control of the gas sectors of countries evading to adjust to their financial obligations. Increasing debt to the Russian giant has become a major argument aimed to persuade Kiev to provide Russia the Ukrainian transmission system, underground gas storage facilities and petrochemical companies. The Russian side mainly meant the acquisition of the Ukrainian

Gas-Transport System (GTS), which has been one of the main transit routes for Russian gas to Europe. It consists of a network of pipelines with a total length of 38.55 thousand km, including 22.16 thousand km of main pipeline. GTS capacity at the input amounts to 287.7 billion m³, at the output – 178.5 billion m³ per year. Transit by “Brotherhood”, a Russian gas pipeline, declines from year to year. In 2007, Ukraine secured the transit of 115.2 billion m³ of gas, and in 2013, amounted to only 86.1 billion m³.

It means that the flow capacity of the GTS was not used even in 50% of its maximum potential. The wear rate of the system, as well as the lack of budget funds for its modernization caused the necessity of seeking investors capable on its own to finance the renovation and modernization of the system. This led to the adoption of the Regulation “On the introduction of amendments to some laws of Ukraine concerning the reform of the management of Ukraine’s GTS” [14].

At the beginning of a new century Moscow and Kiev began negotiations on creation a Russian-Ukrainian consortium to manage the Ukrainian transit pipelines. There were furthermore plans to create two or three consortia involving the EU, Russia and even the US.

The agreement, eventually, has not been reached. One of the reasons was the strong politicisation of the situation around the Ukrainian transmission system, treated as “national property”, which could not belong or be managed by anyone else, but Ukraine itself.

In 2007, Putin unexpectedly stated that both countries were working on a new project consortium, in exchange for shares to Gazprom, Naftogaz would get access to Russian gas fields. In response, the Ukrainian government passed a law prohibiting the privatization of the national gas system to prevent a potential takeover of it by Gazprom [8].

More successfully ended the Russian operation on the Belarusian gas market. In 2007, Minsk in exchange for a transition period when raising gas prices consented to the acquisition by Gazprom of 50% of the shares in Beltransgaz, the owner of the transit pipeline, sending the Russian gas to the West. Treating Beltransgaz as a tool used by the Lukashenko regime to balance a total dependence on energetic resources, Belarus for many years defended from selling this strategic company to a Russian concern [8]. In 2011, Gazprom bought the other half of the shares of Belarusian gas operator [18].

3. LIMITING A TRANSIT ROLE OF UKRAINE AND BELARUS

The lack of prospects for the acquisition of Ukrainian gas pipelines and frequent conflicts with neighbours concerning the supply and transit of Russian gas, led Russia to create alternative transport routes to bypass these countries and get direct access to the European market.

A construction of the Yamal pipeline is a part of such a strategy. This was the first diversification project, aimed at reducing dependence on the Ukraine, and at the same time raise the importance of Belarus as a transit state. Another project, which fits in the Russian concept of becoming independent from transit countries for the transmission of energy resources, was the construction of the Nord Stream pipeline. From the Russian point of view, both Nord Stream and its twinning project – South Stream – were intended to increase the guarantee of security of supply to the EU, as well as to strengthen its position in negotiations with existing transit countries.

4. GAZPROM TRANSIT PROBLEMS TOWARDS CHANGES ON THE EU ENERGETIC MARKET

An important issue in the field of energy interests of Russia on the European market are the EU actions concerning the diversification of energy supplies. Next to them, the European Commission supports efforts to liberalize the EU gas market. Valid from 2011 “Third Energy Package”, enforces competition on the energy market, strengthen the independence of regulators and requires separating production, transmission and distribution activities within the EU. One of the records of particular objections of Russia, requires from companies operating on the EU market allowing access to pipelines to other gas suppliers [20]. Initiated changes have a direct impact on Gazprom, as they need to resign from conducted strategy on the European market.

Moscow has already achieved a compromise with the EU in the case of the Nord Stream pipeline, which runs through the territorial waters or exclusive economic zones of Russia, Finland, Sweden, Denmark and Germany. Nord Stream has been partially released from the demands of the Third Package, as a project of “European importance”. The Russians had hoped that a similar “suspension” rules package would be applied to the next Gazprom’s strategic investment – the South Stream pipeline.

Russia might be a bit anxious concerning Ukrainian plans to reform Fuel and Energy Complex. In October 2014, “Peter Poroshenko’s Block” presented a project of complying the Ukrainian gas market to the EU standards and the Third Energy Package.

The project assumes that Naftohaz should be divided by types of business (a part concerning transmission and underground gas storage will be separated). The party offered open access to the country’s gas-transport infrastructure and adapting regulations of the gas market to EU standards. The share of each foreign gas supplier for the Ukraine from 2018 should be limited to 30% of the annual volume of the country’s consumption [12].

Changes initiated by the EU on the energy market as well as Ukrainian government’s declaration to comply with them to increase the transit risk for Russian gas supplies (through the territory of the Ukraine). The transit risk is divided by the Russians into two categories:

1. real – took place recently,
2. potential – expected in the near future.

In the real risk one can mention unsanctioned consumption of gas transported through the Ukraine (for example gas conflicts in January 2006 and January 2009), which could involve legal consequences. According to the export contracts of Russian gas to the EU, responsibility for its delivery to the collection points located within the EU falls on the supplier (Gazprom), regardless of the transit or any other problems standing in the way of the indicated points. Therefore, there is a real risk of lawsuits brought by European consumers against Gazprom in the event of interruptions in gas supplies, even if the cause is related to the actions of a third party (transit). Although European recipient does not put forward such complaints against Gazprom after the events of early 2006 and 2009, there is no guarantee that it will not do so in the event of another transit crisis between Russia and the Ukraine.

The potential risk group includes the risk resulting from irreversible changes that have already begun and will be continued as a consequence of the subordination of Ukraine to those applicable to EU energy markets. Firstly, there is a question about the risks associated

with the future division of the company Naftohaz and the transfer of the rights of the national operator GTS system initially separated from the structure of the company Ukrtransgaz, and at a later stage of the consortium of foreign (European and American) companies with his participation. Secondly, it is a risk applied to operators of Ukraine's GTS principle of "mandatory third party access" in relation to supplies under existing and already contracted power and gas transport. As a result of these changes, from the raw material supplier – Gazprom – there is a risk of so-called "non-compliance of contract" – a contract between the supply of gas to the EU and securing it by transit agreement [9].

5. RUSSIAN PROJECTS TO DIVERSIFY GAS TRANSMISSION ROUTES

Yamal pipeline

Extremely popular in the 90s the Yamal gas pipeline project assumed the construction of two lines with a total capacity of over 60 billion m³ of gas per year. Until now one pipeline has been built with a capacity of 33 billion m³ per year, providing the raw material for Germans and Poles. Implementation of the second line has been suspended due to the change of Russian priorities and taking up in the late 90's the work on the project for a different route of a pipeline [10]. Yamal gas pipeline bypassing the Ukraine, was supposed to be the first of three attempts – except for Nord Stream and South Stream) – limiting the transit importance of that country. The second line of the Yamal gas pipeline, would question both of these projects, however, even this one not passing through the Ukraine, would restrict its strategic importance.

Nord Stream (North European Gas pipeline, trans-baltic gas pipeline)

Year by year Russia puts forward more and more allegations towards the Ukraine, the main transit country for Russian gas. They concerned not just any kind of settlement systems (often barter, the type of transport for gas), but also the timeliness of settlements and the level of prices. In this situation, Gazprom decided that the only way to solve problems is to build a gas pipeline directly to Germany, bypassing transit countries.

The decision to build Nord Stream, which runs from Russian Vyborg under the Baltic Sea to the German Lubmin near Greifswald, was taken in 2005. In the same year a consortium for its construction was created, which included: Gazprom (51% of shares), Wintershall Holding GmbH and E.ON Ruhrgas AG 15.5%, and NV Nederlandse Gasunie and GDF SUEZ 9% of shares [26]. Capital expenditures, equal to 7.4 billion euros, were covered in 30% by the shareholders and in 70% by bank loans.

Nord Stream consists of two lines with a total length of 1200 km. Construction of the first of them lasted from April 2010 till November 2011, while the second one was completed in October 2012 [4]. Transmission capacity of both lines is 55 billion m³ per year.

The purpose of Nord Stream, except for the diversification of export routes for Russian gas in case of problems with transit countries, is also to open the way to new markets in the European area.

Germany's consent to the pipeline creation was dictated by the growing domestic demand for energy resources, which resulted from continuing at that time a significant economic

growth. When the Nord Stream started to operate, Russia began to supply the German market for almost 40% of natural gas consumed there (34–38 billion m³) and over 30% of oil (32–34 million tons), and as a result Germany has become the largest EU consumer of Russian energy.

The main investment project was supplemented by two land projects: the OPAL gas pipeline responsible for the transmission of Russian gas to the south and the NEL pipeline, supplying Russian gas to the trans-regional transmission system located in the western part of Germany [4].

South Stream (Southern Pipeline)

The Russian-Ukrainian gas crisis in early 2006, which resulted in short-term interruptions in the supply of “blue fuel” to European countries, was the reason for developing the next strategy of diversification of export routes for Russian gas to the West. South Stream was supposed to be another gas transmission route from Russia, bypassing the Ukraine.

South Stream, which was a joint project of ENI, Wintershall and EDF, was supposed to become a guarantor of Russian gas supplies to Central and Southern Europe. The route of the gas pipeline with a length of 3600 km started from southern Russia and went under the Black Sea to Bulgaria and then to Serbia, Hungary, Austria and Slovenia. One of the branches was to supply gas to Greece and the south of Italy.

The potential importance of South Stream was two-fold:

- 1) The pipeline would ensure the security of Russian natural gas supplies to Europe through the elimination of the Ukraine as a transit country.
- 2) From the Russian point of view, the construction of a new pipeline would not only reduce dependence on Ukrainian transit pipelines, but also ensure getting Russian gas to southern European market before competitors from the Caspian region and Central Asia.

South Stream was to consist of four lines with a total capacity of 63 billion m³ of gas per year. Its construction was initiated in late 2012, and the launch of the first line was to take place in 2015; the full power of the pipeline was supposed to be achieved in 2018. Capital expenditures were estimated at 15.5 billion euros, of which 10 billion euros accounted for its sea part [26].

The European Commission was originally neutral towards the South Stream project. The argument for supporting the project in favour of Gazprom was to increase the possibility of importing natural gas to Europe and the creation of new infrastructure.

However, already in October 2011, the European Commission rejected the possibility of granting South Stream with the status TEN (EU Energy Priority Project), which would facilitate its financing. A similar defeat ended the efforts of Moscow to exclude the pipeline from the regulation of the Third Energy Package [26]. According to the EC intergovernmental agreements of Bulgaria, Hungary, Greece, Slovenia, Croatia and Austria and Russia were contrary to the Third Energy Package of the EU. In the opinion of the EC agreements give excessive rights to Gazprom, including management of the pipeline, exclusive access to it or fixing tariffs. However, by mid-2014, countries participating in the project (including the EU) disagreed in their views with Brussels, protecting the project and ignoring demands to freeze its construction. Finally, the US has pressured Bulgaria, a country in which South Stream

should enter the territory of the EU. The official reason for suspending the execution of the project on the territory of Bulgaria became a tender for the construction of the Bulgarian section of the pipeline, won by the company “Sroytransgaz Consortium”. It consists of Bulgarian company Gas Project Jug and Sroytransgaz, controlled by Gennady Timchenko, subjected to USA (but not the EU) sanctions [3].

According to the Russians, the US was interested in freezing the South Stream project, not only for political reasons. According to Russian data, Ukraine is considering putting their pipelines under the control of American and European companies and in such a situation South Stream would drastically reduce the value of these assets.

On December 1, 2014, President Putin said that Russia gave up construction of the South Stream pipeline because of the unwillingness of the EU and “unconstructive position” of the European Commission. At the same time, Gazprom bought a 50% stake in South Stream Transport B.V from European partners Wintershall, Eni and EDF.

The Turkish Stream

Simultaneously with the withdrawal of the South Stream project, the Russians launched a construction of a new gas pipeline – the Turkish Stream – which would be led through the Black Sea to Turkey and then to the border with Greece. The new transmission route was supposed to consist of four lines with a total capacity of 63 billion m³ per year, the first of them with a capacity of 15.75 billion m³ was planned to operate by the end of 2016. Gas from this line was solely planned to be sent to the Turkish market [27]. The pipeline is going to run 660 km of the route previously planned for South Stream and a further 250 km through a corridor to the European part of Turkey [1]. The cost of the entire project was estimated at about 19 billion euros [24]. Commentators point out that the agreement between Moscow and Ankara was a blow to the Transatlantic pipeline (TANAP), which was lobbied by the US and the EU.

Changing the position of the Balkan countries on their participation in the Russian project to build a gas pipeline brings the Turkish Stream into question. At the beginning of April 2014 the foreign ministers of Greece, Serbia, Hungary, Macedonia and Turkey signed in Budapest a declaration to build a new gas pipeline from Turkey to Europe. Moscow interpreted this as clear support for the Turkish Stream, as all the representatives of the mentioned countries were keen on participating in the project.

But a few days later it became clear that negotiations between Gazprom and Turkey came to halt. Greece had to sign an agreement to extend the pipeline in its territory on April 21, what did not happen as a result of accusations of Gazprom by the European Commission for breach of antitrust law.

At the beginning of May, Serbian President Tomislav Nikolic said that the implementation of the Turkish Stream was impossible and his country would not receive gas from the Russian pipeline. In turn, the Serbian Prime Minister said that the country joined the construction of a gas pipeline from Azerbaijan, in competition with the Turkish Stream. Macedonia made the accession to the Russian project dependent on its acceptance by the EU. The last one, seeing the danger of the Turkish Stream increase Europe’s dependence on gas supplies from Russia, calls for its blocking [21].

By the end of July, the media reported the suspension of Russian-Turkish negotiations on the construction of the gas pipeline Turkish Stream, and a Russian Energy Minister Aleksander Novak announced a delay of its launching [23]. The main reason for the suspension of negotiations, experts pointed to the lack of compliance to grant Turkey a discount on Russian gas. An additional obstacle is the desire of Russia to build four gas pipelines with a capacity of 63 billion m³ of gas per year, while Turkey agrees to build only one line for their own needs.

The next three lines would be dedicated to European customers. In addition, Gazprom has not reached an agreement with the Turkish company Botas concerning a discount on the supplied gas. At the end of February, the Turkish Energy Minister Taner Yildiz said that his country received from Russia a discount of 10.25% (in 2014 the price of gas to Turkey amounted to USD 366 per 1000 m³). In May, Gazprom CEO Alexei Miller said that Gazprom and Botas initially agreed to the new price. Nevertheless, Turkey still sought to negotiate a lower price similar to the price of gas for Germany [17]. In September 2016 Gazprom got the approval from the Turkish government for the construction of two lines of the Turkish Stream.

6. NORD STREAM-2

Due to the protracted negotiations on the construction of the Turkish Stream, Gazprom once again transformed the strategy of diversification of gas export routes to Europe, signing an agreement with European partners on the construction of two new lines of Nord Stream, running under the Baltic Sea from Russia to Germany. A newly established company, New European Pipeline AG, will be in charge of this project. Initially, control over the Nord Stream-2 was to be performed by Gazprom, while the share of BASF / Wintershall, OMV, Shell and E.ON was to reach 10%, and Engi – 9% [22]. Finally, the Russian gas giant agreed to sell 1%-stake in the project to Engi company, while losing control of the project (50% of shares) [6].

The launch of new pipelines, with a total capacity of 55 billion m³ per year, would take place by the end of 2019. Experts note, however, that the capacity of Nord Stream-2 is not enough to fulfill all contractual obligations – that is why in order to minimize the risk of transit, a line to Turkey should be considered.

At the end of 2015, President Putin pointed to the possibility of returning to build the Turkish Stream, however, under the condition of receiving by Turkey a written guarantee from the EU “that the route through Turkey to Europe is a priority project and the EU will support it.” Putting the matter this way, actually deprived the project of any chance of realization, as Turkey is not a member of the EU, and there is no chance of getting such guarantee [2].

At the end of November 2015 representatives of nine European countries in a letter to the European Council President Donald Tusk demanded to withdraw from the project Nord Stream-2, arguing that it will strengthen Europe’s dependence on Russian natural gas, which denies the European Union policy of diversification of energy sources and gives Russia another instrument to exert geopolitical pressure.. The authors of the letter criticized also the attitude of Germany for putting its own economic interests above the interests of the energy

security in Eastern Europe. The final version of the letter was signed by representatives of Estonia, Hungary, Latvia, Lithuania, Poland, Romania and Slovakia. The original version was signed by the Czech Republic and Greece [16]. Also Italian Prime Minister Matteo Renzi spoke out against Nord Stream-2, highlighting that the project negates the spirit of the sanction campaign against Russia [19].

Another document raising criticism of building a second line of Nord Stream was a letter sent to European Commission President Jean-Claude Juncker by the leaders of eight Member States in March 2016. In the letter, signed by prime ministers of the Czech Republic, Estonia, Hungary, Latvia, Poland, Slovakia and Romania and the President of Lithuania, it is stated that the Nord-Stream-2 “does not contribute either to diversify sources or to diversify suppliers. This will increase the dependency on existing roads (supply), which is not consistent with the objective of EU energy legislation, which aims to increase security of supply and market liberalization” [5].

The operator of the project – Nord Stream-2 – referred to the allegations, claiming that the construction of a new gas pipeline does not threaten the energy security of Europe. The operator agrees that the security of energy supplies is crucial for Europe and the second gas pipeline of Nord Stream will reduce the risk of disequilibrium for Eastern and Central Europe [13].

Against the project, not for the first time, was the USA. American diplomats believe that the second branch of this pipeline will undermine the strategy of the EU Energy and annihilate projects in the field of liquefied gas. The Americans undermined the desirability of building the Nord Stream-2, not only due to the fate of US exporters of liquefied natural gas, as LNG producers have the opportunity to sell raw material for the Asian market, where the gas has a higher price. The second line of Nord Stream will also harm Ukrainian economy, which still is a key transit country for Russian gas to Europe [25].

Therefore, Nord Stream-2 has divided members of the European Union. Some of them see the project as part of Russia’s foreign policy, aimed at the EU’s energy dependency. Its construction support the countries such as Austria, France, the Netherlands, and above all Germany. Companies from the above mentioned countries are involved in the project. They argue that the Nord Stream 2 project is purely commercial.

Although the European Commission has many times declared that it will scrupulously check whether the plans of Nord Stream-2 comply with EU regulations, but so far Brussels has not declared a verdict in this case.

7. CONCLUSION

The Kremlin hiding behind Gazprom has consistently pursued a policy of diversification of export transmission systems, designed to eliminate Ukraine as a transit country. Initially, President Putin expressed hope for full transit independence from Kiev already in 2020. A little later, Russian media stated that after that date small amounts of gas may still be sent to the West via Ukraine.

The Turkish Stream was supposed to be the only route capable after 2019 to provide the EU 63 billion m³ of gas currently flowing through the Ukraine. Following the declaration on the construction of Nord Stream-2, partially unfreezing the Turkish Stream and resigning

from the renewing of a transit contract with the Ukraine, Russia played “va banque”. In 2019 the transit contract expires with the Ukraine and the new terms proposed by the Ukrainian side are not acceptable to the Kremlin. In the spring of 2015 the Ukrainian government passed a law “On the natural gas market”, to adjust their domestic gas market to the regulations of the European energy law. According to it, the tariffs for transportation of gas should be set by a local energy regulator based on the costs of the GTS operator and available transmission capacity. Tariffs should be also equal for transit and domestic transmission. For Russia, this means raising the price for the transmission of gas from 33.5 USD to 55.8 USD per thousand m³. A new tariff proposed by Kiev is higher not only than the price of gas transport using the Yamal-Europe pipeline, but also than the current tariff for the Nord Stream. Kiev’s decision to raise tariffs for gas transmission can give strong arguments to Gazprom and its European partners, who argue that the Nord Stream-2 is primarily a commercial project, not a political one [11].

Over the next nearly four years, Gazprom has to solve the problem of supply of Russian gas to European consumers, to fulfil the full range of long-term contractual obligations towards the countries dependent on supplies through the Ukrainian gas transmission system. Prolonging the contract with the Ukraine after 2020 seems now unlikely, though not impossible, in case Ukrainian and Russian are able to find mutually acceptable terms.

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