THE BALKANS AS A TRANSIT REGION FOR GAS PIPELINES TOWARDS EUROPE

Nefail EMINI[1]

Abstract

The Balkan Peninsula is moving from a peripheral position in the European energy architecture towards an increasingly important role as a key region for transporting natural gas to the markets of the European union. The geographical position of the Balkans as a connecting bridge between Europe, central Asia and the middle east, which are rich in energy sources of the old continent. Under the conditions of the energy security crisis following the escalation of the war in Ukraine, the EU has strengthened its commitment to reducing dependence on Russian gas supplies and developing alternative supply routes, particularly through Caspian resources and American gas. The war in the middle east has made the diversification of not only energy sources but also transit routes even more urgent. In this context, the Balkan is becoming a strategic hub connecting Caspian resources, LNG, American LNG, and European markets. Despite the fact that the EU has imposed restrictions on Russian gas, TurkishStream continues to play an important role in supplying gas to Europe.

The current system of gas corridors relies mainly on the Trans Adriatic Pipeline (TAP), which transports Azerbaijani gas from the Caspian region through Greece and Albania towards Italy and the European market. From Fier, the Ionian – Adriatic Pipeline (IAP) project aims to extend the network from Albania through Montenegro and the Croatian coastline to Split, with a planned capacity of approximately 5 billion cubic meters per year. The IAP could connect the markets of Albania, Montenegro, Bosnia and Herzegovina and Croatia with TAP, turning the Adriatic coastline into a very important two – way gas corridor. An important dimension of this architecture is also American LNG. The Alexandropoulos terminal in Greece, with an estimated capacity of around 5.5 billion cubic meters per year, has been designed as an entry point for LNG, including supplies from the United States, and is connected to the Greek network, the Greece – Bulgaria interconnector and TAP. At the same time, the Krk terminal in Croatia, which began operations in 2021 and has been expanded towards a capacity 6.1 billion cubic metres per year, functions as a regional hub for distributing gas to Hungary, Slovenia AND THE Balkan markets.

The Vertical Gas Corridor represents another strategic project of particular importance for diversifying the sources and routes of natural gas supplies in Europe. Passing through the Balkans and enabling the interconnection of regional energy system with the markets of Central Europe, this corridor contributes to strengthening energy security and reducing dependence on traditional supply sources. The East Med project, which envisaged transporting gas from Israel and Cyprus through Crete and Greece towards Italy, remains an important example of the geopolitical ambition to diversify European Supplies.

Keywords: Balkans, Natural Gas, TAP, East Med, IAP

The Balkans as a transit region for gas pipelines towards Europe

Historically, the Balkans has served as a connecting bridge between the east and the west. From this geographical area, alexander the great marched towards the east, while the ottoman empire marched towards Vienna. Today, the role of the Balkans is undergoing an important transformation: from a historical corridor for military, cultural and economic movements, it is now gradually becoming a strategic hub in the distribution of energy resources. The geographical position of the Balkans and its proximity to regions rich in energy resources, such as the Caspian region, the Middle East, Russia and the Eastern Mediterranean, are turning the region into an important strategic hub for transporting natural gas towards international markets. In the past, the Balkans had a very peripheral role in the energy strategy of the European Union, but this situation has changed over the last four years, giving the region an energy significance that it had not previously possessed. Through pipelines, interconnected gas networks, and other pipelines expected to be built, the region will be able to become an important area for transporting these resources towards consumers in Europe. At the same time,

[1] Nefail Emini – PhD Candidate at South East European University (SEEU) – ne32354@seeu.edu.mk

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these alternative routes will reduce the EU's energy dependence on Russian natural gas. This will provide the Union with greater energy security, more favourable prices and greater political independence. "The Southeast European region is an important historic transport corridor connecting Europe, Asia and Africa. A vital section of the Trans-European energy infrastructure is located here." (Asenov, 2018, p. 233).

The European Union is an extraordinary political and economic power, but it is poor in terms of energy resources, and in order to meet its needs, it is almost entirely dependent on external suppliers. "In 2025, the EU's natural gas import dependency rate was 87.6%. (Eurostat, 2026). This energy dependence has often also turned into political and economic dependence, which has affected Brussels' decision – making independence. This high level of dependence has made energy security one of Brussels' most important policies, which began to occupy an important place in the Union's political offices following the 1973 oil crisis and reached its peak with the Russian invasion of Ukraine in 2022. "Energy supply security is often defined as the availability of an adequate supply of energy at a reasonable cost.." (Dulian, 2024, p. 1). This increase in its importance has occurred particularly after the Russian invasion of Ukraine and the escalation of tensions in the Middle East, which restricted traditional supply sources and the traditional routes used to transport these energy resources. These developments have highlighted the vulnerability of European energy markets and the need to diversify the sources of supply as well as the routes used to transport natural gas.

"A key part of ensuring secure and affordable supplies of energy to Europeans involves diversifying supply routes. This includes identifying and building new routes that decrease the dependence of EU countries on a single supplier of natural gas and other energy resources. (European Commission, n.d., p. 2). The European Union has also been interested in diversifying energy sources and supply routes in the past, as demonstrated by its support for the "Nabucco" project, which would have passed through the Balkans, but which ultimately failed partly as a result of political disagreements within the Union. Despite its failure, this is an indication that the Union has been interested in new routes and suppliers.

The development of gas corridors in the Balkans can give the region a greater role in the European energy architecture, placing it at the intersection of the economic, geopolitical and security interests of the European Union. Through corridors such as the Trans Adriatic Pipeline (TAP), the Ionian – Adriatic Pipeline (IAP), and other planned projects such as East Med, a new energy map is being created for the European Union.

The United States of America is strongly involved in diversifying energy sources for the European Union, as it is interested in the Union reducing its dependence on Russian gas. In this new context of energy strategy, the Balkans is gaining great importance as a key point in the distribution of energy resources. "The past year has seen the Administration of President Donald Trump engage in an aggressive commercial diplomatic campaign to press Europe to look to the United States as its main energy partner. In particular, the Administration has focused on the Western Balkans as a region ripe for providing strategic entry points for U.S. liquefied natural gas (LNG) to power Europe (Primorac, 2026, p. 2). In this new European context, the Balkans is taking on a critical role in Washington's Central Europe. Thus, Balkan Peninsula no longer functions only as a transit area, but also as a practical mechanism through which the EU can reduce its dependence on traditional energy sources and, at the same time, strengthen the security of its supplies.

Pipelines passing through the Balkan Peninsula towards Europe

As mentioned above, thanks to its geographical position and proximity to regions rich in energy resources, the Balkans is taking on a new role following the ongoing crises in Ukraine and the Middle East, becoming a hub in the distribution of energy resources. Even before the conflicts

in these regions, the Balkans was an area through which several pipelines passed, but these are expected to multiply in the future, which would provide Brussels with greater ease and energy security, while also increasing the importance of the Balkan Peninsula. Some of these existing pipelines have changed the direction of the natural gas they transport. While in the past they exported Russian gas, they are now being adapted to transport American gas towards Eastern and Central Europe.

One of the most important pipelines passing through the Balkan Peninsula is the Trans Adriatic Pipeline (TAP), whose importance has become particularly evident now, following the closure of the Strait of Hormuz as a result of the war in the Middle East. "Connecting with the Trans Anatolian Pipeline (TANAP) at the GreekTurkish border, TAP will cross Northern Greece, Albania and the Adriatic Sea before coming ashore in Southern Italy to connect to the Italian natural gas network. (Trans Adriatic Pipeline AG (TAP AG), 2017, p. 1). Then Trans – Anatolian Pipeline transports natural gas from the Shah Deniz fields, in Azerbaijan towards Turkey and, through it, towards Greece and Albania, before ending in Italy. The section from Turkey to Italy has a length of 870 kilometres and a capacity of 11.2 billion cubic metres of natural gas. This pipeline gained great importance because it was the first completed project that would bring natural gas from the Caspian region, more specifically from Azerbaijan's Sah Deniz fields, towards the EU. From 2020 until September 2025, TAP had exported around 50 billion cubic metres of natural gas to Europe, which contributed to increasing Europe's energy security and, at the same time, not only diversified the EU's traditional pipeline routes. As a result of the crises in Ukraine and the Middle East, this pipeline gained great strategic importance for the Union, as it enabled uninterrupted supplies at a time when traditional suppliers from the Persian Gulf interrupted their supplies because of the closure of the Strait of the Hormuz, helping to ease the European energy crisis.

Perhaps the Trans – Balkan Pipelines the perfect example of the changing energy dynamics on the old continent. A pipeline that transported Russian natural gas from north to south is now being transformed into a pipeline that will export American natural gas from south to north. "While the Trans Balkan pipeline system (TBP) has historically been a large-volume gas transport route for Russian gas to SEE and Turkey, this role gradually reduced in the past decade due to commissioning of new import infrastructure in SEE (TurkStream) and under the impact of Russia's invasion of Ukraine flows from North to South finally came to an end with the stop of Russian transit flows through Ukraine on 1 January 2025." (Fisher, 2025, p. 3). This pipeline had a maximum capacity of 27 billion cubic metres of natural gas per year.

The Vertical Gas Corridor is a very important strategic project whose main objective is to increase the energy security of Eastern, Central and Southeastern Europe and, at the same time, diversify energy sources and supply routes. This initiative extends from the Baltic Sea in the north to the Aegean Sea in the east. "The Vertical Gas Corridor (VGC) is emerging as a strategic route for transporting liquefied natural gas (LNG) from Greece into Southeastern and Central Europe, including Ukraine. Built upon the newly operational Alexandropoulos Floating Storage and Regasification Unit (FSRU) and the existing Trans – Balkan Pipeline in reverse flow, the VGC links seven countries – Greece, Bulgaria, Romania, Hungary, Slovakia, Moldova and Ukraine – via existing infrastructure and modest upgrades leading to 10 BCM in transit capacity." (United States Energy Association (USEA), 2025, P. 1). This pipeline, which passes through the Balkans, enables the creation of an alternative to Russian gas for the countries of Eastern and Central Europe, which have historically been dependent on Russian gas and vulnerable to disruptions in its supply. They now have an alternative source and greater energy security. This new gas corridor represents an entry point for American liquefied gas, with Greece and its terminal in Alexandropoulos becoming an important hub for disrupting gas towards the north. At the same time, this corridor is also connected to natural gas coming from the Caspian region, reducing dependence on Russian gas. This corridor also creates an

alternative source of non – Russian gas for Ukraine and Moldova, helping these countries are also benefiting from this corridor. Through a Memorandum of Understanding, Serbia and North Macedonia have joined the initiative, with projects including the North Macedonia – Greece interconnector, with a capacity of 1 billion cubic metres of natural gas, and the interconnector between North Macedonia and Serbia, with a capacity of 1.5 billion cubic metres of natural gas.

This corridor is changing the energy map of Europe and the Balkans because, in a way, it brings an end to the monopolistic position of transit countries through which gas pipelines previously passed towards Europe. It creates a much safer south – to – north transit route, all with the single objective of increasing the Union's energy security. A very important element of his pipeline is also the fact that it creates an energy alternative for the Balkan countries, which can now be supplied with American gas from Greece and gas from the Caspian region, reducing the dependence that some countries in the region have had on natural gas flowing from Russia. In addition to these pipelines that are currently operational, there are also other projects for the construction of new pipelines in the Balkans, which will further increase the region's importance as a hub for distributing energy resources towards Europe. One of them is the Ionian – Adriatic Pipeline (IAP), which is expected to be built soon and calls for its construction have already been opened. "The Ionian – Adriatic Gas Pipeline (IAP) is a strategic gas supply infrastructure linking Albania, Bosnia and Herzegovina, Croatia and Montenegro to take advantage from the TAP as well as from other gas interconnectors and LNG supply infrastructures such as floating LNG Terminal KRK in Croatia "(European Union Strategy for the Adriatic and Ionian Region (EUSAIR), 2025, P. 54). This gas pipeline has a length of 516 kilometres and an annual capacity of 5 billion cubic metres of natural gas, and in Albania it will be connected to the TAP pipeline. It serves to transport Azerbaijani gas towards Central Europe, but at the same time it could also serve to transport liquefied gas from island of Krk in Croatia towards Western Europe. This gas pipeline is very important because, in addition to the Vertical Corridor, it offers another alternative for the European Union to obtain natural gas supplies, and at the same time, provides the Balkan countries with an alternative to Russian gas. This pipeline is also creating an alternative for the Balkan countries, as historically they have been dependent on Russian gas, which, for much of the time has also served as a lever through which the Kremlin has exerted influence and, at times, pressure on these countries in order to maximise its goals and interests in the region. However, the possibility of American gas flowing through this pipeline will create an alternative source, bringing an end to Moscow's energy monopoly over the region.

Another pipeline that was planned to be built and which, by 2026, should already have been operational is the EastMed gas pipeline, which caused tensions and strong confrontations between two countries in the region, Turkey and Greece. "About 1900 km long of EastMed section, the 1.300 – km offshore gas pipeline runs from the offshore fields and runs from the offshore fields of Levantine Basin and links Cyprus and Crete, before traversing 600 km in Eastern Greece, through the Peloponnese, to its final 210 km stretch along the Ionian coast to reach Italy via the Poseidon section. "(Ministry of Energy, Commerce and Industry, Cyprus, n.d.). This gas pipeline will have a length of 1.900 kilometres and is expected to be the longest gas pipeline in the world to pass through the sea. It will have a capacity of 10 billion cubic metres of natural gas per year, while its maximum capacity is expected to reach 20 billion cubic metres of gas per year. This project was planned to begin in 2022 and be completed between 2025 and 2027, while its value amounts to 6.9 billion dollars, but it has still not even begun.

This project dates back to 2013, when it was designated under European Commission Regulation 347/2013 as a project of common interest and particular importance to the EU. The European Union contributed 40 million dollars to carry out feasibility studies, which means that EastMed has strong support from the European Union.

The impact of this project can be seen in the efforts made by European Union to build it, because if it were to be realised, this would be a major victory for Brussels. Through EastMed, it would not only meet its growing demand for natural gas, but would also diversify its energy sources, and this would "save" it from the dependence it has developed on Russian gas, as energy dependence has turned into political and economic dependence, undermining Brussels' sovereignty in a certain way.

The United States of America initially strongly supported this project because, through EastMed, it aimed to complete with Nord Stream 2 and TurkishStream, both Russian pipelines. Washington aimed to create an alternative source for the countries of the European Union and other countries in the region to replace Russian gas, because according to Washington, Moscow was undermining peace and stability across the continent through gas and was threatening its interests in this region. The United States withdrew from this project, creating uncertainty about what would happen to it. Turkey strongly opposed this project because it bypassed the country, which would threaten its status as a "hub state" in the distribution of energy resources. Israel, Cyprus and Greece have strongly supported this project, and they continue to hold bilateral meetings with the aim of advancing this initiative. However, under the new geopolitical circumstances, the EU and the United States may become strongly engaged again in building and putting this pipeline into operation, which would ease the energy pressure on Brussels as a result of the crises in Ukraine and the Middle East.

Croatia has become a very important hub for liquefied gas from the United States of America, after Greece, which indicates the important position the Balkans holds in Washington's energy strategy. "Krk Terminal serves as a key hub for Central/Eastern Europe, playing a strategic role in reducing dependence on Russian gas. "(Neë Frontier Foundation, 2025, p.3). The terminal has a capacity of 6.1 billion cubic metres of natural gas, and it is intended to supply American gas to the countries of Central and Eastern Europe, as well as the Balkans, thereby reducing these countries dependence on gas coming from Russia. In this way, in addition to gas from the Caspian region, American gas will create a strong alternative to the main traditional supplier, Russia.

Albania signed an agreement worth 6 billion dollars with the United States and Greece for the supply of 1 billion cubic metres of American liquefied natural gas. At the same time, the agreement provides for the transformation of Vlore into an important energy hub, which will subsequently be connected to the TAP energy corridors, the Vertical Corridor and the Ionian – Adriatic gas pipeline. Through this intervention, Washington aims to increase the energy security of the region and the European Union and, at the same time, reduce energy dependence on Russian gas.

Conclusion

The new geopolitical circumstances facing the world today as a result of the war in Ukraine and the Middle East have placed the Balkans at the centre of the European Union's new energy architecture. For a long time, the EU has sought not only to diversify its energy sources but also to find alternative routes for supplying them. Since the Balkans is very close to countries rich in these energy resources, it is now becoming a very important hub for distributing natural gas to consumers in Europe.

TAP demonstrated how important it is for Europe's energy security at a time when Russia's and the Middle East's traditional routes and sources were closed because of the wars taking place there, placing the Union in a situation that was both complex and dangerous. Recognising the importance of the region as a safer transit area, the EU transformed the Vertical Corridor, which in the past transported Russian gas, into a pipeline that transports gas from the Caspian region and the United States towards Central and Eastern Europe.

These success stories have led the Union to support and finance other major energy projects, such as Ionian – Adriatic Pipeline, which will diversify energy sources and routes. At the same time, Brussels is financing feasibility studies for the EastMed project, which will enable the transportation of gas from the Eastern Mediterranean fields towards European markets and would provide a strong source and an alternative to Russian gas. This EU strategy is linked to reducing its dependence on Russia as much as possible, and in this way, the Balkans is becoming a vital area for Brussels energy security.

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