BROOKINGS ENERGY SECURITY INITIATIVE

and

NATIONAL COMMITTEE ON AMERICAN FOREIGN POLICY
CENTRAL ASIA/CASPIAN SEA BASIN REGION PROJECT

STRATEGIC ASSESSMENT
OF THE
CASPIAN SEA BASIN
REGION

MAY 7-8, 2009
ROUNDTABLE
(with Policy Recommendations)

WASHINGTON, DC
Our Mission

The National Committee on American Foreign Policy was founded in 1974 by Professor Hans J. Morgenthau and others. It is a nonprofit, activist organization dedicated to the resolution of conflicts that threaten U.S. interests. Toward that end, the National Committee identifies, articulates, and helps advance American foreign policy interests from a nonpartisan perspective within the framework of political realism.

American foreign policy interests include

• preserving and strengthening national security;

• supporting countries committed to the values and the practice of political, religious, and cultural pluralism;

• improving U.S. relations with the developed and developing worlds;

• advancing human rights;

• encouraging realistic arms-control agreements;

• curbing the proliferation of nuclear and other unconventional weapons;

• promoting an open and global economy.

Believing that an informed public is vital to a democratic society, the National Committee offers educational programs that address security challenges facing the United States and publishes a variety of publications, including its bimonthly journal, American Foreign Policy Interests, that present keen analyses of all aspects of American foreign policy.
The Brookings Energy Security Initiative (ESI) takes a multidisciplinary approach to the interrelated economic, environmental, and strategic challenges associated with developing an effective and viable long-term energy security strategy. Energy security is a major factor influencing how countries conduct their foreign, economic, and international security policies. Major supplier countries with vast energy resources exercise more power on the international stage than ever before. Energy is a primary consideration in how large importers – in need of adequate, reliable, and affordable supplies of energy – make alliances, offer foreign aid, and otherwise conduct their foreign policy. ESI aims to guide effective, pragmatic policies to address these and other U.S. and global energy security issues over the next decade. ESI’s focus for this initiative is both on U.S., foreign and domestic policy-making and policy-makers, and also for other key nations, companies, financial markets, and global institutions.

The National Committee on American Foreign Policy (NCAFP) has been running track I½ and track II projects for over 15 years – one on U.S. – China relations with a particular emphasis on the Taiwan issue, a second on the North Korean nuclear challenge, a third on Northern Ireland which we recently successfully concluded, a fourth on the future of U.S. alliances with Japan and South Korea, a fifth on the Greater Middle East and a sixth on the Central Asia/Caspian Sea Basin Region. The NCAFP Central Asia/Caspian Sea Basin Region Project was initiated in 2005 to focus on U.S. national interests in the five former Soviet republics of Central Asia (i.e., Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan and Uzbekistan) and to create a track I½ and track II framework to facilitate dialogue and advance such interests. The NCAFP has visited Kazakhstan three times as guests of the Kazakhstan government, has hosted track I½ and track II roundtables with civilian and military officials from the U.S. and Kazakhstan governments, and has prepared reports on such activities with policy recommendations. Track I diplomacy in the region has encountered many pitfalls in large part because of a suspicion that a fundamental tenet of U.S. policy in the region has been regime change. There are ample opportunities for track I½ and track II engagement with Kazakhstan’s southern neighbors as a precursor to more effective track I diplomacy, and the NCAFP has been encouraged by officials of the interested governments to pursue such opportunities.

The landlocked Caspian Sea Basin region has substantial oil and gas reserves of great interest to major global energy consumers including China, India, the European Union and the U.S. The geopolitics of the region are extremely complex with Russia having major economic and political interests as well as holding the card of the primary transit routes for oil and gas. With the assistance of Western and Chinese governments and investors,
the nations in the region have pursued to different degrees multi-vector policies resulting in long term supply arrangements and the construction of pipelines to China and across the Caucasus to the Black Sea and the Mediterranean. However, it will be a challenge to develop further projects providing greater energy security for the region and those with interests in the region that are commercially, technically and politically realistic.

ROUNDTABLE OBJECTIVE

Earlier this year, ESI and NCAFP representatives determined that events in the Caucasus last year, and in Russia, Ukraine and Central Asia subsequently, presented an obvious strategic moment to have a Roundtable dialogue among officials and experts from the U.S., E.U., and the Central Asia/Caspian Sea Basin Region. The objective of the Strategic Assessment of the Caspian Sea Basin Region roundtable conference was to harness Brookings ESI's convening power and expertise with NCAFP's track 1½ and track II expertise to accomplish the following:

• engage officials from and experts on Central Asia/Caspian Sea Basin Region countries – Kazakhstan, Turkmenistan, and Azerbaijan – in a constructive track II dialogue with officials and experts from the U.S. and E.U. which will lay a predicate for improved track I dialogue in the future;
• have the dialogue focus on geopolitical and geostrategic developments in the region, and energy security in particular, in light of developments in Georgia, Russia, Ukraine and elsewhere in the region; and
• produce the following report with policy recommendations for the new U.S. Presidential Administration and Congress.

The Roundtable was organized into four panels listed in the Appendix. The NCAFP Project Director lead the discussion of topics relating to geopolitical/geostrategic considerations. The ESI Project Director and a colleague lead the discussion of topics relating to energy security issues. The panel topics, the panelists, and the other participants are listed in the Appendix. The views expressed in the following report are those only of ESI and the NCAFP.

TRIBUTES

The Strategic Assessment of the Caspian Sea Basin Region roundtable could not have occurred without the generosity of a number of donors, including Access Industries, ENI, EXXON, Mutual of America, the Shelby Cullom Davis Foundation, John Bell, and other individuals and private foundations. We also thank our colleagues at ESI and NCAFP and all the participants for their hard work.
THE CONFERENCE

The Strategic Assessment of the Caspian Sea Basin Region conference sought to evaluate the present state of affairs in the Caspian region, as well as the region’s geopolitical importance to the United States and to the European Union, especially with reference to energy security. Our efforts were given impetus by concerns about Russian attempts to restore the region into its own sphere of influence, growing Chinese inroads, instability in neighboring Afghanistan, and uncertainty about the ability of the post-Soviet republics of Central Asia and the Caucasus to maintain their sovereignty under multiple internal and external pressures. All this had to be measured against the backdrop of Central Asia being geographically landlocked and separated from Europe by Russia, of unresolved conflicts in Afghanistan and in the Caucasus, and the key problem of freeing the flow of the energy riches of the Caspian Sea Basin to the rest of the world, despite great power rivalries.

The conference was divided into four panel discussions: geopolitics, pipeline routes, pipeline security, and other issues: Russian and Chinese inroads, insecurity in Afghanistan, and the lack of regional cooperation between post-Soviet states, and each was chaired by a Brookings or NCAF expert. Rivalry between great powers, competing pipeline routes, and ability of the states of the region to deal with those problems were running themes throughout the conference discussions.

The goal of the conference was not only to evaluate the existing situation, but to present recommendations to the new administration concerning best ways to approach and resolve existing problems.

In addition to U.S. experts, the conference hosted participants from numerous countries, including the United Kingdom, Germany, France, Azerbaijan, Kazakhstan, and Turkmenistan. Conference participants also took part in a joint session with the Carnegie Endowment for International Peace and the James A. Baker III Institute for Public Policy on “Russia and the Caspian in the Global Energy Balance.”
Key Issues

We identified the following problems of key concern for the United States:

• The lack of long-term U.S. and EU policies towards the Caspian Sea Basin region, which preclude a coordinated US-EU approach, and the need to demonstrably respect the sovereignty of the Caspian basin states, which resent being treated as subjects rather than partners, especially as pertains to energy resources;

• Russia’s policy of using energy as a tool to restore its international influence by preserving its quasi-monopoly on oil and gas pipelines supplying Europe. This clashes with local (as well as Western) needs to insure a steady flow of oil and gas out of the region by using politically secure, technically feasible, ecologically safe, and economically viable multi-directional routes. To increase Europe’s dependence on Russian gas or gas transported through pipelines it controls, Russia is establishing a network of export pipelines to bypass transit states that are not key European customers or deemed reliable – i.e., Nord Stream, South Stream and Blue Stream. In addition, to further secure its position over European energy needs, Russia is seeking to procure steady supplies of oil, gas, and uranium from Central Asia. Without those supplies, Russia will not have enough available gas to satisfy growing European demands. Nor will it be able to optimize use of the pipelines it controls;

• Lack of cooperation amongst the states of Central Asia (and similarly, amongst the states of the Caucasus), weakening their ability to face external challenges;

• Acknowledgment of growing Chinese political influence and economic inroads in Central Asia, whether in energy, manufactured goods commerce, or finance. China’s objective is diversification of suppliers and economic advantage which in the long term will pose a major challenge to the U.S.;

• The attraction Central Asian and Caucasian peoples feel for the West, especially for the United States, combined with the desire to stay away from problematic Afghanistan and Pakistan;

• Uncertainty about future geopolitical developments in the region caused by great power rivalries potentially dangerous to local states, as well as uncertainty about the real extent of oil and gas deposits in the basin;

• The key Russian policy of trying to recover its historic sphere of
influence in its so-called Near Abroad, to coincide with a perceived current position of strength relative to the 1990s;

- From the perspective of western oil and gas industry, specific challenges facing exploitation of Caspian Sea riches extend from cost to risks, and from owner-user relationship to required costly innovations. Most hydrocarbons in the Caspian are natural gas or extremely gaseous, and even the oil in Tengiz and Kashagan cannot be developed without concomitantly developing gas as well. Moreover, gas markets are not fungible like oil and commodity markets, and are therefore locked into long-term relationships among consumers, transporters, producers/suppliers, and their financing partners;

- As a result of the current economic crisis, demand for energy in Europe is down, prices are down, and credit is tight, with the consequence that investment in additional production and transportation will be deferred.

Handling the Issues

1. U.S. policies towards the region have basically been unchanged since the region gained independence from Moscow in 1991. We did not reach agreement about the best way for Washington to balance the need for a patient, pragmatic approach towards existing regimes with on-going concerns about the progress of democratization and of human rights.

2. Better coordination between U.S. and EU policies is necessary, which is especially difficult given the lack of competence in Brussels to act on the issues and the absence of a common EU energy policy, either in procuring new supplies or coordinating current energy deals. While the political case for developing alternative pipelines and a Southern Corridor to reduce European energy dependence on Russia is compelling, the practical obstacles of making the commercial case and raising the necessary capital present major challenges for Western governments and commercial partners in contrast to the Russian and Chinese modus operandi. The goal of limiting great power competition in the region to commercial matters – a widely shared view, especially among the states of the region – still seems unlikely despite the expected 80% rise in European gas needs by 2030.

3. There was no disagreement about the necessity to “reset” relations between Moscow and Washington to pre-2003 levels, but there was no consensus about what the U.S. has to bring to the bargaining table in order to achieve that result. Some expected that concessions
concerning missile bases in central and eastern Europe, extending NATO eastward, or nuclear arms reduction deals would be adequate bargaining chips. However, others felt that it is unlikely that Russia would divert its attention from being primarily focused on restoring its historic sphere of influence in its Near Abroad. Besides its favorable geopolitical position in the area, Russia has a number of other factors in its favor: historical ties, the persistence of a common Soviet mentality, the role of the Russian language as *lingua franca*, the presence of large Russian minorities (mostly in Kazakhstan), control over Central Asian and Caucasian nationals working in Russia who send remittances to their home countries, and finally, a media monopoly — especially among TV audiences. The question arose whether Russian “imperial” ambitions and its legitimate interests in the region endanger the sovereignty of post-Soviet states — a situation which can hardly be solved if Moscow does not limit the scope of its ambitions.

4. Opinions varied regarding the extent of Russia’s ability to use its position as a key supplier of gas to Europe for political gains. Russia’s strength lies in the lack of a common EU energy policy and in growing European reliance on Russian gas supply: 80% of Russian oil exports go to Europe, 40% of Europe’s natural gas comes from Russia, and 2/3 of Russia’s total export revenues come from Europe. Three new Russian “streams” (Blue Stream, Nord Stream, and South Stream) are bound to increase Russia’s bargaining position. On the other hand, those that would temper their views of Russian dominance cited European perceptions of Russian unreliability as a dependable supplier, the mutual dependence between client (the EU) and supplier (Russia), in addition to the existence of storage capacity in the EU and lack thereof in Russia, and the prospect of alternate supplies and energy conservation. While the projected increase in European demand for gas cannot be met from the Middle East and North Africa, the presence of shale-oil deposits in central and eastern Europe coupled with U.S. recovery technology could be a medium-to-long-term game-changer. Moreover, unlike those in Central Asia, Russian gas fields (except for the Sakhalin fields) have no other possible export route except westward, making Russia dependent upon Europe as a main trading partner.

5. Overcoming the lack of regional cooperation is one of the most pressing challenges for Central Asia. Existing great power rivalries for influence, energy, and transit routes, as well as the persistent rivalry between Tashkent and Almaty for the position of the Central Asian business hub (despite the economic disparity between Kazakhstan and the rest of Central Asia that favors Almaty) are among the key obstacles. Similar difficulties exist in the Caucasus, in addition to the unsettled issue of “quasi-states” (Nagorno-Karabakh, Abkhazia, South Ossetia), of occupied Azeri territories, of the Armenian lobby in Washington,
and most of all, the Russian policy of destabilization of the region in order to maintain its influence. Russia’s *divide et impera* policy has been in place since the very collapse of the Soviet Union, although it was not applied in Central Asia, to the great benefit of its southern neighbor, Kazakhstan.

6. The total volume of energy riches of the Caspian Sea Basin remains unclear, although the consensus was that Turkmenistan indeed has the ability to fulfill its gas commitments, with presenters from the region tending to favor higher estimates. Suggestions about how to achieve the unimpeded flow of oil and gas from the region included: reliance on Baku as an energy hub, with Kazakh oil and Turkmen gas brought by various routes through the Caspian Sea for transit to the West; securing more reliable deals with Russia, which needs Central Asian gas to fulfill its deliveries to Europe; building more pipelines through Turkey; and possible future pipeline deals with Iran. The idea of a southern oil route through Afghanistan and Pakistan had little support. Another problem for Caspian Sea basin energy exports is that Russian pipelines are under singular control, while others answer to multiple entities. The recent EU endorsement of Nabucco (a projected gas pipeline connecting Baku and Vienna and bypassing Russian territory) does not preclude EU Member State involvement in other routes. Doubts were also voiced about the validity of recent Caspian Development Corporation proposals.

7. Apprehension about Chinese inroads or “soft expansion” coincides with the realization that China is in the process of overshadowing Russia in the very near-term as the number-one commercial partner of Central Asia. Chinese manufactured goods already predominate in Central Asian bazaars, and China has entered the banking field in Kazakhstan, and invested in local infrastructure. Oil imports from the region were estimated to cover 10% of China’s needs by 2030. Chinese laborers are not only building roads and railroads, but pipelines connecting the Caspian Sea basin to Xinjiang. The so-called “Project of the Century” – the gas pipeline from Turkmenistan to China should enter into service in 2010. On its side of the border, China is establishing Han settlements on the Xinjiang side of the Kazakh-Chinese border aimed at creating a wedge between the Uighurs and Kazakhstan. Chinese leadership within the Shanghai Cooperation Organization (SCO), where Russia barely holds the role of equal partner and Central Asian states play auxiliary roles, was stressed as proof of the growing Chinese role.

8. There is a feeling among Central Asians (if not among the Caucasians) that a future conflict between Russia and China for dominance in the region is inevitable, but Russia still remains a lesser evil than China
and a last-resort source of protection against the latter.

9. Central Asian states tend to regard both Afghanistan and Pakistan as continuous sources of instability: extremism, terrorism, narcotrafficking, and widespread poverty. NATO intervention in Afghanistan has not only failed to produce stability, but has not even improved the country’s electricity supply – the grid produces the same amount of electricity as it did under the Taliban.

10. The State Department’s relocation of Central Asian affairs into the same office which deals with Afghanistan and Pakistan is perceived in the region as a lack of U.S. confidence in the progress of Central Asian modernization, rather than a way to disconnect Central Asia – in the eyes of the Washington bureaucracy – from its former colonial power. Kazakhstan, which worked hard to get the OSCE 2010 presidency, understandably does not see itself in the same category as Afghanistan.

Policy Recommendations

The new U.S. administration inherited several major domestic and international crises requiring its immediate attention. This relegates concerns about Central Asia even farther down on the list of priorities, a rather usual state of affairs. However, the situation is not static, and U.S. inaction only reinforces the dominant roles of Russia and China in the region. The U.S. and the EU must pay attention to the developments in the region and establish a coherent long-term policy towards this increasingly important – and vital to energy security – part of the world.

While the preservation of the sovereignty of the post-Soviet republics of the region remains an obvious priority, there is no point in contesting the historic influence of Russia, or in viewing Chinese inroads as a purely negative development. After all, they likely provide more competition to Russia than to the U.S. and the EU.

In establishing a coherent policy towards the Caspian Sea Basin region, Washington should take the following suggestions into consideration:

1. Continue to support the sovereignty and territorial integrity of the states in the region, providing assistance in solving local conflicts in the Caucasus (Nagorno-Karabagh, Abkhazia, South Ossetia) and fostering cooperation among Central Asian states (in the fields of water resources, environment, commerce, combating narcotrafficking, etc.). The U.S. must avoid giving the impression that the West is exclusively interested in securing energy supplies while thwarting Russia in the process, and it must be cognizant of the other priorities and concerns of the countries in the region.
2. Develop a long-term policy towards the region and work more closely with the EU and its member states to establish common policies. In order to build new pipelines, alignment among commercial and governmental actors is necessary.

3. Reassure local governments that U.S. interests in the region are of a long-term nature. Extend U.S. or EU governmental sponsorship to projects in the area by private oil and gas companies involved in building export routes to the West.

4. Oil and gas transit through Baku being at present the only practical route available in order to avoid passing through Russian territory, Nabucco should not remain an orphaned project, but instead be given priority in Western capitals. The problem is that peace and security in the Caucasus is a necessary prerequisite for attracting private capital. Combining the political and commercial imperatives required for the pipeline’s viability will be a challenge for the Nabucco consortium.

5. Russia’s interests in the regions cannot be underestimated. Despite persistent economic, social and institutional weaknesses (to include unbalanced socio-economic development and overdependence on energy and raw material exports), Russia still perceives itself as a great power. Russia in 2009 is not the Russia of the 1990s. Thus, wherever possible, the U.S. government should pursue objectives that will allow the countries of the region to avoid binary choices for/against the stated objectives of Russia.

6. Take advantage of the prestige that the Western way of life enjoys in the region in order to strengthen links. Cultural and educational exchanges, in addition to high-level visits, an increased media presence and tourism are other key focus areas. The cultivation of young leaders – the carriers of modern, post-Soviet experience – who will shortly replace the aging generation of present officials is important. The importance local elites attach to Western approval is an element working in U.S. and EU favor and should be taken advantage of.
Appendix

LIST OF PANELS AND PARTICIPANTS

PANEL 1. GEOPOLITICS
The evolving interests of Russia, China, the United States and the EU in and around Central Asia, and the ability of the countries of the region to balance their interests.

Panel Chair
Dr. Michael Rywkin
NCAFP Project Director

Panelists
Dr. Hafiz Pashayev
Deputy Foreign Minister of Azerbaijan and Rector, Azerbaijan Diplomatic Academy
“A View from Baku”

Dr. Marat Shaikhutdinov
Chairman, Foreign Policy Analysis and Prognostics Committee, Ministry of Foreign Affairs, Republic of Kazakhstan
“A View from Astana”

Dr. Thomas Graham
Senior Director, Kissinger Associates, Inc., and former Special Assistant to the President and Senior Director for Russia U.S National Security Council
“A View from Washington”

Ambassador John Ordway
Former US Ambassador to Kazakhstan
“An American Perspective from Central Asia”

PANEL 2. PIPELINES
Politics and Economics of Pipeline Routes; Economic Interest vs. Political Reality; Legal Status of the Caspian Sea. Baku as the transit hub.

Panel Chair
Jonathan Elkind
Brookings Energy Security Initiative

Panelists
Edward Chow
Senior Fellow, Energy and National Security Program, Center for Strategic and International Studies (CSIS)
PANEL 3. ENERGY SECURITY
Energy Security Policies of Russia, the United States, and the European Union; Impact of other players: China, Turkey, India, Pakistan, Iran, and of conflicts in Afghanistan and the Caucasus.

Panel Chair
Dr. Charles K. Ebinger
Director, Brookings Energy Security Initiative

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Fiona Hill
Senior Fellow, Brookings, currently serving as National Intelligence Officer for Russia and Eurasia at the National Intelligence Council

Boyko Nitzov
Director, Eurasian Energy Program, Atlantic Council of the United States

Kurt-Dieter Grill
Head of Government Relations for Babcock-Borsig Service, and former Member of the Bundestag

Dovlet Atabayev
Head of Representative office in Europe, The state Agency for Management and Use of Hydrocarbon Resources at the President of Turkmenistan

Kuralai Baizakova
Dean of the Faculty of International Relations, Al-Farabi Kazakh National University

Robert Ebel
Senior Adviser, Energy and National Security Program, CSIS
PANEL 4. MATTERS OF REGIONAL COOPERATION, AFGHANISTAN, CHINESE INROADS, AND RUSSIA

Panel Chair
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NCAFP Project Director

Panelists

Regional cooperation
Johannes Linn
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“The Caspian Sea Basin and Eurasian Continental Integration.”

Dr. Martha Brill Olcott
Senior Associate, Russian & Eurasian Program, Carnegie Endowment of International Peace
“Towards a New Conceptualization of Regional Integration”

Afghanistan
Ambassador Joseph Presel
former US Ambassador to Uzbekistan
“Afghanistan on Central Asian Agendas”

Chinese Inroads
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“Chinese Inroads”

Marlene Laruelle
Institut National des Langues et Civilisations Orientales (INALCO), Paris
“Perception of China in the Region”

Russia
Ambassador Steven Pifer
Visiting Fellow, Brookings
“Resetting Relations with Moscow and the Caspian”

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