Return of Pipelines

_____________ Report prepared – 25 April 2026 _____________

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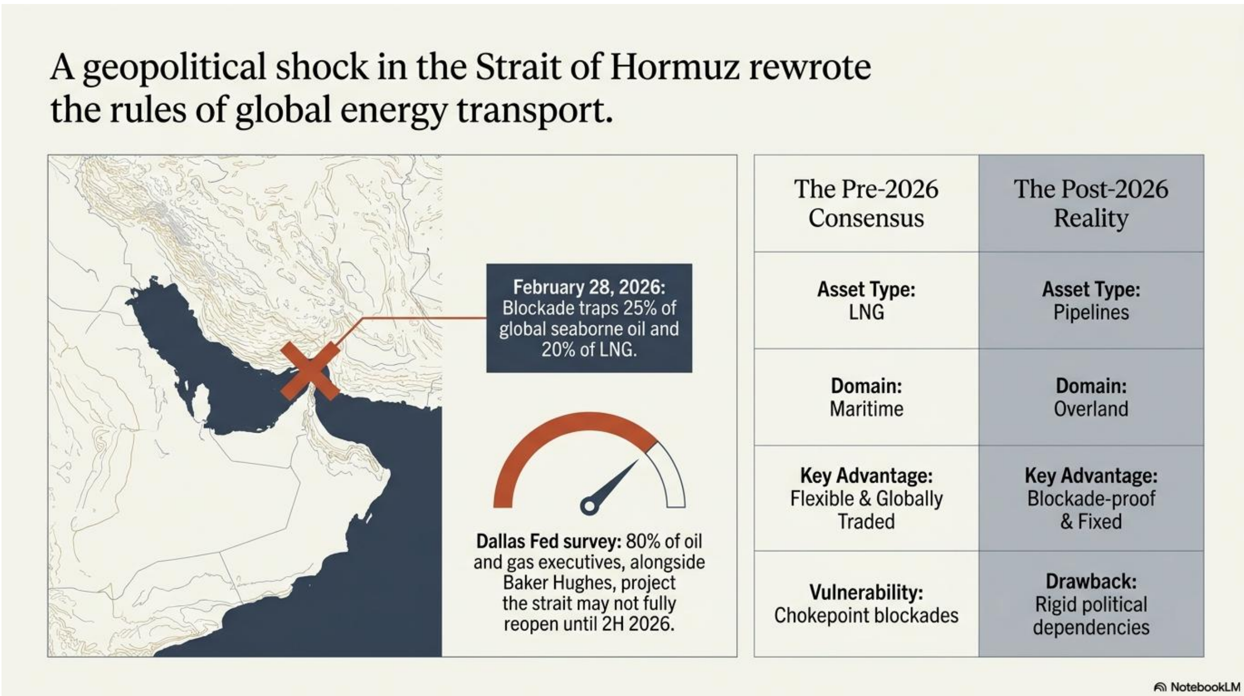
Return of Pipelines

Steel Arteries: Why Pipelines Are Back at the Center of the World's Energy Map

nCa Special Report

There is a certain irony to what is happening right now in global energy. --- For years, pipelines were the infrastructure everyone was moving away from — too rigid, too political, too tied to specific suppliers and specific regimes. LNG shipping was supposed to be the future: flexible, globally traded, free from the chokepoint of a bilateral relationship. Then February 28, 2026 happened.

When the United States and Israel launched their air war against Iran and assassinated Supreme Leader Khamenei, Iran responded by blocking the Strait of Hormuz — the narrow waterway through which roughly a quarter of the world's seaborne oil and a fifth of its LNG had previously flowed. Analysts called it the largest disruption to the global energy supply since the 1970s oil crises. And almost immediately, the conversation about pipelines changed.

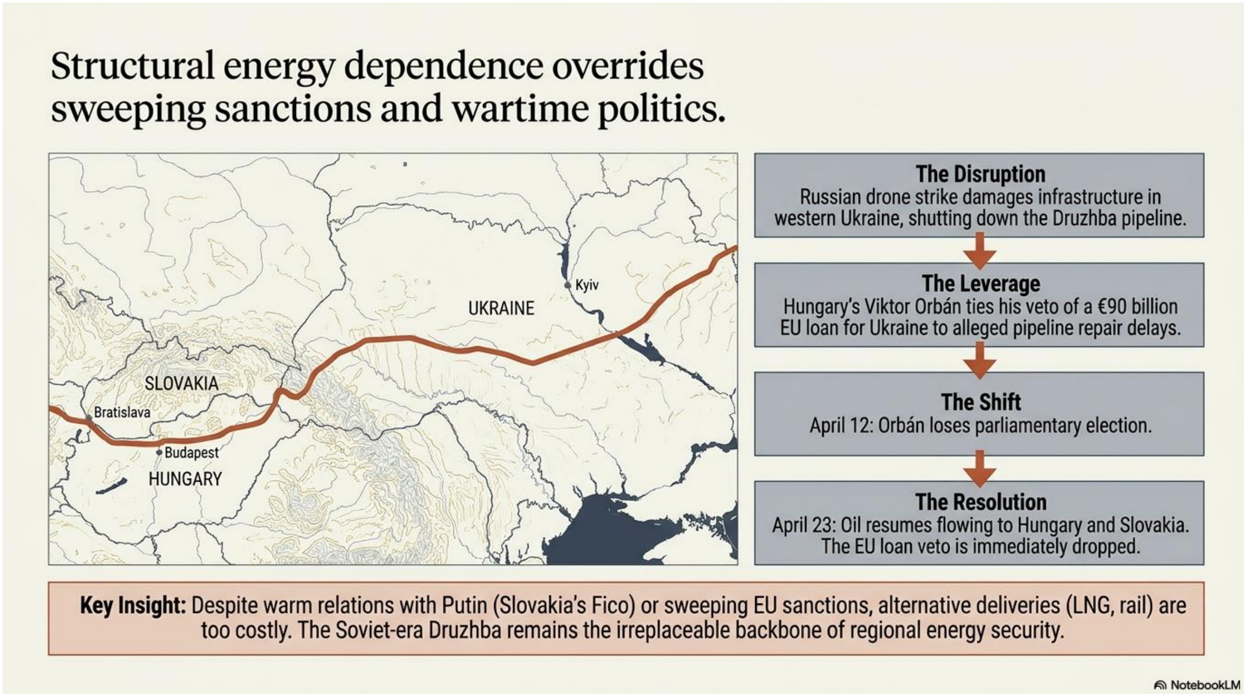


Baker Hughes now assumes the strait may not fully reopen until the second half of 2026, a view shared by nearly 80% of oil and gas executives surveyed by the Dallas Federal Reserve. The company's CEO has warned of "persistent risk premiums" for both oil and LNG prices.

That is not a short-term shock. That is a structural shift — and it is forcing governments, companies, and energy planners to rediscover the one form of energy infrastructure that can't be rerouted around a naval blockade: the pipeline.

The Druzhba Moment

Nothing illustrates the pipeline's return to prominence better than what happened in late April in Eastern Europe. The Druzhba — Russian for "friendship," one of the world's longest oil pipeline systems — had been shut down for nearly three months after a Russian drone strike damaged infrastructure in western Ukraine. On April 23, Hungary and Slovakia began receiving crude oil again, ending a hiatus that had strained both countries' energy supplies.



But the restart was about far more than oil. Hungary had been blocking a €90 billion EU loan to Ukraine, with Prime Minister Viktor Orbán tying his veto to Kyiv's alleged foot-dragging on pipeline repairs. The political situation shifted when Orbán lost Hungary's parliamentary election on April 12, and the new government signaled it would drop the veto — which it did, the moment oil started flowing again.

Slovakia's Prime Minister Robert Fico, who has maintained warm relations with Putin throughout the war, welcomed the restart but claimed it proved the pipeline blockage had been politically motivated all along — a charge Kyiv denies and the EU has not supported.

Whatever the truth of those accusations, the episode revealed something important: even amid a war, sweeping sanctions, and years of European rhetoric about diversifying away from Russian energy, Hungary and Slovakia remain structurally dependent on a Soviet-era pipeline.

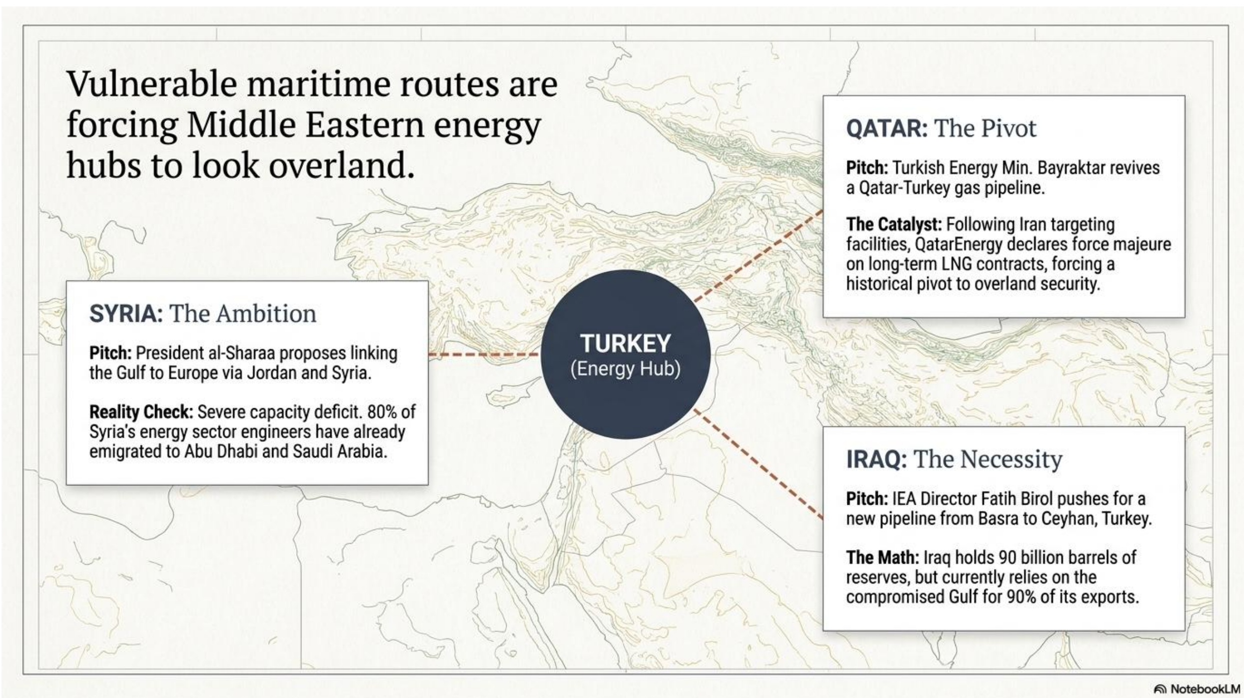
Alternatives — tanker deliveries, LNG imports, rail — exist, but they are costlier and less reliable. The Druzhba, however imperfect, remains the backbone of those countries' energy security.

The Middle East: When the Sea Becomes a Battlefield

The Hormuz closure has revived a decades-old idea: moving energy over land to bypass vulnerable maritime chokepoints.

The most ambitious version of this thinking centers on Syria.

At the Antalya Diplomacy Forum, Syria's President Ahmed al-Sharaa declared that his country — once a war zone — wants to become an alternative transit route for energy and goods, linking the Gulf to Turkey and onward to Europe via Jordan. The plan focuses not on roads but on pipelines: rehabilitating existing infrastructure, extending the Arab Gas Pipeline, and potentially building new corridors funded by Gulf money.



It is a striking vision. It is also, experts warn, far from straightforward. --- Critics point out that Syria lacks the infrastructure, stability, and skilled technical workforce for such ambitions — noting that roughly 80% of the engineers who used to work in Syria's energy sector have since left the country for jobs in Abu Dhabi and Saudi Arabia.

The more immediately actionable proposal comes from the IEA. --- IEA Director Fatih Birol has publicly called for a new oil pipeline connecting Iraq's Basra oil fields — which hold around 90 billion barrels of reserves — to Turkey's Mediterranean terminal at Ceyhan, describing it as "a necessity for Iraq and an opportunity for Turkey" and arguing that financing such a project is now achievable.

Iraq currently exports roughly 90% of its oil through the Gulf, almost all of it passing through Hormuz. A Basra-Ceyhan link would change that calculus entirely.

Turkey, meanwhile, is positioning itself at the center of every one of these conversations. Its existing pipeline network — TANAP, TAP, the South Caucasus Pipeline, and potential new corridors through Syria and Iraq — makes it a natural hub for energy flows between Asia and Europe.

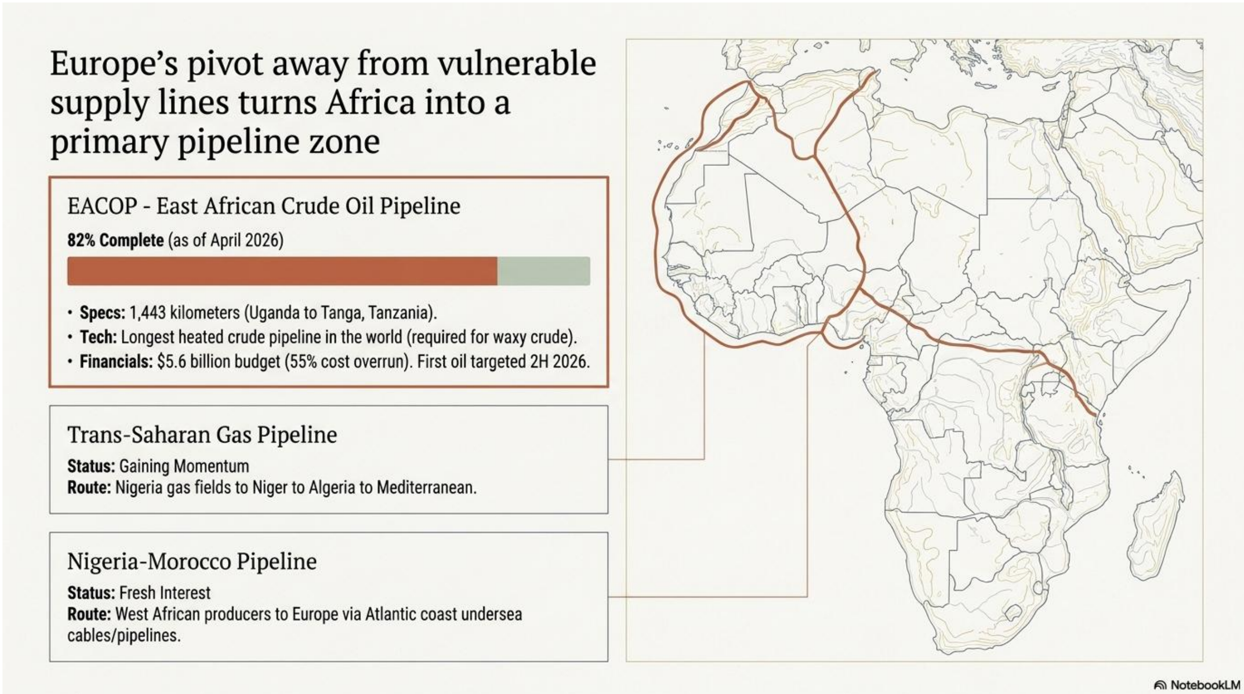
Turkish Energy Minister Bayraktar has also revived the idea of a Qatar-Turkey gas pipeline crossing Saudi Arabia, Jordan, and Syria, arguing that with Hormuz unreliable and LNG exports disrupted, an overland gas route to Europe now makes strategic sense.

Qatar has historically been cool on the idea, preferring the flexibility of LNG, but QatarEnergy declared *force majeure* on some long-term LNG supply contracts after Iran targeted its facilities — meaning the overland option has suddenly become more attractive.

Africa: From Afterthought to Pipeline Geography

Africa rarely features in mainstream energy geopolitics, but it is quietly becoming one of the most active pipeline construction zones in the world, driven partly by European demand for alternatives to Russian and Middle Eastern supply.

The most concrete example is the East African Crude Oil Pipeline. As of April 2026, EACOP — a 1,443-kilometer heated pipeline connecting Uganda's Lake Albert oil fields to the Tanzanian port of Tanga — has reached 82% completion, with first oil targeted for the second half of 2026.



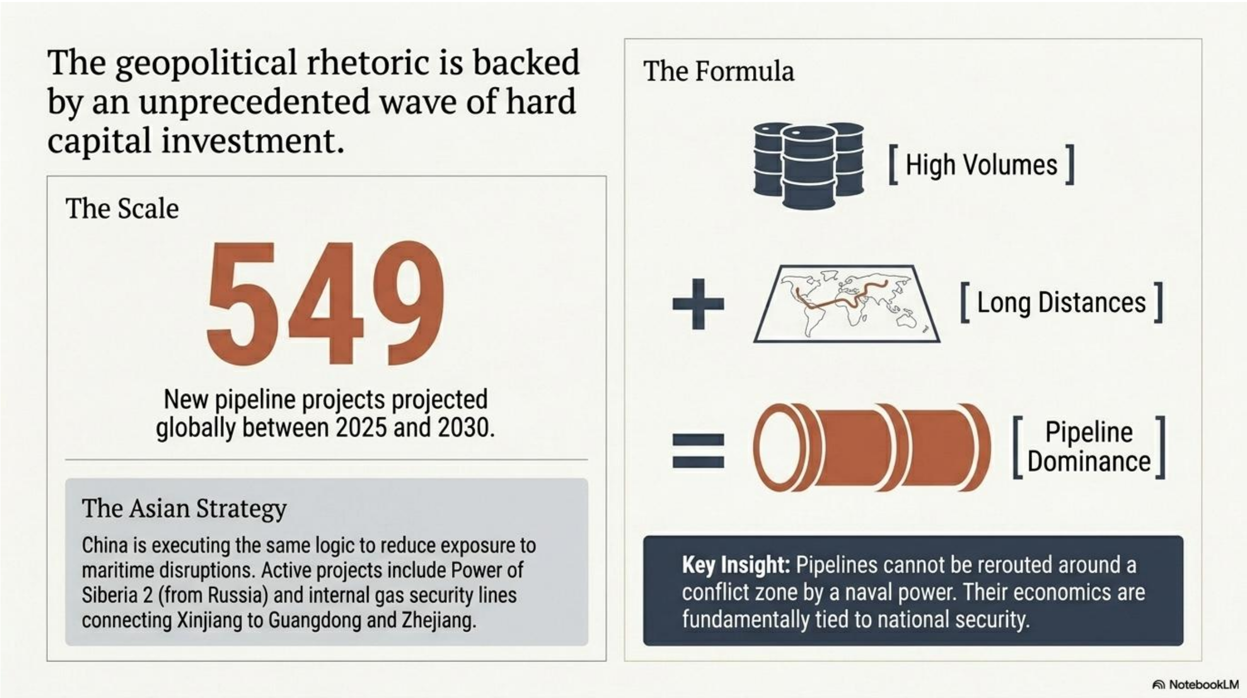
It will be the longest heated crude oil pipeline in the world, necessary because Uganda's crude is thick and waxy and solidifies without warming. Cost overruns have pushed the project budget to around $5.6 billion, roughly 55% above initial estimates, but the pipeline is on track to begin exports this year.

Further north, longer-discussed projects are gaining new momentum. The Trans-Saharan Gas Pipeline — connecting Nigerian gas fields through Niger and Algeria to Mediterranean export points — has been under discussion for decades.

The Nigeria-Morocco pipeline along the Atlantic coast, which would link West African producers to Europe via undersea cables and pipelines, is attracting fresh interest. These are not imminent projects, but the political urgency created by the Hormuz crisis has moved them higher up the agenda.

The Numbers Behind the Shift

This is not just geopolitical rhetoric. The pipeline construction pipeline, so to speak, is genuinely filling up. Industry projections point to **549 new pipeline projects** globally between 2025 and 2030, with hundreds already under construction. In Asia, projects like China's Power of Siberia 2 from Russia, and internal gas security pipelines connecting Xinjiang to Guangdong and Zhejiang, reflect the same logic: reduce exposure to maritime routes that can be disrupted by distant geopolitical events.

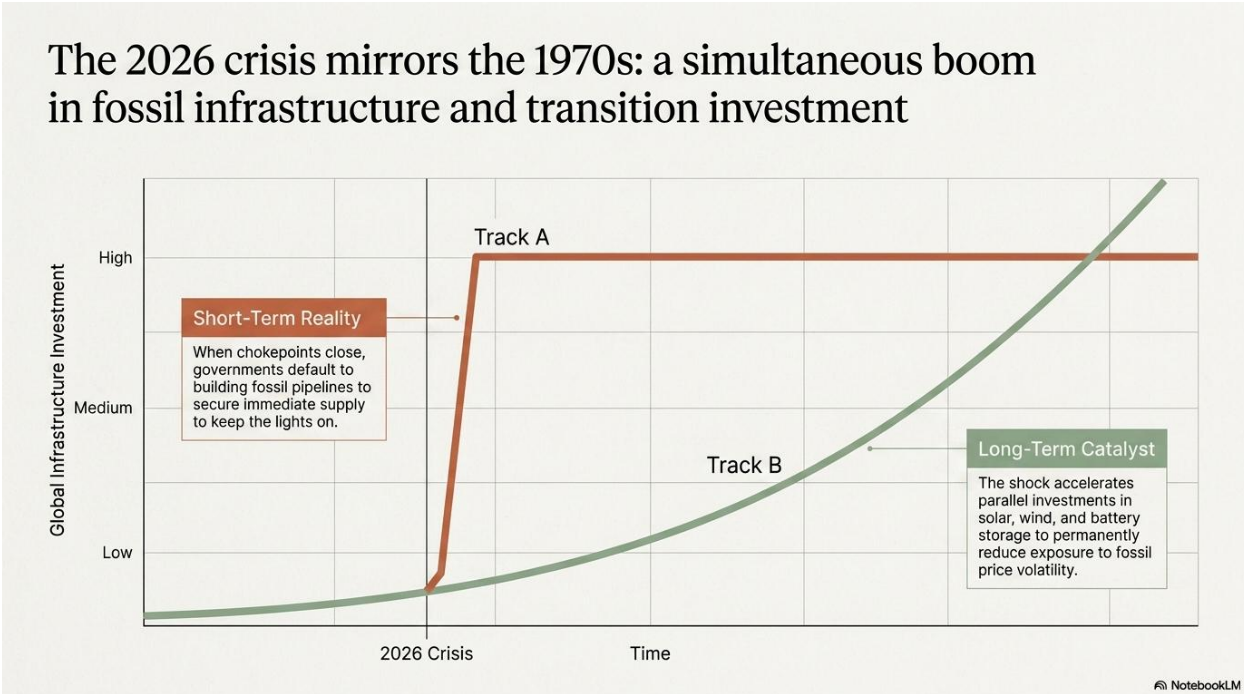


The economics reinforce the trend. Over long distances and high volumes, pipelines are simply cheaper than LNG, and unlike shipping lanes, they cannot be rerouted around a conflict zone by a naval power.

The Uncomfortable Paradox

There is a tension at the heart of all this that deserves to be named. The world continues to talk seriously about energy transition, decarbonization, and the eventual end of fossil fuel infrastructure. But what 2026 has demonstrated, with uncomfortable clarity, is that when the chips are down — when a chokepoint closes and lights need to stay on — governments build pipelines.

This does not mean the energy transition is dead.



Experts note that the same crisis is accelerating investment in solar, wind, and battery storage in countries that want to reduce their exposure to fossil fuel price shocks. Europe's longer-term goal of reducing gas dependence remains intact. But in the short and medium term, the infrastructure being built today is overwhelmingly fossil fuel infrastructure, and much of it is designed to last for decades.

The 1970s oil crises produced both a pipeline building boom and the first serious wave of investment in energy efficiency and alternatives. The 2026 Hormuz crisis may produce something similar: a burst of pipeline construction now, paired with accelerated transition investment for the longer run.

The Lesson That Keeps Having to Be Relearned

What the events of early 2026 have shown — from the Druzhba's political resurrection in Central Europe, to the IEA chief calling for a new Iraq-Turkey pipeline, to Syria's new government pitching itself as an energy corridor — is that pipelines are extraordinarily hard to replace.

They embed themselves into the infrastructure, the economics, and the politics of the countries they serve. They create dependencies that outlast the governments that built them.

For decades, the conventional wisdom was that LNG had made the rigid, politically fraught pipeline obsolete. The Strait of Hormuz has suggested otherwise.

When the sea becomes unreliable, energy tends to return to land — through the steel arteries that were never really as obsolete as we thought.