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The Moscow-Ankara Energy Axis and the Future of EU-Turkey Relations

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ABSTRACT

The Turkey-Russia-EU energy triangle is a relationship of interdependence and strategic compromise. However, Russian support for secessionism and erosion of state autonomy in the Caucasus and Eurasia has proven difficult to reconcile for western European states despite their energy dependence. Yet, Turkey has enjoyed an enhanced bilateral relationship with Russia, augmenting its position and relevance in a strategic energy relationship with the EU. The relationship between Ankara and Moscow is principally based on energy security and domestic business interests, and has largely remained stable in times of regional turmoil. This paper analyses the dynamics of Ankara-Moscow cooperation in order to understand which of the three scenarios in EU–Turkey relations – conflict, cooperation or convergence – could be expected to develop bearing in mind that the partnership between Turkey and Russia has become unpredictable. The intimacy of Turkish-Russia energy relations and EU-Russian regional antagonism makes transactional cooperation on energy demand the most likely of future scenarios. A scenario in which both Brussels and Ankara will try to coordinate their relations with Russia through a positive agenda, in order to exploit the interdependence emerging within the "triangle".

ÖZET

Türkiye Rusya ve AB arasındaki enerji üçgeni bir karşılıklı bağımlılık ve stratejik uzlaşma ilişkisidir. Ancak, her ne kadar Rusya'ya enerji bağımlılıkları olsa da, Batı Avrupalı devletler için Rusya'nın Kafkasya ve Avrasyadaki ayrılıkçılığa ve devlet özerkliğinin erozyonuna verdiği desteğin kabullenilmesinin zor olduğu ortaya çıkmıştır. Bu arada, Türkiye Rusya ile güçlendirilmiş ikili ilişkileri sürdürürken, AB ile stratejik enerji ilişkisindeki konumunu ve alakasını artırmaktadır. Ankara ve Moskova arasındaki ilişki esasen enerji güvenliği ve yurtiçi ticari çıkarlara dayanmakta olup; bölgesel karışıklık zamanlarında büyük ölçüde istikrarlı bir seyir izlemiştir. Bu çalışma, Türkiye ve Rusya arasındaki ortaklığın öngörülemez hale geldiğini akılda tutarak; Ankara-Moskova işbirliğinin dinamiklerini, AB-Türkiye ilişkilerindeki üç senaryodan -çatışma, işbirliği ya da yakınlaşma- hangisinin gerçekleşmesinin beklenebileceğini anlamak için analiz etmektedir. Türkiye-Rusya enerji ilişkilerinin yakınlığı ve AB-Rusya bölgesel zıtlaşması enerji talebine ilişkin alışveriş çıkarına dayalı işbirliğini gelecek senaryoları arasındaki en olası senaryo yapmaktadır. Bu senaryoda; Brüksel ve Ankara bu "üçgen" içinde ortaya çıkan karşılıklı bağımlılığı kendi çıkarları için kullanırken, Rusya ile ilişkilerini pozitif bir gündeme dayalı olarak koordine etmeye calışacaklardır.

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Introduction

Russia has, for several decades now, been the leading oil, gas and coal supplier to Turkey and the EU. Both, indeed, are natural destinations for Russian energy resources, as demonstrated by the strong (and growing) energy interdependence between them and Moscow. This situation is further reinforced by the quite limited opportunities for diversification for both Turkey and the EU (on the supply side) as well as for Russia (on the demand side), in the light of which current energy relations seem expected to continue with only minor deviations. Yet, fluctuating bilateral relations between Turkey and Russia on the one side and unresolved territorial conflicts and political tensions between the EU and Russia on the other might modify some of the current patterns. This would challenge the Ankara–Moscow partnership, which, for its part, could impact on the development of EU–Turkey relations in the energy field.

Thus, the question is how Turkey–Russia energy dynamics do, or will, affect Ankara–Brussels relations more broadly – in particular, which of the three scenarios in EU–Turkey relations – conflict, cooperation or convergence – could be expected to develop bearing in mind that the partnership between Turkey and Russia has become unpredictable? The convergence scenario in EU–Turkey relations foresees a genuine revitalization of Turkey's accession process as a consequence of Ankara's full coordination of its energy policy with that of the EU. The cooperation scenario instead assumes that the EU and Turkey could promote their energy interests and projects without deepening their political and strategic dialogue. The conflict scenario would mean confrontation between the EU and Turkey, which would then also undermine their partnership in the energy field.

In order to understand how Turkey–Russia relations affect those between Turkey and the EU, the paper will analyse focal issues and key drivers in the energy "triangle" comprising Turkey, Russia and the EU. Such issues could include the growing importance of Russia for Turkey's energy sectors; Turkey–Russia bilateral relations, and the impact of existing and new political/security challenges (i.e. tensions over the Russian warplane incident in Syria); territorial conflicts in the Black Sea region, e.g. those involving Ukraine and Georgia; and the evolution of "pipeline politics" between Turkey, Russia and the EU – i.e. the destinies of TurkStream and the Southern Gas Corridor.

1. Turkey–Russia relations within the bilateral and regional context

The Turkey–Russia–EU energy triangle has always been determined by the bilateral relationship between Ankara and Moscow. Even if these two disagree on a number of issues of geopolitical importance (wars in Ukraine and Syria, territorial conflicts in the Black Sea region, Iran, etc.), they have agreed to develop their partnership around trade and economy with a focus on energy.

Energy security has long been a vital priority in Ankara’s foreign-policy making. Its relationship with regional producers has been determined by Turkey’s goal to be a transit country from Russia, the Middle East and the Caspian Sea to Europe. The aim has been twofold: (1) diversify energy suppliers in order to meet its own needs, and (2) increase the country’s relevance as a transit zone. However, over the years these efforts have been influenced by sets of focal issues and key drivers, leading to the evolution of different scenarios around Turkey as an energy hub in the region.

2. Key drivers and focal issues: territorial conflicts in the Black Sea region

The end of the Soviet Union and the emergence of new independent states in the Black Sea and Caspian region caused a radical shift in Ankara’s foreign policy. Turkey’s penetration into this region began with the offer of a free-market economy and cooperation on international energy projects. Ankara was important in guaranteeing access to Caspian energy sources as well in creating partnerships in the Black Sea basin in order to secure transport routes for the distribution of oil products to the West. However, the relationship between Turkey and Black Sea littoral countries has always developed along bilateral lines, rather than within multilateral formats. This is despite the fact that Ankara is a member of the BSEC (Black Sea Economic Cooperation) and has participated in a number of initiatives within the Black Sea area. Indeed, Ankara’s foreign-policy concept has never included a vision or strategy in the Black Sea region. The official website of the Turkish Foreign Ministry does not even mention the Black Sea in its description of policy interests towards different regions. Moreover, under the section “Maritime issues”, the Black Sea basin is not even listed. This clearly hints at a lack of perception of the Black Sea as a region (Republic of Turkey Ministry of Foreign Affairs, 2017b). At the same time, it also indicates that Ankara has no interest in being a leading actor in any regional project or organization (e.g. BSEC or BLACKSEAFOR – the Black Sea Naval Co-operation Task Group).

Consequently, Turkey has preferred to build relationships with both Ukraine and Georgia through bilateral formats rather than engaging with them in multilateral and regional fora. Ankara has always assumed that certain disputes on territorial issues and energy security were the main hindrance to a strategic partnership within the region. Indeed, the unresolved status of regional conflicts (Crimea, the Donbas region, Abkhazia and South Ossetia) in which Russia is seen as a supporter of secessionism have represented points of contention between Ankara and Moscow. Officially, Turkey supports the territorial integrity of Ukraine and Georgia, and does not recognize the annexation of Crimea by Russia or the de facto independence of Abkhazia or South Ossetia.

Moreover, Ankara supports the Euro–Atlantic aspirations of both Georgia and Ukraine. However, Turkey has adopted a cautious approach to the territorial conflicts in the region.

Ankara defines its relationship with Ukraine as strategic, and Turkey is the second largest trade partner for Ukraine. The Ankara–Kiev partnership has been framed around security, economy and tourism. In particular, more than 280,000 Crimean Tatars living in Ukraine – predominantly in Crimea itself, now annexed by Russia – have been considered an important element in strengthening bilateral relations between the two. In the framework of humanitarian assistance, Ankara has financed a number of initiatives (worth more than US$25 million) related to housing projects in Crimea, and humanitarian assistance for IDPs (Internally Displaced Persons) from the Donbas region. According to Turkey's Foreign Ministry, Ankara and Kiev cooperate in several international and regional organizations, such as the UN, the Council of Europe, the OSCE (Organization for Security and Co-operation in Europe) and the BSEC. Furthermore, cooperation takes place in the military sphere on a bilateral basis and within the context of the NATO–Ukraine Commission, BLACKSEAFOR and Operation Blacksea Harmony (Republic of Turkey Ministry of Foreign Affairs, 2017a). In 2017, Turkey and Ukraine signed off on a visa-free regime for their citizens in order to facilitate contacts and further enhance their relationship. Bilateral relations between Turkey and Georgia are similarly developed in the fields of economy, energy infrastructure and security. Visa requirements have also been mutually abolished. Turkey has been, and remains, Georgia's single largest trade partner with a turnover worth more than $777.9 million (Ajeganov, 2016).

The current deepening Ukrainian crisis is placing Turkey in a difficult diplomatic position. At stake are Ankara's commitments to its Western allies and its cultural kin, Crimean Tatars, against its economic and political relationship with Moscow. Ankara has remained passive with regard to defending the rights of the Muslim Turkic Tatars, who oppose the Russian annexation of Crimea. Furthermore, although Turkey has supported Ukraine's territorial integrity and sovereignty in all official declarations, statements regarding Crimea have been made without mentioning Russia. In contrast to the EU, the US, Canada, Australia, Japan, Switzerland and Norway, Turkey did not apply any bilateral sanctions against Russia following its actions in Crimea. This certainly demonstrates how Turkey is avoiding confronting Russia. Indeed, Turkey always avoided making geopolitical choices between Russia and the transatlantic community when it came to Eastern Europe and the South Caucasus. During the 2008 Georgian–Russian war, Turkey tried to balance the West and the Kremlin by preventing NATO Mistral ships from entering the Black Sea basin, appealing to the 1935 Montreux Convention, a document that limits the access of non-littoral powers into the Black Sea through the Turkish Straits.

Political scientist Igor Torbakov has described Turkish–Russian relations as "political dualism", stemming from their "competitive cooperation" in a number of areas including the energy field (discussed below) (Markedonov & Ulchenko, 2011). As seen, among the diverging issues are also territorial conflicts in the Black Sea region – namely, the Russian annexation of Crimea – war in Ukraine and Russian recognition of de facto Abkhazia and South Ossetia.

3. Key drivers and focal issues: Turkey's dependence on Russia

The energy cooperation between Russia and Turley goes back to 1997, when the two signed an intergovernmental agreement, for a 25-year period, on the construction of the Blue Stream pipeline guaranteeing 16 bcm of natural gas per year for Turkey. Due to the highly profitable trade relations between Turkey and Russia, Turkish businessmen lobbied in favour of the project. With this step, Turkey became the second largest importer of Russian gas after Germany.

Today, Turkey buys around 55 percent of its natural gas and 12 percent of its oil from Russia (Republic of Turkey Ministry of Foreign Affairs, 2017c). Space heating and electricity production throughout the whole of Turkish territory is largely provided thanks to natural-gas imports from Russia. Around 42 million cubic metres (mcm) of Russian natural gas comes daily via Ukraine. In the case of an interruption, the Marmara region and Istanbul would face energy shortages, as the amount gas lost could not be substituted from elsewhere. And there is neither enough storage capacity for natural gas nor reserves for electricity generation to overcome a possible energy crisis. That is why 'the risk of an energy shortage is such a major threat for Turkey that it could easily overshadow diplomatic manoeuvres' (Republic of Cyprus Press and Information Office, 2014).

Additionally, Russia is Turkey's second largest trading partner. The two countries claim that the growing trade volume between them is expected to triple, to some $100 billion, in the coming years (Cetingulec, 2016). The major Russian investments in Turkey go into the telecommunications, energy and tourism sectors. The activities of Turkish construction firms in Russia form another pillar of their economic relationship. Furthermore, Turkey and Russia are collaborating on the framework of BSEC, BLACKSEAFOR and Operation Black Sea Harmony.

Moreover, in 2010 Ankara and Moscow signed an agreement on the construction of the Akkuyu Nuclear Power Plant. The Russian state-owned Rosatom has started to build Turkey's first nuclear power plant in the port of Mersin. As Turkish President Recep Tayyip Erdoğan put it, the event marked the dawning of a "new era" in bilateral relations. And indeed, the Turkish–Russian nuclear-energy partnership has further increased Turkey's energy links with Russia.

Finally, in 2012, Ankara granted Russia permission to construct the South Stream pipeline through Turkey's Black Sea territorial waters. South Stream was supposed to bring some 63 bcm of Russian natural gas to Europe. In exchange, Ankara secured significant price concessions from Gazprom, as Moscow agreed to renegotiate long-term oil-indexed gas contracts. The decision to negotiate transit access for cheaper prices was, however, criticized by the EU. Turkey's decision was perceived as a fundamental risk for the feasibility of the Southern Gas Corridor initiative (Koranyi & Sartori, 2013). However, the South Stream pipeline project has been abandoned, owing to controversy over non-compliance with European Union competition and energy legislation such as the Third Energy Package, and was subsequently replaced by TurkStream.

The realization of TurkStream was uncertain, as relations between Turkey and Russia worsened after a Russian Sukhoi Su-24 attack aircraft was downed over Syria by the Turkish Air Force in November 2015. Russia quickly introduced sanctions against Turkey, banning the import of Turkish fruit and vegetables, the sale of charter holidays for Russians to Turkey and construction projects with Turkish firms in Russia. The visa-free travel regime between the two countries was also suspended. However, in late June 2016, President Erdoğan apologized for the incident and bilateral relations improved. In July 2016, following a reconciliation meeting in Moscow, presidents Putin and Erdoğan signed a long-delayed deal to build the TurkStream pipeline.

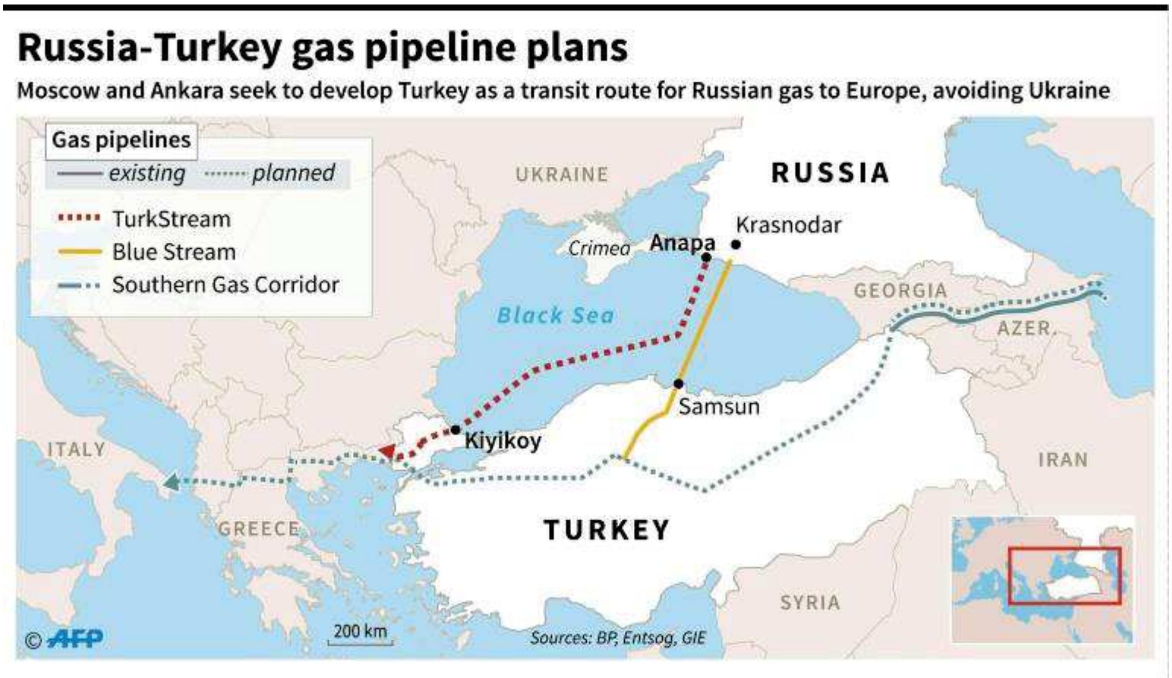
TurkStream 1 would essentially replace the 14 bcm-per-year Soviet-era Trans Balkan (TBL) Pipeline, which has been used since 2011 by private gas providers operating in Eastern Thrace and the Greater Istanbul area. TurkStream 1, whose onshore part will be co-owned by BOTAŞ and Gazprom, has an initial transit capacity of 15.75 bcm. The 900 kilometre offshore component, estimated to cost around $6.35 billion, will be entirely financed by Gazprom, the owner and sole operator of the pipeline. In conjunction with Blue Stream, which also has a capacity of 16 bcm to be expanded to 19 bcm/y, the Russian-owned and/or operated pipeline will be able to export to Turkey up to 35 bcm per year of Russian gas – equal to almost 83 percent of Turkish 2016 demand (estimated at 42 bcm).

The completion by late 2019 of TurkStream's first leg will eliminate Turkey's transit dependence on Ukraine and secure lower gas prices for its Russian imports[1] (Mikulska, 2017). As for the Moscow's interests, the replacement of South Stream with TurkStream would serve Russia's interests in securing its existing and future share in Turkey's gas market, the fifth largest in OECD (Organisation for Economic Co-operation and Development) Europe, and its most important importer out of Former Soviet Union after Germany. It would also allow Russia to significantly limit its own transit dependence on Ukraine, although it is not clear if a second TurkStream pipeline will be constructed, especially before 2019, to reach Gazprom's clients in the Balkans and southern Italy via Greece. TurkStream 2 would, however, definitely increase the geopolitical value of Turkey in Russia's eyes and turn Turkey into a transit corridor of major importance for *both* Russia and the EU.

Thus the TurkStream will commit Gazprom and BOTAŞ to another long-term contract, covering a maximum volume capacity of 15.75 bcm per year, close to one third of Turkey's current demand. The existing long-term contract between the two state companies – which has, since 2005, been serviced through the Blue Stream pipeline – provides 16 bcm per year and is set to expire in 2025, although it has a ten-year renewal clause (Rzayeva, 2014: 22-23).

[1] In 2016 Botas won a 10,25% discount by Gazprom, a policy that was discontinued for 2017. It is not inconceivable though that after the completion of the project new reductions may be negotiated.

Map 1 – TurkStream and Blue Stream Pipeline Routes (Vietnam Investment Review, 2016)



Russia-Turkey gas pipeline plans. (AFP/Kun Tian)

4. Key drivers and focal issues: The role of Turkey and Russia in the Southern Gas Corridor

Europe’s Southern Gas Corridor Strategy is founded on the necessity to maximize imports of non-Russian gas via non-Russia-controlled territory. The policy dates back to the mid-2000s, when the European Commission appointed, in September 2007, former Dutch Foreign Minister Jozias Van Aartsen as a special coordinator to promote the EU’s Southern Gas Corridor (Van Aartsen, 2009), and, in particular, the two projects of common interest put forward by several EU member states in the period between 2001 and 2005 – namely, the Nabucco (2005) and ITGI (2001) (Interconnector Turkey–Greece–Italy) projects.

Initially, the policy was identified as part of the comprehensive TEN-E (Trans-European Energy) strategy, but it was elevated after the first Russian–Ukrainian crisis of 2005–6 to a special status as a core component of the 2008 EU Energy Security and Solidarity Action Plan (Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions- Second Strategic Energy Review, 2008: 4-5). The policy’s strategic goal was to establish a fourth route of supply diversification after Russia, Norway and North Africa so as to limit the Union’s import dependence on Russian gas exports transited via Belarus and Ukraine.

At the time, the European Commission recognized as potential sources of supply for the Southern Gas Corridor not only the Caspian Sea (i.e. Azerbaijan) and Central Asia (Uzbekistan; Kazakhstan; and, primarily, Turkmenistan) but also Middle Eastern gas from northern Iraq and Egypt, which could reach the Turkish pipeline network via the then planned extension of the Trans Arabian Gas Pipeline system.

The idea that the Southern Gas Corridor (SGC) could be developed as a multi-sourced gas-supply route to the European Union tilted the European Commission in support of the larger[2] Nabucco pipeline project, in which Turkey played a leading role both as an original member and a shareholder in the early consortium – which dated back to the Cooperation Agreement of October 2002 – as well as the quintessential transit state for the entire Corridor, regardless of which project would be eventually selected.

Turkey's involvement in the Union's evolving SGC was secured by dint of its geographical position as well as the considerable political and economic influence that Ankara could bring to bear vis-à-vis Azerbaijan, whose decision would prove to be vital for the selection of the winning pipeline project. Baku, via its national oil company SOCAR, controlled, along with the Shah Deniz partners, the only readily available gas volumes that could be exported to Europe in ways that bypassed both Russian territory and Russian geostrategic influence. These volumes, estimated at 16 bcm per year, would come from the second phase of the development of the Shah Deniz gas field (SD2), in which the Turkish national oil and gas company TPAO was the second largest shareholder, with a 19 per cent stake.[3]

Turkey's aspirations moved beyond its evident role as an important transit state – especially after it negotiated, in October 2011, a unified transit-tariff regime for the entire length of the Nabucco project, extending from the Turkish–Georgian border to Baumgarten, Austria's Central European Gas Hub. Turkey was already a major importer of Azeri gas from Phase 1 of the Shah Deniz field, consuming up to 6.6 bcm annually since 2007, and aspired to secure an additional 6 bcm per year from SD2 at privileged prices.

Becoming an important transit country, through the construction of TANAP (the Trans-Anatolian Pipeline) and TAP (the Trans-Adriatic Pipeline), was not the only, or even the most important, priority for Turkey's gas strategy vis-à-vis Europe's SGC strategy and Ankara's allies in Transcaucasia. For Turkey, Azeri gas exports would first and foremost diversify its own imports from Russia, and, as Gulmira Ryzayeva put it, "Turkey's greater involvement would make Ankara more self-assertive in the regional political scene and increase its negotiating power vis-à-vis the EU and its accession talks which have fallen behind since Turkey became an EU candidate." (Rzayeva & Tsakiris, 2012: 12).

The link to Turkey's accession talks (Tekin & Williams, 2009: 337-356) is also attested by several statements on the part of senior Turkish policymakers. As highlighted by Turkish Deputy Undersecretary for Energy and Natural Resources Yusuf Yazar, the "energy corridor" role has strengthened Turkey's position in the accession period … In terms of European vital interests, the

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[2] Nabucco, as a 31 bcm/y capacity pipeline, was almost three times bigger in terms of transit capacity compared to the initial capacity of its competitors, namely the ITGI project (11 bcm/y) and the TAP project (10 bcm/y).

[3] It is notable that TPAO controls an even bigger share of Shah Deniz (19%) than SOCAR which according to the terms of the existing Production Sharing Agreement has a share of 16,7%.

EU must shorten and ease the accession period to guarantee both the realization and operation of this "energy corridor". In 2009 Turkish Prime Minister Recep Tayyip Erdogan even threatened to reconsider his country's support for the Nabucco project, if the EU did not open the energy chapter in its accession talks with Turkey noting that "If we are faced with a situation where the energy chapter is blocked, we would of course review our position [on Nabucco]." Accordingly, former Turkish Minister of Energy Taner Yildiz even claimed that "with Nabucco, we believe we deserved [to be a member of] the EU" (Koranyi & Sartori, 2014; 32-33).

Although the attempted linkage between Nabucco and Turkey's accession talks failed to produce any significant progress for Turkey's EU candidacy, Ankara's attempts to ameliorate its own energy dependency through the increase of its imports diversification met with considerable success. Apart from the fact that Turkey controls, via the state-owned BOTAŞ corporation, a 30 percent stake in the TANAP pipeline (Socor, 2012), once SD2 is completed in 2020, it will be importing more gas from Azerbaijan – around 12.6 bcm per year – than the entire EU, which will get a total of 10 bcm per year via TAP[4] (BP, 2013).

By 2020, if Turkey's gas demand remains at its current level of 42.5 bcm, Azeri gas exports would cover 28 percent of its final consumption, compared with the 55 percent of its demand that is (and will remain) covered by Russian exports. This is a considerable improvement in terms of Turkey's import-diversification strategy, and one that will have a lasting effect given the long-term duration (25 years) of the Shah Deniz 2 contracts[5] (BP, 2017). Azerbaijan would thus emerge as Turkey's most important gas supplier second only to Russia, which will continue to dominate Turkey's gas-import portfolio well into the mid-to-late 2020s (and, most probably, beyond that, given the dynamic of the TurkStream 1 project and the existing long-term projects between Gazprom and BOTAŞ).

The prolongation of Turkish dependence on Russian exports well into the next decade and a half is not only indicative of Gazprom's competitive pricing. It is also a testament to the failure of the SGC strategy to operate as a multi-sourced supply "highway" and secure credible alternative exporters to Russia, other than Azerbaijan. Part of the reason for this shortcoming relates to the political upheaval provoked as a result of the so-called Arab Spring in 2011, which not only turned Egypt into a net gas importer as early as 2012 but also eliminated – due to the spillover of the Syrian civil war and the rise of Daesh/so-called Islamic State – any serious discussion regarding the construction of a gas pipeline between Turkey and the KRG (Kurdish Regional Government) that could feed into TANAP. The most significant blow to the EU's SGC strategy, however, was the

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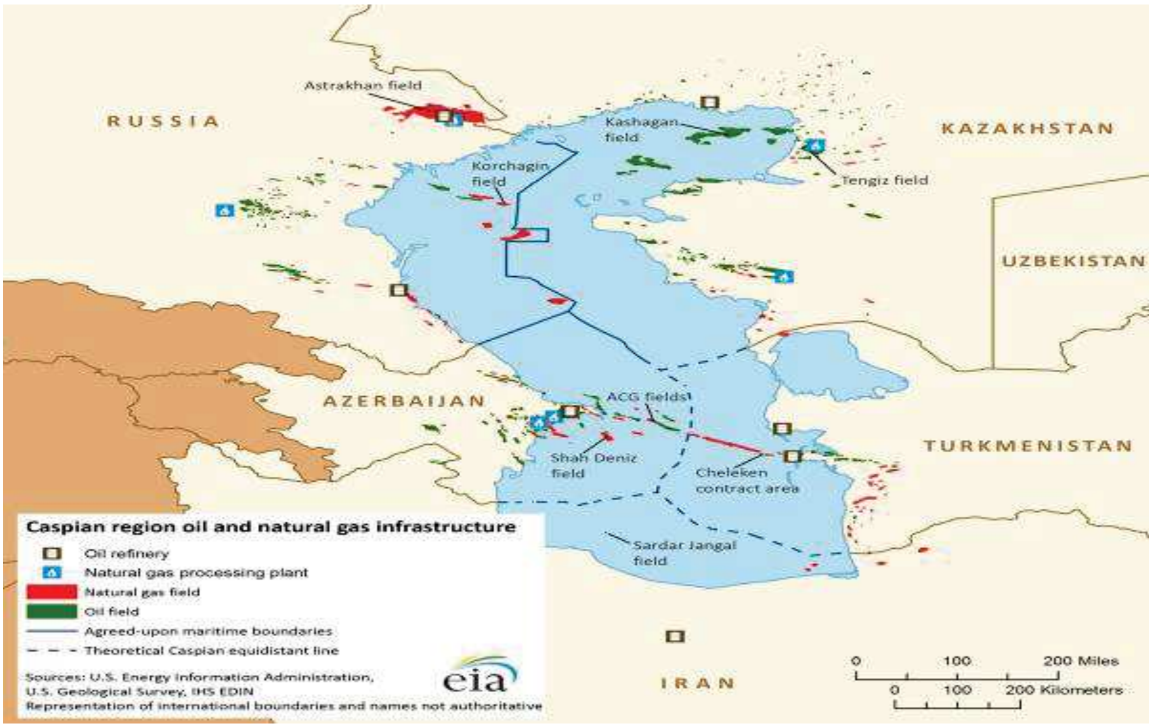
[4] Of the 10 bcm/y which is the initial throughput capacity of TAP, 8 bcm/y will be transited via Greece and Albania to Italy purchased by Axpo Trading AG, Enel Trade SpA, E.ON Global Commodities SE, Gas Natural Aprovisionamientos SDG SA, GDF SUEZ S.A., Hera Trading srl and Shell Energy Europe Limited . 1 bcm/y will be consumed in Greece by DEPA Greek Pubic Gas Company S.A. and 1 bcm/y will be transited to Bulgaria for EAD Bulgargaz via the IGB (Interconnector Greece-Bulgaria). These data are based on the supply contracts signed between TAP and the offtakes in September 2013.

[5] For Turkey's 2016 gas demand, p.29. For the share of Russian gas exports as a component of Turkish demand, p.29 and p.34.

“loss” of Turkmenistan’s potential supplies and the self-elimination, up to 2015, of Iran as a potential supplier of the original Nabucco project.

The inability – primarily due to US and EU diplomatic opposition – of Nabucco’s planners to secure gas supplies from Iran, so as to make their original plan viable to the Shah Deniz consortium, resulted in a major push on the part of the US and the European Commission that focused on the resolution of the Azeri–Turkmen maritime disputes in the Caspian Sea. The disputes included competing claims over the respective EEZ (Exclusive Economic Zone) limits of the two littoral states and the ownership of the Kyapaz/Serdar oil and gas field, which lies (Bohr, 2016: 86-88), literally, in the middle of the route of a potential Trans Caspian Gas Pipeline (TCGP) that could easily cover the existing un-contracted capacity of the TANAP pipeline project – namely, 15 bcm per year.

<u>**Map 2 – Turkmen–Azeri Maritime Disputes**</u> (U.S. Energy Information Administration, 2013: 2)



Turkey, which, contrary to US and EU policies, systematically championed during 2009–10 the idea of securing Iranian gas in order to make the Nabucco pipeline viable (see Tynan, 2009a; Tynan 2009b; Tynan 2009c; Sariisik, 2009), endorsed the efforts of the European Commission to resolve the Kyapaz/Serdar dispute and construct the TCGP, but even the combined efforts of Ankara and Brussels could not overcome Russia’s strong opposition to the construction of TCGP in the absence of a comprehensive agreement regarding the status of the Caspian Sea. On 13 September 2011, a few days after the European Council authorized the Commission to officially promote the TCGP pipeline, Russia’s Foreign Ministry issued a statement that unapologetically condemned what it perceived as Europe’s “intervention” in the Caspian Sea. The statement noted Moscow’s "surprise" at the decision of the EU Council, underlining the fact that it "regretted the EU's decision which by all appearances, ignores the current international, legal and geopolitical situation in the Caspian basin". The Russian communiqué also warned that "all attempts to intervene in the Caspian deal could seriously complicate the situation in the region and negatively affect talks on the status of the Caspian Sea"(Azernews, 2011).

The EU's energy Commissioner at the time, Gunter Oettinger, did not mince his words when, noting, with notable un-diplomatic clarity during an interview with *Deutsche Welle* on 14 September 2011, that Russia should not use its gas exports to politically pressure Europe and its Caspian partners: "if the Russians try to hinder Nabucco both technically, by constructing South Stream, and politically, by pressuring Ashgabat [the Turkmen capital] and Baku, I personally will have less confidence in numerous gas contracts with Russia and believe less that gas is not a political instrument for Russia" (1News.Az, 2011).

Russia's opposition to the SGC policy was in line with its strategic goal of blocking the formation of alternative export routes for the hydrocarbon resources of former Soviet Union states that followed a pro-Western approach, aspired to become members of the Euro–Atlantic space (through membership of NATO and/or the EU), and opposed Russian attempts to reintegrate the post-Soviet space into a sphere of nearly exclusive Russian influence. Given the economic dependence of (especially) Azerbaijan and Turkmenistan on their hydrocarbon exports, if those states remained dependent on a Russian-controlled pipeline export system they would have limited means and/or incentives to oppose the re-establishment of Russia's hegemony in their respective regions. In short, if, as former US Energy Minister Bill Richardson succinctly noted, the goal of US policy in the region was to press for "the construction of east-west oil and gas pipelines in Central Asia, securing political autonomy for the newly independent states of the former Soviet Union" (Richardson, 2005: xvii), then Russia's goal was, and is, to do the exact opposite (Margelov, 2002: 195-211).

Although Russia might have been persuaded to tolerate a small-scale SGC project – the size, for instance, of TAP phase 1 – it would remain vehemently opposed to a larger and more disruptive project such as the original 31 bcm-per-year Nabucco project, especially if its construction involved the loss of its regional influence in the southern Caspian Sea. If Moscow had been opposed *in principle* to the concept of a SGC, then it could have used the opportunity of its August 2008 conflict with Georgia as a pretext to physically damage or even cripple the Corridor's vital infrastructure, which connects Baku to Erzurum via Tbilisi – namely, the Southern Gas Caucasus pipeline.

Russia even preferred to lose its economic leverage over Turkmenistan to China, which underwrites its policy of diplomatic preeminence in Central Asia, but it could not accept Turkmenistan opening, in alliance with Azerbaijan, a route for the expansion of Western influence in Central Asia that could have also seriously competed with its share of the European gas markets. In the absence of Iran, the addition of Turkmenistan to the project would have rendered Nabucco viable, and would have at least tripled the net positive effect of the EU's import diversification from the SGC area by 2020. Given the depth and breadth of China's influence over Turkmenistan, and the continued frictions between Azerbaijan and Turkmenistan, this prospect remains quite questionable today.

Turkey always sympathized with and supported the aspirations of the former Soviet republics of Central Eurasia, especially Azerbaijan, to chart an autonomous and often anti-Russian foreign policy. This was partly the reason it proved to be so instrumental in US/EU efforts to build the Baku–Tbilisi–Ceyhan oil pipeline as well as the TANAP pipeline system, which was fundamental to the entire SGC strategy (Ediger & Durmaz, 2016: 131-149). Turkey also has no particular qualms about reinvigorating the prospects of securing either Turkmen or Iranian gas for the existing non-contracted capacity of TANAP, estimated at 15 bcm per year – or, for that matter, the prospective construction of a second TANAP project – and has encouraged regional players, including Azerbaijan, to move in that direction after international sanctions on Iran were lifted following the P5+1 nuclear agreement (i.e. that of China, France, Russia, the UK and the US plus Germany) with Tehran in late 2015 and 2016 (Tanchum, 2015: 55-65).

Yet at the same time, Turkey would not be blinded to the fact that once the TCGP collapsed and Iran was cut off as a supplier from Nabucco, despite its sincere efforts to the contrary, the original idea behind the SGC would be downgraded to something far less ambitious and far less annoying to Russia. Turkey did not embrace the idea (often supported in EU circles) that the bypassing of Ukraine as a conduit for its Russian gas imports was mutually exclusive with its diversification of supplies through the implementation of the Southern Gas Corridor. This policy continues to guide Turkey's energy diplomacy in its triangular relationship with Russia and the EU.

Conclusions: the Moscow–Ankara energy axis and the future of EU–Turkey relations

Turkish–Russian relations have always been a complex set of geopolitical "games", in which energy issues have significantly decreased the possibility of a divergence between the countries. Energy, moreover, has transformed historical rivalry into an enhanced bilateral partnership. In its relations with Russia, Turkey has consistently put its economic interests before political strategies – and its private sector has played a very important role in strengthening this approach.

Consequently, Ankara has remained passive, opting not to protest too much at the Kremlin's assertive policies in the region and deciding to pursue its own political goals pragmatically. While Turkey generally supports Western positions in the region vis-à-vis the Ukraine crisis, it does not want to alienate itself from Moscow. Most likely, Turkey will continue to balance East and West, avoiding taking sides and calling for a peaceful solution of the crisis in Eastern Europe and the South Caucasus.

Furthermore, Turkey will seize the greatest possible advantage by purchasing energy resources from all the main producers in the region. On the one hand, it will try to reduce its dependence – and possibly that of Europe – on Russian gas by embarking on the construction of the Trans-Anatolian Pipeline (TANAP) and by paving the way for the realization of the Southern Gas Corridor (SGC). On the other hand, it will give Moscow the possibility of increasing its energy exports to the

West through TurkStream, bypassing both Ukraine's territory and the EU Commission's competition rules (Schleifer, 2012).

The benefits of TurkStream 1 for Turkey were so significant that the project "survived" the recent Russian–Turkish crisis over Syria, which threatened to derail the entire framework of cooperation between the two countries after Turkey downed a Russian Su-24 fighter in November 2015. It could be argued that the significance of the project acted *inter alia* as an impetus for President Erdoğan to mend fences with President Putin in June 2016, although this does not mean that Russian and Turkish geopolitical interests are now (or will become) fully aligned over the Syrian question (see Uysal, 2016; Khlebnikov, 2017).

Ankara opted for a far more balanced approach that simultaneously promoted both the TANAP/TAP (Trans-Adriatic Pipeline) and the South Stream and then the TurkStream gas pipelines, building on its own successful example regarding the Blue Stream project, which had already halved its own transit dependence on Ukraine before the EU devised its SGC strategy. Turkey has consistently upheld this parallel track, which delicately balances competing EU and Russian interests. Although South Stream was conceived as a bypass of Turkey, Ankara supported the project in order to keep its relationship with Russia intact, and in 2011 it granted South Stream developers the necessary permits to route the pipeline through its EEZ (Exclusive Economic Zone).

The lack of progress in Turkey's EU accession talks regarding the opening of the Energy Chapter or the completion of the Trans European Network Chapter, in combination with the country's non-participation in the Energy Community, "exempts" Turkey from any European intervention over its sovereign energy-policy options – thus granting Ankara a high degree of diplomatic flexibility, which other EU member states do not have. This has also been translated into substantial cooperation with Russia.

Energy ties between Ankara and Moscow are also expected to significantly influence the future of EU–Turkey relations in the light of the evolution of the EU–Russia energy partnership, which – despite periodic ups and downs – appears to be moving towards increasing mutual dependence. Indeed, notwithstanding the deterioration in relations following the eruption of the conflict in Eastern Ukraine and the annexation of Crimea by the Kremlin, energy interdependence between Europe and Russia continues to grow, while the diversification options put in place both by Brussels and Moscow do not seem sufficient to replace a significant part of the current exchanges.

In this context, Russia's attempt to circumvent Ukrainian territory not only from the north (via Nord Stream 2) but also by the southern route – although divisive within the EU – might eventually contribute to reinforcing this mutual dependence, in line with some compromise initiatives launched by the European Commission and Gazprom. With the realization of TurkStream, this new setting – free of potential interference from Washington – would contribute to increasing the direct role of Ankara in the energy triangle, and significantly impacting on the future of EU–Turkey relations.

In this context, a **cooperation** scenario in the energy field becomes the most likely outcome for Turkey–EU relations: a scenario in which both Brussels and Ankara will try to coordinate their relations with Russia through a positive agenda, in order to exploit the interdependence emerging within the "triangle". As analysed above, bilateral relations with Russia in the natural-gas sector will be central in cementing Turkey's energy cooperation with the EU; indeed, in this domain Ankara will be able to exploit its strategic position, acting as a natural-gas crossroads (and, potentially, a hub) for southeastern European countries and Italy.

This scenario also assumes that Turkey's energy policy vis-à-vis the EU would not antagonize Russia, balancing the strategic interests of both Moscow and Brussels. In this framework, it will be fundamental for Ankara to pursue (and to present to its European counterparts) the realization of TurkStream not only as an initiative to strengthen its partnership with Russia but also as an added value for Europe's energy security. If understood by Brussels and the EU member states in southeastern Europe as a tool to avoid further transit disputes with Ukraine and to secure Russian supplies to their markets, TurkStream (and hence Turkey) may become an increasingly important variable in the European energy equation.

A precondition for the emergence of this scenario is the undisputed commitment of Turkey to the realization of the Southern Gas Corridor, by supporting both TANAP and TAP, and possibly by allowing new gas molecules (i.e. northern Iraq) to transit through its infrastructure. Ankara's full commitment will be pivotal for the implementation of the European Commission's diversification strategy, and will definitively dismiss the idea that TurkStream and the Southern Gas Corridor are competing and mutually exclusive projects.

The analysis carried out throughout this paper suggests that the **convergence** scenario in Turkey's relations with the EU is far less likely, considering the current dynamics within the 'energy triangle'. Indeed, in order to achieve this outcome both Ankara and Brussels need to adopt not only a more innovative approach in order to revitalize Turkey's EU accession process but also a progressive alignment of their internal energy rules – especially in the gas domain. This would mean, specifically, the adoption and implementation by Ankara of the *acquis communautaire* (the EU's body of accumulated legislation and regulations), with all the implications that this may have on the destiny of Russian gas supplies to Turkey. However, considering the current status of Turkey–Russia energy relations and Ankara's reliance on Moscow's hydrocarbons, full convergence on this issue appears unlikely. A more cautious and balanced approach by both Turkey and the EU in this context would indeed avoid direct confrontation with Russia, strengthening the current energy interdependence among the parties.

The recent compromises achieved by the Commission and Moscow on competition and regulatory issues might contribute to slightly alter the picture.[6] But, despite these efforts, which show the willingness of the parties to establish a fruitful dialogue on highly divisive energy issues, it is likely

[6] In March 2017, Brussels presented a draft agreement reached with Gazprom to end a two-year probe into the company's alleged abuse of its dominant position in Central and Eastern Europe: the Russian giant, in fact, has proposed a number of commitments – which may become binding under Article 9 of the EU's competition Regulation 1/2003 – that should guarantee competition in the regional gas sector. In addition, back in 2016, the parties agreed on lifting the limits on Gazprom's use of OPAL, the onshore pipeline linking Nord Stream to Germany, allowing Russia to pump more gas supplies to Europe while bypassing the traditional route via Ukraine.

that Russia will do its best to prevent similar situations in a market – the Turkish one – in which it still retains strong commercial (and hence political) control.

Furthermore, in a convergence scenario Turkey is expected to align its current policy on climate change with the ambitious one established by the EU. This would lead to the reduction of oil and coal (and, to a lesser extent, gas) imports from Russia, as they generate high levels of carbon emissions. In order to meet its electricity demand and fill the capacity gap generated by the suspension of coal-fired power plants, Turkey would be expected to increase its electricity production from renewable energy sources. Given the importance of Ankara for Moscow’s hydrocarbon exports, it is likely that Russia will use all the tools at its disposal (i.e. discounted prices) to keep its shares in the large and profitable Turkish energy market.

Finally, as noted above, full convergence with the EU may envisage Turkey taking active measures to reduce its energy dependence (and that of Europe) on Russia, particularly by strengthening its supply-diversification strategy. However, given the current regional energy context and the difficulties of immediately procuring new gas resources for its market (e.g. from Turkmenistan, Iran or East Med), as well as the capacity of Russia to exploit its dominant market position in Turkey, it is difficult to imagine Ankara adopting a proactive diversification strategy that might alienate its stable energy-cooperation patterns with Moscow. In conclusion, although this scenario could enable Turkey to establish more strategic forms of energy cooperation with the countries of the Caspian Sea basin as well as the eastern Mediterranean region, thereby harmonizing Turkey’s regional energy policy with a wider policy of Westernization, the weight of Moscow–Ankara bilateral energy ties is likely to prevent such disruptive developments.

The least likely outcome in Turkey’s relations with the EU is **conflict**. This scenario envisages the deepening of Turkey’s energy cooperation with Russia and the transformation of its existing energy dependence into a more comprehensive and strategic energy cooperation, to the detriment of Ankara’s energy partnership with the EU. This could potentially undermine European energy security and increase the joint capacity of Russia and Turkey to employ energy as a tool for influencing developments in the European Union. Under this scenario, Turkey could hamper the Southern Gas Corridor and limit the EU’s access to the energy resources of the Caspian Sea basin, and possibly of the East Med and Middle East.

The conflict scenario could also lead to an increase in the Russian share of Turkey’s natural-gas market, transforming the current mutual dependence between the parties into an over-reliance of Ankara vis-à-vis Moscow. Despite Turkey’s recognition of the importance of a strong bilateral partnership with Russia, Turkish pragmatism would necessarily prevent the establishment of a mono-directional energy strategy and an almost exclusive dependence on Moscow for its energy supplies. In this context, energy cooperation with the EU cannot be completely dismissed by Turkey, as it would contribute towards balancing Russian dominance in its energy market (as well as its political leverage), and could be used by Ankara to establish/reinforce multilateral energy initiatives in its neighbourhood.

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FEUTURE sets out to explore fully different options for further EU-Turkey cooperation in the next decade, including analysis of the challenges and opportunities connected with further integration of Turkey with the EU.

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1. Mapping the dynamics of the EU-Turkey relationship in terms of their underlying historical narratives and thematic key drivers.
2. Testing and substantiating the most likely scenario(s) for the future and assessing the implications (challenges and opportunities) these may have on the EU and Turkey, as well as the neighbourhood and the global scene.
3. Drawing policy recommendations for the EU and Turkey on the basis of a strong evidence-based foundation in the future trajectory of EU-Turkey relations.

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