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Research Article

EURASIAN ENERGY SECURITY IN THE FACE OF RUSSO-UKRAINIAN TENSIONS AND TURKEY'S ROLE AS A POTENTIAL ENERGY HUB

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ABSTRACT

After the political and military crisis between Russia and Ukraine in 2014, the EU's energy security was again in question. In fact, this was not the first time for the EU to question the reliability of the Russian energy supply. Similar disputes sparked controversies over gas prices in 2006 and 2009 in the context of efforts to maintain secure and reliable energy markets. Russia has often used its energy resources as an instrument of threat and blackmail in foreign policy relations with the EU, especially after the 2000s. Regarding alternative energy routes, Turkey has raised an important option since the end of the Cold War. Its location as a geographic bridge connecting east and west, as well as the strategic ownership of gas pipelines such as TANAP increase Turkey's potential to contribute to the European energy security in case if it becomes a real energy hub rather than a transit country.

Keywords: Energy security, Nabucco, TANAP, Turkish Stream, Russia, Ukraine.

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ENERGY SECURITY IN THE GRAND CHESSBOARD

Academic efforts in order to make sense of the increasing importance of pipeline politics in world affairs and the new "great war" in Brzezinski's "grand chessboard, and especially in the Caspian region to control and use its vast resources has been a major study area during the post-Cold war era. The last two decades have witnessed a fiercer battle for energy security and the uninterrupted energy flow especially in and around the Caspian region mainly due to the emergence of the power vacuum which was then replaced by a quite clear "Russian comeback" . While energy interruptions were not widely experienced even during the Cold War era due to the continuing flow of the resources to Europe by the USSR even if the two are positioned in opposing blocs (Dannreuther, 2006: 198), the post-Cold War environment raised questions about the reliability of this flow. Within this context, since the flow of natural gas and oil requires a supply and demand side as well as a transit country/countries, the three actors seemed to be even more important in the new energy game in the town; energy giant Russia, energy-hungry Europe, and politically-preferable transit route Turkey, respectively. The debates over European energy security or more broadly of the East-West energy corridor had become more popular after the energy crisis of 2006, a politically-motivated Russian move against Ukraine as a warning against its pro-Western re-orientation and a strategic move to downgrade Ukrainian reputation in the Western eyes as a reliable transit route through which almost half of Gazprom's flow to the EU passes (Cheavlier, 2009: 109 and "Ukraine Natural Gas Facts). The recent annexation of Crimea by Russia, defying all outside criticism and rejection was comparatively much more concerning within the context of energy security and Russo-Ukrainian relationship which in many cases has a quite important impact upon the Russo-European relationship as well. It was not the first time that Russia strategically used its energy card, but this time the European capitals much more seriously felt the need to find a common solution to the risk of having an aggressive energy supplier with gradually increasing leverage over Europe.

Within the context of such a background, the very concept of "energy security" deserves greater attention since securing energy supply, as seen from the Russian moves in the post-Cold War era, has indeed become a major issue in terms of security, politics, foreign policy and economics. Before thinking about how energy supply can be secure and accessible for the actors in need, defining the concept and elaborate on its components is essential in order to have a better grasp of the concept itself and apply it to the Russo-Ukrainian and Russia-EU contexts.

Kalicki and Goldwyn (2005) define the concept of energy security as follows:

"In its most fundamental sense, energy security is assurance of the ability to access the energy resources required for the continued development of national power. In more specific terms, it is the provision of affordable, reliable, diverse, and ample supplies of oil and gas…" (Kalicki and Goldwyn, 2005: 9).

Pascual and Elkind mention 4 elements of energy security as "availability, reliability, affordability and sustainability" (Pascual and Elkind, 2010: 122). The European Commission refers it as "uninterrupted physical availability of energy products on the market at an affordable price for all consumers" (Sovacool, 2010:

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4). The MIT Working Group on Asian Energy and Security puts its emphasis on the prevention of any possible energy crisis and if it occurs anyway, to limit its impact by decreasing the demand-side's vulnerability (Hippel et al., 2010: 75). Lastly, and as a quite compact but powerful definition comes from Dyer and Trombetta who refer to the concept as "continuous access to various forms of energy in sufficient quantity and at affordable prices" (Dyer and Trombetta, 2013: 3-18) Thus, drawing from the intersection points of all these definitions, to refer to the flow of a particular energy resource as secure, the flow of energy resources from the supply side to the demand side should be reliable and sustainable. This flow should be free from probable energy crises which would have serious economic and political impacts. Moreover, a hegemonic supplier is unacceptable due to the risks which is stemming from vulnerability of the demand side since energy resources are regarded as highly strategic assets.

Within this context, with its rich energy resources and the relatively more insecure character of the Middle Eastern supply points, the ex-Soviet area is quite central to the efforts to diversify the supply and if possible, transit route, too, which would not only challenge Russian pricing policy but also limit the political risks attached to the current dependency on the Russian supply. This centrality of the geography has been a timeless centrepiece of the geopolitical studies. Brzezinski is still right in its assumption that "Nonetheless, geographic location still tends to determine the immediate priorities of a state—and the greater its military, economic, and political power, the greater the radius, beyond its immediate neighbors, of that state's vital geopolitical interests, influence, and involvement." (Brzezinski, 1979: 38). Echoeing this assumption implicitly, Grigas (2017) argues that the geopolitical notion of Eurasia is possibly more important than the geographic one" whereas Kaplan (2018) further strengthens this position with an energy dimension starting that "just as there are military geopolitics, diplomatic geopolitics and economic geopolitics, there is also energy geopolitics". Austvik and Rzayeva (2017: 540) quite rightly argue that "Geopolitics is very much is a geo-economic phenomenon and vice versa. Any state´s control of a given territory is in the end a question of "economic gain" – how to finance the costs and how to gain an optimal share of the values created or transmitted in/on that territory" which explicitly underlines the link between economics, energy, geopolitics and thus the rivalry over critical geographies within the context of energy-driven political chessboard. The two considered together, can be said that echoing what Mackinder had thought of the region, "the Heartland" (Mackinder, 1904: 421-444), or Brzezinski's "grand chessboard" stretching "from Lisbon to Vladivostok" (Brzezinski, 1979: 35). Further reinforcing this line of argumentation, and historically a though-provoking argument comes from Sempa (2002) who argued that the struggle for "Eurasian mastery" was the "geopolitical essence of the First World War, the Second World War, and the Cold War".

Therefore, how the puzzle between the EU and Russia (as the two key actors in this geopolitically vital "heartland" and the key supply and demand players of the Eurasian chessboard aside from the Far Eastern booming demand), was formed, structured and restructured over time, which moves resulted in the increasing number of debates about the European energy security and the risks of the EU's dependency on the Russian energy supply would be discussed in the next section in the light of the Russo-Ukrainian crisis till 2015.

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THE PUZZLE OF THE ENERGY POLITICS BETWEEN RUSSIA AND THE EU: THE QUESTION OF DEPENDENCE

Since energy dependency is not a problem per se, and it needs an aggressor in order for it to be defined as a risk, the missing link has been the strategic use of energy resources by a power, which is Russia in our case with an interest-oriented attitude in the form of either altering the amount of the flow or increase in prices. Especially during the independence period of the Baltic states, Russia used this weapon for numerous times in 1990, 1992, 1994 and even between 1998-2000 to "punish" their moves towards independence at first, and then, as a result of their cooperation with the West (Smith, 2006: 1-2). According to Lough, that kind of attitude was repeated by Russia over 40 politically motivated situations during the period between 1991 and 2004 (Lough, 2011: 8). Reinforcing the argument that the Russian actions were highly politically motivated, failed attempts to use energy weapon against Ukraine in 1993 just before a meeting on the withdrawal from nuclear weapons and the Black Sea fleet and in 1995 amidst disputes over the Ukrainian membership to the CIS Customs Union speaks for themselves (Fredholm, 2005: 17). One of the major problems with these cases was the silence of the West which was regarded as a dangerous energy-related "appeasement policy".

Similarly, energy crises of 2006 and 2009 mainly stemmed from political concerns of Russia with the fear of "losing ground in Ukraine". As a result of these crises, compared to the ones in the 1990s, the EU has paid more attention on its dependency question and its relationship with the Caspian and the Black Sea regions, once again realised the importance of the diversification of not only supply but also transit routes, and saw the importance of a harmonised common European external energy policy to deal with Russian strategic use of its energy card, aiming "to isolate Ukraine, suppress Central Asian energy producers, circumscribe Azerbaijan, and enhance its influence in Turkey and the Balkans." (Kim and Blank, 2016: 40) Since as of 2019, the EU does not have more than 25 large-scale LNG import terminals accounting for 215.1 bcm which is significant but still less than half of its yearly demand (Yafimava, 2020), it would be safe to argue that pipelines and thus, energy security and Russian use of it as a policy card would keep its significance for the foreseeable future which is basically one of the key reasons behind the Russian efforts to by-pass Ukraine as seen 2014 onwards more intensively as in the cases of Nord Stream 2 and South Stream or the Turkish Stream (Pirani and Yafimava, 2015; Siddi, 2017) as the project underwent changes and downsizing.

CRISES BETWEEN RUSSIA AND UKRAINE: A CHRONIC REMINDER OF THE RISKS OF ENERGY DEPENDENCY

2006 Crisis

Regarding the energy crisis in 2006, the process called as "Orange Revolution" is of importance. The semi-authoritarian Ukrainian leadership under Leonid Kuchma suffered from allegations of corruption, nepotism and non-transparent influence of the oligarchs, a common feature of almost all ex-Soviet states. Hence, the presidential elections of 2004 took the form of a choice between the status quo –i.e. the continuation of corrupt and authoritarian rule- and change

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–i.e. improvements in rights and freedoms and policy of Westernisation- rather than between the two candidates, namely Viktor Yushchenko and Kuchma's candidate, Viktor Yanukovych (McFaul, 2006: 14-21). In November 2004 Yanukovych was apparently won the election but the fraud in the elections caused mass protests and repeat of the second round of presidential election. As a result of protests and division within the armed forces, Yushchenko improved his chance before and won the presidential election on December 26, 2004 (McFaul, 2006: 35-43).

Pro-Western Yushchenko, promised reforms in domestic politics as well as in relations with Russia and the West. While he aimed at a more transparent energy relationship with Russia including investigations on the murky firm, Ros-Ukr-Energo (RUE) (Lough, 2011: 14) on the other hand he declared his desire to join the EU and even NATO (Dannreuther, 2006: 4). Not surprisingly, during the gas cut off to Ukraine on January 1, 2006, this political change has been argued to be one of the latent reasons of the crisis by the Western media. Consequently, EU member states waiting for the gas through Ukraine has suffered seriously and had to use their strategic reserves in the face of crisis.

Even though the crisis was solved on January 4, 2006, the crisis taught some lessons to all the sides involved; dangers of over-dependence on a single supplier and/or a transit route, the impact of Russian interests-driven policies, use of energy card over third parties, and the need for a powerful international regime to regulate energy trade and to settle disputes (Stern, 2006: 8-13). The belated and ineffective EU response came finally in the form of congratulations to both parties for their efforts to settle the dispute and an emphasis on the need for the EU to consider alternative routes for the future (Stern, 2006: 14). Thus, the first of the blows to the reputation of Ukraine for European customers was supply and Ukrainian route as almost the sole transit route of gas imports. Additionally, the crisis highlighted the possible negative impact of the Russian leverage over East-West energy transportation (Lough, 2011: 8).

2009 Crisis

With the return of Timoshenko to the seat of Prime Ministry in 2007, she aimed at changing some of the basics of the energy trade between Russia and Ukraine by eliminating RUE as the intermediary and to initiate direct sales from Gazprom (Pirani, 2009: 10). The problem arose when Gazprom accused Naftogaz for having a significant amount of debt and "stealing" the gas for domestic storage while Naftogaz denied all these accusations. As a result of these accusations and heightening tension between the two states, gas supply to Ukraine was cut off on January 1, 2009. Until the settlement of the crisis on January 20, gas supplies to Europe were firstly reduced and then completely stopped which was the first time in energy flow records of these actors since the Soviet times. With the agreement on January, 19, the parties agreed on an increase in gas prices flowing to Ukraine, eventually equating them to European prices, stricter payment plans, and enhancing role of the Gazprom's subsidiary in Ukraine, Gazprom-Sbyt. Politically, some disagreements between the President Yushchenko and Prime Minister Yulia Timoshenko has been claimed by Gazprom as one of the causes of the delayed settlement (Pirani, 2009: 15-37) and the Ukrainian political puzzle has been further complicated by these claims.

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Sensibly enough, this second blow to the reputation of the Ukrainian route within the context of energy transportation to the West as a reliable transit route was mentioned by Stern as a tool of the Russian administration to strengthen its position regarding its projects, namely Nord and South Stream pipelines towards Europe bypassing Ukraine. European Commission's appointment of a "fact finding mission" on January 5, and President Barroso's attempts to settle the dispute through telephone traffic and deployment of the EU Mission on January 11 were the responses of the European side (Pirani, 2009: 39-47). Even though the EU showed a higher profile compared to the previous crisis of 2006, the efficacy of the ECT to settle disputes and thus, the EU's control over its own energy supply was in question again.

2014 Crisis

In November 2013, Yanukovych decided to suspend political and economic association agreement (Trenin, 2015: 5) with the EU and showed his clear desire to pursue a more pro-Russian policy line by accepting $15 billion funds from Russia. (Mearsheimer, 2014: 80), This political alternation caused mass protests in Kiev's Independence Square (Maidan Nezalezhnosti /Майдан Незалежності) stemming from the disappointment of the public about the failed path towards a closer relationship with the EU which they saw as an "exit" from the politics plagued by oligarchs, nepotism, corruption, and poverty. The crisis can be seen as the peak point of the Russia vs. the West rivalry over Ukraine so far. After this crises country appears to be on the front lines of a renewed great-power rivalry between east and west. The tension over the country gradually increased in the last decade due to the Ukraine's moves closer towards the EU and NATO indicated that they see their future in Europe and vice versa, rather than for instance a clear Ukrainian move towards joining the Eurasian Economic Union composed of Russia, Kazakhstan, Belarus, and Armenia which would be operational on January 1, 2015. NATO's actions against Russia's near abroad policy of which the EU's Eastward expansion and its efforts to conclude associations agreements with post-Soviet countries are regarded by Russia as Trojan horses and caused irritation and accepted as serious concerns in the Russian policy-makers' eyes. While the protests in the Maidan are seemed to be ceased with negotiations between Yanukovych and protesters, more radical and ultranationalist groups demanded an immediate and more effective change rather than the reforms Yanukovych promised to conduct. Subsequently, Yanukovych had to flee in late February. Russian response was to act in quite short of time and annexed Crimea of which 60 percent population is ethnic Russian (Mearsheimer, 2014: 81) and Sevastopol on March 18 –based on a referendum held on March 16 thanks to the pro-Russian groups' taking control of the local government- and strongly encourage the independence of the People's Republics of Donetsk and Luhansk and further supports such movements in other regions of the Eastern Ukraine. In May, Petro Poroshenko, a pro-Western and pro-Maidan oligarch won the presidential election, and this is resulted with clearly caused irritation in Russia.

In terms of energy politics, in an attempt to "punish" its pro-Russian tendency as early as February, Ukrainian Naftogaz sued its Crimea-based subsidiary Chornomornaftogaz, accusing the firm of delaying its payments. Crimean response in March came quite radically too. The company was nationalised

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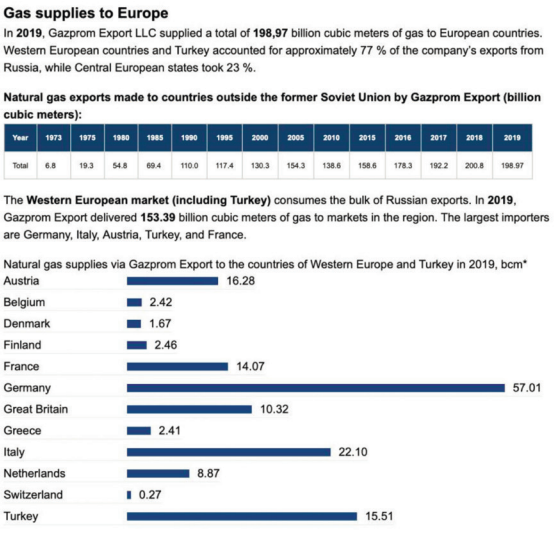
and handed over to Gazprom (Interfax-Ukraine, 2014). Starting from April, Ukraine faced serious problems regarding natural gas flow from Russia. At first, the discount deal between Gazprom and Naftogaz was cancelled due to not only increased the price Ukraine pays for the Russian gas (from $268 to $485.5 per one thousand cubic meters), but also forces Ukraine to pay its debt to Russia as soon as possible. Now, Ukraine also has to pay "in advance" for natural gas. In June, Russia decided to halt natural gas supplies to Ukraine and would provide the country only with the amount that the company's "European partners" needed (Bloomberg.com, 2014). By this wise move, Russia aimed at silencing Europe to some extent and have a freer hand in implementing its policies against the new Ukrainian government without facing serious European response. Finally, Ukraine had to accept $385 per one thousand cubic meters which means significant rise compared to the pre-Maidan price, and promised to pay its debt as soon as possible along with its agreement on paying in advance for the Russian natural gas. Since in 2010 Ukraine agreed to extend Russia's lease to the Black Sea naval base in Crimea from 2017 to 2042 to get cheaper natural gas from Russia already (Bloomberg.com, 2014a), Russian hand is quite powerful in terms of this pricing shift especially after annexing Crimea and thus, has to offer nothing in return for its presence in Crimea. Compared to relatively silent and inefficient but gradually increasing responses of the West in terms of the Russian moves against Ukraine we witnessed in the cases of the crises in 2006 and 2009, this time the EU downgraded its relationship with Russia, NATO froze its cooperation and Russia's accession process to the Organisation for Economic Cooperation and Development (OECD) was cancelled (Trenin, 2015: 4-8 and Mearsheimer, 2014: 78-79). The European Commission published "European Energy Security Strategy" in which the significance of European "solidarity", the need for further storage capacities and importance of increasing use of renewables are again underlined with direct reference to such energy crises and to particular potential energy disruptions in the winter of 2014 (European Commission, 2014).

Figure 1. *Gazprom's Gas Supplies to Europe*



Source: gazpromexport.ru

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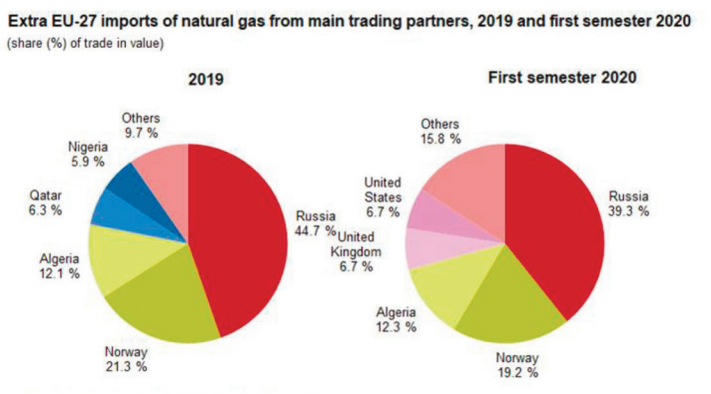
In the "European Energy Security Strategy" of May 2014, the European Commission, referring directly to the recent crisis in Ukraine, once again warned its EU Member States to act in unity and encouraged the use of renewables in order to limit energy dependence on Russia (European Commission, 2014). Still, considering the failed idea of the Polish Prime Minister Donald Tusk to establish an energy union to end the Russian influence on the energy realm or some other proposals from Washington and Brussels to use sanction card on the Russian energy sector, it'd be fair to conclude that even though political and security-related measures were taken more eagerly and urgently, particular bilateral preferences and diverse energy profiles of the EU members still far from ideal to "punish" the "aggressor" within the context of reliable and secure energy flow (Goldthau and Boersma, 2014: 13-15). In terms of common response, however, the EU's position as the guarantor of the Ukrainian natural gas debt as well as the IMF's promised support to clear it to secure the "October deal" between Russia and Ukraine can be regarded as important steps (Bbc.com, 2014).

An Interdependent Relationship?

The Russian share in EU's energy imports, as of 2019, is almost 24.9 percent in oil and 38.3 percent in natural gas (European Commission, 2020). While European energy consumption will increase by 10 percent in 2030, its energy production will decrease by 20 percent and the EU's own natural gas reserves which for the time being satisfy approximately 43 percent of its demand, but it will satisfy only 16 percent as of 2030 (Liuhto, 2009: 113-114). Therefore, energy issues in European policy-making would be more important in the upcoming decades and since the renewables are far from satisfying European energy demand for now and for the short to medium-term (Aalto, 2009: 157-180 and Belyi, 2005: 364), oil and natural gas would remain as the major resources. On the other hand, Russian dependence on the EU investment to improve its infrastructure and energy sector and EU's position as a major trade partner for Russia turned the relationship toward mutually dependent one. Russia puts an emphasis on diversifying its supply routes by constructing new pipelines toward Asia and signing deals with the Far East countries as a response to European plan to find alternative pipelines and to limit the Russian investment in European market, a mutual effort to "find alternatives" which engenders further mutual mistrust.

Figure 2. *EU-27-Gas Imports*



Source: ec.europa.eu

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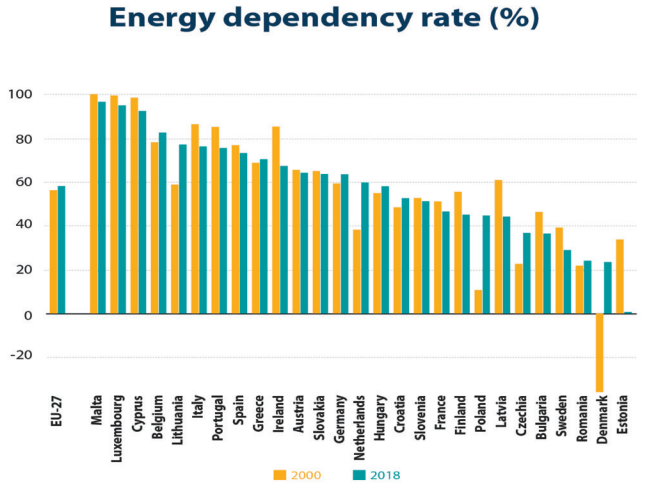
Nevertheless, it would be fair to argue that energy resources are proved to be more strategically important assets than the revenues from energy trade which is expected to be spent on investment due to the fact that energy is a more urgent need for the importer side suffering from insufficient storage capacity (Liuhto, 2009: 120). This is the case especially considering the fact that Russia can satisfy required increase in exports with its current infrastructure for the next decades (Kalicki and Goldwyn, 2005: 43) and investment on its infrastructure stands out neither as an urgent need nor an obligatory task. Still, Russia needs $330 billion to improve its upstream gas sector only which proves that the money which would follow the footsteps of energy resources is not an expendable source of income for Russia. Through securing its energy sector renovation with Western funds, excessive amounts would allow Russia to canalise its funds to other areas such as arms production and arms trade which is one of the leading sectors of Russian economy (Brzoska, 2004: 113).

Figure 3. *European Energy Dependency*



Source: ec.europa.eu

Within the context of this bilateral energy relationship plagued with mistrust and asymmetrical interdependence, diversification of supply via reliable transit routes is a key to alter the atmosphere; a causal mechanism that brings us to the debate what role can be played by Turkey in this energy chessboard.

Turkey: Striving for Becoming an Energy Hub

"Turkey has ambitions to become a major Eurasian energy hub. Better connections with supplier countries and energy consumers would not only increase Turkey's geopolitical standing. They would also bring lucrative business, in the form of transit fees or through new refineries, LNG terminals and trading facilities. And they could make it easier for Turkey to diversify its own energy supplies and to re-export any surplus gas it may have. In many ways, Turkey already fulfils the role of an energy hub. It does so through the Bosphorus straits and through several new pipelines that link itself to Russia and the Caspian region" Katinka Barysch (2007: 2). Within the context of dependency, Turkey, as an important

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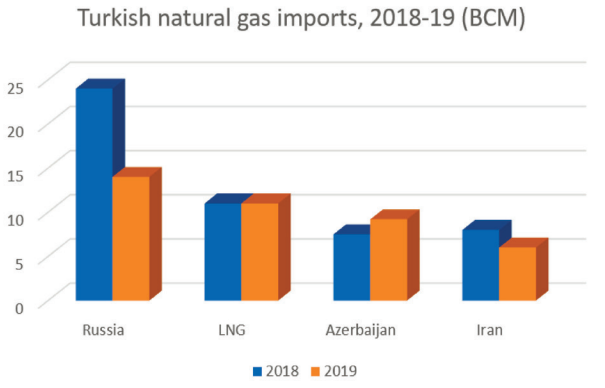
candidate to play a role of a transit route for the diversification of energy supply stands out as a key player. It does not have the potential to contribute to the European efforts to diversify supply, but also has its own agenda of raising its geostrategic profile by cooperating with global and local actors.

The end of the Cold War provided Turkey with windows of opportunity for Central Asia and the Caspian region both to fill the power gap and to fill new pipelines toward Europe. Encouraged by the West and especially by the US in the immediate post-Cold War (Winrow, 2001: 234), Turkey headed attention to the energy-rich countries of the Caspian region in which has close cultural and historical ties. Additionally, this opportunity was perceived as a chance to turn Ceyhan port into a new Rotterdam. Ambitious goals of acting within a united Turkic world "from the Adriatic Sea to the Great Wall of China" were passionately mentioned several times by leading political figures. Accordingly, Turkey funded TV channels, student exchanges, and cultural centres to utilise the "national kinship" ties with the newly independent "Turkic republics". It also initiated Turkic Summit Meetings every year (Larrabee, 2011: 103-104). The problem was that the Turkish economy at that time, was suffering severely from its structural weaknesses and high levels of inflation which prevented Turkey from channelling necessary economic sources to those countries in order to act as the winner of the power struggle. With respect to the Turkey's limited success in the region, it should also be noted that along with their strong ties with Russia, newly independent states' concerns about potential "patronising" attitude of Turkey over them resulted in the link to be much weaker than it had been expected during the thorny years of the Cold War when the "Turkic world" had been under the USSR rule (Fuller, 2008: 133).

Figure 4. *Turkish Natural Gas Imports 2018-2019*



Source: mei.edu

Nevertheless, thanks to its fortunate about close location to the Middle East and the Caspian basin in which hold 70 percent of global oil and gas reserves. It has geographical advantage to play a role as key energy transit route, in other words becoming, an "energy hub" (Fuller, 2008: 86 and Mane-Estrada, 2006: 3784). However, it should also be noted that even though the joint declaration of the Turkey-EU High Level Energy Dialogue meeting of 2015 refers to Turkey as "a natural energy bridge and an energy hub between energy sources in the Middle Eastern and Caspian Regions and European Union (EU) energy markets"

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(European Commission, 2015), first "bridge" and "hub" are not interchangeable concepts but rather quite different from each other and second, being a "hub" requires more than geopolitical positioning which is a key argument behind the criticism that such an approach by for instance, BOTAS or seen above even the EU Commission would be quite simplified and far from grasping the whole picture of requirements. Another problem is Turkey's own inability to satisfy its energy needs and the necessity to limit its own dependence on the Russian resources which is around 80 to 90 percent in terms of oil and 65 percent in natural gas (Pamir, 2007: 255 and Pascu, 2006: 2). As a growing market and a booming economy, its energy demand raises 8 percent annually, further questioning the possible negative impacts of this dependency, increasingly requiring Turkey to find alternative resources and to encourage renewables, and if necessary, even nuclear energy about which Turkey already made substantial efforts. Thus, its desire to become the 4th artery of the European energy demand after Russia, Norway and Algeria will not only raise its profile internationally, but it will also help Turkey in satisfying its own energy needs and in reducing its over-dependency on imported energy. Within this context, as a component frequently mentioned by experts as a prerequisite of becoming an "energy hub", Turkey's Natural Gas Market Law of 2001 focused on the liberalization of energy market and urges that any company cannot import natural gas more than 20 percent of expected national consumption and thus, state-owned BOTAS should not be part of any new natural gas contract until its share diminish to 20 percent while on the other hand private companies increase their shares and as of 2017 the natural gas imported by private companies were still only around 22 percent (Austvika and Rzayeva, 2017: 540). In order to become an energy hub, "extensive infrastructure, developed pipeline network, refineries, storage facilities, gas liquefaction points, regasification terminals and petrochemical units" are also essential and Turkey's performance in this picture does not seem so impressive so far especially with a far less developed storage capacity and pipeline network for the time being to become an energy hub (Winrow, 2011: 82). So whether Turkey can become an energy hub is a question way beyond the mere geographic location and such a goal would be demanding much more effort, time and possibly regulations on Turkey's part.

SOME MAJOR PROJECTS IN TERMS OF THE REALISATION OF TURKEY'S DESIRE TO ACT AS AN ENERGY HUB

BTC and BTE: The Major Legs of the East-West Energy Corridor in the Immediate Post-Cold War Era

One of the major embodiments of the energy role played by Turkey is the Baku-Tbilisi-Ceyhan oil pipeline. The project, called as the "Deal of the Century" is one of the main legs of the East-West Energy Corridor and enjoyed a serious amount of support by the United States. The intergovernmental agreement on the project was signed in 1999 and US was one of the signatories as was the case in the Memorandum of Understanding with Kazakhstan in 2001 (BTC Project) (Bilgin, 2007: 6389). The pipeline is the second longest oil pipeline after the famous Russian-governed Druzhba (Friendship) Pipeline. 1768-km pipeline which became operational in 2006 carries up to 1 million barrels per day (Tekin and Williams, 2011: 149 and Baran, 2005: 108). The strength of the

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pipeline was reinforced with the participation of Kazakhstan after a Kazakh-Azerbaijani agreement on the flow of crude oil from Kashagan field to Baku starting from 2009 (Bilgin, 2007: 6389-6390). The pipeline also implies that the Iranian role is constrained in energy supply and has a symbolic importance that Russian monopoly over oil transportation was targeted successfully for the first time. Additionally, the pipeline strengthens the independence of Azerbaijan and Georgia from Russian hinterland while also promoting a closer relationship between these states and Europe (Cornell et al., 2005: 24).

Thanks to the pipeline, Turkey could significantly increase its transit revenues, improved its facilities in the port of Ceyhan, and prevented the Bosphorus which already carries 7 percent of oil trade in the world (Pamir, 2007: 251) to be overused which could end up an ecological disaster (Mitchell et al., 1996: 80-81 and Kalicki and Goldwyn, 2005: 151). According to Mike Bilbo, director of communications and external affairs for BP in Turkey, "This is one of those turning points in history. It changed the picture for Turkey overnight" (Kuser, 2006).

Quite similar features were shared by its natural gas equivalent, namely the Baku-Tbilisi-Erzurum (BTE) natural gas pipeline. Similarly, BTE was the first non-Gazprom export route of the Caspian gas from the Shah Deniz field of Azerbaijan (Kalicki and Goldwyn, 2005: 156). The pipeline is the first part of the transportation of the Caspian gas to Western Europe through Turkey or in other words of the East-West natural gas energy corridor and a significant part of the "dream project" of Trans Caspian Gas Project supported by Turkey and the US (Kalicki and Goldwyn, 2008: 182). The pipeline is also called as the South Caucasus Pipeline (SCP) and carries up to 8.8 bcma natural gas since its operationalization in 2006 (Tekin and Williams, 2011: 150). In terms of natural gas it would be a fair argument that carrying natural gas westwards has been the key to Turkey's energy profile within the context of energy politics and thus the paper will now touch upon firstly Nabucco pipeline and then TANAP and the recent "Turkish Stream".

The Nabucco as a Showcase of the European Inability to Devise an Economically Feasible Common Energy Policy

The 3800-km pipeline passing through Turkey, Bulgaria, Romania, Hungary and terminates at Austria has expected to carry up to 31 bcma natural gas and became operational in 2014. Nabucco could have been supplied 5-10 percent of the EU's natural gas consumption in 2020. The project was backed by the US and the EU. For instance, while the Intergovernmental Agreement was signed, EU Commission President Barroso, EU Commissioner for Energy Piebalgs and US Special Envoy for Eurasia Richard Morningstar were present. Barroso defined the project as a "truly European project" (Tekin and Williams, 2011: 156). By Piebalgs, the pipeline was named as the "embodiment of a common European energy policy" (Norling, 2007: 7). Listing of the pipeline as a priority object by the European Commission in both 2006 and 2007, the appointment of van Aartsen as special co-ordinator of the Nabucco project and the decision to provide €200 million to the pipeline were other indications of the strong European support for the project. This was the first time the Commission financially supports a pipeline construction (Larrabee, 2011: 114). Accordingly,

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the initial feasibility study of the Nabucco in 2004 was paid by the EU (Barysch, 2007: 6).

Barysch points out a significant debate on the pipeline about its capacity. As it was argued above, the pipeline would satisfy only 5 to 10 percent of the EU's total natural gas consumption. While this amount raises questions, she uses a quote from an energy expert: "If Nabucco prompted Russia to reduce its prices as little as €1 per thousand cubic meters, then- even if not a single cubic meter of gas ever flowed through Nabucco- it would provide a good return on its €5 billion investment". Other than its role as the major alternative route linking the Caspian resources to Europe, the project was also a test case for the EU to imply a common energy policy. Moreover, Nabucco could have shown the advantages of cooperation for Turkey and the EU in an era that they have some difficulties in their bilateral negotiations (Barysch, 2007: 4-5).

However, the commissioning of the Nabucco faced major obstacles and difficulties. First and probably the most important one was to find reliable physical supply to fill the pipeline. Azerbaijani gas could fall short to do so on its own and additionally Caspian or Middle Eastern participation was required. Even though there was the possibility of the Iraqi, Egyptian and Iranian gas to fill the pipeline, the question here is the Western reluctance to even name Iran as a potential supplier due to the Iranian nuclear programme dispute. Prospects were not brighter with respect to the political circumstances in the post-war Iraq and post-Arab Spring Egypt as other potential supply points. The agreement between Turkey and Iran on the production in the South Pars field in 2007 was a major Turkish step to overcome the difficulty which is faced with strong US opposition anyway (Barysch, 2007: 5). The question of Iran is also a major issue that may deter Western investors including European Investment Bank and EBRD (Norling, 2007: 35-36). Another concern is the possibility of terrorist attacks which could have affected the European energy consumption plans dramatically (Liuhto, 2009: 117). European concerns about the leverage that would be achieved by Turkey with the pipeline without concluding the membership process is another difficulty (Barysch, 2007: 6 and Liuhto, 2009: 117).

Among the Russian responses to the efforts of operationalising the Nabucco pipeline, to "convince" particular EU members was a basic feature. For instance, Russia promised an extension of the Blue Stream pipeline to Hungary and used its close relationship with OMV of Austria and ENI of Italy (Barsych, 2007: 5-6). Russia's close relationship with Germany might be an important reason behind Schroder's comment on Nabucco as a "non-sense" project (Norling, 2007: 16) and Merkel's opposition to the direct funding of the project by the European Commission (Socor, 2009). Moreover, Schroder also helped Putin's lobbying efforts to materialise South Stream project as a Russian counter-move against the Nabucco (Lough, 2011: 11). Russian efforts to promote its project and to limit the resources to flow into the Nabucco as in the case of the 2007 agreements (Klare, 2008: 112-113) with the major suppliers along with the deals Gazprom secured with the major players of the Nabucco project such as Bulgaria, Austria, and Hungary (Tekin and Williams, 2011: 183) were quite wise steps on the part of Russia to push Nabucco to failure.

Lastly, Turkey's discomfort with its request to use some of the natural gas carried

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through the pipeline for its domestic energy demand played an important role in the project's failure. Turkey demanded opening of the energy chapter in its negotiations with the EU and to be able to use 15 percent of natural gas carried by the pipeline for its raising domestic demand (Okumus, 2013) which poses another challenge to the EU's energy security, too, as the key transit route, if it continues to be dependent on the Russian resources to the extent it currently depends. As the last blow to the pipeline, The Shah Deniz Consortium's choice of transporting the Shah Deniz II field's natural gas via the Trans Adriatic Pipeline (TAP), running from Kipoi in Greece to Italy through Albania and the Adriatic Sea rather than the projected Nabucco pipeline required another pipeline between the two points which brings us to the Trans Anatolia Pipeline (TANAP) project. This decision was a serious blow to not only Nabucco project, but also to the Nabucco West which was designed to replace Nabucco with a shorter pipeline and relatively low transportation capacity which was projected to transport natural gas to Baumgarten region of Austria following the route Turkey-Bulgaria-Romania-Hungary-Austria (Sonmez et al., 2013: 814-820). Thus, to a great extent, TANAP became the only remaining alternative to replace the failed Nabucco and to act as the "missing link" between the Caspian resources and TAP.

Trans Anatolia Natural Gas Pipeline (TANAP) and Change of Plans in the South Stream Pipeline

The Trans Anatolia Natural Gas Pipeline (TANAP) is the recent ambitious natural gas transportation project, developed primarily by Azerbaijan and Turkey which would act as a part of Southern Gas Corridor (Guliyev, 2014) and the "missing link" between the Shah Deniz field and TAP. As the date pointing to the kick-off of the project, December 24, 2011 can be considered when the agreement on the project was signed between the Energy Ministers of the two countries. In terms of its stakeholders, Turkey's BOTAS holds 30 percent of stakes whereas Azerbaijan's SOCAR holds 58 percent (Karakelle, 2014). As the only European party, BP decided to join the project by buying 12 percent of stakes which it bought from SOCAR. The pipeline will pass 1800 kilometres within the borders of Turkey, cutting through 21 cities. The construction of the pipeline will start in 2015 and expected completion date is 2018 in order for the pipeline to start delivery to Europe in 2019 (Melville, 2014). The pipeline will transport 16 bcma in 2019 of which 6 bcma will be used for Turkey's own energy demand, an important achievement for Turkey considering its refused demand in the Nabucco project with respect to domestic use of a certain portion of the flow. A gradual increase in the project's capacity is also projected. Accordingly, the pipeline is expected to carry about 21 to 24 bcma in 2023 and 31 bcma in 2026 (Yilmaz and Kilavuz, 2012). In terms of Turkey's natural gas demand, it should be noted that while Turkey pays $585 to Iran per a thousand cubic meters of natural gas and $400 to Russia, it pays $330 to Azerbaijan (Rzayeva) which is another major financial advantage of the project for Turkey, considering its growing energy demand.

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Figure 5. *TANAP Pipeline*

Source: botas.gov.tr

Whereas TANAP represents a significant step toward Turkey's goal to becoming regional energy hub, but there are still some concerns about the project. One of the problems with the project is, as a basically Turkey-Azerbaijan joint project, its lack of multilateral cooperation as opposed to the failed Nabucco project. Moreover, the absence of EU acquis-oriented institutional and legal framework is another point that is in stark contrast to the Nabucco project that was completely under the EU law (Tagliapietra, 2014). As a last point, with the exception of BP after the exit of E.ON and Total from TAP due to their economic concerns about the stagnant energy demands of Greece, Albania, and Italy there is no European energy firm within the consortium. This absence of European partners is particularly noteworthy considering the perception of the Russian-backed South Stream's project as much more economically beneficial project with a route composed of relatively energy-hungry destinations (Naturalgasworld.com, 2014).

However, TANAP is still strongly supported by the EU. Thanks to its potential to become an important part of EU's energy security efforts in the near future in spite of the above-mentioned concerns about the project, The European Commission welcomed the Shah Deniz Consortium's choice of TANAP and ruled out the Nabucco pipeline by referring to it as being "not feasible" (Okumus, 2013). Moreover, the then President of the European Commission Barroso, as a sign of the European support to TANAP and highlighting the importance of the project for Europe, sent a video message to the inauguration of the project to display the EC's support (Jarosiewicz, 2014). Moreover, the EU Energy Commissioner Gunther Oettinger welcomed the project as the first direct link between the EU and the Caspian basin "Commissioner Oettinger welcomes TANAP gas pipeline agreements", 2012).

In order to evaluate the significance of the pipeline, comparisons should be made between TANAP and other natural gas pipelines on the field and its capacity should be assessed in the light of the current facts of East-West energy transportation. One of the most important pipelines between Russia and the West, the Yamal pipeline carries around 33 bcma and the Nord Stream, 55bcma. Overall,

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Gazprom's flow of natural gas accounts for almost 37 percent of the European consumption as of 2019 (Soldatkin, 2019).). Additionally, it should be noted that 33 percent of the energy consumption of the EU is met by the EU members which accounts for 170-180 bcma. Non-Russian resources are also an important part of the EU's energy consumption with Norway and Algeria only providing almost one third of the EU's energy consumption. Assessing TANAP's ambitious 31 bcma capacity which is expected to be reached in 2026 in the light off these facts and figures, its importance goes without saying at least in limiting the Russian share in the EU's energy consumption which could push down Russia after Norway in terms of natural gas suppliers which might help the EU in case of future Russian interest-driven crisis with subsequent energy cut-offs and pricing revisions. Its even more ambitious projected capacity of 60 bcma (Evgrashina, 2012) in the future is more than the Nord Stream's capacity. Putting aside the evaluation of how realistic such a capacity is, probably more importantly, it also shows the expectations about the future participation of other Caspian countries as well as the Middle Eastern resources. Thus, CEO of SOCAR Turkey, Kenan Yavuz's reference to the project as a "matter of security for the EU" (Karakelle, 2014) seems fair enough.

Figure 6. *Nord Stream Pipelines*

Source: bbc.com

The recent Russian cancellation of the South Stream and renaming of the pipeline as the "Turkish Stream", as announced by Vladimir Putin in late 2014 in Ankara during his visit, which would transport the same amount of natural gas, 63 bcma, not to Europe via its proposed route, but rather to Turkey seems striking within this context. Putin declared that the work on the project will be halted and the amount will be transported via Turkish-Greek border rather than using Bulgarian route. Thus, this decision was thought to increase the amount of natural gas that passes through Turkey by 63 bcma (Bbc.com, 2014a and Theguardian.com, 2018), before the project was downsized and agreed upon two pipelines carrying 15.75 bcma each -as opposed to the first plan of having only one

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line of 15.75 bcma-, summing up to a still ambitious 31.5 bcma. Considering the ultimate capacity prospect of TANAP which is 60 bcma and this 31.5 bcma, the amount Turkey will be able to transit after its own consumption from these supplies will account for more than one-seventh of the EU's natural gas demand (currently around 550 bcma) if they reach their full potential.

Figure 7. *Turkish Stream*

Source: balkaneu.com

Thus, Turkey now has the potential to play the role of the "key Eurasian energy hub" more than ever, carrying out both the EU-backed projects and Russia-backed projects in accordance with its interest-driven calculations, making itself an invaluable partner for both actors' energy-related policies. As long as Turkey keeps its commitment to delicate steps on this energy chessboard, meaning that it maintains a healthy contact with both the EU and Russia without alienating either side due to the projects it participates in, also thanks to diminishing trust in Ukraine as a transit point due to political instability, in the medium to long-run, it might have the chance to raise its profile in the foreseeable future. It should however, be noted that while the Turkish dimension is as such, with the Nord Stream 2 and Turkish Stream, Russia would further deepen its key supplier role and Eurpopean dependence by seriously damaging the diversification efforts of the EU and succeeding in isolating Ukraine to a great extent. And in that context it is noteworth thay underlying the divergences within Europe, Gazprom succeeded in signing a shareholders agreement on Nord Stream 2 with E.ON, BASF, Shell, ENGIE and OMV (Siddi, 2017: 112), the key Western European energy companies, showing the East-West divide on diversification efforts too within Europe itself.

CONCLUSION

Within the context of the trilateral energy game, the Russian position is the clearest one with the aim of enhancing Russian global profile through strategic use of energy politics. The EU's profile is more complicated due to its suffering from internal disagreements and frequent triumph of national interests of individual member state. For instance Glachard, on this point, had argued that "the [EU]

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market has borders that are not Europeanised. Each country treats its border with a third country as a national border. When Spain wants to interconnect with Morocco and negotiates tariffs, investments, rules of access etc., they are doing EU external energy policy but they do it on a national basis. It's the case everywhere in EU. This cannot work anymore." (Energy Post, 2015) Probably, the most delicate role is and will be played by Turkey. While on the one hand Turkey is the target of different supplier and importer interests as an inevitable transit route, on the other hand, it has to be quite cautious in its steps in order not to antagonise one of these actors in order to both play the "energy hub" role successfully in the future and to satisfy its own growing energy needs. Turkey's continuing efforts to operationalise the East-West energy corridor via its territory while at the same time its nuclear deal with Russia and increasing trade volumes in addition to green light to both Blue Stream 2 and cancelled South Stream - of which importance for Turkey's transit role dramatically increased with the Russian decision to move its transport line in a way that passes through Turkey rather than Bulgaria which would have the potential to add Turkey's transit role a huge amount of 31.5 bcma which is, besides Nord Stream 2- by itself quarter of the amount Gazprom carries to European countries excluding Turkey - are showcases of this delicate act of balancing between the two actors. Nevertheless, in case LNG imports keep increasing in Europe whereas booming gas demands of Asia surpasses European demand significantly, then Turkey's long term goal of becoming an energy hub would significantly suffer. Otherwise, with a highly pragmatic and pro-active approach as in the case of the realisation of TANAP project while simultaneously strengthening its energy relationship with Russia, Turkey seems to pursue a wise strategy as an actor which reinvented its significance for both actors in terms of energy politics. In this delicate trilateral game, probably the best policy for Turkey, in line with its ambitious goal of becoming an energy hub and aside from the required internal reforms, to pursue can be derived from the words of Henry Temple Palmerson who served as the British Prime Minister between 1855 and 1865: "We have no eternal allies, and we have no perpetual enemies. Our interests are eternal and perpetual, and those interests it is our duty to follow" (Heath, 1969: 39).

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