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# *Linking Foreign Policy and Energy Security: An Asset or a Liability for Turkey?*

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# Linking Foreign Policy and Energy Security: An Asset or a Liability for Turkey?

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ABSTRACT

This article aims to examine the intricate interaction between energy politics and Turkish foreign policy in a turbulent region in terms of challenges and opportunities. From a theoretical perspective, the focus of the article lies at the critical intersection of soft and hard security, as well as domestic and external politics. It argues that, on the one hand, Turkey has been highlighting its potential of 'energy hub' position as an asset and, on the other hand, Turkey also needs to effectively deal with numerous hard and soft security issues closely linked with its foreign policy and rising domestic energy needs, which constitutes a major liability. Ultimately, the delicate balance that Turkey will try to strike will have a decisive impact in terms of determining its nature of interaction with other critical actors and future role as a regional power.

**Keywords:** Energy Security, Turkish Foreign Policy, Pipeline Politics, Climate Change, Geopolitics, Energy Politics

# Dış Politika ve Enerji Güvenliği Bağlantısı: Türkiye Açısından Fırsat mı Tehdit mi?

ÖZET

Bu makale son derece çalkantılı bir bölgede şekillenmekte olan enerji politikaları ve Türk dış politikası arasındaki karmaşık etkileşimi zorluklar ve fırsatlar çerçevesinde incelemektedir. Teorik açıdan çalışma, yumuşak ve sert güvenlik faktörlerinin yanı sıra iç ve dış siyasetin kritik kesişimine odaklanmaktadır. Makale, Türkiye'nin potansiyel bir "enerji merkezi" olma konumunun önemli bir avantaj olduğunu vurgularken, diğer taraftan, ülkenin dış politikası ve artan enerji ihtiyacı ile yakından bağlantılı çok sayıda sert ve yumuşak güvenlik sorununun etkin bir biçimde yönetilmesinin büyük bir zorluk yarattığını savunmaktadır. Sonuç olarak, enerji politikaları Türkiye'nin dış politikasında korumaya çalıştığı hassas dengeler, diğer kritik aktörlerle ilişkilerin belirlenmesi ve bölgesel bir güç olarak Türkiye'nin gelecekteki rolünün şekillenmesi açısından belirleyici bir önem taşımaktadır.

**Anahtar Kelimeler:** Enerji Güvenliği, Türk Dış Politikası, Boru Hattı Siyaseti, İklim Değişikliği, Jeopolitik, Enerji Politikaları.

## Introduction

This article argues that change and turbulence are the two key factors that lie at the intersection of energy politics and foreign policy in Eurasia and the Middle East. The global and regional actors, which would be able to manage and shape change in the energy realm in these volatile geopolitical environments marked by wars, tensions and numerous crises, are the ones successfully meeting the challenges of energy security in forthcoming years. Moreover, domestic and external linkages clearly have a decisive impact on the outcome of a complex web of relations. Within this context, Turkey faces a plethora of challenges, as well as nascent opportunities in its quest for emerging as an "energy hub" in its neighborhood, while trying to tackle the problems arising from its own energy dependency.

There are compelling changes in the global energy scene with significant implications for global and regional actors. The increasing share of Liquefied Natural Gas (LNG) in the inter-regional energy trade, the implications of the shale gas revolution in the US, the declining oil prices in the global markets, the intensifying competition from Asian markets, and the implications of the climate change and environmental concerns constitute some of the core areas of change.[1]

Against this backdrop of drastic change, the energy security challenges for Turkey are compounded by the stark realities of on-going and impending conflicts and difficult foreign policy choices in a turbulent region. The rising tensions with Russia and complications caused by the Syrian crisis constitute the key challenges. Nevertheless, there are also some areas that pose nascent opportunities. Turkey's increasing ties with Azerbaijan, particularly within the framework of the Trans-Anatolian Pipeline project emerges as a major opportunity for Turkish and European energy security. There are also some grey areas, which inherently entail some challenges that could turn into a liability for Turkish foreign policy, but also has the potential to become an asset if handled prudently. These are the newly found Eastern Mediterranean energy resources, energy relations with the Kurds in Northern Iraq, removal of international sanctions on Iran, the new Silk Road project of China and the fight with the climate change. In order to be able to turn these grey areas into assets rather than new challenges, a congruent strategy between energy politics and foreign policy decisions is critical.

## Theoretical Assessment: Linking Foreign Policy and Energy Security

Energy security is an "elastic" term; in that there is a tendency in the literature to tackle the concept from different angles of economics and politics or to change the scope of it by focusing on the narrow perspective of supply security or on the broader perspective to include environment, competitive markets and efficiency. While the International Energy Agency (IEA) defines energy security as "the uninterrupted availability of energy sources at an affordable price"[2], the European Union[3] adopts a more encompassing understanding defining energy security as, "Ensuring, for the

1 For detailed analysis of these changes, see World Energy Council, *World Energy Issues Monitor 2016: A Climate of Innovation-Responding to the Commodity Price Storm*, 2016; International Energy Agency, *World Energy Outlook 2015*, Paris 2015; World Energy Council, *Tackling Policy Uncertainty*, https://www.worldenergy.org/wp-content/uploads/2015/05/Tackling-policy-uncertainty.pdf, (Accessed on 28 September 2016).

2 International Energy Agency (IEA), "What is Energy Security?". https://www.iea.org/topics/energysecurity/subtopics/whatisenergysecurity,/ (Accessed on 29 March 2016).

3 For a detailed overview regarding evolution of the EU's energy security understanding and policies, see S. Duygu Sever, Ali Tekin and Paul A. Williams, "Evolution of EU Energy Policy", Ali Tekin and Paul A. Williams (eds.), *Geo-Politics of*

well-being of its citizens and the proper functioning of the economy, the uninterrupted physical availability of energy products on the market, at a price which is affordable for all consumers (private and industrial), while respecting environmental concerns and looking towards sustainable development".[4]

Given the challenges of the 21st century emerging from regional political and military turmoil, the pressing need to fight with the climate change and to keep up with the global market dynamics, an integrated approach towards energy security, combining politics, economics and environmental challenges,[5] is needed. Therefore, this article builds its analysis on an understanding of energy security where three major pillars of supply security, competitiveness and sustainability interact.

Apart from its definition, another highly contested feature of energy security is its place in politics and national agendas. Within the realist paradigm, hard security issues mainly evolve around the military security dominating the national and international agendas, implying that matters related with energy resources are more of soft power items coming from liberalism.[6] However, the changing dynamics of the international system and increasing interdependence among the actors today affected both the notion of "security" itself and the place of energy in it. NATO's increasing focus on the importance of energy security would be an outstanding example of this.[7] Although since the 1970s oil crises, the energy security as a non-traditional security threat started to find its place on the national agendas, the end of the Cold War led NATO to redesign its strategic concept to include uninterrupted natural resources and energy security.[8] Thus energy came to be considered as part of a new understanding of security, which has become broader in terms of new threats,[9] including "economic and social threats [such as] poverty, infectious diseases and environmental degradation."[10] Accordingly, energy has become almost as important as the other non-military aspects of power to ensure security. Therefore, the energy security is assessed as an issue of power interest that has become a question of national strategy.[11] Especially from the dimension of supply security, accessing or owning energy resources have become strategically important in the current conditions of global market/politics, and countries such as Russia have developed policies aligned with the theoretical claim that energy is "too important" to be analyzed as "a subject of international political economy" alone.[12]

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*the Euro-Asia Energy Nexus*, Hampshire UK, Palgrave Macmillan, 2011, p.13-37.

4 "Green Paper: Towards a European Strategy for the Security of Energy Supply", *European Commission,* Brussels, 29 November 2000, http://aei.pitt.edu/1184/01/enegy_supply_security_gp_COM_2000_769.pdf, (Accessed on 29 March 2016).

5 Arianna Checchi et al., "Long-Term Energy Security Risks for Europe: A Sector-Specific Approach", *CEPS Working Document,* No.309, January 2009.

6 Giedrius Cesnakas, "Energy Resources in Foreign Policy: A Theoretical Approach", *Baltic Journal of Law & Politics*, Volume 3, No.1, 2010, p.31.

7 Mitat Çelikpala, "Enerji Güvenliği: NATO'nun Yeni Tehdit Algısı", *Uluslararası İlişkiler*, Volume 10, No.40 Winter 2014, p.75-99.

8 Mehmet Efe Biresselioğlu, "NATO'nun Değişen Enerji Güvenliği Algısı: Türkiye'nin Olası Konumu", *Uluslararası İlişkiler*, Volume 9, No.34, Summer 2012, p.227-252.

9 Mustafa Aydın and Aslı Toksabay Esen, "Inside/Outside: Turkey's Security Dilemmas and Priorities in the Early 21st Century", Hans G. Brauch et al. (eds), *Coping with Global Environmental Change, Disasters and Security – Threats, Challenges, Vulnerabilities and Risks*, Berlin, New York, Springer, 2010, p.208.

10 United Nations, *Report of the High-level Panel on Threats, Challenges and Change, A More Secure World: Our Shared Responsibility*, UN Document A/59/565, 29 November 2004.

11 Daniel Yergin, "Ensuring Energy Security", *Foreing Affairs*, Volume 85, No.2, 2006, p.69.

12 Cesnakas, "Energy Resources in Foreign Policy: A Theoretical Approach", p.32.

When the strategic importance of energy security coincides with different leverages of countries with different roles in the energy game as producers, consumers and transit countries, the interaction between energy security and foreign policy becomes inevitable. To the extent that the states are interdependent in energy, their foreign policies and energy strategies are also interlinked. The physical ties through expanded energy infrastructures and political ties through long-term contractual commitments between suppliers and consumers create "room for politics."[13] Ensuring the uninterrupted and affordable energy supplies at the domestic level, defining the rules of the game for the energy markets now and in the future at the international level are today's tough realpolitik. Thus "alliances are formed not with those that we like, but with those that we need."[14]

This connection highlights a clear role for energy in foreign policy to the extent that energy dynamics shape the foreign policy of the involved actors coercively or voluntarily. While voluntarily, energy can play a role in a state's relations with particular regions and actors in the form of partnerships and cooperation,[15] it is also common to consider energy as a tool of policy together with other economic, military or diplomatic instruments, "to achieve and manipulate foreign policy goals around the world."[16] Consequently, energy can operate both as a factor of influence on foreign policy outcomes and a tool of foreign policy.[17]

While the effect of energy on the foreign policy is critical, as the two are interlinked, the effect of foreign policy on the energy security is also decisive. As Yergin asserts, "energy security will depend much on how countries manage their relations with one another, whether bilaterally or within multilateral frameworks."[18] From this perspective, for long term energy contracts and partnerships between the importer and exporter countries, political stability in domestic politics and bilateral relations is vital as it is critical in the assessments of investors for highly budgeted infrastructure and international pipeline projects.[19]

## Global and Regional Drivers of Change

The global energy field is very dynamic and a number of issues have emerged as a game-changer for key players. These range from the increasing share of LNG in the inter-regional energy trade to the implications of the shale gas revolution in the US, the rising competition from Asian markets, the plummeting oil prices in the global markets and the implications of the climate change and other environmental concerns. These global trends pose a number of challenges, as well as some opportunities for Turkey, and are often primarily in the grey area, where challenges and opportunities intersect.

Current global trends indicate that natural gas with an almost %50 increase in its consumption is the fastest growing fossil fuel and Asia Pacific is expected to replace Europe as the largest gas consumer

13 Brenda Shaffer, *Energy Politics*, Philadelphia, University of Pennsylvania Press, 2009, p.28.

14 Sascha Müller-Kraenner, *Energy Security*, London, Earthscan Publishing, 2008, p.xi.

15 Mert Bilgin, "Energy and Turkey's Foreign Policy: State Strategy, Regional Cooperation and Private Sector Involvement", *Turkish Policy Quarterly*, Volume 9, No.2, 2010, p.81-92.

16 Alliance for Innovation and Infrastructure, "Energy as an Instrument of Foreign Policy", 25 June 2015, http://www.aii.org/energy-as-an-instrument-of-foreign-policy/, (Accessed on 27 March 2016).

17 Shaffer, *Energy Politics*, p. 28.

18 Yergin, "Ensuring Energy Security", p.82.

19 Shaffer, *Energy Politics*, p.28.

soon.[20] Moreover, the growing demand for gas would lead to increasing LNG trade across regions by early 2020s, doubling from its current levels of 230 million tons by 2025 and expected to overtake pipelines as the dominant medium of transported gas by 2035.[21] Concomitantly, 60% of the increase in the global gas supply originates from unconventional gas, such as shale gas.[22] Although the spread of the shale gas production beyond North America is uneven due to the Trans-Atlantic divide over the perspectives on the fracking activities, the United States would move from being a net importer to net exporter within a decade as a result of continuous growth of its shale gas sector. The reflection of this on the foreign policy realm would be diminishing of the US dependence on the Middle East for energy and providing new alternatives for European consumers. World Energy Outlook 2015 foresees that "one-fifth of the projected rise in global demand consists of gas transported over long distances via very capital-intensive pipeline or LNG projects."[23] This potential for a new wave of LNG projects could also threaten Russian dominance in the gas markets.

As for Turkey, these new developments, while providing alternatives for diversification such as LNG purchases from Qatar, could also undermine financial feasibility of alternative pipeline projects going through Turkey during a period of low energy prices. It is noteworthy that Turkey's role as an oil-transit country is important rather than vital for global importers because of oil's greater fungibility. By contrast, concerning exports for natural gas, Turkey's "crossroad" position in pipeline systems is fundamental for securing alternative supplies. However, the LNG factor may threaten this position in the long run since Turkey's special position rests mostly upon strategic pipelines.[24]

Once initial investments in liquefaction plants and purpose-built tankers are realized, gas converted to liquid becomes viable for sea transport and for distances over 3.000 km stands out as a competitive alternative to the pipeline transportation. To the disadvantage of Turkey, LNG projects dominate the agenda of some suppliers such as Egypt and Qatar, compared to the plans for extension of pipelines through Turkey. Suppliers' choice between LNG and pipelines via Turkey is especially important in the region bordering the Persian Gulf. The success of projects such as Trans-Anatolian Pipeline (TANAP) Project that connects Turkey to European markets, also solidify Turkey's potential as an "artery" for larger markets for uninterrupted and secure energy supply in a highly fragile region.

Another key driver of global change arises due to the increasing Asian demand for energy. Despite the fact that the increase in gas demand is mitigated by the competition from renewables, coal and efficient technologies, the developing countries of Asia are considered as the cradle of opportunities for the future natural gas markets since they account for the 75% of the increase in natural gas imports and for approximately half of the rise in global natural gas demand.[25]

20 IEA, *World Energy Outlook 2015*, Paris 2015, p.4.

21 The Bosporus Energy Club, *Game Changers in Energy, Geopolitics and Investment*, Istanbul, December 2015, p.25.

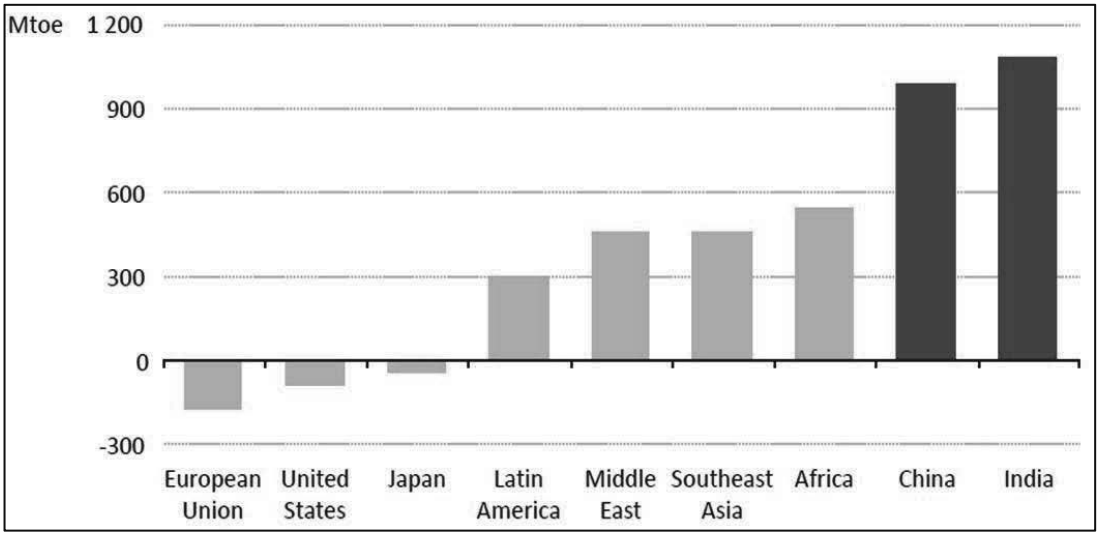
22 IEA, *World Energy Outlook 2015*.

23 Ibid, p.4.

24 John Roberts, "The Turkish Gate: Energy Transit and Security Issues", *EU-Turkey Working Papers,* No.11, Center for European Policy Studies, October 2004, p.19-21.

25 IEA, *World Energy Outlook 2015*.

**Figure 1.** Change in Energy Demand in Selected Regions, 2014-2040




**Source:** International Energy Agency, *World Energy Outlook 2015*.

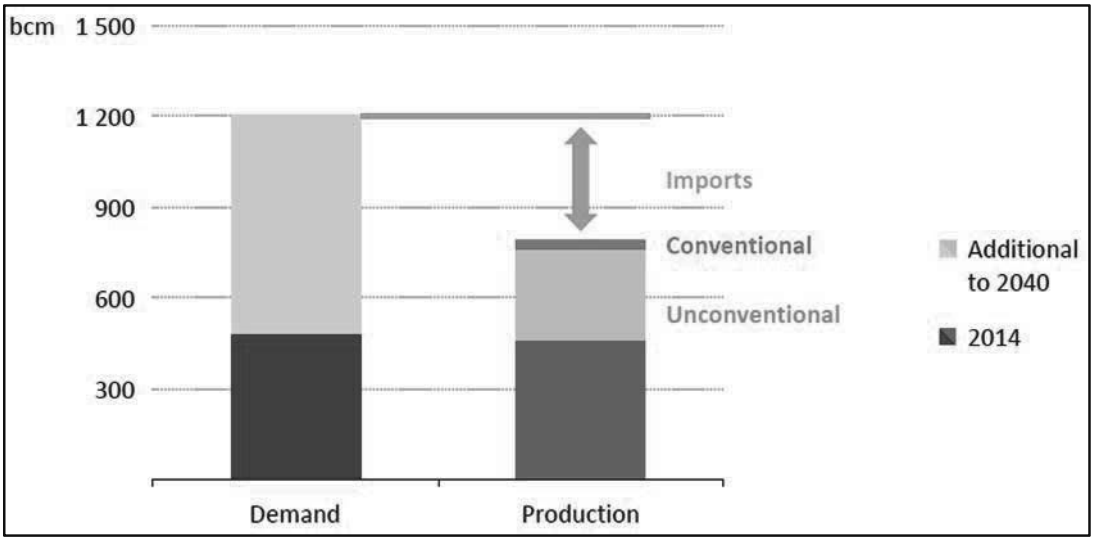
China and India emerge as the major actors, whose increasing demand for natural gas is complemented by a parallel rise in the need for natural gas imports. As this further emphasized the importance of the Caspian reserves and energy producers as potential exporters, China itself has also become an important energy player in the region due to its direct investments in the Caspian Basin.

China offers the Caspian energy producers a vital energy market that rivals Russia and Europe. This intensifies the competition over the access to the Caspian resources, which will potentially enable the producers with a bargaining leverage vis-à-vis the consumers. Moreover, China is increasingly becoming a competitor for the EU not only for gas coming from the Caspian region but also from Russia. Since Russian gas supplies could not easily meet the demand coming from both European and Chinese markets, the competition between the two would offer a bargaining position to Russia.[26] Moreover, as Russia's current production levels are decreasing, studies indicate that most of its future production will materialize in Western Siberia and this would give China an advantage over Europe as it is better placed for these new Russian production areas.[27]

26 Shaffer, *Energy Politics*, p.46.

27 Aldo Spanjer, "Russian Gas Price Reform and the EU-Russia Gas Relationship: Incentives, Consequences and European Security of Supply," *Energy Policy*, Vol.35, 2007, p.2889-2898; Energy Information Administration (EIA), "Russia looks beyond West Siberia for future oil and natural gas growth", 19 September 2014, http://www.eia.gov/todayinenergy/detail.cfm?id=18051#, (Accessed on 03 April 2016).

**Figure 2.** Natural Gas Demand and Supply in Developing Asia, 2040




**Source:** International Energy Agency, *World Energy Outlook 2015.*

In the meantime, however, despite the projections of growing demand from Asia in the longer term, the recent sharp decrease in the oil prices has several implications over the global energy market dynamics in the short and medium term. From the exporters' perspective, low oil prices represent a considerable decrease in oil revenue. According to projections of the International Energy Agency (IEA), although the product output will be higher in the foreseeable future, the OPEC oil export revenue will fall by a quarter by 2040.[28] While the low oil prices pose a major challenge for Moscow with troubling implications for its economy, it is a positive development for Turkey to alleviate its chronic current account deficit, originating primarily from its high energy imports. Highlighting that Turkey is a "net winner" from low oil prices, then Deputy Prime Minister Ali Babacan had stated that each ten dollar drop in oil prices, would help reducing Turkey's current account deficit by 4 billion 400 million dollars.[29]

Consequently, the world is moving from a "sellers" market to a "buyers" one, but the question is for how long and for whom? Moreover, what the implications of the low energy prices would be for nascent infrastructure projects and large scale energy sector investments are rather uncertain at the moment. Although projections suggest that the low prices will not last long due to growth in global oil demand and reduction in the revenues of oil producers, current trends also undercut the policy support for the energy transition to clean energy resources and efficiency.[30]

Last but not the least, the major challenge for the years to come arises out of climate change and environmental concerns. As the understanding of security and the scope of risks evolve, these new kinds of threats constitute new forms of tests for the international community to assess its capability to act multilaterally in a coherent manner. Together with conventional security threats such as global terrorism, climate change is now one of the hardest tests for the binding nature of global

28 IEA, *World Energy Outlook 2015*, p.4.

29 "Turkey a 'net winner' from low oil prices: Deputy PM Babacan", *Hürriyet Daily News*, 22 January 2015.

30 IEA, *World Energy Outlook 2015*.

decisions and the credibility of international regimes. Today the extreme weather conditions are accompanied by steadily warming atmosphere and ocean. The fact that the period between 1983 and 2012 was the warmest time interval for the last 1400 years is only one of the several consequences.[31] The persistence of current emission trends leads to a projected increase of global average temperature by 2.6–4.8 degrees Celsius (°C) and of the sea levels by 0.45–0.82 meters by the end of this century.[32] The spillover effects of the consequences are multiple, affecting food security through reduced crop yields[33] or water security through increasing drought.[34]

About 78% of the total greenhouse gas (GHG) emissions increase from 1970 to 2010 consists of emissions of $CO_2$ from fossil fuel combustion and industrial processes.[35] Accordingly, most of the mitigation discussions evolve around requirements to re-design countries' energy profiles in line with low-carbon technologies, clean energy resources and efficiency policies. The recent Conference of Parties (COP21) summit in December 2015, where 195 countries came together to adapt Paris Agreement that promotes decreasing GHG and diversifying away from coal, oil and natural gas to limit the temperature increase to 1,5 °C above pre-industrial levels,[36] was a historic step.[37] On its term, Turkey presented its Intended Nationally Determined Contribution (INDC) to reduce emissions by 21% from the business as usual scenario by 2030.[38] Although the target was criticized as being "inadequate" by Climate Action Tracker,[39] Turkey's official Climate Change Action Plan released in 2012 demonstrated a determined discourse based on the vision to "become a country fully integrating climate change related objectives into its development policies … within its special circumstances."[40]

## Turkey's Foreign Policy Vision and Energy Strategy

Against this backdrop of global change in the energy realm, this section aims to identify the nature of interaction between Turkey's energy strategy and foreign policy based on the two major documents released by the relevant ministries: "The Strategic Plan 2015-2019" by the Ministry of Energy and Natural Resources and "Our Foreign Policy in the Beginning of 2016" by the Ministry of Foreign Affairs.

31 Intergovernmental Panel on Climate Change (IPCC), *Climate Change 2014: Synthesis Report*. Contribution of Working Groups I, II and III to the Fifth Assessment Report of the Intergovernmental Panel on Climate Change [Core Writing Team, R.K. Pachauri and L.A. Meyer (eds.)], IPCC, Geneva, Switzerland, 2014, p.2.

32 University of Cambridge, Institutional Investor Group on Climate Change (IIGCC) and UNEP Finance Initiative, *Climate Change: Implications for Investors and Financial Institutions*, June 2014.

33 *Climate Change: Implications for Agriculture*, University of Cambridge and BSR, June 2014.

34 Ümit Şahin and Levent Kurnaz, *İklim Değişikliği ve Kuraklık*, İstanbul Politikalar Merkezi, October 2014.

35 IPCC, *Climate Change 2014: Synthesis Report*, p.2.

36 United Nations Framework Convention on Climate Change, *Adoption of the Paris Agreement, Proposal by the President*, Draft Decision CP.21, December 2015.

37 "Paris İklim Zirvesi'nde Tarihsel Anlaşma", *National Geographic Turkey*, 15 December 2015. http://www.nationalgeographic.com.tr/makale/kesfet/parisiklimzirvesindetarihselanlasma/

2683, (Accessed on 06 April 2016).

38 United Nations Framework Convention of Climate Change, *Republic of Turkey Intended Nationally Determined Contribution*, 30 September 2015, http://www4.unfccc.int/submissions/INDC/Published%20Documents/Turkey/1/The_INDC_of_TURKEY_v.15.19.30.pdf, (Accessed on 07 April 2016).

39 "Turkey", *Climate Action Tracker,* 22 October 2015, http://climateactiontracker.org/countries/turkey.html (Accessed on 07 April 2016).

40 Ministry of Environment and Urbanization, *Climate Change Action Plan 2011-2023*, Ankara, 2012, p.14.

The Strategic Plan 2015-2019, prepared by the Turkish Ministry of Energy and Natural Resources, highlights that the rules of the global energy game are being re-written and that today's agenda consists of the major topics of economic growth, energy demand, energy efficiency, and environmental harmony.[41] The report acknowledges that given its high energy dependency, risks posed by varying markets under the effect of global and regional trends are crucial for Turkey. In this framework, Turkey identifies main themes and goals of its energy strategy as security of energy supply, energy efficiency, good governance, regional and international effectiveness, technological innovation and improvement of investment environment. It is crucial to note that "sustainability" is not identified as a separate theme, rather it is strategically designed as an umbrella concept that includes all other themes with the consideration of environmental, economic and sustainability principles in each goal. Among the themes, "Security of Energy Supply" and "Regional and International Effectiveness" emerge as being highly interlinked with foreign policy. Stressing on the fact that the exporter portfolio and routes for imports has to be diversified in order to reduce the country's vulnerability, the plan sets the goal of conducting studies for the procurement of natural gas by private sector from Iraq, Qatar, Algeria, Turkmenistan, Eastern Mediterranean, Africa and other potential countries, decreasing the dependency on one single country for imports of natural gas to 50% until the end of plan period.[42]

The plan indicates that "Turkey, due to its position, is suitable for being an energy transition center (hub); however relevant infrastructure, market formation and regional effectiveness should be provided."[43] To this end, the goals of establishing a strong and reliable energy infrastructure, reaching optimum resource diversity, effective demand management, integrating Turkey with regional energy markets and becoming a powerful actor in the international arena are determined as the major national strategies. The strategic plan underlines the necessity of active energy diplomacy accompanied with infrastructure projects to utilize Turkey's proximity to energy rich regions and export dependent markets. Given the critical importance of new transit pipeline projects for the energy hub position, the construction of at least three international projects and the completion of at least one international project until the end of the plan period is a concrete target set by the Ministry.[44]

Throughout the Strategic Plan, two points imply the critical role of foreign policy conduct in the Turkish energy policy. First, the plan assumes that due to their multinational characteristics, transit projects and regional integration efforts could be hampered by the lack of harmonization among the actors in terms of finance and administration.[45] Thus carefully designed bilateral and multilateral relations strengthened by the international law become a priority. Second, the Plan points to the need to become more active in international organizations and their decision making mechanisms to enhance Turkey's effectiveness in international arena.[46] While these two goals further reveal the intersection between energy policies and foreign policy, the strategic goals of the Ministry assumes the obvious need for harmony with the foreign policy vision.

Turkey's foreign policy, as presented by the Minister of Foreign Affairs Mevlüt Çavuşoğlu in the 5th of March 2016, acknowledges the global and regional turmoil and envisions Turkey as the

41 Taner Yıldız, "Presentation of the Minister" in Turkish Ministry of Energy and Natural Resources, *Strategic Plan 2015-2019*, Ankara, 2015, p.6.

42 Turkish Ministry of Energy and Natural Resources, *Strategic Plan 2015-2019*, Ankara, 2015, p.39.

43 Ibid. p.23.

44 Ibid. p.78.

45 Ibid, p.76.

46 Ibid, p.80

major actor for stability, security and prosperity.[47] For such a role Turkey indicates its determination in following the required policies, which target to strengthen Turkey's role as a responsible actor in international arena and to get its place among the world's leading diplomatic powers.[48] Touching upon timely problems, the Ministry highlights that while the pace of the relations with the EU needs to be maintained, Turkish membership is not an "option" but rather a "strategic necessity."[49] This argument is in congruence with the Turkish energy strategy to become a hub opening to the European markets and contributing to EU's supplier and route diversification.

In terms of relations with other countries, while Azerbaijan is labeled as a "priority" and the partnerships between Turkey, Azerbaijan and Turkmenistan are highlighted, a direct connection is stated between the materialization of TANAP and the disagreements over the Caspian's status between Azerbaijan and Turkmenistan.[50] After stating that Turkey and Russia have intense economic ties, the document indicates its concerns and "disappointment" due to Russia's policies in the close neighborhood in Georgia, Ukraine and Syria as well as its airspace violations,[51] hoping that the relations will be normalized soon. It is also highlighted that Turkey supports international efforts for the resolution of the conflicts regarding Georgia's territorial integrity.[52] Although the direct link is not established in the document, Georgia is critical for the safety of the Southern Gas Corridor. In the section regarding Cyprus and Greece, the document emphasizes that any action in the Eastern Mediterranean basin that neglects Turkey's rights and interests in the region, would be only an attempt to increase the tension in the region and be unlawful. Moreover, it highlights Turkey's position as the protector of Turkish Cypriots' property rights over the region's natural resources.[53] With Israel, contacts for the normalization of the relations continue. Regarding Qatar, although there is no reference to energy and LNG exports, the policy targets to take the cooperation with Qatar in politics and economics to the highest level.[54] Turkey's interest to develop its relations with Gulf Cooperation Council in every aspect is also mentioned.[55]

In the energy section, Turkey's geostrategic location between large energy reserves and markets as well as its high import dependency that necessitates diversification of suppliers and routes is mentioned with reference to the crisis with Russia. Major goals of the Energy Strategy, namely the increase of the indigenous and renewable resources, production of nuclear energy, strengthening of Turkey's transit role, becoming an energy "center" and contributing to Europe's energy security, are repeated in the context of foreign policy as well. In the context of TANAP, the foreign policy vision underlines the importance of cooperation with Azerbaijan, Turkmenistan and Georgia.[56]

While there is a significant match between energy strategy and foreign policy vision in the official documents and future projections, due to the rapidly changing dynamics in Turkey's neighborhood, some incongruence also emerge in foreign policy applications.

47 "2016 Yılı Başında Dış Politikamız (*Our Foreign Policy in the Beginning of 2016*)", Ministry of Foreign Affairs, 2016, p.6, http://www.mfa.gov.tr, (Accessed on 03 April 2016).

48 Ibid. p.11.

49 Ibid. p.13.

50 Ibid. p.92.

51 Ibid. p.17.

52 Ibid. p.87.

53 Ibid. p.58-59.

54 Ibid. p.68.

55 Ibid. p.67.

56 Ibid. p.152-154.

## Liabilities in the Energy Realm with Rising Tensions in Foreign Policy

As far as the foreign policy and energy linkages are concerned, the most important factor for Turkey's position as a transit country is Russia's attitude towards Turkey and other producers in the Caspian region. Turkey is viewed as a competitor with Russia in transporting Caspian exports to Europe, as some argue that the EU considers Turkey as an alternative transit route to access to the Caspian sources bypassing Russia.[57] This triggers a rivalry between Turkey and Russia in the field of energy transport and leads Russia to factor in Turkey's role in its regional geopolitical considerations.

When Turkey's special geographic position close to gas producers other than Russia is combined with the willingness of the nine producers holding 49.9% the world's total reserves, to expand their markets,[58] Turkey emerges as the perfect piece of the puzzle needed for European energy supply diversification. This creates challenges for Turkey concerning Russia and causes a disadvantaged position due to its high natural gas dependency on Russia, which in turn weakens its competitiveness.[59] It also urges Russia to promote alternative projects to hinder Southern Gas Corridor's[60] significance.

For the EU, it would be unrealistic to argue that imports from diversified sources via Turkey could totally substitute the gas imported from Russia, as the amounts transported via pipelines through Turkey could only complement it. Yet, these alternative routes would still lead to a more competitive market environment challenging the Russian energy giant Gazprom monopoly in the EU markets with more commercial and competitive strategies.

On the other side, potential export routes for the Caspian energy to Europe and China have empowered the Caspian states' hands to negotiate better deals with Russia.[61] From another perspective, this is also used by Russia to make the Southern Corridor less attractive for the Caspian producers by offering higher prices for the region's gas resources. For example, in March 2008, Russia, Turkmenistan, Kazakhstan, and Uzbekistan agreed that the gas trade among them would take place on the basis of the 'European-level prices', which is what Europe pays for Russian gas minus the transportation costs and a Gazprom fee.[62] Another agreement was signed in 2009 between Russian Gazprom and Azeri SOCAR concerning long-term gas supplies of Caspian gas to Russia at market prices. Experts argue that these purchases of Russia had undermined the nascent Nabucco project and significantly overshadowed its feasibility.[63]

While Turkey is trying to promote its role as a significant energy corridor for European energy security, paradoxically has its own energy challenges due to its overdependence on Russia. When the trade relations between Russia and Turkey are examined, they present a very asymmetric dynamic, particularly due to Turkey's high energy dependency on Russia.

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57 Ali Tekin and Iva Walterova, "Turkey's Geopolitical Role: The Energy Angle", *Middle East Policy*, Vol.14, No.1, 2007, p.89.

58 Azerbaijan (0,6%), Kazakhstan (0,8%), Iran (18,2%), Egypt (1,0%), Turkmenistan (9,3%), Iraq (1,9%), Qatar (13,1%), Uzbekistan (0,6%), Saudi Arabia (4,4%). "BP Statistical Review of World Energy", June 2015.

59 Ali Tekin and Paul A. Williams, "Turkey and EU Energy Security: The Pipeline Connection", *East European Quarterly*, Vol.42, No.4, 2009, p.425; Ziya Öniş and Şuhnaz Yılmaz, "Turkey and Russia in a Shifting Global Order: Cooperation, Conflict and Asymmetric Interdependence in a Turbulent Region", *Third World Quarterly*, Vol.37, No.1, 2016, p.71-95.

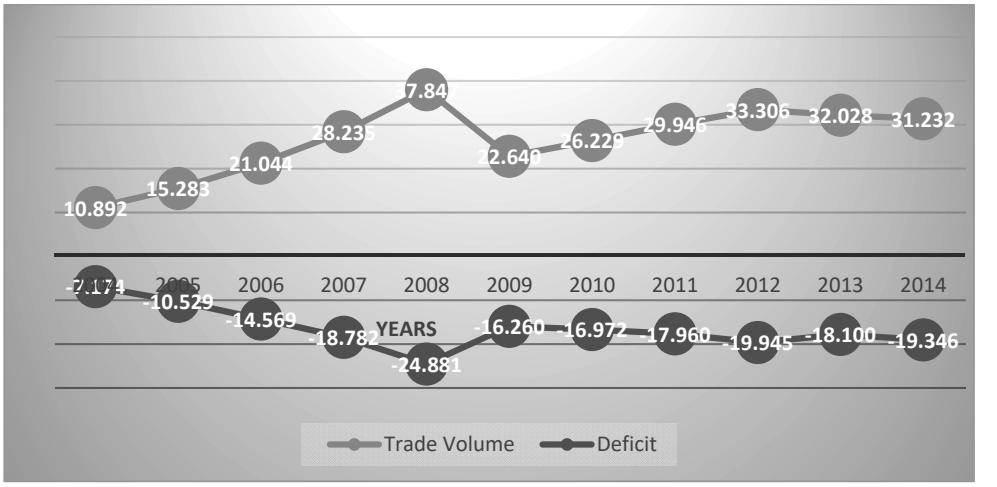
60 The Southern Gas Corridor is a complex project aiming at contributing to the EU's energy security by transferring gas supplies from Caspian region and the Middle East. The project consists of three pipelines South Caucasus Pipeline (SCP) across Azerbaijan and Georgia, Trans Anatolian Pipeline (TANAP) across Turkey, and Trans Adriatic Pipeline (TAP) across Greece and Albania into Italy. BP, 2016, *The Southern Gas Corridor*, http://www.bp.com/en_az/caspian/operationsprojects/Shahdeniz/SouthernCorridor.html, (Accessed on 25 September 2016).

61 IEA, *Perspectives on Caspian Oil and Gas Development*, December 2008, p.44, http://www.asiacentral.es/docs/caspian_perspectives_iea_dec08.pdf, (Accessed on 2 April 2016).

62 Ibid. p.44.

63 "Rus-Azeri Gaz Anlaşması Ortalığı Karıştırdı", *Euractiv,* 30 June 2009.

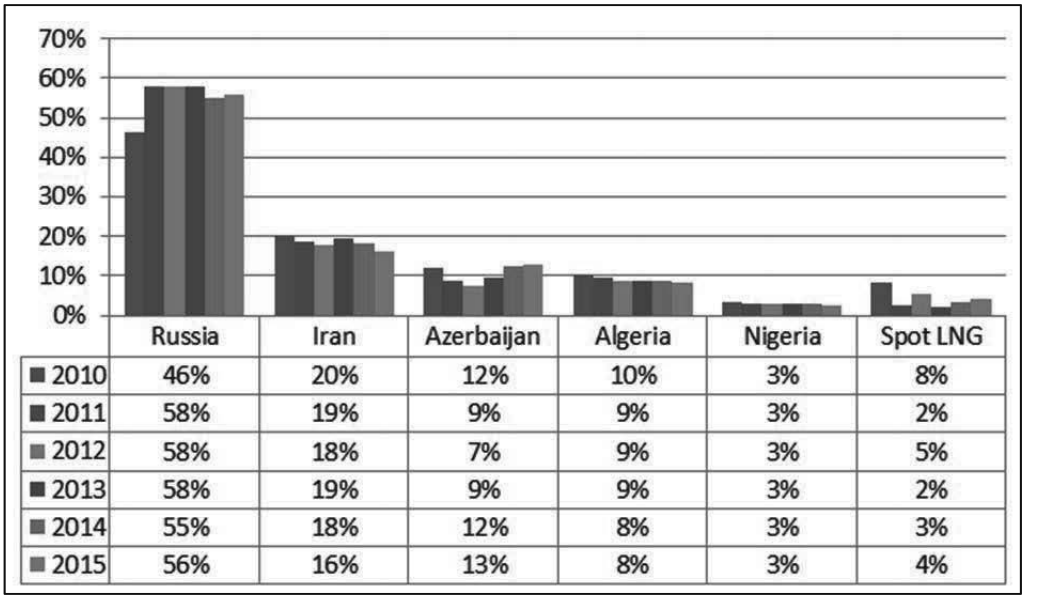
**Figure 3.** Turkish-Russian Trade Volume and Trade Deficit




**Data Source:** TÜİK 2015 and Office of the Commercial Counsellor, Moscow, 2015.

The imbalance in trade relations originates primarily from Turkey's energy dependence on Russia. Thus Turkey, which is 98.8% dependent on foreign supplies for natural gas, has imported 56% of its natural gas from Russia in 2015.[64] The table below presents the natural gas purchases over the past six years with the lions share supplied by Russia.

**Table 1.** Turkey's Natural Gas Exports, by Country




| | Russia | Iran | Azerbaijan | Algeria | Nigeria | Spot LNG |
|---|---|---|---|---|---|---|
| 2010 | 46% | 20% | 12% | 10% | 3% | 8% |
| 2011 | 58% | 19% | 9% | 9% | 3% | 2% |
| 2012 | 58% | 18% | 7% | 9% | 3% | 5% |
| 2013 | 58% | 19% | 9% | 9% | 3% | 2% |
| 2014 | 55% | 18% | 12% | 8% | 3% | 3% |
| 2015 | 56% | 16% | 13% | 8% | 3% | 4% |

**Data Source:** Turkish Ministry of Energy and Natural Resources, 2010-2015.[65]

64 In line with the official reports, the data for 2015 covers the period until the end of September. Turkish Ministry of Energy and Natural Resources, "Dünya ve Ülkemiz Enerji ve Tabii Kaynaklar Görünümü", No.10, 2015, p.47.

65 Ibid. p.47.

This dependence on Russia would be further enhanced with the deal made for the Akkuyu nuclear power plant. In July 2010, the Turkish Parliament approved a bill on an intergovernmental agreement for the construction of Turkey's first nuclear power plant in Akkuyu. According to the agreement, the Russian state-owned atomic power company ROSATOM would be constructing and operating the Akkuyu nuclear power plant.[66] Turkey's nuclear power strategy is based and justified on the arguments of enhanced energy security, cost reduction, lower carbon emissions, and technological transfer opportunities.[67] While Moscow offered a commercially attractive deal, there are also significant concerns which have not been open to public debate. In addition to seismic risks, there are risks of radiation leakages, radioactive waste and storage problems, potential adverse effects on marine life, the challenge of protecting the nuclear power plant against terrorist attacks and providing the safe keeping of highly strategic materials, risks of accidents, and potential proliferation crises. As all of these constitute major challenges,[68] the establishment of a proficient and effective oversight mechanism monitoring every stage of the process is essential.[69] Ultimately, the nuclear energy deal will have a dual impact on bilateral relations. On the one hand, it will enhance Turkish-Russian economic ties with an approximately $20 billion dollars of new Russian investment in Turkey, and on the other hand, it will make Turkey even more reliant on Russia in the energy realm. The fact that the Russians will maintain ownership of the nuclear plant after construction is an important factor presenting a potential risk in a political environment marked by serious tensions due to geo-political divergences.

It's noteworthy that Russia is also considering cooperating with Turkey as a conduit in order to transfer its gas to new markets in Europe. On December 1, 2014, President Putin during his visit to Turkey, in a quite surprising move, announced his decision to shelve the $45 billion South Stream project.[70] As the crisis between Russia and the European Union was deepening over Ukraine, Putin had been struggling to prevent an imminent economic recession amid low oil prices and sanctions due to the annexation of Crimea and the developments in Ukraine. Instead of South Stream that was planned to reach Europe through the Black Sea to Bulgaria, Serbia, Hungary, Slovenia and Austria, Putin announced the Russian intention of redirecting the project to Turkey through a different Black Sea pipeline for creating a 'hub' for Southeastern Europe at the Greco-Turkish border. While some commentators in the international press coined the name 'Turkish Stream' for the project,[71] it was clearly not the final word from either side. In the meantime, the Turkish Minister of Energy and Natural Resources, Taner Yıldız, confirmed Ankara's commitment to TANAP and TransAdriatic Pipeline (TAP) as essential pieces of the Southern Gas Corridor.[72] And, the deteriorating political

66 Y. M. Primakov, *Турция: новаяроль в современномире*. [Turkey: a new role in a modern world], Moscow Russian Academy of Sciences, 2012.

67 Global Relations Forum, *Turkish Energy Strategy in the 21th Century: Weathering Uncertainties and Discontinuities*, Task Force Report, 2013, p.103-114.

68 For an insightful analysis of the strategic effects of nuclear energy development, see Adam N. Stulberg and Mathew Fuhrmann (eds.), *Nuclear Renaissance and International Security*, Redwood City, CA, Stanford University Press, 2013.

69 Sinan Ülgen, *Nükleer Enerjiye Geçişte Türkiye Modeli (Turkish Model in Transition to Nuclear Energy),* EDAM Report, Istanbul, EDAM, 2011.

70 "Putin Scraps South Stream Gas Pipeline after EU Pressure," *Bloomberg*, 2 December 2014, http://www.bloomberg.com/news/2014-12-01/putin-halts-south-stream-gas-pipeline-after-pressure-from-eu.html, (Accessed on 22 February 2016).

71 "Ankara says Turkish Stream not just transit Project." *World Bulletin*, 11 December 2014, http://www.worldbulletin.net/news/150464/ankara-says-turkish-stream-not-just-transit-project, (Accessed on 22 February 2016); "Turkish Stream to Replace South Stream Gas Pipeline", *Novinite.com,* 11 December 2014, http://www.novinite.com/articles/165354/Turkish+Stream+to+Replace+South+ Stream+Gas+Pipeline-+Erdogan (Accessed on 04 March 2016).

72 Taner Yıldız, "Keynote Speech at Caspian Forum", December 2014; Emre Peker, "Russia, Turkey Complete Initial Turk Stream Gas Pipeline Talks", *The Wall Street Journal,* 11 December 2014, http://www.wsj.com/articles/russia-turkey-complete-initial-turk-stream-gas-pipeline-talks-1418288422, (Accessed on 25 March 2016).

relations between Turkey and Russia over Syria in late 2015 caused the "Turkish Stream" project to be shelved momentarily.[73]

In terms of energy-foreign policy linkages, it is observable that Turkey kept a low profile in its criticism of Russia when the latter invaded Crimea. Most probably because of its energy dependence and strong economic ties, Turkey remained relatively silent in the Ukrainian crisis throughout 2014 and 2015 since the crisis did not constitute direct challenges to its foreign policy interests. As a result Turkey managed to deal with the crisis without hindering its bilateral relations with Russia. Moreover, Turkey also tried to evade the sanctions regime against Russia and Foreign Minister Çavuşoğlu acknowledged that Turkey did not want to join the EU sanctions against Russia, highlighting that Russia is an important trading partner for Turkey. He also suggested being "realistic" about whether the EU countries can do without Russian gas, stating that "every country must consider its own interests."[74]

Deepening geo-political differences in the Syrian crisis, however, which constitute a critical component of Turkey's Middle East strategy with hard security implications for Turkey, emerged as the main game-changer. While Turkey and Russia were able to compartmentalize their expanding economic ties with intensifying geo-strategic differences in the earlier phases of the Syrian crisis,[75] when Russia became actively engaged on the ground with strong support to the crumbling Assad regime, the Turkish foreign policy interests openly clashed with the Russian ones. Hence, the uneasy partnership facilitating compartmentalization was no longer tenable.

After a Turkish Air Force F-16 fighter jet shot down a Russian Sukhoi Su-24M bomber aircraft which briefly violated the Turkish airspace near the Syria–Turkey border on 24 November 2015, Turkish vulnerability due to its high energy dependence on Moscow has increased following a deterioration of relations in the political and economic realm. Still, within the framework of long-term international agreements, energy projects already in force between the two countries continued. Nevertheless, the political crisis in bilateral relations affected the pace of the Akkuyu project causing a disruption in construction plans. Concomitantly, increasing tensions in the foreign policy realm due to Syria has affected potential energy projects and had caused the idea of the "Turkish Stream" to be placed on hold for an indefinite time period. Nevertheless, latest developments proved how energy and foreign policy dynamics could interact very quickly and change the political scene. The attendance of Putin to the World Energy Congress held in İstanbul between 9th and 13th of October, 2016 and the signing of the intergovernmental agreement for the realization of the "Turkish Stream" in the context of this visit on October 10, 2016, were clear signs of energy acting as a facilitator for the reconciliation in bilateral relations. Although the details and concrete construction schedule of the project are subject to future developments, currently, strong economic interdependence between Turkey and Russia and mutual energy interests revitalized formerly shelved Turkish Stream.

Apart from turbulent Turkish-Russian relations, ethnic conflicts in the Caucasus also create supply-side concerns, since there are several frozen and hot conflicts in the area that could stall

73 "Russia Shelves Turkish Stream Pipeline Project", *Euractiv*, 3 December 2015, https://www.euractiv.com/section/europe-s-east/news/russia-shelves-turkish-stream-pipeline-project/, (Accessed on 04 March 2016).

74 "Dışişleri Bakanı Sayın Mevlüt Çavuşoğlu'nun Die Zeit Gazetesine Verdiği Özel Mülakat", Ministry of Foreign Affairs, 12 February 2015, http://www.mfa.gov.tr/disisleri-bakani-sayin-mevlut-cavusoglu_nun-die-zeit-gazetesine-vermis-olduklari-mulakat_-12-subat-2015.tr.mfa, (Accessed on 30 September 2016).

75 Öniş and Yılmaz, "Turkey and Russia in a Shifting Global Order", p.81-87.

energy transportation projects via Turkey.[76] The conflicts of the region include, but are not limited to, ethnic conflicts within Georgia, conflicts between Russia and Georgia, Nagorno-Karabakh conflict between Azerbaijan and Armenia and recent escalating tensions, Crimean and Ukrainian crises, which complicate the stability and security in the region. This affects the strategic calculations of the Caspian states regarding production and export routes of their resources, and lead energy companies to hesitate to invest significant sums of money in the area.[77] Another major challenge on the supply side is the legal status of the Caspian Sea. Iran and Russia share the legal position that the Caspian Sea is an inland lake rather than a sea, allowing only joint control by the littoral states, while their position is challenged by the joint Azeri, Turkmen and Kazakh view that the Caspian is a sea, requiring the implementation of the United Nations Convention on the Law of Sea.[78] As long as the legal disputes remain unresolved, the efforts of the energy rich Azerbaijan, Turkmenistan and Kazakhstan to build Trans-Caspian energy routes are effectively curtailed by Russia and Iran. The likelihood of a resolution of the problem seems to be low as its endurance ensures the Russian and Iranian strategy of obstructing cross-Caspian energy transit projects.

The political crisis between Russia and Turkey, due to divergences over Syria was very critical in demonstrating the importance of diversification in the energy realm and it clearly revealed Turkey's liability in the context of Russia. This is also a good example of how regional crises, even if not initially bilateral in nature, centering around hard security issues, could spill over into the energy realm rendering it at the intersection of hard and soft security. Consequently, in an effort to cope with its liability arising from its high energy dependence on Russia and the adverse spill-over effects of regional conflicts in the energy realm, Turkey started to place more emphasis on the potential assets through partnerships such as the TANAP project.

## Assets in a Volatile Region through Partnerships

The areas where there is congruence between Turkey's energy strategy and foreign policy emerge as assets. In this context, while the relations are getting more strained with Russia, in line with the favorable foreign relations between Turkey and Azerbaijan there is increasing energy collaboration. The new energy initiative, which lies at the heart of this cooperation, is TANAP. On June 26, 2012, Turkish President Erdoğan and Azerbaijani President Ilham Aliyev signed the Intergovernmental Agreement for the project.[79] Accordingly, the first gas flow is expected in 2018. The initial projected amount of annual gas transport will be 16 billion cubic meters (bcm). Responding to both Turkish domestic and European demands, 6 bcm would be allocated for domestic consumption in Turkey and the remaining 10 bcm would be transferred to Europe. In fifteen years, TANAP's gas flow capacity is expected to reach to 31 bcm. TANAP has initially a more limited scope then the Nabucco pipeline project, which is now effectively shelved, but also has a higher feasibility due to the Azeri throughput commitment.[80] TANAP will also connect to the TAP to transfer Azeri gas to Europe. The fact that it

76 M. Gareth Winrow, "Energy security in the Black Sea-Caspian Region", *Perceptions*, Vol.10, No.3, 2005, p.89.

77 IEA, *Perspectives on Caspian Oil and Gas Development,* p.46-51.

78 United Nations, *The UN Convention on the Law of the Sea*, 1982, p.23-30. http://www.un.org/depts/los/convention_agreements/texts/unclos/unclos_e.pdf, (Accessed on 5 March 2016).

79 "Intergovernmental Agreement between the Government of Republic of Turkey and the Government of the Republic of Azerbaijan concerning the Trans Anatolian Natural Gas Pipeline System", Istanbul, 26 June 2012, http://www.tanap.com/content/file/TANAPIGA.pdf, (Accessed on 24 February 2016).

80 M. Tahir Kılavuz and Şuhnaz Yılmaz, "Restoring Brotherly Bonds: Turkey-Azerbaijani Energy Relations", *PONARS Eurasia Policy Papers*, Policy Memo No.240, Washington D.C., September 2012, p.150-153.

has a more limited scope also means that it would not entirely eliminate alternative projects. Rising tensions with Russia has increased the significance of TANAP for Turkey for diversification and it also intensified Turkish efforts to expedite its completion.

The international agreement concerning the construction of TANAP pipeline is a significant achievement for Turkey. However, these supply-side factors require caution since they will be instrumental in assuring necessary amounts of natural gas which will render the Southern Gas Corridor's diversification potential meaningful. Consequently, supplementary agreements with supplier states concerning their commitments in the purchase of natural gas are necessary to minimize the risks arising from uncertainties. The fact that Turkish state owned energy company BOTAŞ has increased its share to 30% from the initial share of 20%, while the projected share of SOCAR is 58% and BP is 12% in TANAP,[81] is also a significant indicator that through its active engagement in energy partnerships, Turkey is trying to move beyond its initial position of being a merely energy transit country towards becoming an energy hub.

As highlighted in the official documents, Turkey is also interested in enhancing its energy cooperation with the Gulf region and particularly with Qatar, which is also a policy alignment with Turkey in Syria. Particularly, in the aftermath of the crisis with Russia, Ankara has intensified its energy contacts with Qatar as a strategy of diversification. As Qatar is the biggest LNG exporter in the world and is also eager about expanding its cooperation with Turkey, during President Erdoğan's visit to Qatar on December 2, 2015, a bilateral agreement was signed in line with the goal of diversifying energy routes to Turkey. In this context, Turkish Ambassador to Qatar Ahmet Demirok highlighted Qatar's role in an interview as "a trusted partner for Turkey in energy security" and stated "Turkey [has] been buying LNG from Qatar until now from the spot market. A long-term deal will undoubtedly sustain a longer-term partnership and contribute to Turkey's energy security. This is simply a win-win situation and I hope that it will be a first step toward a broader energy cooperation with Qatar."[82] It is noteworthy that in the same interview, he also highlighted that Turkey and Qatar were fighting against "common enemies" in Syria,[83] indicating the congruence between energy policies and foreign policy strategies.

## Dilemmas of Turkey's Energy and Foreign Policies: Limiting Risks and Seizing the Opportunities

There are some issue areas for Turkey leading to risks and opportunities. High risks could turn into high gains if opportunities are seized in a timely and prudent manner. It is rather soon to classify these issue areas as a clear case of congruence or incongruence between Turkey's energy and foreign policies as they are currently entrapped in a gray zone. These issues include the future strategies concerning the energy resources of the Eastern Mediterranean, energy ties with Iraq, developments concerning Iran in the aftermath of the removal of sanctions, the plans regarding the revival of the Silk Road in a new form and sustainable growth policies in the context of climate change. In responding to these challenges, it is crucial for Turkey to adjust its foreign policy in line with the requirements and priorities of its energy strategy.

81 *Türkiye'nin Enerji Merkezi Olması Yolunda TANAP Projesi'nin Rolü,* HASEN Enerji ve Ekonomi Araştırmalar Merkezi, İstanbul: HASEN Publications, 2014, p.12.

82 Interview with Ahmet Demirok, Ambassador of the Turkish Republic to Qatar, "Turkey and Qatar Confront Common Enemies in Syria", *Daily Sabah*, 28 February 2016.

83 Ibid.

The Eastern Mediterranean energy resources,[84] due to the political problems and geo-political differences particularly between Turkey and the Greek Cypriots, as well as Turkey and Israel, present the parties with the most significant challenges. Due to the high potential of the energy reserves with an estimated amount of 122 trillion cubic feet (tcf) of natural gas reserves, equivalent to 21 billion barrels of oil[85], it also has the promise of providing tantalizing opportunities. Overall, it is a case where major incongruences between energy interests and current foreign policy choices. Overcoming the obstacles of the Cyprus conflict,[86] the delineation of the Exclusive Economic Zones in the Eastern Mediterranean, overcoming the Israeli-Turkish tensions and the spill-over effects of the Arab Spring present some of the critical challenges. However, if effectively utilized through cooperation, these resources could provide significant economic gains for the relevant parties and would be significant for the European energy security through further diversification. Ultimately, whether a relative-gains or an absolute-gains approach would prevail would depend on the successes of effectively multilateraling the Levantine natural gas project on the supply and the demand side.[87] Inclusion of all key parties -Cyprus, Israel, Turkey and Greece- and facilitating the future inclusion of other littoral states, although difficult, is critical. Eventually, energy resources could either energize peace in the Eastern Mediterranean, or fuel further conflict depending on the nature of interaction between energy politics and difficult foreign policy choices.

In addition to the energy resources of the Eastern Mediterranean, Iraq presents a promising opportunity as well as a potential source of gas for TANAP. Iraq has the world's 5$^{th}$ largest proven oil reserves (8,8% of total world reserves) and the 12$^{th}$ largest proven natural gas reserves in the world with its 3.6t tcm (1,9% of world total) of gas.[88] However, although Baghdad expressed its willingness to cooperate with Turkey in energy projects, Iraq's internal disputes over the control of oil and gas reserves and over the control of the money generated from the exports has caused significant uncertainty.[89]

Another factor which will affect the diversity and amount of natural gas transported via Turkey is the developments related to Iran-Western relations. By the end of 2014, explorations revealed that Iran holds the world's largest proven natural gas reserves with 34 tcm, corresponding to 18,2% of the world resources, and it ranks the 4$^{th}$ in gas production with 155,3 million tonnes of oil equivalent (mtoe) per year.[90] However, despite its large reserves, due to the impact of the sanctions and its crumbling infrastructure, Iran is currently only 22$^{nd}$ in the world in gas exports.[91] So far, Iran poses

84 For an in-depth analysis, see Volkan Ş. Ediger, Balkan Devlen and Deniz Bingöl Mcdonald, "Levant'ta Büyün Oyun: Doğu Akdeniz'in Enerji Jeopolitiği", *Uluslararası İlişkiler*, Vol.9, No.33, spring 2012, p.73-92.

85 Emmanuel Karagiannis, "Shifting Eastern Mediterranean Alliances", *Middle East Quarterly*, spring 2016, http://www.meforum.org/meq/pdfs/5877.pdf, (Accessed on 25 March 2016).

86 Ayla Gürel and Fiona Mullen, "Can Eastern Mediterranean Gas Discoveries Have a Positive Impact on Turkey-EU Relations?", Senem Aydın-Düzgit et. al. (eds.), Global Turkey in Europe II: Energy, Migration, Civil Society and Citizenship Issues in Turkey-EU Relations, IAI Research Papers, 2014, p.49-69.

87 Ioannis N. Grigoriadis, "Energy Discoveries in the Eastern Mediterranean: Conflict or Cooperation?", *Middle East Policy Council*, Vol.21, No.3, Fall 2014.

88 "BP Statistical Review of World Energy".

89 "Crescent eyes Iraqi Gas Routes beyond Nabucco", *Reuters*, 4 June 2009, http://www.reuters.com/article/idUSTRE5535IH20090604, (Accessed on 2 February 2016); Ekaterina Pokrovskaya, "Dispute Between Baghdad and Kurdistan Holds Back Iraqi Oil Potential", *Oil Price*, 16 July 2015, http://oilprice.com/Energy/Crude-Oil/Dispute-Between-Baghdad-and-Kurdistan-Holds-Back-Iraqi-Oil-Potential9153.html, (Accessed on 4 February 2016).

90 "BP Statistical Review of World Energy".

91 Central Intelligence Agency, *The World Fact Book: Iran*, 22 March 2016, https://www.cia.gov/library/publications/the-world-factbook/geos/ir.html, (Accessed on 03 April 2016).

as a risky country for investors mainly because of its tense relationship with the West. Dating back to the 1996 Iran-Libya Sanctions, which later became Iran Sanctions Act in 2006, the US imposed sanctions on foreign and domestic companies that invest more than $ 20 million in Iranian petroleum resources, which would contribute to the development of the country's energy sector. Moreover, Iran's refusal to conform with the international law concerning nuclear programs also led to international pressures. Overall, increasing tensions in Iran's external relations resulted in a decrease of Western companies' investments. For instance, due to increasing political risks in the country, foreign firms which had already invested in the South Pars region, such as Total, Stateoil Hydro, Shell, and Repsol, have affirmed in 2008 that they would not invest further.[92]

The recent nuclear deal with Iran facilitating the incremental removal of sanctions, emerges as an important game changer creating a new potential for energy collaboration. July 14, 2015 marked a critical turning point in the relations between Iran and the international community. After numerous failed attempts, the five permanent members of the UN Security Council as well as Germany, the EU and Iran finally managed to broker a deal regarding the Iranian nuclear program, namely the Joint Comprehensive Plan of Action (JCPOA).[93] As a result, Iran has already benefited from a sanctions relief estimated around $7 billion, and, Iran's foreign trading partners already anticipate high returns from a post-sanctions environment, particularly in the energy realm.[94] Concerning the supply of Iranian gas via Turkey into Europe, as the state of affairs changes, the inclusion of Iran into the Southern Corridor project could be under consideration. This is another case clearly indicating the interaction between foreign and energy policies, as well as the issues of hard and soft security. However, since Turkey and Iran support different sides in the Syrian conflict along the Sunni-Shia axis, Turkey also need to manage the challenges arising from this incongruence.

Moving beyond Iran to Central Asia, where there is significant energy competition between global and regional powers, one recent significant development has been the announcement by China of its "One Belt, One Road" (OBOR) initiative reviving the old Silk Road concept.[95] This grandiose project, would potentially cover 55% of world GNP, 70% of its population, and 75% of its proven energy reserves.[96] A substantial financial commitment of up to $300 billion in infrastructure financing from China is expected in the coming years, excluding the leveraging effect on private investors.[97] While Turkey has voiced numerous times its interest towards becoming a partner in the project,[98] the details and the nature of this partnership is not clear yet. However it is clear that it will be shaped by the broader dynamics of Turkey's expanding ties with China, despite the differences over the Chinese government's treatment of the Uighurs and recent policy divergences over Syria.

When the paradoxes are considered all together in line with their connection with foreign

92 IEA, *Perspectives on Caspian Oil and Gas Development*, p.27.

93 "Joint Comprehensive Plan of Action", US Department of State, http://www.state.gov/e/eb/tfs/spi/iran/jcpoa/, (Accessed on 30 September 2016).

94 Tara Shirvani and Sini Shirvanil, "What's next after Iran's Nuclear Deal?", *World Economic Forum*, 26 November 2015, https://www.weforum.org/agenda/2015/11/iran-nuclear-deal/, (Accessed on 5 February 2016).

95 Theresa Fallon, "The New Silk Road: Xi Jinping's Grand Strategy for Eurasia", *American Foreign Policy Interests: The Journal of the National Committee on American Foreign Policy*, Vol.37, No.3, 2015, http://www.tandfonline.com/doi/abs/10.1080/10803920.2015.1056682?journalCode=uafp20, (Accessed on 1 April 2016).

96 "One Belt, One Road: China's Great Leap Outward", *China Analysis, European Council on Foreign Relations,* 2015, http://www.ecfr.eu/page/-/China_analysis_belt_road.pdf, (Accessed on 2 April 2016).

97 Ibid.

98 Christina Lin, "A New Eurasian Embrace: Turkey pivots East while China marches West", *Transatlantic Academy Paper Series*, 2014, http://www.gmfus.org/publications/new-eurasian-embrace, (Accessed on 10 March 2016).

policy, there is a tendency to analyze the developments with hard security lenses. However, this perspective alone risks overlooking the critical relationship between energy, foreign policy and the environment that affects the global dynamics and will emerge as one of the most pressing challenges in the upcoming decades. It is the connection between the climate change and energy policies more important and target energy efficiency and diversification of the energy profiles with low carbon energy resources. By its nature, the struggle with the climate change requires global action. It necessitates the harmonization of multilateral cooperation in the sphere of foreign policy with the domestic energy policies, where the concrete remedies are to be implemented. The fight with climate change and policies regarding the decrease of GHG necessitate urgent action. Turkey could transform this challenge into an asset by transparent domestic energy policy to curb its emission and to increase its credibility as well as its role in the global environmental regimes by being a proactive state in the implementation of mitigation policies.

On the other hand, this gray area has the risk to turn into a liability in case Turkish energy strategy implementations cannot meet the expectations raised with official goals and targets. Despite relevant policies and institutions, Turkey is criticized for its limited progress in actually addressing the climate change.[99] Moreover, reports highlight that in the case of delayed action regarding the mitigation of emissions and efforts for "green growth", Turkey may have to face negative consequences on its economic development and growth rates especially after 2024.[100]

In this context, a critical choice for Turkey rests in the balance between its energy strategy, national development plans and its international credibility in the fight against climate change. While the discussions over a global renaissance of coal mainly driven by fast-growing countries continue,[101] there is an increasing tendency among Turkish policy-makers as well to prioritize coal in Turkish development plans.[102] The Energy Strategy 2015-2019 sets the target of increasing the electricity generation from domestic coal to 60 billion kWh annually compared to 32,9 billion kWh in 2013.[103] The energy and development strategies focused on increasing coal's overall share in Turkey's primary energy supply to 37% by 2020 could cause international political opposition against Turkey given the contradiction with the global stance against coal.[104] The renewable resources' shares are already minimal in Turkey's energy profile. To illustrate, in 2015, the share of wind energy in electricity generation was only 4,4% compared to natural gas 37,9% and coal 28%.[105] These figures imply that there is a room for progress in renewable energy. Accordingly, Turkey through carefully designed policies aligning energy strategy with its foreign policy in the realm of especially climate change, could secure the role of a credible partner for the struggle with climate change. This congruence and credibility would be also effective for attracting foreign investment in the realm of renewables, once and if the policies are combined with fair and transparent legal frameworks.

99 Ethemcan Turhan, Semra Cerit Mazlum and Ümit Şahin, "Beyond Special Circumstances: Climate Change Policy in Turkey 1992-2015", *WIREs Climate Change*, 2016.

100 Erinç Yeldan and Ebru Voyvoda, *Low Carbon Development Pathways and Priorities for Turkey*, WWF Turkey and İstanbul Policy Center, 2015, p.47.

101 Jan Christoph Steckel, Ottmar Edenhofer and Michael Jakob, "Drivers for The Renaissance of Coal", *PNAS*, 6 July 2015, http://www.pnas.org/content/112/29/E3775, (Accessed on 07 April 2016).

102 Ümit Şahin et al., *Kömür Raporu: İklim Değişikliği, Ekonomi ve Sağlık Açısından Türkiye'nin Kömür Politikaları*, İstanbul Politikalar Merkezi, Kasım 2015, p.25.

103 Turkish Ministry of Energy and Natural Resources, *Strategic Plan 2015-2019*, p.36.

104 Global Relations Forum, *Turkish Energy Strategy in the 21th Century,* p. 24.

105 Turkish Ministry of Energy and Natural Resources, "Dünya ve Ülkemiz Enerji ve Tabii Kaynaklar Görünümü", No.11, 2016. p.19.

Apart from the climate change and mitigation policies, another environmental issue that lies at the edge between liabilities and assets for Turkey is the Straits. Both for Turkey, determined to become an energy corridor, and for the EU, determined to achieve supply security through diversified routes, the Straits requires special attention, constituting an important pillar of Turkey's transit role.[106] Each year 2.9 million barrels of oil per day pass through the Straits,[107] which is remarkable compared to 1.1 million barrels transported in 2010 through the Kirkuk-Ceyhan Pipeline and Baku-Tbilisi-Ceyhan Pipeline with combined full capacity of 2.815 million barrel per day.[108]

The number of oil tankers and other dangerous cargo vessels passing through the Straits rose from 4.248 in 1996 to 10.153 in 2010,[109] most of which lack modern standards of oil transportation. With the dissolution of USSR and with Russia's increasing Black Sea exports, the traffic in the straits increased as well, resulting in a growth in hazardous cargo passing through the Bosphorus. Since the right of free passage for trade through the Bosphorus precludes any restrictions and guaranteed by the Montreux Convention, Turkey becomes subject to the risks of a potential incident in the Straits.[110] The risk of an environmental disaster in the Straits renders the issue more than just an energy transit problem, adding an environment dimension.[111] Consequently, the strengthening of technical and legal control mechanisms for the maintenance, safety and technology requirements for the passage over the Straits is essential in the decades to come.

## Conclusion

The interlinked nature of energy security and foreign policy requires a harmony in the states' energy strategies and foreign policy visions. For an energy dependent country like Turkey, while a carefully designed foreign policy agenda can increase the country's energy security, a mismanaged political dispute can turn the disruption of imported supplies to an actual threat.

Although Turkish energy market is sizeable in terms of its consumption, it is not large enough compared to the EU or China to drive the global changes. Accordingly, "Turkey is neither a strategic energy producer nor a consumer. It is, however, a significant oil transit country with future potential and a potential gas transit country with increasing significance".[112] Turkey is also emerging as a critical partner in assuring European energy security through energy transport from the producers in Turkey's vicinity to Europe. In this respect, Turkey's role within the external dimension of European Energy Policy cannot be underestimated. Turkey's willingness and capacity as a transit country could progressively increase when its conditions and foreign policy strategies enable it to strike a delicate balance between the deepening energy trade with problematic suppliers in the Caspian and the Middle East regions, the challenging relations with its European partners, and the increasing domestic pressures due to its rising energy needs.

106 Global Relations Forum, *Turkish Energy Strategy in the 21th Century*, p.29.

107 EIA, *World Oil Transit Chokepoints*, 10 November 2014, https://www.eia.gov/beta/international/regions-topics.cfm?RegionTopicID=WOTC, (Accessed on 03 April 2016).

108 Global Relations Forum, *Turkish Energy Strategy in the 21th Century*, p.29.

109 Ibid. p.33.

110 The accidents of *Independenta* in 1979 and *Nassia* in 1994 are the major examples for the threats faced by the passage of oil tankers, see Susanne Nies, "Oil and Gas Delivery to Europe", *IFRI Gourvernance Europeen et Geopolitique de L'Energie Report,* No.11, 2011, p.102-103

111 Roberts, "The Turkish Gate", p.19.

112 Global Relations Forum, *Turkish Energy Strategy in the 21th Century,* p.16.

A strategy which targets harmony between energy policy and foreign policy has to address all the issue areas highlighted in this article. However, in addition to favorable developments in the energy realm such as TANAP, which already constitute an asset for Turkey, the potential for Ankara to increase its assets and limit the liabilities mainly lies in the "grey" areas. In order to transform these issues away from potential liabilities towards promising assets, the congruence between the foreign policy actions and the energy policy is a decisive factor with the development of prudent mechanisms to cope with the global energy trends and regional geo-political challenges. In order to be able to do so, Turkey needs to be adaptive to detect and manage the change, and be proactive about the global game changers such as the climate change in both its domestic sphere and in international arena. On the domestic realm, strategies highlighting efficiency and mix diversification policies should support the international dimension. Only by fulfilling these conditions, Turkey can cope with the change and turbulences and become an effective regional actor. Otherwise, its dilemmas carry a high risk of turning them into liabilities.

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