



TURKEY AND EUROPE

CHALLENGING PARTNERS

TURKEY AS A EUROPEAN ENERGY PARTNER AND THE CHALLENGE FOR EUROPEAN SECURITY

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TURKEY AS A EUROPEAN ENERGY PARTNER AND THE CHALLENGE FOR EUROPEAN SECURITY

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Turkey, with its strategic location at the crossroads of Europe and Asia, is one of the key countries in the energy geopolitics of Eurasia. While it lacks substantial energy resources itself, Turkey's geographical position enables it to present itself as an energy bridge, corridor, center or hub in the region. It is estimated that 73% of proven oil reserves and 72% of proven gas reserves in the world are located in Turkey's neighborhood. This makes Turkey an important energy corridor for the European market, which accounted for almost 20% of all global oil consumption and 30% of global natural gas consumption in 2019 (BP Statistical Review of World Energy, 2020). Turkish policymakers have frequently made references to these geopolitical role conceptions, interchangeably, in order to highlight their country's strategic importance for consumers in Europe and producers in Asia since the end of the Cold War. This paper aims to explore and evaluate Turkey's changing role as a partner for the EU and possible challenges for European security in light of the latest developments, particularly the intensified competition between the EU and Turkey in the security fields.

Turkey and Energy

The politics of energy in Turkey has become one of the defining factors in the economic, security and foreign policies of the country since the 1980s, as a result of its rapidly increasing energy consumption since the early 1990s. The figures provided by the Turkish Ministry of Energy and Natural Resources (MENR) indicate that energy demand in the country has grown by an average of around 6% annually in the past decade, which is the highest among all OECD member states and second highest in the world after China (İpek, 2017: 174). As Turkey lacks enough indigenous energy resources, Turkish policy makers will continue to have to deal with this challenge for a long while. In response, Ankara's main objective has been to find reliable sources from which energy can be supplied at reasonable prices and without major risks of interruption. Yet, this is not an easy task, considering that Turkey currently imports around 75 percent of its primary energy supply, which is mainly composed of oil and natural gas.

The country's import dependency was estimated to be of more than 90% in oil

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and 99% in natural gas in 2019 (<https://enerji.gov.tr/homepage>). Natural gas imports in this context are a particularly important concern for Turkey's energy security, as its consumption increased almost tenfold in the period between 1992 and 2002 (Winrow, 2014: 4). Turkey purchased around 45 billion cubic meters of natural gas from other countries in 2019, recording an almost 50% increase in ten years (<https://enerji.gov.tr/homepage>). A total of 34% of this came from Russia, 21% from Azerbaijan and 17% from Iran through four pipelines (Russia-Turkey Pipeline, Western Route; Blue Stream Pipeline; Iran-Turkey Pipeline; Baku-Tbilisi-Erzurum [BTE] Pipeline), which have a total capacity of 46.6 billion cubic meters. The remaining 28% of Turkey's energy consumption relies on LNG imports from Algeria, Qatar and Nigeria (Petform, 2021). In terms of crude oil, Turkey's imports come mainly from Russia, Iraq, Kazakhstan, Saudi Arabia and Kuwait.

This fragile state of affairs imposes itself on Turkey's energy priorities and consequently its policies. Turkey's main energy objectives are to reduce its dependence on imported energy sources, secure its energy supplies and improve energy efficiency. It should be noted that these objectives are also among the defined objectives of the EU. The Union's Energy Union Strategy is a policy instrument that runs in tandem with the European Green Deal, which has the ambitious goal of bringing secure, sustainable, competitive and affordable energy to all EU consumers. The EU's strategy is based on five closely interrelated and mutually reinforcing dimensions to achieve these objectives: a) Energy security, solidarity and trust; b) A fully integrated internal energy market;

c) Energy efficiency contributing to moderation of demand; d) Decarbonizing the economy; and e) Research, innovation and competitiveness.

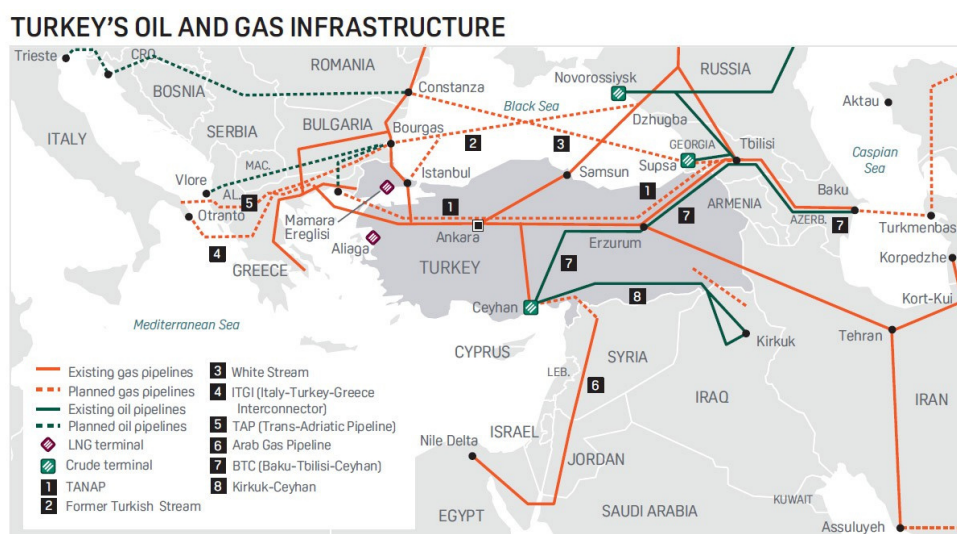
The first dimension has the objective of diversifying Europe's energy sources, while making better use of energy produced within the EU. The second dimension aims to create a fully integrated internal energy market via the use of interconnectors, which will enable energy to flow freely across the EU - without any technical or regulatory barriers. The third dimension strives to achieve a decrease in the EU's energy consumption and therefore energy imports by increasing energy efficiency, reducing pollution and preserving domestic energy sources. The fourth dimension pushes for decarbonizing the economy of all EU member states via the adoption of a global deal for climate change, and encouraging private investment in new infrastructure and technologies, an ambitious plan that simultaneously results in a decrease in funding of projects, both within and outside the Union that do not follow its criteria. The fifth dimension employs research, innovation and competitiveness in order to bolster efforts in achieving breakthroughs in low-carbon technologies via coordinated research and the financing of projects in partnership with the private sector.

On the other hand, Turkey's approach to energy in the international arena is also marked by clear geopolitical power projections as its aim to become an energy transit hub between Europe and Asia shows (MENR, 2018). This strategic goal indicates that Turkey's geographical position provides an opportunity for it to play an important role in connecting

energy consumers in Europe with the energy suppliers in the Middle East, Russia, the Caspian Basin and the Eastern Mediterranean. It is estimated that 73% of proven oil reserves and 72% of proven gas reserves in the world are located in Turkey's neighborhood (Bilgin, 2010: 114). This makes Turkey an important energy corridor for the European market. As defined in the joint declaration of the Turkey-EU High Level Energy Dialogue meeting in 2015, Turkey is "a natural energy bridge and an energy hub between energy sources in the Middle Eastern and Caspian Regions and European Union (EU) energy markets" (Joint Declaration, 2015).

Pipelines and Projects

The East-West energy corridor project for transporting the oil and natural gas resources of the Caspian Basin to Europe via pipelines passing through Turkey was the turning point for Turkish-EU energy relations in the early 1990s (Baran, 2003). Turkey's geopolitical role as an energy bridge between Europe and Asia has frequently been highlighted by both Turkish and Western officials since then (For examples, see Tahralı, 2019). The Baku-Tbilisi-Ceyhan (BTC) oil pipeline and the BTE natural gas pipeline, which became operational in 2006-2007, received strong backing from Western leaders mainly because these two pipelines were perceived as key geopolitical instruments in limiting the traditionally strong Russian influence over the newly independent countries of the region (Talbot, 1997). Such energy projects have also enabled the emergence of a strategic rapprochement between Turkey, Azerbaijan and Georgia in the Caucasus (Çelikpala and Veliev, 2015). Turkey's role as an energy bridge between the European markets and Asian producers received another significant boost when the Iran-Turkey Natural Gas Pipeline became operational in 2001, and the Blue Stream pipeline started to carry significant quantities of Russian natural gas for Turkish consumption in 2003. In 2007, the Interconnector Turkey-Greece-Italy (ITGI) was completed, with a goal of transporting 7 bcm (billion cubic meters) of natural gas per year of Azerbaijani natural gas to the European market (Depa, 2010). Plans were also developed to construct a Trans-Caspian natural gas pipeline, in order to connect Turkmenistan with the East-West energy corridor, but it has failed to materialize.



Source: Platts

Map 1: Turkey's Oil and Gas Infrastructure[1]

In the field of crude oil transportation, on the other hand, Turkey has already consolidated its role as a transit state between Europe and Asia, thanks to the Kirkuk-Yumurtalık and BTC pipelines, which both carry oil from Iraq and Azerbaijan respectively to the Turkish Mediterranean port in Ceyhan, and together have a total annual capacity of 121 million tons. It is estimated that more than two billion barrels of oil have been shipped from the Ceyhan terminal since 2006, in addition to the considerable volumes of oil carried by tankers through the Turkish straits (Erşen and Çelikpala 2019).

Beginning in the 2000s, Turkish officials have become less satisfied with the role of transit state and started to emphasize their desire to make Turkey a regional energy hub, bringing together suppliers and consumers where the price of energy would be determined. This is definitely a much more ambitious geopolitical role compared with transit, in which “the transit country owns the transmitting pipelines, for which it receives rent,” or a corridor, which means that the transit country is merely a geographical bridge for the transportation of energy (Tangör and Schröder, 2017). This perception is perhaps best represented in the words of former Turkish energy minister Taner Yıldız, who wrote, “Turkey can be more than a bridge; it has the potential to become a regional center between Asia and Europe. The core of Turkey’s energy policy is circular, and the diameter of this circle is equal to the world’s diameter.” (Yıldız 2010: 36).

The Russia-Ukraine natural gas crises of 2006 and 2009 provided a suitable geopolitical environment for the Turkish leaders to work towards the realization of

this ambitious goal. As the EU and Russia started to look for alternative routes for energy pipelines, Turkey’s political leverage vis-à-vis both actors increased significantly, not only due to its favorable geographical location as a transit country, but also because of its economic potential as a large natural gas importer in the region. Both the EU’s Southern Gas Corridor (SGC) initiative and Russia’s Turkish Stream project in this regard have offered Turkey the chance to find additional sources for its growing domestic energy demand, while generating major economic benefits in the form of transit fees (Siddi, 2017). More importantly, its decision to participate in these two competing projects at the same time has provided Ankara with the opportunity to play a more prominent role in the energy geopolitics of Eurasia.

The most recent project contributing to Turkey’s hub objective is the TransAnatolian Pipeline (TANAP). The intergovernmental agreement to construct the pipeline was signed in 2012 between Turkey and Azerbaijan, the construction started in 2015, and it became operational in June 2018. The pipeline annually delivers 6 bcm of natural gas from the Shah Deniz II field of Azerbaijan for Turkish domestic consumption, while the remaining 10 bcm is going to be transferred to Europe via the TransAdriatic pipeline (TAP) that runs from Greece, via Albania, to Italy. The BTE-TANAP-TAP route, which is the backbone of the SGC, was to become operational in March 2021 (TAP, 2021).



Map 2: Trans-Anatolian Gas Pipeline (TANAP)[2]

Stretching over 3,500 kilometers and requiring an investment of around \$45 billion, the SGC is crucial to the EU's plans to decrease its dependence on Russian energy. It also greatly benefits Azerbaijan, which will finally be able to export large volumes of natural gas to the European market. There are already plans to increase the capacity of TANAP so that it can supply the EU with 23 bcm of gas in 2023 and 31 bcm in 2026 (Botaş, 2021). It is also claimed by SOCAR officials that, in the longer term, TANAP can be expanded to carry natural gas to Europe from Iran, Iraq and the Eastern Mediterranean region (Anadolu Agency, 2014). Such a development is also expected to transform Turkey into an “effective regional gas-trading hub” (Sartori, 2017). Turkey's Petroleum Pipeline Corporation (BOTAŞ) already holds a 30% share in TANAP, which makes the project an even more important part of Turkey's energy hub discourse.

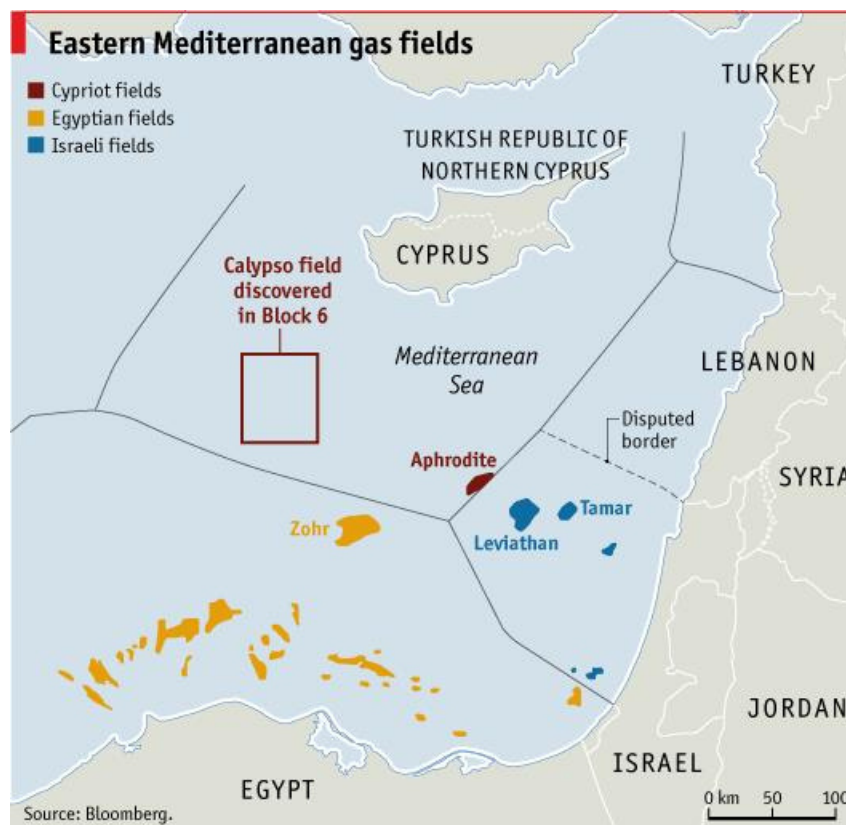
Apart from the ongoing SGC and Turkish Stream projects, there are also plans to build new pipelines or expand the existing ones to transport oil and natural gas to Europe from the Middle East, Caspian Sea and Eastern Mediterranean via Turkey. One possible option is to connect Iran with the SGC project, since currently around one fifth of Turkey's natural gas is supplied via the Tabriz-Erzurum pipeline. However, this is not an easy task considering that most of Iran's natural gas fields are located in the south of Iran and the modernization of the country's poor internal gas infrastructure would require huge investments, particularly from the West, which is currently prevented from doing so by the US sanctions on Iran.

Another project that was introduced by Ankara in the hope of boosting its chances of becoming an energy hub was the construction of a natural gas pipeline between Turkey and Northern Iraq. For this purpose, a sales agreement was signed with the Kurdish Regional Government (KRG) of Iraq as early as November 2013, and BOTAŞ reportedly started work on a pipeline to transport natural gas from the region (Pamuk and Çoşkun, 2013). It should also be noted that the KRG began exporting oil to Turkey in trucks in 2011, while a new pipeline was inaugurated almost two years later to carry oil from the Taq Taq and Tawke oilfields in Northern Iraq to the Turkish port of Ceyhan (Roberts, 2016). Despite these developments, the energy deals between Turkey and the KRG have been rejected by the central government in Baghdad, which had serious disputes with Erbil about the production and export of the oil and natural gas resources in Northern Iraq.

[2]Source: <https://www.tanap.com/tanap-project/why-tanap/>

The issue also strained Ankara's relations with Baghdad until 2014, when the rise of ISIL in Syria and Iraq dramatically changed the geopolitical landscape of the Middle East. A few years later, just as the ISIL threat was significantly weakened by the joint efforts of regional and international actors, the KRG leadership's decision to declare independence via a referendum in September 2017 caused a crisis in Erbil's relations with both Baghdad and Ankara, the latter being particularly concerned about the implications of such a development for its own Kurdish issue. Baghdad's takeover of certain Kirkuk-area oil and gas fields and following the KRG losing control of nearly half of the production from the area's oil fields after the referendum, its budgetary problems have become even more problematic and it started experiencing severe budgetary constraints that caused payment delays to international companies. In the end, it seems that Turkey's security related concerns prevented the parties from moving forward to realize further cooperation (Roberts, 2018).

Turkey has also been closely monitoring the developments in the Eastern Mediterranean basin, which holds significant gas reserves, particularly in the maritime areas of Cyprus, Israel and Egypt. Nevertheless, the developing competition and the energy agreements within the Eastern Mediterranean also threatened to overturn Turkey's energy policy, whose primary goal has been to maintain Turkey's position as an energy hub between the east-west and north-south corridors. Turkey's belief is that the Turkish route in transporting Eastern Mediterranean gas by pipeline to the European market was suddenly off the agenda with the Israeli-Egyptian cooperation. Turkey's absence is a serious concern for the region because of Turkey's overlapping maritime claims, vast domestic market, and potential as a transit route for Eastern Mediterranean gas exports.



Map 3: Eastern Mediterranean Gas Fields[3]

The EU and Turkey

Despite the fact that the European Union and Turkey are drifting apart, mainly because of Turkey's democratic backsliding, but also due to Turkey's assertive way of promoting its interests in its neighborhood, their strategic thinking on energy and energy security overlapped to some extent for a significant portion of the first two decades of the 21st century. The European Union has the long-term objectives of transitioning to green energy and diversifying its energy imports in order to decrease its dependency on specific energy exporters. Turkey also considers as a strategic objective the diversification of its imports and decreasing its dependence on specific energy exporters, while in the meantime it aims to become a regional energy hub connecting the energy producing countries of the Middle East and Russia, as well as the Caspian and Eastern Mediterranean regions, with the European energy market (Erşen and Çelikpala, 2019). Given its unique geographical position between Europe and Asia, Turkey also has the advantage of controlling the Bosphorus and Dardanelles straits. This enables Turkey to present itself as a key transit state – a geopolitical role which has also been acknowledged by the EU authorities in their SGC Strategy (European Commission, 2016 and 2020: 32). The joint declaration of the Turkey-EU High Level Energy Dialogue meeting in 2015 even went a step further and defined 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” (European Commission, 2016).

This statement came during the climax of

the crisis in Ukraine, which brought the EU's need to diversify its energy imports and decrease its energy dependence on Russia to the forefront, as relations between the two major regional actors deteriorated significantly. Both the European Union and, its ally, the US saw the lessening of the EU's dependency on Russia for energy imports as a priority that would allow the Union and its members to start to have more leverage and freedom of action when it came to their diplomatic interactions with Moscow, especially in a period of crisis. Moreover, the prospect of a possible repeat of the two natural gas crises between Russia and Ukraine in 2006 and 2008, given the breakdown in relations between Kiev and Moscow, expedited the EU's need for alternative supply routes and suppliers of energy imports (Erşen and Çelikpala, 2019).

In this undertaking, Turkey was perceived as a key actor in the new regional and energy security contexts, which enabled Ankara to strengthen its role and geopolitical importance to the EU. The European Union and its member states believed that integrating Turkey into the European energy market would cement EU-Turkey relations, and further Turkey's commitment to becoming an EU member state in the future. Since the accession process was still alive at the time, energy was considered another means to ensure that Turkey would remain within both the EU's and the West's orbit (Eizenstat and Kalemli-Özcan, 2015). It was no accident that Turkey was at the epicenter of every single project concerning the transportation of natural gas to Europe (TANAP, Nabucco etc.), as well as a key part of the SGC that sought to bypass Russia.

The SGC incorporates four projects: the operation of- Shah Deniz natural gas-condensate field (“SD1” project) and its full-field development (“SD2” project), the operation of the South Caucasus Pipeline (“SCP” project) and its expansion (“SCPX” project), the construction of the Trans-Anatolian Natural Gas Pipeline (“TANAP” project), and the construction of the Trans Adriatic Pipeline (“TAP” Project), (Southern Gas Corridor, 2020). The main purpose of the SGC is to bring Caspian gas to the EU in an effort to eliminate the rate of dependence on Russian gas, as well as to diversify energy resources (European Commission, 2016). As far as the SGC is concerned, Turkey is designated as a key player, since it carries the natural gas to the European states. The Trans-Anatolian Natural Gas Pipeline (TANAP) is not only part of the SGC, but also comprises the longest stretch of the \$40 billion project (Reuters, 2019). The realization of the project started in 2011, when Turkey and Azerbaijan signed a Memorandum of Understanding in relation to the TANAP project, while other related agreements were reached in the following years. The Trans-Anatolian Natural Gas Pipeline (TANAP) project was completed in 2019 (Southern Gas Corridor, 2020). The same year, the TurkStream pipeline was also completed, giving Turkey the status of the largest gas transit corridor to Europe (Deutsche Welle, 2017).

Nabucco started in 2002, aiming to bring gas from the South Caucasus, Turkmenistan and possibly Iran to Europe. Despite the fact that the project was supported by the EU, the US, the potential transit countries and the energy suppliers, the initiative was abandoned in 2013. Limited demand, the high price of construction and the rivalry between competitor pipelines such as TANAP and

TAP, were among the reasons that contributed to its cessation (MICCO, 2015). Also Russia, which had interests in the Caspian region, signed deals with Turkmenistan and Kazakhstan to diminish the amount of natural gas to be available to Nabucco, as well as with Azerbaijan for control of part of Shah Deniz natural gas resources (Muftuler-Bac and Başkan, 2011: 372).

Both the EU and EU member state officials publicly acknowledged Turkey’s role in European energy security and linked that role with Ankara’s EU accession prospects. Italian and Swedish Foreign Ministers Massimo D’Alema and Carl Bildt stated on August 31st 2007 in an op-ed that “Turkey is a key actor in the realm of energy security [...] it is our shared interest to incorporate Turkey in a functioning integrated system” (Bildt and D’Alema, 2007). While the EU’s Nabucco Coordinator, Jozijs van Aartsen, called the project a “stepping stone” along Turkey’s EU membership path, the then EU Commissioner for Enlargement Olli Rehn highlighted energy as “an area in which the benefits of Turkey’s EU accession process are easy to see” (Rehn, 2009). Manuel Barroso, who was at the time the President of the EU Commission, said that energy cooperation “is one of the cases where we can show to the European public opinion how important Turkey is for the EU [...] Turkey should not be seen as a burden, but an asset” (Vucheva, 2009).

Similarly, Turkish officials highlighted Ankara’s importance and role in the EU’s energy security, while linking that role with Turkey’s EU accession prospects. President Erdoğan stated that “Turkey can play an important role in resolving the EU’s energy problem” (EURACTIV, 2009), while former Foreign Minister Ahmet

Davutoğlu underlined Turkey's indispensable role in the EU's energy security (Davutoğlu, 2008: 92). Nevertheless, geopolitical problems, souring Turkey-EU relations and domestic developments in Turkey (European Parliament, 2020) became important roadblocks standing in the way of the realization of Turkey's energy plans. It has become clear that it is not possible to separate natural gas issues from sensitive political and geopolitical matters in Turkey-EU relations. This is particularly true for Turkey's aim of becoming an energy hub for Europe, considering that wars, terrorism and conflict zones in its immediate neighborhood can all negatively influence the energy projects transiting the country.

The current dramatic political transformation in Turkey's regional periphery has been a catalyst in EU-Turkey relations. Turkey's political elite perceived rising security challenges in the country's near abroad as a threat to its sovereignty and territorial integrity, and existing problems became more acute as new variables entered into the equation, including the discovery of new hydrocarbon reserves in the Eastern Mediterranean, the Arab Spring and the civil war in Syria. The EU's attitude to the failed coup attempt in Turkey in 2016, as well as the divergence of its strategic interests from those of Ankara in Syria and elsewhere in Turkey's neighborhood, resulted in a sea change in Ankara's view of EU-Turkey relations (Lecha, 2019; Pierini, 2020). The Turkish government no longer regards the European Union as a sincere partner, and thus the EU lost any kind of leverage over Turkey. This development played a key role in the evolution of Turkey's recent relations with Russia (Pierini, 2020).

Since 2016, and as the situation in the Eastern Mediterranean started to evolve, the EU's attitude and considerations *vis-à-vis* Turkey and its role in Europe's energy security and in the region in general have also changed. The escalation of tensions between Turkey and other key states in the energy equation of the Eastern Mediterranean, such as Egypt and Israel, have had an impact on the planning of the energy projects. Turkey, which was part of nearly every planned energy project that would bypass Russia and was part of the Southern European Corridor, is now for the time-being excluded from the Eastern Mediterranean plans. Turkey is therefore considered today more of a potential client rather than a transit state. Given the fact that Turkey is the region's second biggest energy market, after Egypt, it cannot and should not be excluded as a potential client, especially given Ankara's growing energy demands and the need to diversify its natural gas imports from Russia, Iran and Azerbaijan. Additionally, from the producing states point of view, as well as from the EU's, having Turkey as a client firstly limits Ankara's leverage and influence in the project in comparison with being a transit state and secondly incentivizes it to improve its relations with the producing and other transit states.

Turkey considers that the developing energy alliance in the Eastern Mediterranean has threatened to upend its energy policy, of which the primary goal has been to maintain Turkey's position as an energy hub between the east-west and north-south corridors. The belief that the Turkish route is the best alternative for transporting Eastern Mediterranean gas by pipeline to the European market via Turkey (Daily Sabah, 2020; Tiryakioğlu, 2017; Altunışık, 2020)



Map 4: Proposed East Med Pipeline[4]

has been shattered with the signature of the Israeli-Egyptian energy deal. So far, Turkey has been removed from the equation with the establishment of the EastMed Gas Forum, and the Cyprus-Egypt-Israel-Greece front has left Ankara diplomatically isolated and has threatened its interests in the region (Pierini, 2020). Even though Turkey protested this developing synergy and escalated its rhetoric against it, the other regional actors, with the support of France, Italy and the US, continued to pursue the strengthening and institutionalization of their cooperative relations. The EastMed Gas Forum has received the backing of the US and the EU, whose relationships with Turkey remain strained due to divergences on a growing number of issues (Aydıntaşbaş, et al., 2020). Turkey's marginalization, which is more a result of its poor ties with Israel and Egypt, its territorial disputes with Greece and the Cyprus problem, constitutes a serious concern, not only because of Turkey's significant potential contribution to the EastMed Gas Pipeline project as a vast energy market and as a possible transit route for Eastern Mediterranean gas exports, but also because of its ability to utilize its overlapping maritime claims, its role in Cyprus and its significant military power in order to disrupt ongoing developments in the region (Euractiv, 2020; Robinson and Jeakins, 2019). Turkey has already demonstrated its ability to do so, as its foreign policy, which relied more on soft power elements during the 2000s, has now radically shifted to a more aggressive position, including sending troops to Syria and Libya, as well as muscle flexing in the Mediterranean (Tol, 2020).

Energy is not a topic which is independent from this discourse. And certainly, Turkey's latest actions in the Aegean and the Eastern Mediterranean, which aggravated the precarious and unstable situation, have tarnished its image as a credible partner to the EU. As there is a clear lack of understanding between the EU and Turkey and the dialogue between them continues only haphazardly, energy issues cannot be insulated from this disconnect. As such, the EU officials and several member states have consistently expressed their concerns over Turkey's commitment to its European future and its credibility and reliability as a partner for the Union.

[4]Source: Tagliapietra, 2013: 21.

On several occasions, in a symbolic act, the European Parliament voted in favor of suspending EU accession talks with Turkey over Ankara's track record in human rights and the lack of respect for other core democratic values (Kroet, 2016; Toksabay and Karadeniz, 2017; Deutsche Welle, 2019). Moreover, the European Parliament has condemned recent Turkish actions in Cyprus and in the Eastern Mediterranean and has called for the imposition of tough sanctions (European Parliament, 2020). Josep Borrell, the EU's Vice-President and High Representative of the Union for Foreign Affairs and Security Policy, labeled Turkey as the EU's biggest foreign policy challenge (Aydıntaşbaş, 2021) and expressed the opinion on March 22nd, 2021, that the EU's strong concern for the domestic developments taking place in Turkey were taking Ankara away from their European path (Borrell, 2021). The EU Heads of States have also threatened Turkey with sanctions for its actions in the Eastern Mediterranean and its role in regional conflicts as well as the erosion of core democratic values, with Austrian Chancellor Sebastian Kurz accusing Turkey of using refugees and migrants as weapons against the EU and calling for an end to Ankara's accession talks with the Union (Deutsche Welle, 2020; Groendahl, 2020).

Meanwhile, French President Emmanuel Macron has been one of the staunchest critics of Turkey, leading the efforts to impose sanctions on Turkey for its actions in the Aegean and Eastern Mediterranean, and its role in the conflicts in Libya, Syria and Nagorno-Karabakh, as well as "undermining the NATO alliance and its partnership with the EU" (Trian, 2020; Peel and Milne, 2019; Irish and Rose, 2020).

The EU leaders today no longer have the appetite to include Turkey in their long-term energy projects, realizing that such a move, given Turkey's behavioral shift, might add unnecessary risks to the EU's interests. As Turkey is now seen as a hesitant partner for the EU and NATO by many European leaders (Pierini, 2020; Pierini & Siccardi, 2021), this creates further skepticism on Ankara's ability to act as part of a lasting solution in the energy sector, which the EU can rely on (Dursun-Özkanca, 2019: 98-112). Moreover, Turkey's closer ties and cooperation with Russia over the last few years reinforces the concerns within the EU regarding Turkey's perceived alienation from its orbit and the Western political system as a whole.

On the other hand, Turkey's marriage of convenience with Russia, which is gradually developing into a strategic relationship, might also decrease Ankara's eagerness to contribute to the EU's efforts to secure and diversify its energy supplies. It is worth mentioning that Turkey itself has been trying to reduce its dependence on Russian energy imports and, so far, has succeeded in this regard to some degree (Tagliapietra, 2018). While Turkish and EU efforts to decrease their dependency on Russia for energy imports underline a common strategic objective, this common objective does not necessarily imply a cooperative relationship. Russian natural gas accounted for 39% of EU imports in 2019 (Yermakov, 2020: 4), with the US, Norway and Algeria being its other major suppliers. Turkey's natural gas supply mixture is similar. Some people even argue that, if one were to consider that there is a limited number of alternate natural gas suppliers and that they produce a finite amount of natural gas every year, both Turkey and the EU will have to compete with each other in order

to secure the energy resources they need if they wish to further limit their dependence on Russian natural gas (Kraemer, 2020).

Moreover, there is concern that if Turkey attains a greater role in the EU's energy supply security in the future, it might attempt to utilize its role to extend its transactional relations with Brussels from refugee and migrant management to that of energy security (Mikhelidze, et al., 2017; Soler i Lecha, 2019: 16-19; Vucheva, 2009; DW, 2009). However far-fetched this scenario might sound, it cannot be entirely disregarded in European policy planning, given that Turkey has in recent years used its role as a host state for several million refugees from Syria and elsewhere to extract funds and concessions from the EU. But, at the same time, in a matter where the market is heavily involved and actually defines the course of events, often irrespective of geopolitical considerations, it would not be wise for Turkey to tarnish its image by transforming a comparative advantage that derives from its geographic position and its market into an instrument of political leverage, if not coercion vis-à-vis the EU. But the latter will certainly need more guarantees on behalf of Turkey and more predictability.

Conclusion

As long as the EU continues to import the bulk of its natural gas via pipelines, Turkey is expected to maintain a significant role as an energy transit country (Berk and Schulte, 2017). However, the rapid expansion of LNG's share in the EU's natural gas imports over the last few years might diminish Turkey's role in the European undertaking, so as to decrease its reliance on energy imports from Russia

and subsequently minimize Moscow's ability to use energy resources as a political instrument to exert pressure on its trade partners (Oxford Institute for Security Studies, 2018). Since prices are expected to remain low (with the exception of 2025-2027, when we might detect a supply-demand gap) and LNG's share in the EU energy market is expected to expand, especially if the US shale gas and LNG exports to Europe increase in the coming years, following a potential improvement in transatlantic relations under a Biden administration (Fleck, et al. 2020), the need for new projects "feeding" the European market will be decreased.

Moreover, in that regard it remains uncertain how or if at all, Turkey's recent discoveries of exploitable natural gas resources in the Black Sea might impact the energy dynamics between itself and the EU. As exploration surveys in the area are ongoing, there is no concrete evidence regarding the actual size of these newly discovered deposits. Nevertheless, based on the current estimates the said deposits do not seem to grant Turkey export capabilities and will be used, most likely, in order to satisfy Ankara's growing domestic needs.

In an era of instability and geopolitical change, the main issue for any energy importer is the reliability and the credibility of its suppliers. The presumed lack of these characteristics led the EU to seek the diversification and independence of its energy supply from Russia, following the energy crises of 2006 and 2008 and the military crisis of 2014 between Russia and Ukraine. While Turkey was seen as a key partner at the beginning of the EU's efforts to achieve its energy supply diversification, over the years Ankara's gradual alienation from the EU has also weakened Turkey's position on developing common energy projects. Should a more

functional relationship develop from the current stalemate in EU-Turkey relations, it is clear that the energy dimension within a transparent and binding framework will be one of the areas of cooperation.

It is worth noting that as the EU has set an ambitious plan for reducing greenhouse gas emissions, (zero emissions by 2050), leading it to renewable energy sources and hydrogen, this would have a direct effect on its future projects, including those of natural gas. The tendency in the Union is to stop supporting such projects financially, which will probably hamper their realization. So, the role of Turkey, which so far has not ratified the Paris Climate Change Accord, and other regional powers will decrease, unless they invest in renewables and other cleaner forms of energy.

Recommendations

As far as energy cooperation and the partnership between the EU and Turkey is concerned, we can propose some actionable policy recommendations that the EU and Turkey can take to stabilize and further develop their bilateral relations.

First, the two actors should seek to clarify policy objectives as far as the energy partnership is concerned. The policymakers should define short-, middle- and long-term cooperation areas through high-level meetings and summits to set a joint actionable political agenda.

Secondly, taking a longer-term view, both the EU and Turkey must also invest in cultivating a mutual understanding of energy cooperation and enhancing the interaction between researchers, journalists, and policymakers to comprehend the other side's perspective.

Both parties, being aware of the adverse effects of the current rivalry in the Eastern Mediterranean, should convene a multilateral conference that would involve all the players in the region. All the parties should acknowledge that some level of cooperation is beneficial for all the actors involved. Needless to say, any unilateral action or efforts to limit such cooperation have been counterproductive.

The parties should also develop a joint energy cooperation plan to transition to green energy and cooperate on the Green Deal. They are aware that the current challenges that the parties face are deep and structural, and any cooperation scheme on energy could help revise political relations.

Lastly the parties should reconsider cooperation related to the diversification of current pipeline projects, LNG, or other means of transportation.

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TURKEY AND EUROPE

CHALLENGING PARTNERS

TURKEY AS A PARTNER

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