

**EU'S ENERGY SUPPLY DIVERSIFICATION:
TURKEY'S ROLE.**

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To my brother

Abstract.

The dissertation deals with Turkey's role in the EU's efforts to diversify its energy supply. To do so, it will analyse the current context in which Turkey, currently a country of the developing world, along with India and China, joined major global powers – the EU, the USA, and Japan – in the race to hoard natural resources.

It will be clear, after having analysed Turkey's geopolitical context and the most important pipelines Turkey is involved in, how important the south-eastern neighbour is for the EU and its supplies: the EU needs Turkey in order to be more independent of Russia and the Middle East.

Aware of the fact that Russia and Middle Eastern countries cannot be completely excluded from the energy supply line, the dissertation will explain that Turkey can play a fundamental role as one link of the supply network - bringing gas and oil from the Caspian region, Iran and Iraq - and can aid in creating alternative routes.

INTRODUCTION

Turkey's last decades have been characterized by its economic growth's pace which is comparable to the largest world economies, such as China and India, and is bringing about a greater need of natural resources.¹

These third world countries have entered into a market which until a couple of decades ago had as major consumers the EU, the USA, and Japan. If we add to this increased number of actors (which badly need natural resources) the fact that the world's population has been growing very swiftly, it will be clear why coal, gas, and oil, became the object of such a harsh competition through the years.

So far, the most used sources of energy are natural gas and crude oil. Oil started being significantly used since the early twentieth century when much of the importations were coming from Azerbaijan (oil or gas deposits in the Middle East had not been discovered yet); natural gas started to be used in the beginning of the 1950s, but it took a long time before it could actually be considered as a proper alternative to oil and accordingly used.²

One of the reasons which did not make gas convenient, if compared to oil, is that, when in contact with oxygen, it explodes; this causes much more risks and, consequently, higher prices, making it less attractive for private companies, which are obviously more interested in dealing with the most convenient product they can pick.

¹ Katinka Barysch (2007), "Turkey's Role in European Energy Security" [online], available from: http://www.cer.org.uk/pdf/essay_turkey_energy_12dec07.pdf [accessed 17 August 2009], p.2;

Hürriyet, "Turkey's Energy Demand to Continue to Grow by 6 pct Annually until 2020" [online], available from: www.hurriyet.com.tr/english/finance/9335048.asp?scr=1 [accessed 25 July 2009].

² Rafael Kandiyoti, *Pipelines: Flowing Oil and Crude Politics* (London : Tauris, c2008), p. 20; Commission of the European Communities (November, 2000), "Green paper – Towards a European Strategy for the Security of Energy Supply" [online], available from: http://aei.pitt.edu/1184/01/energy_supply_security_gp_COM_2000_769.pdf [accessed 10 August 2009].

The oil industry is still more than lively and oil is more efficient than gas: none of this impels states, let alone companies, to diversification.³

Nevertheless, environmental problems,⁴ and the harsh competition we have referred to, oblige state administrations to focus on natural gas more than on the past. Every state needs it and, consequently, the natural gas market as well is characterized by a great competition.

To this competition, the EU must add several other problems due to the fact that Norwegian resources are relatively decreasing and due to the heavy dependence on Russian gas. Though, the relations between Russia and Ukraine have been causing problems to natural gas European supplies, and considering the importance that such a client, i.e. the EU, has for Russia, a pipeline has been proposed, as we will see, a pipeline ('Nord Stream') which would by-pass several countries (including Ukraine) and would arrive in Germany.

However, the Russia-Ukraine crises of 2006 and that of 2009 set alarm bells ringing and showed how risky it can be to be mainly dependent on only one major supplier can be.⁵ Indeed, EU's geographical position is relatively lucky: it borders with the Russian Federation, it shares the Mediterranean Sea with Libya and Algeria and, through Turkey, it is linked to the Middle East (Iraq, Iran and Syria) and the Caucasus, which is the gate toward the Caspian and Central Asian natural resources.

Clearly, apart from Russia and North Africa, all the areas are linked to Europe by Turkey. Moreover, both when we talk about Iran and Iraq (the two Middle Eastern countries bordering with Turkey) and the Transcaucasian and Caspian region, we are referring to potential suppliers which yet did not achieve at all their potential of

³ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, intro., pp. XI-XII, 15.

⁴ *Ibid.*, p.19

⁵ *Ibid.*, p. 2; BBC News (January 5, 2009), "Russia to Cut Ukraine Gas Supply" [online], available from: <http://news.bbc.co.uk/1/hi/world/europe/7812368.stm> [accessed 10 August 2009].

supplies to Europe. In fact, Iraq and Iran have been prospected years ago already, but several problems, such as embargoes⁶ and wars, impeded the stipulation of contracts of certain relevance.

With regards to the Transcaucasian and Caspian regions much must still be done to access into their markets. In fact, Azerbaijan, Kazakhstan, and Turkmenistan are rich in oil and gas and can be potentially considered as part of a great route, the so called fourth artery⁷ (where the other arteries are those from Russia, North Africa, and Norway).

Turkey, therefore, is of great importance in the EU's process of diversification which will bring the Caspian and Transcaucasian gas, without forgetting, Iranian and Iraqi gas, into the European market.

I will try now, analysing the EU's needs and Turkey's relations with its neighbours (which are also EU's potential suppliers), to consider those pipelines which in one way or another involve Turkey and the EU, to explain what position Turkey has in the EU's plan which would see Turkey, together with Russia, North Africa, the Middle East and the Caspian, Turkey as a part of the EU's project for achieving energy diversification.

⁶ *Ibid.*, p. 194.

⁷ John Roberts, "The Turkish Gate: Energy Transit and Security Issues," *Turkish Policy Quarterly*, Vol. 3, no. 4 (October, 2004), p. 19.

SECTION 1.

1.1 EUROPEAN UNION NEEDS.

The European Community at the early stage and subsequently the European Union have always imported natural resources.⁸ Even if not totally devoid of resources, the EU has not enough domestic natural resources to meet its domestic demand. The continuously rising energy demand, therefore, makes the EU one of the first consumers and importers of gas and oil, thus causing it to be more and more dependent on imports from Russia, the Middle East and, to a less extent, Norway and Algeria.⁹

Thirty percent of EU oil imports come from Russia, 45 percent from the Middle East and 16 percent from Norway; 40 percent of gas imports come from Russia, 30 percent from Algeria and 23 percent from Norway.¹⁰ However, in the last decade in particular several problems have emerged.

Indeed, although the Barents Sea seems to have still many reserves which have not been exploited, Norway's gas production has been decreasing year after year, and many analysts underline how with the actual rates of production Norway will be able to continue its production for only other twenty-three years.¹¹ With regards to Russia, it is the richest in gas country in the world; yet some concerns about the ability of Moscow to meet its domestic need came up and consequently, even its

⁸ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, pp. 21-22.

⁹ Lako, P. & J.C. Jansen, "What Scenario Studies Tell About Security of Energy Supply in Europe" [online], available from: <http://www.ecn.nl/docs/library/report/2001/c01054.pdf> [accessed 3 July 2009].

¹⁰ *Ibid.*, p. 9; Alexander's Gas and Oil Connections, August 7, 2008, "EU Reports on Energy Imports and Production" [online], Available from: www.gasandoil.com/goc/news/nte83251.htm [accessed 14 July 2009]; Commission of the European Communities, November, 2000. "Green paper – Towards a European Strategy for the Security of Energy Supply" [online]. Available from: http://aei.pitt.edu/1184/01/enegy_supply_security_gp_COM_2000_769.pdf [accessed 10 August 2009]; Commission of the European Communities, March 2006. "Green paper: a European strategy for sustainable competitive and secure energy" [online]. http://eurlex.europa.eu/smartapi/cgi/sga_doc?smartapi!celexplus!prod!DocNumber&lg=en&type_doc=COMfinal&an_doc=2006&nu_doc=105 [accessed 10 August 2009], p. 3.

¹¹ Commission of the European Communities, "Green paper – Towards a European Strategy for the Security of Energy Supply."

ability to continue its supplies to Europe in the next years is in question. Moreover, the problems originated by its disputes with Ukraine in 2006 and 2009¹² made clear that Russia badly needs further gas, namely that coming from the Caspian region.

At the moment the EU dependency on energy imports is around 50 percent, an amount which will increase in the next 20 or 30 years, if things will remain the same, up to 70 percent.¹³ This high dependency obviously enforces the EU to look for alternatives that not only would give a back-up alternative in the case of unexpected problems, such as the Ukraine-Russian disputes in 2006 and 2009, but would also give Brussels a much stronger power of dealing prices with the main suppliers, since they, especially Russia, seem quite keen to exploit their situation of quasi-monopoly.

In this sense the Caspian region and Central Asia seem to be new frontiers to be discovered and their energy resources could prove very valuable.¹⁴ As we will see later on, in the early 1990s the region was considered as a potential new area in which much gas and oil would have been found. Unfortunately for those who were already planning huge investments in the region, estimates were to be proved wrong.¹⁵ Nevertheless, the region offers a valid option, and finally, even if late, the EU understood its importance and started considering the relations with the region with much more attention.

The EU, then, has a great need of energy; however many other actors are in the same situation, and competition is high. This has been obliging the EU to look for new partners and strengthen, through cooperation and institutions, relationships with all those countries which can offer new routes and possibilities. The Caspian Sea and

¹² Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 135; “Russia to Cut Ukraine Gas Supply.”

¹³ Commission of the European Communities, “Green paper – Towards a European Strategy for the Security of Energy Supply.”

¹⁴ Roberts, “The Turkish Gate: Energy Transit and Security Issues,” p. 40.

¹⁵ Jeff Corkhill, “New Options in the Caspian Sea” [online], www.epmag.com/archives/features/2888.htm [accessed 22 April 2009].

Caucasus are among those, and for having good relations with those areas it is necessary that relations with Turkey are kept and improved, if possible. In fact, the best route for gas and oil coming from the Caspian region other than Russia would be through pipeline passing through Turkey, and arriving ultimately in Europe.

Now I will therefore analyse Turkey's energy situation and its relationships with its neighbours, so that it will be clear why its role might be important for the EU's supplies.

SECTION 2.

2.1 TURKEY'S NEEDS.

Turkey lies in a region containing around 70 percent of both global oil and gas reserves; ironically, however, hardly any of these natural resources are in Turkish lands.¹⁶ In fact, according to data which date back to 2006 and 2007 Turkey produce 45,000 barrels per day of oil, 320 billion cubic feet of gas and 72 million short tons of coal, while consuming respectively 690,000 barrels per day of oil, 1.1 trillion cubic feet and 86 million short tons.¹⁷

By no means can Turkey's domestic production meet Turkey's domestic consumption.¹⁸ Moreover, Turkey's energy imports are increasing yearly, and in the last decade its imports tripled, driven by an energy demand which is expected to grow 6 percent every year until 2020.¹⁹ Yet, Ankara must improve its energy supplies coming both from the internal and external; in fact, it must be considered that by 2020 Turkey is expected to consume something like 66 billion cubic metres, while the supplies for that year should not be more than 41 billion cubic metres.²⁰ Improvement to the pipeline network and the stipulation of new contracts would be therefore much welcomed.

¹⁶ *Ibid.*, p.18; Ali Tekin and Paul A. Williams, "Turkey and EU Energy Security: the Pipeline Connection," *East European Quarterly*, Vol.42, Issue 4 (December, 2008), p.57; Barysch, "Turkey's Role in European Energy Security," p.1; Energetska Strategija, "Turkey's Energy Strategy" [online], available from: www.energetska-strategija.hr/doc/stdr/turkeys_energy_strategy_en.pdf [accessed 29 July 2009]; Ahmet Davutoğlu, "Turkey's Foreign Policy Vision: an Assessment of 2007," *Insight Turkey*, Vol.10, no.1 (2008), p. 91.

¹⁷ Energy Information Administration (April, 2009), "Turkey" [online], <http://www.eia.doe.gov/emeu/cabs/Turkey/Full.html> [accessed 20 August 2009].

¹⁸ "Turkey's Energy Strategy," p. 7.

¹⁹ *Hürriyet*, "Turkey's energy demand to continue to grow by 6 pct annually until 2020."

²⁰ Gareth M. Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," *Oxford Institute for Energy Studies* (June, 2009), p. 14.

Turkey now imports 90 percent of gas and oil from Russia and the Middle East; by 2010 imports will account for 75 percent of Turkey's total energy requirements.²¹ Greater diversification²² of imports is therefore a high priority.

However, the increasing demand will require not only diversification; indeed it is vital to keep alive those agreements already in existence, and to improve those connections which link Turkey to other countries. In fact, the pipelines which link Turkey to Iran and Iraq are of extreme importance given the potential of both those states. Unfortunately, though, those pipelines, the Tabriz-Ankara (which transports gas) and the Kirkuk-Ceyhan (oil), are often targets of PKK guerrilla actions.

Moreover, this growing energy demand has been coinciding with a long period of drought which caused many problems to the hydroelectric energy system,²³ and which led to using gas to drive power plants, normally operated by water power. Besides this, as some studies show, Turkey's natural resources reserve margin²⁴ cannot be treated as, and compared, to other states' natural reserve margins. Usually, in fact, the standards reserve margin could be between 10 and 20 percent of the normal capacity. However, some past experiences show that in Turkey 40 percent of

²¹ Igor Torbakov (October 2007), "Making Sense of the Current Phase of Turkish-Russian Relations" [online], available from: www.jamestown.org/uploads/media/jamestown-TorbakovTurkeyRussia.pdf [accessed 20 June 2009]; Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 146; Diana Gregor (October 28, 2008), "Turkey's Relations with Iran" [online], available from: <http://www.realite-eu.org/site/c.9dJBLLNkGiF/b.2300261/apps/s/content.asp?ct=5829755> [accessed 3 August 2009]; Fiona Hill, "Caspian Conundrum: Pipelines and Energy Networks," in *The Future of Turkish Foreign Policy*, eds. Lenore G. Martin & Dimitris Keridis (Cambridge, Ma : MIT Press, 2004), p. 212.

²² Tekin and Williams, "Turkey and EU Energy Security: the Pipeline Connection," p. 58; Hill, "Caspian Conundrum: Pipelines and Energy Networks," p. 213.

²³ Barysch, "Turkey's Role in European Energy Security," p. 2; Mustafa Filiz and al., "The Importance of Hydropower Plants in Turkey's Energy Planning" [online], available from: www.dsi.gov.tr/english/congress2007/chapter_2/57.pdf [accessed 3 August 2009].

²⁴ The 'reserve margin' is "a measure of available capacity over and above the capacity needed to meet normal peak demand levels ... Regulatory bodies usually require producers ... to maintain a constant reserve margin of 10-20% of normal capacity as insurance against breakdowns in part of the system or sudden increases in energy demand" (Energy Vortex, "Reserve Margin, Reserve Capacity" [online], available from: http://www.energyvortex.com/energydictionary/reserve_margin__reserve_capacity.html [accessed 14 August 2009]).

margin is the lowest that can be reached.²⁵ If lower, the system could start being under pressure and blackouts are likely. Governments know that: in 1979 the frequent power cuts seem to be among the reasons which caused Ecevit to be forced out of office.²⁶

Therefore, considering that 90 percent of the energy consumed is imported and that the energy domestically produced is insufficient, Turkey seems to be obliged to optimize the use of energy (it is in this sense that on May 2007 the Energy Efficiency Law was enacted)²⁷ and to diversify its energy imports.

2.2 TURKEY AND EU.

Especially in the last fifteen years, it is obvious that economic relations between Turkey and the European Union have been influenced by the talks concerning the Turkey's access as a full member into the EU. Even if many European officials would like to keep Turkey's admission and its geopolitical importance separated, that seems impossible indeed.²⁸

Turkey, situated in a region where so many of its neighbours are so rich in oil and gas, became an important geostrategic player: 35 percent of global total gas reserves lie in ten states²⁹ which obviously are interested in letting their gas transit through Turkey to Europe. This makes it clear that, whether Turkey will become an EU member or not, Brussels must continue cooperating with Ankara.

In fact, Turkey is a fundamental partner when talks are about gas and oil coming from the Middle East and the Caspian region. Consequently, Ankara often

²⁵ David Tonge (March, 2007), "Turkey's Energy Sector Under Stress" [online], available from: <http://ibsresearch.com/content/turkeys-energy-sector-under-stress> [accessed 29 July 2009].

²⁶ Barysch, "Turkey's Role in European Energy Security," p. 2.

²⁷ "Turkey's Energy Strategy," p. 7.

²⁸ Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," p. 2.

²⁹ Tekin and Williams, "Turkey and EU Energy Security: the Pipeline Connection," pp. 57-58; Roberts "The Turkish Gate: Energy Transit and Security Issues," p. 18.

links its importance as a reason to obtain advantages regarding the admission into the EU and Several statements made by Turkish politicians made clear that they see the Nabucco pipeline project as a *passepartout* towards an easy process for making Turkey a member of the EU.³⁰ Unfortunately for Turkey's plans, the European Union does not seem to share the same opinion.

Nevertheless, the EU would like to see Turkey signing the Energy Community Treaty which would make uniform the regulatory framework and would make cooperation between the different states (also those which are not EU members) easier.³¹ This is perceived, however, by Turkey as a further EU attempt to obtain the advantage of a Turkey which would respect a common framework with the EU, while giving nothing in return as far as Turkey's admission into the EU is concerned. This perceived 'asymmetrical' relation seems to be one of the biggest obstacles to making agreements and realizing projects which would be profitable for both Turkey and the EU.³²

Yet, the situation seems to be in a deadlock, and not possible to be improved any time soon due to the issues related to the Republic of Cyprus. In fact, Turkey's embargo against Cyprus has led the Nicosia government to block the opening of most of the chapters which Turkey could work on to adapt its domestic systems to the EU *acquis communautaire*. So far, of the thirty-five chapters to deal with, only one has been open and closed with success; ten have been opened, while eight have been blocked.³³

³⁰ Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," p. 8.

³¹ *Ibid.*, p. 8; Barysch, "Turkey's Role in European Energy Security," p. 6.

³² Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," p. 23.

³³ *Ibid.*, p. 7; Barysch, "Turkey's Role in European Energy Security," p. 7.

2.3 TURKEY AND RUSSIA.

Historically, relations between Russia and Turkey were traditionally bad. With its dream of conquering Istanbul, the Russian Empire was seen as a rival and threat to the Ottoman Empire. Although Soviet Russia and the Turkish Nationalists cooperated with each other during the independence war and the early years of the Turkish Republic, after the Second World War, the Soviet Union continued to have expansionist designs on in Eastern Anatolia. Turkey meanwhile became an important ally of the United States.

In the 1990s, however, relations improved to some extent³⁴ and the two powers, both regional powers at that moment, started undertaking better economic relations. This was of course due to Turkey's need for energy and Russia's rich natural gas and oil resources. Indeed, 60 percent of the gas imported by Turkey is bought from Gazprom.³⁵

In this sense, Turkey and the EU share the same most important natural resource supplier and, therefore, they both have to diversify their energy source and try to find alternative suppliers other than Russia. Nevertheless, they have to be able to lessen their economic dependence on Russia without jeopardizing their relationship with it.³⁶

Yet, the moment does not seem to be the best one. Indeed, Turkey and Russia have clashed on several issues: through the years, Turkey has been trying to regulate the tankers' passage through the Bosphorus because of the pollution caused by the traffic in a highly populated city such as Istanbul, and because of the elevated risk of

³⁴ Lerna K. Yanik, "Allies or Partners? An Appraisal of Turkey's Ties to Russia, 1991-2007," *East European Quarterly*, Vol.XLI, no. 3 (September, 2007), p. 349.

³⁵ Barysch, "Turkey's Role in European Energy Security," p. 2.

³⁶ Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," p. 4.

accidents.³⁷ Russia has been considering this as an attempt to give momentum to the pipeline which has been constructed between Baku and Ceyhan.³⁸ However, both the countries are trying to solve the problems caused by the passage of tankers through the Bosphorus backing two different pipelines: Turkey is backing the Samsun-Ceyhan pipeline while Russia backs the South-Stream pipeline.

Another major source of problems between Ankara and Moscow is the Caucasus. Turkey has been trying to strengthen its relations with the Transcaucasian countries, especially Azerbaijan and Georgia, which are fundamental for such pipelines, as the Baku-Tbilisi-Ceyhan pipeline. As detailed below, Russia is trying to offer political and economic advantages to Azerbaijan³⁹ so as to deprive Turkey –and, therefore, the EU- of a regional key-state.

Currently, the relationship between Russia and Turkey will be much influenced by EU relations with Russia and EU relations with Turkey. Ankara could in fact shift its geopolitical position according to the benefits that it can get. For example, the liberalization of the domestic Turkish market will offer a good opportunity for Gazprom to acquire a relevant share of the Turkish market.⁴⁰ This provides an incentive for Moscow to maintain good relations with Ankara.

However, the two countries have many overlapping interests in the Transcaucasian and Central Asian regions; to varying degree, they are both important in the pipeline talks and indeed they must talk to coordinate their moves and to understand how they both could get the most from it. For this reason, the visit of the

³⁷ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 141; Terry Adams, “Caspian Oil and Gas Development and the Black Sea Region,” in *Europe’s Black Sea Dimension*, eds. Terry Adams, Michael Emerson, Lawrence Mee and Marius Vahl (Brussels : Centre for European Policy Studies ; Athens : International Center for Black Sea Studies, 2002), pp. 52-53.

³⁸ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 141.

³⁹ Turkish Weekly (July 2, 2009), “Russia Asks Turkey to Join South Stream Project” [online], available from: <http://www.turkishweekly.net/news/82972/russia-asks-turkey-to-join-south-stream-project-sechin.html> [accessed 26 August 2009].

⁴⁰ Tekin and Williams, “Turkey and EU Energy Security: the Pipeline Connection,” pp. 58-59; Barysch, “Turkey’s Role in European Energy Security,” p. 2.

Russian Prime Minister, Vladimir Putin,⁴¹ offered to both Turkey and Russia a good opportunity to talk about the trade exchange, the situation in the Caucasus, the Russia-NATO relations and to sign protocols about energy (natural gas, oil and nuclear).

2.4 TURKEY AND CAUCASUS.

In recent decades Turkey has been developing good and stable relations with Azerbaijan and Georgia, and especially beginning from 2008 has been trying to bring about a rapprochement with Armenia.⁴²

Turkey's relations with Azerbaijan have always been positively influenced by the fact that both the states are predominantly Turkic and the main languages, Turkish and Azeri, are very similar and mutual intelligible. Moreover, the fact that Azerbaijan is relatively rich in oil, and the Caspian oil and gas directed to Turkey must pass through Azerbaijan, gives Turkey a reason more to consider Azerbaijan an important ally.

Yet, some problems have arisen between the two countries, as results of the attempts to find a rapprochement between Armenia and Turkey, backed by the US government.⁴³ The issue is much complex and only indirectly related to the pipeline politics. Yet Armenia and Azerbaijan are involved in the Nagorno-Karabagh problem;

⁴¹ Haroutiun Khachatrian (August 11, 2009), "Armenia: Putin Visit to Turkey sparks Hopes and Fears in Yerevan" [online], available from:

<http://www.eurasianet.org/departments/insightb/articles/eav081109a.shtml> [accessed 21 August 2009];

Habibe Özdal (August 5, 2009), "Putin's Visit to Turkey: What is on the Agenda?" [online], available from: <http://www.turkishweekly.net/op-ed/2541/putin%E2%80%99s-visit-to-turkey-what-is-on-the-agenda.html> [accessed 21 August 2009]; BBC News (September 3, 2008), "Turkish President in Armenia Trip" [online], available from: <http://news.bbc.co.uk/1/hi/world/europe/7596768.stm>.

⁴² Ömer Erzeren, "Roadmap to Peace?" [online], available from:

http://www.qantara.de/webcom/show_article.php/_c-476/_nr-1151/i.html [accessed 15 August 2009].

⁴³ İhsan Dağı (April 27, 2009), "The Armenian Question, Turkey and the US" [online], available from: <http://www.todayszaman.com/tz-web/yazarDetay.do?haberno=173590> [accessed 21 August 2009].

Turkey has always supported Azerbaijan in the issue but the recent conciliatory moves towards Armenia are considered by Azerbaijan as a betrayal by an ally.⁴⁴

Georgia is also vital for the pipelines departing from Azerbaijan (and potentially for those from Central Asia) and terminating in Turkey and/or Europe. Moreover, Turkey has all the interest to have a stable Caucasus free from Russian domination.⁴⁵ Turkey thus strongly supports a Georgia involved in the Euro-Atlantic bloc, while Georgia supports Turkey's full membership into the EU.⁴⁶ This diplomatic proximity has also been shown during the last war between Russia and Georgia, during which Turkey supplied Georgia with extra gas when the small Caucasian country was having encountering difficulties in receiving it from Russia.⁴⁷

Indeed, considering Russia's aims in the region, especially in Georgia, and the unsolved conflict between Azerbaijan and Armenia, Turkey is continuing its policies which aim to keep good relations with Tbilisi and Baku, and to improve those with Yerevan.

2.5 TURKEY AND CENTRAL ASIA.

Immediately after the Soviet Union breakdown, many global and regional powers tried, even though without much success,⁴⁸ to exploit the political vacuum in the region to become influent actors in the area. Ankara sought to make use of its historical and cultural Turkic links with Kazakhstan, Uzbekistan⁴⁹ and Turkmenistan.

⁴⁴ Erzeren, "Roadmap to Peace?"

⁴⁵ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 176.

⁴⁶ Civil (March 14, 2006), "Turkey, Georgia Pledge Mutual Support" [online], available from: www.civil.ge/eng/article.php?id=12068 [accessed 29 July 2009].

⁴⁷ Civil, "Turkey, Georgia Pledge Mutual Support;" Igor Torbakov (September 12, 2003), "Georgia and Turkey Strengthen Ties to Offset Russian Influence" [online], available from: www.eurasianet.org/departments/insight/articles/eav120903.shtml [accessed 29 July 2009].

⁴⁸ Neil Melvin, "Introduction," in *Engaging Central Asia*, ed. Neil Melvin (Brussels: Centre for European Policy Studies, 2008), p. 2.

⁴⁹ "It does not seem likely that Uzbekistan can contribute in any meaningful way to EU energy security. What is more, the manner in which its own energy resources are exploited makes them more of a force

Unfortunately for Turkey, the Tsarist and the Soviet dominance in the region seemed to have cancelled much of the pan-Turkic ideal in the region (if it ever existed), not giving, therefore, much hope to Turkey's aims in the region.

Unlike the situation in the 1990s, however, 2000s have revealed a Turkey less interested in the pan-Turkic aspect, while it gained ground, especially thanks to the USA which would be happy to see such a thing, the idea of Turkey as a model for those new independent states that would have needed an example to look at for the developing of more secular societies and for starting a process which should bring democracy in Central Asian region.⁵⁰ Besides, Turkey undertook a much more pragmatic and economic-based approach in the region.⁵¹

Accordingly, many agreements have been signed through the last years. I will briefly analyse now the relations that Turkey has been having with Kazakhstan and Turkmenistan.

With Kazakhstan. When Kazakhstan became independent it needed new partners which could have helped it to become less dependent on Russian influence. Turkey, therefore, offered a good option to strengthen relations with a state which was well organized professionally in many aspects. In the early 1990s the relations were aimed at achieving a military cooperation which would have given many benefits to Kazakhstan. It is in this sense that since 1993 several agreements, such as the 'Agreement on Cooperation in the Field of Military Education' or the 'Agreement on

for resentment and instability within Uzbekistan itself than a force for socioeconomic development." (Michael Hall, "The EU and Uzbekistan: Where to Go from Here?" in *Engaging Central Asia*. Ed. Neil Melvin (Brussels : Centre for European Policy Studies, 2008), p. 74).

⁵⁰ Gareth M. Winrow (July, 1997), "Turkey and the Newly Independent States of Central Asia and the Transcaucasus" [online], available from: <http://meria.idc.ac.il/journal/1997/issue2/jv1n2a5.html> [accessed 14 August 2009]; Federico Bordonaro (May 12, 2007), "Turkey Stakes a Central Asian Claim" [online], available from: http://www.atimes.com/atimes/central_asia/ie12ag01.html (accessed 14 August 2009).

⁵¹ Aigerim Shilibekova, "Turkey-Kazakhstan Relationship in the Military Sphere: Outcome and Outlook," *European Journal of Economic and Political Studies* 1(2) (2008), p. 67.

Cooperation in the Field of Technology and Defense Industry’, have been signed.⁵² Interestingly, since October 2004 Turkish language has been taught at the Military Institute of Foreign Languages.⁵³ Later on, since the early 2000s the relations became being much more intense⁵⁴ and moved by economic reason; and Turkey, through the Company Çalık Enerji, became one of the most important investor in the rich-in-oil Kazakh field of Kashagan.⁵⁵

With Turkmenistan. Turkey and Turkmenistan started having high-level relations again only on 2007. In facts, the meeting held on March 3, 2007 in Ankara was the first visit paid by the Turkmen President in Turkey since 1999. That generated some hope that finally it would be possible to talk about the Trans-Caspian pipeline again, which would give Europe and Turkey access to Turkmen gas.⁵⁶

Still, even if Turkey has been trying hard to improve and maintain its good relations with Kazakhstan and Turkmenistan, which need Turkey as a gate to the rich European market, Russia is still influential and it heavily controls the regional infrastructure.⁵⁷ It seems therefore clear that it will still stake a long time before Central Asian states will be able to take major decisions independently of Russia.

2.6 TURKEY AND IRAQ.

⁵² *Ibid.*, pp. 68-69.

⁵³ *Ibid.*, p. 69.

⁵⁴ *Ibid.*, p. 67; Deniyar Kosnazarov (January, 2009), “Turkey and Kazakhstan: Similarities in Foreign Policy Tactics, Concepts and Approach” [online], available from: <http://www.eurasiacritic.com/articles/turkey-and-kazakhstan-similarities-foreign-policy-tactics-concepts-and-approach> [accessed 21 August 2009].

⁵⁵ John Daly (January 23, 2008), “Turkey Emerges as Mediator in Turkmenistan-Azerbaijan Dispute” [online], available from: http://www.jamestown.org/edm/article.php?article_id=2372743 [accessed 18 June 2009].

⁵⁶ Lale Sariibrahimoglu (March 27, 2008), “Turkmenistan Warms to Turkey, but Makes No Pledge for Gas Supplies” [online], available from: http://www.jamestown.org/single/?no_cache=1&tx_ttnews%5Btt_news%5D=33499 [accessed 21 August 2009].

⁵⁷ Michael Denison, “Turkmenistan and the EU: Contexts and Possibilities for Greater Engagement,” in *Engaging Central Asia* ed. Neil Melvin (Brussels : Centre for European Policy Studies, 2008), .p. 93.

Turkey-Iraq relations have been dominated by two issues: Kurds and natural resources,⁵⁸ which are linked because the Kurdish region in Iraq is also rich in oil. Turkey has been concerned that a possible independence of the Iraqi Kurdish region could have repercussions for Turkey's Kurdish population and could jeopardize the transportation of oil from Kirkuk into Turkey.⁵⁹

Because of that, Turkey became one of the major actors in the post-Saddam era in Iraq, and many Turkish officials, including the Prime Minister, made clear that Turkey does not want an independent Kurdish state in northern Iraq.⁶⁰

Iraq is 4th and 10th in the proven oil and gas fields ranking, and it is therefore of extreme importance for Turkey. However, because of the wars which have occurred since 1980 (Iran-Iraq war, First Gulf War, Second Gulf War) the flow of oil coming from Iraq has been repeatedly interrupted, when not completely disrupted (as when Iraq invaded Kuwait)⁶¹.

For these reasons, Turkey has been trying to cooperate with Iraq to improve the military and economic cooperation between the two countries so as to exploit their potential at the maximum and to set up a common security area.⁶²

2.7 TURKEY AND IRAN

⁵⁸ Muhammad Muslih, "Syria and Turkey: Uneasy Relations," in *Reluctant Neighbor: Turkey's Role in the Middle East*, ed. Henry J. Barkey (Washington, DC: United States Institute of Peace Press, 1996), p. 54; Patricia Carley, "Turkey's Role in the Middle East" *United States Institutes of Peace* (Washington: United States Institutes of Peace, 1995), p. 10; F. Stephen Larrabee and Ian O. Lesser, *Turkish Foreign Policy in an Age of Uncertainty* (Santa Monica, CA: Rand, 2003), p. 52.

⁵⁹ Annette Grossbongardt (January 17, 2007), "Turkey Concerned as Kurds Take Control of Northern Iraq" [online], available from: <http://www.spiegel.de/international/0,1518,460324,00.html> [accessed 3 August 2009].

⁶⁰ Today's Zaman (April 3, 2009), "PM Erdoğan Says Turkey Defends Formation of Iraqi State on Basis of Iraq Nationality" [online], available from: <http://www.todayszaman.com/tz-web/detaylar.do?load=detay&link=171383> [accessed 21 August 2009].

⁶¹ Simon C. Mayall, *Turkey: Thwarted Ambition* (Washington, DC: Institute for National Strategic Studies, National Defense University, 1997), p.57.

⁶² Turkish Weekly (August 11, 2009), "New Partnership Model in Turkey-Iraq Relations" [online], available from: <http://www.turkishweekly.net/news/86550/new-partnership-model-in-turkey-iraq-relations.html> [accessed 21 August 2009].

After the 1979 Islamic revolution: the ideological differences between the two countries did not appear to be solvable: Turkey embodied the idea of a secular state which was quite alien to the identity of the Islamic Republic of Iran.⁶³ Yet both countries understood that collaboration would have been much more profitable and worked to establish and maintain good economic relations. Indeed, Turkey needs Iranian gas, while Iran needs Turkey as a gate towards Europe. Although the USA embargo, which obviously, to a certain extent, influences Washington allies' moves,⁶⁴ has not been able to hinder the relations between the two states, which are quite good indeed; in fact, not even the relations between Iran and the EU seem to have been too much influenced by the USA embargo.

Indeed, not only do the two countries aim at reaching a volume of trade of \$20 billion per year by 2011 but Iran is potentially one Turkey's most reliable suppliers of natural resources,⁶⁵ since it ranks in the world rankings as the 3rd for proven oil fields and 2nd for proven gas fields. The agreement signed in May 2007 indicates that relations between the two countries could further improve.⁶⁶ In fact, the Turkish company BOTAS signed a memorandum of understanding to invest in three Iranian gas fields called South Pars, and to build a 2000km long pipeline which should pass through Turkey en route to Europe.⁶⁷

Yet, there are some problems linked to Caspian gas. Iran support a route, alternative to the planned one with Nabucco, which would bring gas to Europe but

⁶³ Bulent Kenes (August 27, 2007), "Turkey-Iran Relations Should Be Encouraged" [online], available from: <http://www.todayszaman.com/tz-web/yazarDetay.do?haberno=120059> [accessed 21 August 2009].

⁶⁴ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 194.

⁶⁵ Emrullah, Uslu (March 3, 2009), "Turkey-Iran Relations: A Trade Partnership or a Gateway for Iran to Escape International Sanctions?" [online], available from: http://www.jamestown.org/single/?no_cache=1&tx_ttnews%5Btt_news%5D=34653 [accessed 21 August 2009].; Kenes, "Turkey-Iran Relations Should Be Encouraged."

⁶⁶ *Ibid.*

⁶⁷ Barysch, "Turkey's Role in European Energy Security," p. 5; Gregor, "Turkey's Relations with Iran," Press TV (July 2, 2008). "Turkey May Develop Iran's South Pars" [online], available from: www.presstv.ir/detail.aspx?id=62247§ionid=351020103 [accessed 30 July 2009].

only after it has passed through Iran. It appears to have been motivated also by interest in investing in the Turkmen gas field of Yolotan,⁶⁸ whose gas would pass through Iran and from there, through Turkey, into Europe.

However, the frequency with which Turkey and Iran are talking, through high-level officials,⁶⁹ seems clearly caused by the will of both the states to keep their relations alive, especially considering that even if Iran supported an alternative way, in the event that Nabucco is realized, Iranian gas could be fundamental ensuring it continues to be fully utilized.⁷⁰

2.8 THE CASPIAN SEA AND ITS LEGAL SITUATION.

In the early 1990s, the Central Asia and the Caspian littoral states were considered to be so rich in natural resources as to be considered a valid alternative to the Middle East. The major global and local powers competed to try and derive maximum benefit from the region.

Unfortunately for those who already had seen a new Eldorado, after many drillings, researches and studies, it was made clear that the region was far from being the new Middle East; rather it was comparable to the North Sea fields.⁷¹ Still, that was and is enough to attract the interests of companies and states.

The EU in the 1990s appears not to have exploited the political vacuum⁷² and lagged behind. In fact, Russia has a historical advantage in the region given by decades of Soviet and Tsarist rule;⁷³ the USA considered the region in a more

⁶⁸ Uslu, "Turkey-Iran Relations: A Trade Partnership or a Gateway for Iran to Escape International Sanctions?"

⁶⁹ *Ibid.*

⁷⁰ Tekin and Williams, "Turkey and EU Energy Security: the Pipeline Connection," p. 63.

⁷¹ Adams, "Caspian Oil and Gas Development and the Black Sea Region," pp. 42-43.

⁷² Melvin, "Introduction," p. 2.

⁷³ Stratfor (September 3, 2008), "Turkey: Eyeing Central Asian Energy Ties" [online], available from: http://www.stratfor.com/analysis/turkey_eyeing_central_asian_energy_ties [accessed 28 July 2009].

geopolitical way, seeing in Central Asia and the Caucasus what Mackinder called the *heartland*, starting signing deals for military collaborations with the states of the region; China, whose main link is the economic one, has an advantage if compared to the EU, since it does not link its foreign relations with the states to human rights and/or democratization issues; Iran, whose domestic energy potential and geographical position could have been reason of large revenues, had faced the USA embargo and a certain political instability; Turkey tried to utilize its social and cultural proximity to the region without much success.

The EU, therefore, needs to strengthen its relations with the region especially in energy matters. Indeed, the EU has been publishing documents dealing with Central Asia, but it took a relatively long period to understand that the region would be important for its oil and gas. Accordingly, keeping and, if possible, improving its relations with Turkey seems to be the favoured move. Even though the neo pan-Turkism in the 1990s did not seem to have worked, it is undeniable that between Turkey and the Turkic states there are cultural and social affinities.⁷⁴ In this sense, much important are not only Kazakhstan and Turkmenistan from where much oil and gas of the region come from, but also Azerbaijan. This is a key state in the region since it is a fair producer of oil and because it is on the opposite coast of the Caspian from Turkmenistan and Kazakhstan. All the pipelines, such as the Trans Caspian one, which could be built to, or all those tankers which, transport gas and/or oil from the Central Asia, will eventually have to pass through Azerbaijan.

However, the Trans-Caspian pipeline has not been built yet, and it seems to be far from it because of the current legal problems. Until the early 1990s, the Caspian waters' use was regulated by an agreement made by Iran and the Soviet Union in the

⁷⁴ İhsan Bal, Sedat Laçiner, and Özcan Mehmet, *European Union with Turkey: the Possible Impact of Turkey's Membership on the European Union* (Ankara: ISRO, 2005), p. 78.

1920s. When the new Republics of Azerbaijan, Turkmenistan and Kazakhstan became independent, the agreement was not considered by the new actors valid anymore.

The issue now is whether the Caspian is a sea or a lake. Were it to be a sea, the Law of the Sea Convention of the 1982 would be applied and the Caspian would be divided in five different national sectors which would be exploited by them to their liking. Though, if the Law of the Sea Convention would not be applied, and it should not be forgotten that of the five littoral states only the Russian Federation and the Islamic Republic of Iran ratified the Convention,⁷⁵ the Caspian and its resources would be jointly exploited.⁷⁶

At the moment the situation is far from being clear, since Iran and, to a certain extent, Turkmenistan do not welcome Russia's preference for the Modified Median Line system which would give bigger share of waters to those states with longer coasts. In fact, Iran, which through the years has been preferring the option which would consider the Caspian a lake and later a division of the waters in five equal sectors,⁷⁷ would have a portion of water without any significant amount of oil and gas; Turkmenistan, on the other hand, would lose important natural resources fields which would be under Azerbaijani jurisdiction.⁷⁸

To date the Caspian has been *de facto* regulated by the littoral states as if it was a sea, dividing therefore the waters into national sectors.⁷⁹ Yet, until these legal

⁷⁵ UN Official Website, "Chronological Lists of Ratifications of, Accession and Successions to the Convention and the related Agreement as at 20 July 2009" [online], available from: http://www.un.org/Depts/los/reference_files/chronological_lists_of_ratifications.htm [accessed 22 August 2009].

⁷⁶ Hill, "Caspian Conundrum: Pipelines and Energy Networks," p. 226.

⁷⁷ Khoshbakht B. Yusifzade (Autumn, 2000). "The Status of the Caspian Sea: Dividing Natural Resources Between Five Countries" [online], available from: http://www.azer.com/aiweb/categories/magazine/83_folder/83_articles/83_yusifzade.html [accessed 22 August 2009].

⁷⁸ Bahman Aghai Diba (February 23, 2004). "The Legal Regime of the Caspian Sea: Any Changes in the Positions of Iran?" [online], available from: <http://www.payvand.com/news/04/feb/1169.html> [accessed 22 August 2009].

⁷⁹ Hill, "Caspian Conundrum: Pipelines and Energy Networks," p. 227.

problems are officially solved,⁸⁰ all those companies which would be interested in investing in the region will be unwilling to do it by the fact that they would not be protected by a legal framework universally recognized.

However, it is likely that at the end the solution will see the Caspian as something which is not a sea nor a lake, but a ‘special body of water’ which will need its own rules.⁸¹

⁸⁰ Barysch, “Turkey’s Role in European Energy Security,” p. 5.

⁸¹ Turkish Weekly (January 28, 2005), “Littoral States Discuss Legal Status of Caspian in Ashgabat,” available from: <http://www.turkishweekly.net/news/2915/littoral-states-discuss-legal-status-of-caspian-in-ashgabat.html> [accessed 22 August 2009].

SECTION 3.

3.1 PIPELINES.

Although for a relatively short distance (less than 2000km) transporting fuel through pipelines is cheaper than using tankers,⁸² and studies showed the potential high risk of accidents and environmental disasters in some ‘choke-points’, Turkey immediately saw increased its geopolitical role increased and started using it as a means for increasing its political influence in the region, so as to try and acquire acquiring momentum for possible EU accession.

Further importance has been acquired by Turkey after the experienced unpredictability of oil prices and after the EU realized how being so much reliant on Russia could be risky. Indeed, the quarrels occurred between Russia and Ukraine in 2006 and 2009 created a shortage of supplies for some EU member states;⁸³ and Brussels became aware of the importance in having more than one alternative to Moscow’s supplies.

Accordingly, therefore, after it has been made clear that new states were rich in oil and/or gas enough to be considered ‘alternatives’, and Russia was not considered the most reliable supplier possible, a period characterized by the stipulation of contracts and agreements started. Yet Russia did not stand and watch, and in 2003 Gazprom signed contracts valid for twenty-five years with Turkmenistan, Kazakhstan and Uzbekistan.⁸⁴ In the meanwhile both Kazakhstan and Turkmenistan also signed other agreements with China and Iran. In fact, Central Asian countries have all the interest to find new partners other than Russia,⁸⁵ which could pay much higher prices and which would be less politically influent.

⁸² Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, intro, p. XI.

⁸³ *Ibid.*, p. 135; “Russia to Cut Ukraine Gas Supply.”

⁸⁴ *Ibid.*, pp. 110, 196.

⁸⁵ Barysch, “Turkey’s Role in European Energy Security,” p. 1.

All these contracts give rise to contradictions and ambiguous situations. For example, Turkmenistan is also dealing for becoming a potential gas supplier of the proposed Trans-Afghanistan pipeline which would involve Afghanistan, Pakistan and India. The pipeline would need around 30bcm of gas; it is indeed not clear if Turkmenistan will have enough gas, especially after having signed other contracts with Russia (50bcm until 2009), Iran (14bcm) and China (30bcm for 30 years).⁸⁶

The very same problem about the dubious ability of Turkmenistan, and in this case Kazakhstan as well, will arise with the Nabucco project. Indeed, both the potential suppliers and the EU should be careful in evaluating to what extent the contract might be respected. The Caspian region it is not indeed a new Middle East and that must be borne in mind.⁸⁷

Yet, the region still remains a valuable option for getting oil and natural gas to flank to the usual suppliers, such as Russia, Algeria and Norway (whose production is declining)⁸⁸. This gives Azerbaijan and Turkey's locations a greater importance since they become important for EU.

In fact, Azerbaijan became an important regional actor not only because of its possession of resources in the Caspian but, to a large extent, because most of the oil and/or gas coming from Kazakhstan and Turkmenistan have to pass through Azerbaijan. Consequently, Turkey as well acquires importance: in Baku's perspective Azeri oil and gas passing through Azerbaijan must cross Georgia and Turkey before reaching Europe. Turkey thus provides the opportunity to those countries willing to

⁸⁶ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 112; Barysch, "Turkey's Role in European Energy Security," p. 5; Owen Matthews (December 22, 2007), "Russia's Big Energy Secret" [online], available from: <http://www.newsweek.com/id/81557> [accessed 30 July 2009].

⁸⁷ Terry Adams, "Caspian Oil and Gas Development and the Black Sea Region," in *Europe's Black Sea Dimension*, ed. Terry Adams, Michael Emerson, Lawrence Mee and Marius Vahl (Brussels: Centre for European Policy Studies; Athens: International Center for Black Sea Studies, 2002), p. 42.

⁸⁸ Roger D. Blanchard, *The Future of Global Oil Production* (Jefferson, N.C.; London: McFarland & Company, 2005), p. 70.

export their resources, such as the aforementioned Kazakhstan, Turkmenistan, Azerbaijan, but even Iraq and Iran, to sell them into the European market; vice versa, it would give Europe the opportunity to buy gas from suppliers other than Russia.

However, the talks concerning Turkey's accession into the EU have not been facilitating the situation, and this naturally has had an impact on all the negotiations and agreements which deal with pipeline projects and energy. Turkey, through some officials, often linked its EU potential full membership to the energy agreements (see the Nabucco project); the EU, on the other hand, wants to keep the two issues well separated.

To make things much more complicated, there is also the Russian will to keep its influential position as the EU's first gas supplier; losing its largest market (80 percent of Russian exportation is directed to the EU)⁸⁹ would be a big blow. Accordingly, Moscow wants to maintain its grip on all the Caucasian and Caspian region, which it regards as the 'Near Abroad' necessary to be controlled since it borders with Russia,⁹⁰ but also because Russia's current production is of 550 billion cubic metres. This quantity is hardly enough for its domestic consumption, making therefore fundamental further supplies of (cheap) gas coming from Central Asia,⁹¹ which can be sold at higher prices than those paid.

Moreover, to keep its predominant position in the gas market Russia is attempting to draw potential EU allies away from Brussels and is taking advantage of the internal divisions between EU member states. In fact, we can see the aforementioned situation between Turkey and Azerbaijan related to Armenia.

⁸⁹ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 221.

⁹⁰ William Courtney and Kennetz Yalowits (October 4, 2008), "Russia's Bid Control Caspian Energy" [online], available from:

www.boston.com/bostonglobe/editorial_opinion/oped/articles/2008/10/04/russias_bid_to_control_caspian_energy/ [accessed 30 July 2009]; Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 154.

⁹¹ *Ibid.*, p. 196; Matthews, "Russia's Big Energy Secret."

Knowing the Azeri displeasure for the Turkey-Armenia's possible rapprochement, Russia immediately let Azerbaijan know that, in return for a much stronger relation between Azerbaijan and Moscow, it could aid Azerbaijan to get a favourable agreement with Armenia in the Nagorno-Karabagh issue; it also said that it would be prepared to buy Azeri gas at European prices.⁹² As proof of how it is trying to divide EU's member states, we could mention the two competing projects of Nabucco and South Stream: indeed they would have as final hub states Austria and Hungary respectively.⁹³

Things would change further on if a Trans-Caspian pipeline had to be built. Though, as said, it still seems to be hard to be realized due to the technical problems that such a project may imply and to the legal problems detailed above.⁹⁴

Finally, it must be remembered that Turkey borders in the south with Iran and Iraq. They could potentially be enormous suppliers of both Turkey and European Union. Yet, Iraq is still an unstable country which cannot offer guarantees, while Iran has been dealing with domestic problems and is still the object of the USA embargo. It seems likely that Washington's desires of keeping Tehran isolated would remain considering that few believe the Nabucco pipeline has a future without Iranian gas.⁹⁵ For now, the Caspian region has 22 percent of oil and 46 percent of gas proven

⁹² Tekin and Williams, "Turkey and EU Energy Security: the Pipeline Connection," pp. 5, 63.

⁹³ Nargis Kassenova, "A View from the Region," in *Engaging Central Asia*, ed. Neil Melvin (Brussels: Centre for European Policy Studies, 2008), p. 125.

⁹⁴ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 108; Barysch, "Turkey's Role in European Energy Security," p. 5.

⁹⁵ Tekin and Williams, "Turkey and EU Energy Security: the Pipeline Connection," p. 64; Vladimir Socor (September 30, 2008), "Hungary Eyes Iranian Gas in Efforts to Resuscitate Nabucco" [online], available from: [http://www.jamestown.org/single/?no_cache=1&tx_ttnews\[tt_news\]=33981](http://www.jamestown.org/single/?no_cache=1&tx_ttnews[tt_news]=33981) [accessed 30 July 2009].

reserves in the world.⁹⁶ I will now analyse briefly the most important pipelines their technical and strategic characteristics.

3.2 BLUE STREAM (gas/realized)

The Blue Stream is the result of a Russian, Turkish and Italian joint venture. It became functional in 2003⁹⁷; it departs from Russian Federation's town of Izobilnoye and arrives in a small town close to Samsun, Durusu, in Turkey. This pipeline seems to be one of those which would be affected by and, in turn would affect, the Nabucco pipeline once realized. Indeed, considering the present capacity, the Blue Stream would be smaller than the Nabucco, but for this very reason Russia proposed to double its capacity;⁹⁸ if so, the Nabucco would be the smaller one.

The Nabucco would bring gas directly into the EU, in Austria, which would therefore become an important hub; accordingly, Russia offered Hungary a similar opportunity, that of being an energy hub, which has not been rejected by the Magyars. The offer consists in the extension of the Blue Stream (so called 'Blue Stream 2') into Hungary.⁹⁹

The project would be interesting not only for the fact that the pipeline would bring gas directly to Europe, and through Turkey, exactly like the Nabucco, but also because it would give Russia the opportunity to export gas to Europe without having to pass through Ukraine.

⁹⁶ Mehdi Parvizi Amineh and Henk Houweling, "Global Energy Security and Its Geopolitical Impediments: the Case of the Caspian Region," in *The Greater Middle East in Global Politics*, ed. M. Parvizi Amineh (Boston, MA: Brill, 2007), p. 354.

⁹⁷ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 147; Greg Bruno (November 20, 2008), "Turkey at an Energy Crossroads" [online], available from: <http://www.cfr.org/publication/17821/> [accessed 17 August 2009].

⁹⁸ Barysch, "Turkey's Role in European Energy Security."

⁹⁹ *Ibid.*.

Indeed, the pipeline proposed extension has been much criticized by the USA, which sees the project as a way to hold EU's dependence on Russia. Moreover, the fact that both Italian and Hungarian companies (the Hungarian MOL is part of the Nabucco project) participate to the project, demonstrates incoherence in overall the EU energy policies.

3.3 CASPIAN PIPELINE CONSORTIUM (oil/realized)

The CPC is a 1510km long¹⁰⁰ oil pipeline which starts from the Kazakh field of Tangiz and arrives at the Black Sea Russian location of Novorossiysk. Crude flowed for the first time in the pipeline in 2001 while regular operations started in 2003.

At the beginning, the main shareholders of the Join Venture were Russian companies, Kazakhstan, Oman and the British Petroleum.¹⁰¹

The pipeline is important because Caspian oil is brought into the Black Sea and from there to other markets. Considering the potential, the shareholders immediately thought about an extension of the pipeline. Two of the most important partners at the beginning however stopped the talks.

In fact, BP, which was the only shareholder without any resource to be transported through the pipeline, was against the possible extension of the pipeline. BP is also a BTC shareholder, and the BTC pipeline is somehow considered to be a

¹⁰⁰ Caspian Consortium Pipeline, "CPC Project Basic Features" [online], available from: <http://www.cpc.ru/portal/alias!press/lang/en-US/tabID!3444/DesktopDefault.aspx> [accessed 16 August 2009].

¹⁰¹ Caspian Consortium Pipeline. "Caspian Pipeline Consortium: a New Global Energy Supplier" [online]. Available from: http://www.cpc.ru/_press/documents/cpc_a4_0303_en.pdf [accessed 16 August 2009]; Upstream Online (April 29, 2007), "Transneft Takes CPC Bite" [online], Available from: <http://www.upstreamonline.com/incoming/article132389.ece> [accessed 16 August 2009]; Silk Road Intelligencer, April 6, 2009. "CPC Pipeline Exports up in 2009" [online]. Available from: <http://silkroadintelligencer.com/2009/04/06/cpc-pipeline-exports-up-in-2009/> [accessed 16 August 2009].

competitor of CPC.¹⁰² However, in late 2008, BP took the decision to sell its stake to Kazakhstan, opening the way to the possible extension.¹⁰³

The other troublesome partner is Russia, through Transneft. Indeed, Transneft thinks, rightly, that an extension of the pipeline will worsen the traffic situation in the Bosphorus. It is therefore asking the other stakeholders to help Russia in building a pipeline bypassing the Bosphorus.¹⁰⁴

However, even if with problems, the CPC is a strategic and important pipeline which brings Kazakh oil into Russia and is indeed working well. If there will not be other major problems, the CPC seems to be one of the main potential competitors for Nabucco.

3.4 NORD STREAM (gas/planned)

The Nord Stream is important since it would link Russian gas to Germany without passing through all those states which were once part of the Soviet Union. (ROUTES?)

At the beginning the pipeline, which would start in the Russian town of Vyborg and would arrive in the German town of Greifswald, would transport 27.5bcm and, after the planned building of a further parallel pipe, it should reach 55bcm.¹⁰⁵ That would be something like a quarter of the incremental European energy demand.

¹⁰² Downstream Today (December 17, 2008), "CPC Shareholders Sign Expansion Deal," available from:

http://www.downstreamtoday.com/news/article.aspx?a_id=14288 [accessed 16 August 2009].

¹⁰³ Downstream Today (December 18, 2008), "Kazakhs to Buy Part of BP's CPC Stake for \$250M" [online], available from: http://www.downstreamtoday.com/news/article.aspx?a_id=14324 [accessed 16 August 2009].

¹⁰⁴ Downstream Today, "CPC Shareholders Sign Expansion Deal;" Upstream Online, "Transneft Takes CPC Bite;" Downstream Today (November 19, 2008), "Russia's Transneft Could Take BP to Court over CPC" [online], available from: http://www.downstreamtoday.com/news/article.aspx?a_id=13854 [accessed 16 August 2009].

¹⁰⁵ Alex Bakst (November 15, 2006), "Sweden afraid of Russian Spooks" [online], available from: <http://www.spiegel.de/international/0,1518,448652,00.html> [accessed 17 August 2009]; Nord Stream, "Nord Stream" [online], available from: <http://www.nord-stream.com/en/> [accessed 16 August 2009];

The pipeline raised many concerns due to the importance of the project and the actors involved. Indeed the USA, Ukraine, Belarus, the Baltic States and Poland are among those opposed to the project. Washington sees the pipeline as a way used by Moscow to keep its influence on continental Europe; Ukraine and Belarus would lose their ‘blackmailing’ power given by the possibility they currently have of shut down the pipes to the European market;¹⁰⁶ the Baltic states and Poland would be bypassed by the pipeline.¹⁰⁷

On the other hand, Russia, the EU, but especially Germany and the other industrial powers, are very interested in avoiding the risk of being disadvantaged by potential quarrels between Russia and Ukraine.

Those countries whose waters would be involved (the Baltic States, Finland and Sweden) are raising important environmental and security issues, and this is causing the project to be delayed.¹⁰⁸

When the project is realized, Russia will be very influential in Europe: in Western Europe as a major supplier, in Eastern Europe as the only supplier, although, Western Europe will be much energy safer since the main problem, ‘the middleman’, i.e. Ukraine, will be cut out.

Reuters (January 21, 2008), “Finland Tells Nord Stream to Study Alternative Routes” [online], available from:

<http://uk.reuters.com/article/idUKL2150308920080121?pageNumber=2&virtualBrandChannel=0&sp=true> [accessed 16 August 2009]; Nord Stream (August 21, 2007), “Nord Stream Re-Routes Pipeline North of Bornholm” [online], available from: http://www.nord-stream.com/uploads/media/Nord_Stream_Press_Release_Re-Routing_Bornholm_eng_21082007_01.pdf [accessed 17 August 2009].

¹⁰⁶ BBC News (September 8, 2005), “Baltic Deal Worries Polish Press” [online], available from: <http://news.bbc.co.uk/1/hi/world/europe/4226296.stm> [accessed 17 August 2009].

¹⁰⁷ Deutsche Welle (April 13, 2007), “Bitterly Disputed German-Russian Gas Pipeline Heads for Estonia” [online], available from: <http://www.dw-world.de/dw/article/0,2144,2441964,00.html> [accessed 16 August 2009].

¹⁰⁸ Bakst A. (November 15, 2006), ‘Sweden afraid of Russian Spooks’ [online], available from: <http://www.spiegel.de/international/0,1518,448652,00.html> [accessed 17 August 2009]; Deutsche Welle (April 13, 2007), “Bitterly Disputed German-Russian Gas Pipeline Heads for Estonia;” Reuters (September 20, 2007), “Estonia Rejects Nord Stream Survey Request” [online], available from: <http://uk.reuters.com/article/idUKMAR13135420070920> [accessed 16 August 2009]; Upstream Online (November 11, 2007), “Delays Hit Nord Stream Plans” [online], available from: <http://www.upstreamonline.com/live/article143622.ece> [accessed 17 August 2009].

3.5 SOUTH STREAM PIPELINE (gas/proposed)

The South Stream pipeline would transport Russian gas from Dzhubga to the Bulgarian city of Varna using an underwater pipeline which would pass through the Black Sea; it would be 900km long and in the beginning would transport 31bcm. Among the reasons for its construction there is the need of a pipeline with a larger capacity than that of the Blue Stream. Moreover, the pipeline would arrive into EU's territory by-passing Ukraine.

Many think that the South Stream has only one reason for being built: it would be a worthy competitor of the Nabucco pipeline. Indeed, Russia is trying to involve the Italian company ENI, Turkey and Hungary. Although also involved in the Nabucco pipeline, Hungary already signed an agreement for the project. In the meanwhile, Russia is lobbying Turkey to agree to let the pipeline pass under the Black Sea Turkish waters.

Apart from the question mark given by the Turkey's assent for the use of its waters, there are some other problems. First of all the project would be twice as expensive as the Nabucco project; second, while Nabucco would bring gas from the Caspian, the South Stream would transport only Russian gas.

Nevertheless, so far Nabucco does not seem to have guaranteed enough gas for the European needs; this of course gives importance to a project which could bring more gas into Europe than that which would be imported with Nabucco (this perspective does not consider the two pipelines competitors, but rather as complementary). Besides, given that the Caspian gas would be enough for European needs, there still remains the fact that sudden shortages may occur: in that case Russia

could have been a possible ‘emergency’ supplier.¹⁰⁹ With such a pipeline, Russia would definitely not be keen to do it.

3.6 BURGAS-ALEXANDROUPOLIS (oil/planned)

The pipeline, which is the result of the joint venture between Gazprom, Rosneft, Transneft, Greece and Bulgaria, will start being constructed by the end of the 2009. The project, which originated from Russia’s wish to have an alternative route to the Bosphorus for the oil coming from the Black Sea port of Novorossiysk, could seem positive for Turkey. In fact, the 45 millions of tons of oil which every year pass through the Strait could cause, sooner or later, an accident of remarkable proportions.

However, Turkey is not involved in the project which moreover seems to be competitor to the Samsun-Ceyhan, indeed the one preferred by Ankara.

The Burgas-Alexandroupolis pipelines would transport more than 30 millions of tons to Greece, through Bulgaria, and would make it easier bypass the Bosphorus and Dardanelles.

3.7 TRANS-ISRAEL PIPELINE (oil/realized)

The TIPline is a 250km long crude oil pipeline which links Eilat, on the Red Sea, to Ashkelon, on the Mediterranean coast.¹¹⁰

When it was built in 1968, it was not backed by the Soviet Union. Indeed the Soviet Union and Israel were not in good relationships at all. This changed, however, when the Soviet Union was replaced by Russia.¹¹¹

¹⁰⁹ Tekin and Williams, “Turkey and EU Energy Security: the Pipeline Connection,” p. 65.

¹¹⁰ Eilat-Ashkelon Pipeline Company. “Company Profile” [online]. Available from: <http://www.eapc.co.il/about.html> [accessed 16 August 2009].

¹¹¹ Ed. Blanche, “Oil Moves Russia, Israel Closer Together,” *Oil and the Middle East* (February 18, 2004), <http://me-arab-crude-oil.tripod.com/RussianoilviaILiTipline.htm> (accessed August 16, 2009).

The TIPLINE became a very important pipeline for Moscow. In 2003 the two states signed an agreement through which Russian oil would pass through the pipeline to the Red Sea from where it would be sold to the Asian market.¹¹²

Even though some problems must be solved (such as the fact that filling a tanker directed to Asia seems to take two or three days),¹¹³ the route is still very convenient if c the other two options are going right around of Africa, or using the only other possible passage, i.e. the Suez Canal, through which however it is possible to pass only with smaller tankers.¹¹⁴

Thanks to this pipeline, then, Russia may have some impact on the Saudi power in the Asian market, where already some actors, such as Japan, have started looking for new potential, and cheaper, partners.¹¹⁵

3.8 BAKU-TBILISI-ERZURUM (/SOUTH CAUCASUS) PIPELINE (gas/realized)

The Baku-Tbilisi-Erzurum pipeline became operative in 2007, as a product of a joint venture of several companies among which the most prominent shareholders are British Petroleum and the Norwegian Statoil. To minimize both the expense and the environmental impact it has used the same corridor as the BTC oil pipeline.

Apart from the mere economic aspect, the most important political achievement of this pipeline has been to give much more economic independence to Georgia. In fact, Georgia has been importing a large share of its gas from Russia for a really expensive price: \$110 per 1,000m³; with the agreement in the context of the BTE, Georgia would pay exactly half of the price currently paid to Russia.

¹¹² Economic Expert, "Trans-Israel Pipeline" [online], available from: <http://www.economicexpert.com/a/Trans:Israel:pipeline.htm> [accessed 16 August 2009]; Blanche, "Oil Moves Russia, Israel Closer Together."

¹¹³ Blanche, "Oil Moves Russia, Israel Closer Together."

¹¹⁴ Gal Luft, March 31, 2004, "A Shortcut for Russian Oil to Asia" [online], available from: <http://www.iags.org/n0331044.htm> [accessed 16 August 2009].

¹¹⁵ Blanche, "Oil Moves Russia, Israel Closer Together;" Luft, "A Shortcut for Russian Oil to Asia."

Yet, some problems came up between Azerbaijan and Turkey. Ankara would like to pay cheaper prices, while importing more gas from Baku. This would lead Azerbaijan to buy other gas from Russia which however would be more expensive.

If, however, these problems between Baku and Ankara are solved, and sabotage, hostilities (see the Russia-Georgia conflict) and terrorist attacks (see the PKK)¹¹⁶, are prevented, the BTE will be able to give reality to its potential. Indeed, had this pipeline been linked to the Turkey-Greece interconnector, or to other planned pipelines, it would bring natural gas into Europe.

3.9 NABUCCO (gas/project)

The planned Nabucco pipeline could be, according to the efforts which the EU is making, the best way to lessen European dependency on Russia. It would bring Caspian, and possibly Iranian, Iraqi and Egyptian, gas from Erzurum in Turkey into Europe in Baumgarten an der March, in Austria,¹¹⁷ diversifying Europe's energy imports. As we have already seen, Russia is doing its best to oppose the project, proposing its own projects (the already mentioned South Stream), and dealing with some EU members.

In the context of the project, Turkey would be a key-state. It would be the state with the longest stretch passing through its territory, and it will probably connect the pipeline coming from Tabriz to the Nabucco so that Iranian gas will finally arrive in Europe.¹¹⁸ Moreover, Turkey would be empowered in its talks with the EU and have revenues due to the collection of the transit fees.¹¹⁹

¹¹⁶ Winrow, "Problems and Prospects for the 'Fourth Corridor': the Positions and Role of Turkey in Gas Transit to Europe," p. 9.

¹¹⁷ Tekin and Williams. "Turkey and EU Energy Security: the Pipeline Connection," p. 63; Barysch, "Turkey's Role in European Energy Security." p. 4.

¹¹⁸ Roberts, "The Turkish Gate: Energy Transit and Security Issues," p. 23.

¹¹⁹ Gregor, "Turkey's Relations with Iran."

Several problems have emerged during the talks: some Turkish officials would like Turkey to have the right of taking 15 percent¹²⁰ of the gas passing through Turkey to resell it. The EU is obviously against this option since either the gas sold to Europe by Turkey would be more expensive, or it would be sold to markets other than the European one. Another problem is the actual ability of Nabucco to meet the EU's demand. It seems doubtful whether Turkmenistan and Kazakhstan, having committed large share of their gas production to China and Russia, will have enough gas to fill the pipeline. In that case, many suggest, Russia would be the first to be called to fill it, but, in that case, the Nabucco pipeline would lose its *raison d'être*.¹²¹

Indeed, the Nabucco has several problems to solve before being realized, yet the fact that Nabucco could actually threaten Russia and oblige it to much more accommodating policies, it would make the project, even if it only remains a project,¹²² important and functional.

3.10 TRANS-CASPIAN GAS PIPELINE (gas/proposed)

A pipeline which would pass through the Caspian would be welcomed by most of the regional powers but Russia. Turkmenistan and Kazakhstan would welcome a direct link for their gas and oil to the other coast of the Caspian which would then lead to the European market. Azerbaijan too would be pleased to be part of such an important project, like Georgia (less likely Armenia) and Turkey. The EU, then, would much appreciate it since it would have the opportunity to receive gas from those states without the intermediation of Russia.

¹²⁰ Tekin and Williams. "Turkey and EU Energy Security: the Pipeline Connection," p.61; Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," p. 19.

¹²¹ Socor, "Hungary Eyes Iranian Gas in Efforts to Resuscitate Nabucco."

¹²² Barysch, "Turkey's Role in European Energy Security," p. 4.

Not surprisingly, Russia opposes the project. As mentioned, it needs Caspian gas in sufficient quantities to sell them to other markets, i.e. the EU. Therefore, opting for a ‘divide and rule’ strategy,¹²³ it tries to involve the Central Asian states in alternative projects; besides, it uses as excuses to block any possible initiative environmental (such as earthquakes) and legal reasons as excuses to block any possible initiative. As noted above, the Caspian must be the subject of a shared legal framework before any project can be realized; indeed Russia is doing everything not to facilitate it.

Therefore, so far, mainly due to these legal problems the project does not seem to be feasible at the moment.

3.11 TURKEY-GREECE INTERCONNECTOR (gas/realized)

Although the quantity of gas transported is of only 12 billion cubic metres (the Nabucco would transport around 30btc), the fact that Caspian gas can arrive in Greece –to which 3bcm of gas are destined-¹²⁴ is not inconsequential: indeed talks to extend the pipeline to Bulgaria and Italy have already been held, and a possible enlargement of the pipe has also been considered.

3.12 BAKU-TBILISI-CEYHAN (oil/realized)

The BTC is the second longest pipeline in the world and does not pass through Russian territory.¹²⁵ The oil starts flowing from Baku and, passing through Tbilisi, it arrives in the Mediterranean seaport of Ceyhan from where it is sold to European and other markets, such as Israel. Obviously, having the longest stretch of the pipeline,

¹²³ Kassenova, “A View from the Region,” p. 126.

¹²⁴ Today’s Zaman (January 10, 2008), “Iran to Restore Gas Flow, but Row Continues” [online], available from: www.todayszaman.com/tz-web/detaylar.do?load=detay&link=131288 [accessed 30 July 2009].

¹²⁵ Tekin and Williams, “Turkey and EU Energy Security: the Pipeline Connection,” p. 59.

Turkey acquired much importance due to the fact that it can directly sell the gas to profitable markets.

When the pipeline was realized in 2006, the USA much appreciated seeing Europe's dependency on Russia lessened.

Nevertheless, in the last couple of years there have been both positive and negative developments: on the positive side, Kazakhstan joined the BTC and therefore will be a supplier of the pipeline;¹²⁶ on the negative side, the Georgia-Russia war showed BTC's weaknesses, as the pipeline could have been a potential target of the Russian army. This brought into question the reliability of pipelines which pass through a region such as the Caucasus.¹²⁷

3.13 KIRKUK-CEYHAN (oil/realized)

The pipeline which links Iraq to Turkey, is the longest pipeline carrying oil out of Iraq. Potentially the route is one of the most important, considering how rich in oil Iraq is. But war, sanctions and the consequent infrastructural problems have been causing continuous closure of the pipeline which therefore is unreliable.¹²⁸ Yet there has been discussions of building a new pipeline parallel to it.

3.14 IRAN-TURKEY (gas/realized)

¹²⁶ "Turkey's Energy Strategy," p. 1.

¹²⁷ William Courtney and Kenneth Yalowits, "Russia's Bid Control Caspian Energy," *Boston.com* (October 4, 2008); Radio Free Europe Radio Liberty (September 4, 2008), "EU's Piebalgs Seeks Political Push for Nabucco Gas" [online], available from: http://www.rferl.org/content/EU_Piebalgs_Nabucco_Gas/1196397.html [accessed 10 August 2009].

¹²⁸ Kandiyoti, *Pipelines: Flowing Oil and Crude Politics*, p. 80.

This pipeline brings Iranian gas from Tabriz to Ankara. Its importance, apart from making Iran one of Turkey's gas suppliers, lies in the fact that the gas passing through it can be sold into the EU market.¹²⁹

3.15 SAMSUN-CEYHAN (oil/planned)

The project is to some extent a competitor of the Burgas-Alexandroupolis project; like that pipeline, it has as aim that of by-passing the Bosphorus and the Dardanelles. Russia would obviously not welcome such a pipeline Turkey would benefit from seeing a decrease in traffic in the Bosphorus.

Since Ceyhan is already the final destination for the BTC, most of the infrastructure needed is already in place, and further expenditure at the terminal would thus be limited.¹³⁰

The project is expected to start on 2011, but it seems that much more needs to be done before work can actually begin.

3.16 OVERVIEW OF THE PIPELINES.

After having examined the relevant pipelines we can understand the extent to which Turkey is, and should be, involved in the energy context.

Brussels needs pipelines which either do not involve Russia (such as the Nabucco pipeline) or do involve Russia but do not pass through Ukraine (such as the Nord Stream), so that problems such those which occurred in 2006 and 2009 would not be likely to happen again.

However, the fact that the EU is planning the construction of a pipeline which would link Europe with Russia implies that the EU is of course interested in keeping

¹²⁹ Roberts, "The Turkish Gate: Energy Transit and Security Issues," p. 23.

¹³⁰ "Turkey's Energy Strategy," pp. 2-3.

Russia as a supplier, even though not as the predominant one, since in that situation it could, ideally, allow Russia to blackmail the EU in the event of conflict.

In order to make Russia ‘one of’ the EU’s energy suppliers rather than ‘the only’ one, it is fundamental to involve Turkey as part of the corridor which should bring gas and oil from Central Asia and the Caspian region, either through a Trans-Caspian pipeline or in tankers. Once arrived in Turkey, after having passed through Azerbaijan and Georgia (less likely Armenia), the proposed Nabucco pipeline could be linked to a pipeline such as the BTE for transporting gas towards Europe.

Lastly, the EU does not speak with one voice. Indeed, Hungary and Austria, for example, are involved in two projects which can be considered as competitors: the South Stream and the Nabucco pipelines. Moreover, it is significant that a pipeline such as the Nord Stream is to be built, by-passing the Baltic states and Poland which are EU member states. That such a project can be conceived suggests that either the pipeline grid within the EU will be improved or the Eastern EU member states will remain at the mercy of Russia.

Turkey therefore needs to talk to the EU, which is a very complex operator that has to deal with several internal members with different needs. In any case, through its role of valid alternative to Russia, due to its proximity to relevant geo-strategic regions, it is obvious that Turkey will be an important actor in the EU’s perspective if Ankara will be able to keep and improve its links with the Caspian and the Middle Eastern regions.

CONCLUSIONS.

Through the years Turkey has acquired an important role in the context of the European Union's energy supplies. Particularly since the beginning of the last decade, the European Union has realized how much natural resources coming from regions other than Russia and the Middle East were needed. For this reason, it seemed logical to strengthen the relations with Turkey so that, not only Iran and Iraq natural resources, but also gas and oil coming from the Caspian region could be transported into Europe passing through Turkey, which geographically speaking is a gateway for Europe to the Caspian oil and gas.

Turkey would be part of a so called fourth artery, the other arteries being those coming from North Africa (Algeria and Libya¹³¹), Norway and Russia. While Norway's reserves can by no means meet the EU's demand, and Algeria lacks political muscle, Russia is rich in both gas and oil and also has considerable political strength. The Russian policy seems to be aimed at keeping the EU heavily dependent on Russia and to doing this it needs to keep its dominant position in the energy market.

Until the 2000s, Russian supplies and EU money balanced each other out, but the Ukraine-Russia dispute caused the EU weeks of concern due to the lack of supplies in several EU member states. New suppliers which would secure supplies in the event of crisis are therefore needed. Indeed, Azerbaijan, Kazakhstan and Turkmenistan, have fairly large deposits of oil and gas, and even though much of it, and much of these states' pipeline grid, are in Russian or, to a less extent, Chinese hands, there are still areas undiscovered which potentially could offer much. In those areas, all the regional and global powers are racing to get a stake.

¹³¹ Roberts, "The Turkish Gate: Energy Transit and Security Issues," p. 21.

To get closer to the region, the EU needs of Turkey which is geographically and culturally close to the Caspian littoral states. These states need of Turkey as well, as the only route, other than Russia, which can be used to sell their gas and oil to the EU. Turkey itself needs to be considered important to increase the other states' perceived Turkish influence in the region¹³² so to speed up, hopefully, the process which should lead to Turkey's admission into the EU.

Turkey, therefore, is a fundamental actor in the context of European energy supplies diversification, although it is not the only option. Russia does not want to lose its most important clients and will find ways, such as the Nord Stream pipeline, to eliminate those problems which have been jeopardizing its economic relations with the EU.

Turkey, proposing itself as a valid and reliable complementary,¹³³ if not alternative, option, will enhance its position during the EU-Turkey talks, but demands such as requiring 15 percent of the gas which would pass through the Nabucco pipeline while in its territory are counter-productive;¹³⁴ as it links Turkey's acceptance of those projects useful for EU diversification, to admission into the European Union. Such demands could be considered by the EU as blackmail, which would make it reconsider how meaningful it would be to switch from a not totally reliable partner, such as Russia, to another one which would be not totally reliable either.

Indeed, those agreements made with Russia, which see Turkey and Russia's companies shareholders in a same project, are the outcomes of realistic politics.

¹³² Davutoğlu, "Turkey's Foreign Policy Vision: an Assessment of 2007," pp. 80-82.

¹³³ *Ibid.*, p. 82.

¹³⁴ Winrow, "Problems and Prospects for the "Fourth Corridor": the Positions and Role of Turkey in Gas Transit to Europe," p. 7.; Templeton Thorp March 14, 2008. "Nabucco Crisis Pits Turkey against the EU and Azerbaijan" [online]. Available from: www.templetonthorp.com/en/news87.html [accessed 3 August 2009].

Turkey knows that the EU does not want to cut its economic links with Russia, nor is the EU an institution devoid of internal divisions. If a project, such as the Nord Stream, cuts out EU members, such as Poland and the Baltic states, it is clear that a state which is not a EU member, such as Turkey, would be quite easily forgotten if the case required this.

It is because of these aspects that Turkey has played an important role for the EU without, at the same time, jeopardizing its relations with Russia. It seems that the role it has had so far, that of the key state of a complementary route is the best, since it gives the EU a further option for its supplies and gives Turkey much more credit in EU's eyes in the perspective of its admission into the EU admission. It will also give Turkey and easier access to natural resources.

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