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Turkey as a Transit Country and Energy Hub: The Link to Its Foreign Policy Aims

Ksenia Krauer-Pacheco

Forschungsstelle Osteuropa an der Universität Bremen
Klagenfurter Straße 3 • 28359 Bremen • Germany
phone +49 421 218-69600 • fax +49 421 218-69607
http://www.forschungsstelle.uni-bremen.de

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About the Author
Ksenia Krauer-Pacheco completed her MA in International Relations: Global Governance and Social Theory at the University of Bremen and Jacobs University Bremen in summer 2011. She has worked as a research assistant at the Research Centre for East European Studies at the University of Bremen and is currently an intern at the European Academy in Berlin. This working paper is based on her MA Thesis.

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Forschungsstelle Osteuropa
Publikationsreferat
Klagenfurter Str. 3
28359 Bremen – Germany
phone: +49 421 218-69600
fax: +49 421 218-69607
e-mail: publikationsreferat@osteuropa.uni-bremen.de
internet: http://www.forschungsstelle.uni-bremen.de

Content

Acronyms

AIOC	Azerbaijan International Operating Company
AKP	Justice and Development Party
bcm	billion cubic meters
BSEC	Black sea Economic Cooperation organization
BTC Co.	Baku–Tbilisi–Ceyhan Pipeline Company
BTC	Baku–Tbilisi–Ceyhan pipeline
BTE	Baku–Tbilisi–Erzurum pipeline
CIS	Commonwealth of Independent States
CSCP	Caucasus Stability and Cooperation Platform
EU	European Union
IEA	International Energy Agency
ILSA	Iran-Libya Sanctions Act
ITGI	Interconnector Turkey–Greece–Italy
LNG	Liquefied natural gas
NATO	North Atlantic Treaty Organization
NGP	Nabucco Gas Pipeline consortium
OPEC	Organization of the Petroleum Exporting Countries
PKK	Kurdistan Workers' Party
RSCT	regional security complex theory
SCPC	South Caucasus Pipeline Company
TAPCO	Trans-Anatolian Pipeline Company
TIKA	Turkish International Cooperation and Development Agency
US	United States

1 Introduction

In recent years a great interest in Turkey has arisen, not only because of its flourishing economy and rising population, but also due to its role in European and Middle Eastern energy and security affairs. Many authors agree that Turkey

> has become a pivotal [country]. Its geographical position, wedged between the European landmass, Russia and the Middle East, has given it a new strategic importance, especially in the energy-pipeline business. And its newly assertive foreign policy is making it count not just in neighbouring countries but as far afield as China and Africa (The Economist 2010: 4).

Regarding the specific topic of energy, Turkey is located between hydrocarbon consumers and producers and therefore plays a crucial role as an energy transit country for oil and natural gas going to the European Union (EU), either from the Caspian Sea, from the Middle East or from Russia. In this sense, Turkey has a geostrategic asset that it can use for its own foreign policy aims regarding the countries in these regions.

Although it can be observed in practice that Turkey's energy strategy and foreign policy choices sometimes follow the same direction, it is still quite uncertain if and how these two policy areas are connected and if Turkey's energy strategy does seek to promote its foreign policy aims in the neighbouring regions. Many questions arise from this puzzle, but the main one that this work will deal with is: *to what extent is Turkey using its geopolitical position as a transit country for energy resources as a tool to promote its foreign policy aims?* It will thus be the objective of this research to explore the consistency between Turkey's energy choices and strategy and its greater geopolitical goals like becoming a regional power and promoting its interests vis-à-vis big international actors such as the EU and Russia, as well as with its regional neighbours (Caspian, Middle Eastern and Central Asian countries).

The main argument will be that Turkey is using its geopolitical position as a transit country for energy resources as a tool to attain its foreign policy objectives. According to the geopolitics and energy geopolitics literature, a country like Turkey, with a geostrategic location in the regional energy dynamics as well as with the desire to play an increasingly active role in the regions surrounding it, will use its energy transit position as a tool to achieve its political aims vis-à-vis its neighbours, thus supporting some pipeline projects against others. In this respect, it is expected that Turkey will promote the construction of oil and gas pipelines leading to its territory from the Caspian, the Middle East and Russia, and that extend across the territories of neighbours with whom it has friendly relations. Moreover, it should support pipeline projects that connect its territory with the European consumers while bypassing Russian territory, thus positioning itself as the main transit country for hydrocarbons that flow to the EU. However, the opposite direction will also be analysed, namely that Turkey's foreign policy objectives influence its choice of the oil and gas pipeline options that pass through its territory. This leads us to assert that Turkey's energy and foreign policies are interdependent.

Although many studies focus on the energy options for the EU and on its dependence on energy sources from Russia, there is not much literature analyzing Turkey's role in the energy geopolitics of the region. And in the energy literature the research done on Turkey's possible use of energy transit as a tool still lags behind the large number of studies that denounce Russia's use of the 'energy weapon' to achieve its foreign policy objectives. There is even less research done on the link between Turkey's energy options and strategy and its foreign policy aims vis-à-vis big powers such as the EU and Russia, or its neighbours in the Caspian and Black Sea region. Thus, by analysing Turkey's energy transit options and strategy and their consistency with its major foreign policy aims, this research will attempt to fill the gap in the insufficient literature on this topic.

In order to conduct this research, it will be necessary to make an in-depth analysis of a specific aspect of Turkey's role in the world (energy and foreign affairs). To this end, a critical analysis of different sources of information is needed (distinguishing between Ankara's broad propagandistic statements and its real interests and aims), such as official Turkish government statements, expert journal articles, energy company documents, and statistical data provided by the International Energy Agency (IEA), the European Commission and BP.

The working paper is structured as follows: The first chapter introduces Geopolitics as an analytical framework useful to analyse Turkey's position in its region as well as its foreign policy aims. It also describes energy geopolitics with the purpose of understanding the role that hydrocarbons and transit routes play in the foreign relations of a state. In this context, the academic literature studying energy resources and transit routes as power instruments used in foreign policy is also presented. Next, the second chapter gives a brief overview of Ankara's contemporary official foreign policy aims as stated in official documents of the Ministry of Foreign Affairs, emphasizing Turkey's main foreign policy goals and relations with the following countries/regions: the South Caucasus, Central Asia, the Middle East, the EU and Russia, as well as its aim to position itself as a regional power. Having discussed these issues, chapter three describes Europe's dependence on the import of oil and natural gas, as well as its supply options, such as Russia, the Middle East and the Caspian Basin. As a necessary next step, Turkey's strategic geographic position and role as a transit country for energy resources flowing to the EU is presented. This is followed by an overview of Turkey's oil and gas pipeline options and its official energy strategy in chapter four. Finally, taking into account all the energy and foreign policy facts described before, chapter five provides an assessment of the consistency of Turkey's energy strategy with its foreign policy aims. The short and long term sustainability as well as the challenges to Turkey's energy strategy will be furthermore assessed. In sum, this analysis will provide the basis to conclude to what extent Turkey is using its geopolitical position as a transit country for energy resources as a tool to promote its main foreign policy aims, and to what extent both issues are interdependent.

2 Analytical Framework

It is first of all crucial to situate this research in a particular set of literature that will provide a framework of analysis to accept or reject the proposed argument. Thus, in order to analyse Turkey's role in its region as well as its foreign policy aims, an overview of the Geopolitics literature will be provided. It is also meaningful to present a more contemporary branch of this literature, namely energy geopolitics, in order to understand the role that hydrocarbons and transit routes play in the energy market, as well as the rivalry dynamics that surround the competition for energy supply and transportation. In this sense, geopolitics and energy geopolitics will provide the framework to analyse the behaviour of Turkey according to its geographic location and position in the energy supply-demand and transit dynamics. Studying energy resources and transit routes as power instruments used in foreign policy will set the frame of reference to analyse how Turkey uses its status of transit country as a tool to achieve its foreign policy aims. Moreover, a definition of regional and pivotal powers in the context of the study of regions will be provided in order to classify Turkey in the international system.

2.1 Geopolitics and Energy Geopolitics

Geopolitics is a discipline that emerged in the late nineteenth century and, as its name suggests, combines politics and geography to provide explanations for the behaviour of states in the international realm. It can be defined as '[t]he study of the impact of geographical distributions and divisions on the conduct of world politics' (Agnew 1998: 128), or as 'simply the study of international relations from a spatial or geographical perspective' (Parker 1998: 5). This term thus refers mainly to the impact of the distribution of the continents and oceans as well as of natural and human resources on inter-state relations. It is important to understand that only territorial states are the actors of the geopolitical imagination and that therefore space can only be divided between these states, all of which compete for primacy, either to dominate the world economically or to create a world empire (Agnew 1998: 9).

Modern geopolitics has developed through time from the original idea presented by Halford Mackinder in his groundbreaking paper 'The geographical pivot of history' (Mackinder 1904). Barnes et al. (2006: 5) describe this 'new' geopolitics as 'the influence of geographic, cultural, demographic, economic, and technological factors on the political discourse among international actors.' Taking this into account, Turkey's geographic location between different regions such as Europe, the Middle East, the Caucasus and to some extent Russia and Central Asia, as well as its position as a transit country for energy resources, will be analysed to assess if these issues play a role in the relations with its neighbours.

In this line of thought, there exists nowadays a subdivision of this approach, namely energy geopolitics[1], which is mainly concerned with energy supply of crude oil and natural gas (Mitchell 1996: 1). Since these are natural resources, their geographic location and their owners are determined by chance, favouring some states and regions over others. Therefore,

> [e]nergy security concerns have always been central to geopolitical interests. Throughout history, the effort to secure access to energy sources and ensure adequate transport routes has demanded technological, commercial, diplomatic and military agility (Fesharaki 1999: 85).

In addition, '[h]istorically, energy commodities have constituted geopolitical instruments' (Coşkun/Carlson 2010: 206) that have been used to further political aims.

The close link between geopolitics and energy can moreover be seen in the key role played by energy resources such as oil and natural gas in the pursuit of geopolitical power. These resources are the basis for economic development and for the functioning of the world as we know it. Due to their scarcity and the decreasing production of 'easy' oil and 'easy' natural gas and the increasing demand for them,

1 For a historical overview of the geopolitical perspectives on the importance of resources, see Le Billon 2004.

they have become a crucial commodity that is highly valued and which plays a major role in the international political and economic spheres. In this line of argument, Bilgin (2009b) has introduced the term 'neopolitics' (new energy order politics), characterized by the continuing crucial role played by oil, the increasing significance of natural gas, and the relative importance of renewable and nuclear energy sources. Thus, according to the new energy geopolitics, the world can be divided into states with a deficit in energy resources (e.g. the United States—US, China, Japan and the EU members) and states with a surplus in these resources (e.g. Russia, Venezuela, most Middle East and Persian Gulf states, Nigeria, Libya, and some Central Asian and Caspian states), a situation which reinforces the geopolitical rivalries between these two sides (Klare 2008: 15).

Moreover, the transit routes for energy resources are also of geopolitical importance. As Barnes et al. (2006: 5) assert when analysing the geopolitics of gas, '[i]n so far as geography, technology, and political choices direct gas trade along one route at the expense of another, investment and revenues are diverted as well, with considerable political implications'. It follows that those who control hydrocarbon resources and the pipeline routes through which they are transported have not only economic but also political power. In this regard, Coşkun and Carlson (2010: 206) argue that in the post-Cold War era, 'a new geopolitics based on resource flows has prevailed over the old Cold War geopolitics drawn by ideological divides.'

A further set of literature worth examining is the new 'energeopolitics', which according to Coşkun (2010: 72)

> [are] deeply influenced by the unprecedented increase in energy demand, and the rise of new regional and global powers. The gap between global energy supplies and demand, the concentration of non-renewable stocks of oil and gas in the Greater Middle East, and the spread of industrial capitalism in China and India have dramatically changed the global energeopolitics.

Harris (2010: 166–169) furthermore asserts that there are three structural developments that have had energeopolitical implications and have affected the geopolitical relations between the biggest energy consumers (such as the US, China and India) and the main producers (like Russia and the states located in the Middle East): the end of the cheap oil era, the domination of national oil companies in the global energy markets, and the geographic location of energy resources, mainly in the Middle East, the Persian Gulf, Central Asia and Russia. Apart from the benefits enjoyed by the new energy superpowers (Russia, Iran and the Persian Gulf states, among others), the new energeopolitics has created opportunities for the states that are located at the centre of the supply and demand routes. Coşkun and Carlson (2010: 208) further assert that pipeline politics play a crucial role in energeopolitics, since the transport of hydrocarbons is determined not only by their supply and demand but also by geopolitical concerns. These authors add that in the context of new energy geopolitics, besides the control for the energy resources, 'the routes of pipelines have become the subject of geopolitical competition for power, influence and for economic advantage'. It is in this context that Turkey, among other transit states, holds an advantageous position as a transit corridor for energy resources flowing from the producer states to the consumers in Europe.

In sum, in order to carry out a geopolitical analysis of the roles states play in their region, it is crucial to be aware of their geographic position in the international system. Moreover, it is important to analyse the distribution of energy resources, such as oil and natural gas, which determines the decisions taken by states and the role that they play in their economic and political relations, either as producers or consumers of hydrocarbons, or as part of the transit routes for these resources.

2.2 Energy and Energy Transit as Power Instruments in Foreign Policy

In order to analyse the role that energy and energy transit play as power instruments, it is first of all important to define what is meant by 'power', since it is a complex concept and there is a wide range of definitions. For the purpose of this research, power will be defined as: 'the production, in and through social relations, of effects that shape the capacities of actors to determine their circumstances and fate' (Barnett/Duvall 2005: 42).[2] As can be observed, power is not only defined in military terms, but can be applied to a broader series of issues and areas, one of which is energy.

As has already been mentioned, oil and natural gas have been indispensable ever since their discovery as fuels for the industrialization of states and they have been the main drivers of modern capitalism. Hydrocarbons have further served aims beyond purely economic ones, such as political and military ones. It is in this way that the Organization of the Petroleum Exporting Countries' (OPEC) former Secretary General, Rodríguez Araque (2001: 7), has argued that

> [a]ll the problems of the energy world are closely intertwined with international relations. Oil matters have a scope much broader than that of mere economic and market affairs. The fact that oil is a vital commodity for both producers and consumers places it on top of the political and diplomatic agenda of our countries.

In a similar way, Yergin (1991: 13) has asserted that 'oil as a commodity [is] intimately intertwined with national strategies and global politics and power.' Therefore, oil and natural gas, as well as the transit pipelines that transport them, have increasingly become a main source of international conflicts.

Energy resources are not only crucial for the consuming countries, since they are strategic in the development of their national economies as well as their military industries, but also for energy producers since they may endow them with power vis-à-vis the consumers.

> In the case of oil, states act not only as owners of the natural resources [...] they also turn themselves into investors. Thus, the increasing weight of oil income in national budgets has made oil more and more a matter of national interest for producing countries. (Rodríguez 2001: 5)

One can clearly observe here the employment of energy resources and transit corridors by states as power instruments used in their foreign policies.[3] For instance, the OPEC countries and Russia, among other actors, have repeatedly used their vast oil and gas reserves, as well as transit pipelines, as a 'weapon' to push for political results in their favour.

There seems to be an informal link between an economic issue such as energy and the foreign policy of a state. In this regard Rosenau (1987: 3) asserts that due to the ever more interdependent world, there is an increasing relevance of economics to the conduct of foreign policy. In this sense, 'issues of economic productivity and distribution have been elevated from low on the global agenda to the realm of high politics' (Rosenau 1987: 3). Additionally, according to Bobrow and Chan (1987: 113),

> [f]oreign policy goals obviously include national influence and power relative to those of external actors, with emphasis on physical security and national autonomy. They also include arranging external relations to support domestic prosperity and stability.
>
> These 'domestic' indicators reflect foreign policy performance as they are affected by 'the geographical position, resource endowment and purchasing power of important actual or potential trading partners, the existence and proximity of political or military rivals, protectors, or clients and the systems in operation in each of these' (Bobrow/Chan 1987: 114).

Moreover, Bobrow and Chan (1987: 125) assert that, although nature and history determine to a significant degree the position and status of countries in the international system, they 'do have many possibilities to improve their international position and carve out a desired niche for themselves.' These authors provide an example of this: '[t]he bargaining power of a country at a point in time can usefully be thought of in terms of a supply-and-demand metaphor not limited to economic goods' (Bobrow/Chan 1987: 125). In this sense, the possibilities of a state depend on its inherited features like energy

2 Power is thus divided into four parts: compulsory power, institutional power, structural power and productive power (Barnett/Duvall 2005: 43).

3 'The study of foreign policy is referred to as foreign policy analysis, and its focus is the intentions and actions of (primarily) states aimed at the external world and the response of other actors (again, primarily states) to these actions' (Hill 2003: 285).

endowments and geographic position and on the value that others put on these attributes. Therefore, the position of a particular country relative to another one is strongest when it is the only supplier (or the most important one) of a valuable good. In sum, Bobrow and Chan (1987: 126) assert that a country's bargaining power in foreign policy benefits when 'it supplies something unavailable elsewhere, or only available at much greater cost, […]'.

Besides the importance of the relations between energy-producing and energy-consuming countries, it is interesting to study the transit states that are involved in the energy cycle. 'Many believe that having control over energy-transport corridors could be almost as essential as having control over energy supplies themselves' (Tekin/Walterova 2007: 84). Transit countries represent a key element in the transportation routes of the oil and gas from the producing fields to the final consumers, and the oil and 'gas pipelines have become political and strategic issues' (Hetland/Gochitashvili 2004: XI). In this context, Turkey plays an increasingly crucial role as a transit country for energy resources flowing from the producers in the Caspian Basin, the Middle East and Russia to the consumers in Europe. It therefore seems plausible that Turkey may use its strategic position as a transit country, as well as its decisions regarding oil and gas pipelines, to achieve its foreign policy aims.

2.3 Regions, Regional Powers and Pivotal States

The study of regions and regional powers renders some insight into the importance of the geographic location of states to determine their role and behaviour, as well as of the influence of geographic proximity on the security interaction between neighbours. A wide range of crucial matters and conflicts in the international system do not occur solely among superpowers, and many issues are determined at the regional level and by regional actors. As Hurrell (2010: 26) has pointed out, '[t]he international system is increasingly characterized by a diffusion of power, including to emerging and regional powers'. For instance, countries like Turkey, which cannot be categorized as superpowers, are gaining power vis-à-vis other states through means other than the traditional military ones.

But before we analyse the behaviour of middle and regional powers and the relations between them, as well as with the great and superpowers, it is necessary to first define what a region is in order to analyse these actors on a regional level. According to Hurrell (2010: 15), there are no 'natural' regions and therefore their definition varies according to the particular issue studied. In this sense, it can be said that regions are socially constructed. Although there is no definitive consensus on the definition, there is nevertheless agreement to some extent that regions are characterized by physical proximity and that there is a sense of identity among a region's members (Thompson 1973: 92–93). In this line of argument, Flemes and Nolte (2010: 2–3) assert that 'the concept of region refers to a geographically delineated subsystem of the global system which is composed of adjacent states.' Hemmer and Katzenstein (2002: 575) add that 'regions are political creations and not fixed by geography.'

Another concept is crucial for this research, namely that of regional powers. China, Brazil, India, Russia, South Africa and Turkey are just some examples of regional powers that are playing an increasingly bigger role in their regions. There is still difficulty in defining what constitutes a regional power and what the difference between this category and middle power is. Most scholars have accepted a definition of middle powers that is based on their international behaviour rather than on their material power. Therefore, middle powers are usually defined as states that do not have great power status, but that nevertheless have international influence (Flemes 2007: 8). Keohane (1969: 298) defines middle powers as states whose leaders consider that they cannot act alone effectively, but may be able to have a systemic impact in a small group or through an international institution.

This means that, since these powers do not exert overwhelming influence on the international stage and therefore do not qualify to be great powers but do not want to be classified as 'the rest', they seek other options for playing a role in the global system. Moreover, these powers tend to have a multilateralist approach in foreign policy and try to increase their global influence through the employment of their specific capabilities what Cooper (1997) calls niche diplomacy. More recently, Nolte (2006: 23) has asserted that the difference between global great powers and regional great powers is that the first ones project their power in different regions of the world and can exercise their influence in the whole globe. On the other hand, regional great powers can only do so at a regional scope.

If we add the social interactions in the region to the commonalities that exist in it, we speak of 'regional security complexes', as defined by Buzan and Wæver (2003). They distinguish between the system level interplay of global powers and the subsystem level interplay of smaller powers and assert that 'regional security dynamics will normally be a significant part of the overall constellation of security in the international system' (Buzan/Wæver 2003: 11). According to the regional security complex theory (RSCT) developed by them, the regional security complex is 'a set of units whose major processes of securitisation, desecuritisation, or both are so interlinked that their security problems cannot reasonably be analysed or resolved apart from one another' (Buzan/Wæver 2003: 491). These complexes 'are defined by durable patterns of amity and enmity taking the form of subglobal, geographically coherent patterns of security interdependence' (Buzan/Wæver 2003: 45).

> The central idea of RSCT is that, since most threats travel more easily over short distances than over long ones, security interdependence is normally patterned into regionally based clusters: security complexes (Buzan/Wæver 2003: 4).

The theory is a blend of materialist and constructivist approaches since it complements neorealism's structural scheme with an emphasis on the regional level. Thus, it is not sufficient to look at the distribution of power to predict conflicts, but it is necessary to complement this with an analysis of historical friendships and hatreds (Buzan/Wæver 2003: 50).

The RSCT states that regional powers play a key role in the regional security complexes and can either antagonize or cooperate with superpowers and great powers. Thus, Buzan and Wæver (2003: 491) define a regional power as 'an actor that counts in determining the polarity structure of a regional security complex' and as a power whose capabilities are large in their region, but not so at the global level; this definition fits Turkey. It moreover interacts with the only superpower (the US) and a range of great powers (such as Russia, China, Japan and the EU) (Buzan/Wæver 2003: 31, 37). A further concept developed by these authors, namely that of insulator, is crucial to categorize Turkey. An insulator is 'a location occupied by one or more units where larger regional security dynamics stand back to back' (Buzan/Wæver 2003: 41, 483), that is to say in the zone of indifference between regional security complexes, which enables them to separate two or more sets of regional security dynamics. Although according to the definition, insulators usually play a passive role (Buzan/Wæver 2003: 485), Turkey can still be seen as an insulator between Europe, the Middle East and the Commonwealth of Independent States (Buzan/Wæver 2003: 484).

For the purpose of this paper, it is important to focus on the definition of 'regional powers'. While outlining an analytical concept of regional power that can be used for research in the International Relations field, Nolte (2010: 889) asserts that regional powers 'generally display a large population in the regional context and a high GDP.' He also maintains that the status of regional power is not only defined by power resources (such as hard and soft power), but also by perceptions (either its self-conception or the perception of external actors of it). A regional power may therefore be defined from a constructivist point of view as a self-created identity for the purpose of conducting a specific foreign policy (Nolte 2010: 892). It follows that the status of a regional power is a social category and depends on the acceptance of this status by other states. However, this status presupposes material resources (Nolte 2006: 27). Regional powers are furthermore 'at the nexus of an emerging multi-polar world order, in which they aspire to play an important role, and a regional order, in which their leadership may be contested' (Flemes/Nolte 2010: 4).

Having understood what basic characteristics define regional powers, we now go on to examine if Turkey can be categorized as one by taking the following definition developed by Nolte (2010: 893): a regional power has the pretension (self-conception) of a leading position in a region that is geographically, economically and political-ideationally delimited, it displays the material (military, economic, demographic), organizational (political) and ideological resources for regional power projection, it has great influence in regional affairs and is economically, politically and culturally interconnected with the region, it influences in a significant way the geopolitical delimitation and the political-ideational construction of the region, it exerts this influence by means of regional governance structures, it defines a common regional identity or project and provides a collective good for the region, it defines the regional security agenda in a significant way and its leading position in the region is recognized or at least respected by other states inside and outside of the region, and acts as a representative of regional interests in international forums. Looking at these elements in Turkey, it can be observed that it has a large population of almost 79 million people (CIA 2011), it has the economic capabilities of a regional power, it was historically connected to the Middle East and culturally to Central Asia and some Caucasian states, and it attempts through its foreign policy to play an increasingly active role in these regions. However, it should be noted that Turkey is not located in a specific region where it can perform a leadership role, but is positioned between different regions, such as Europe, the Middle East and the Commonwealth of Independent States (CIS) (Buzan/Wæver 2003: 41). In this respect, the current Turkish Foreign Minister Ahmet Davutoglu (2008a) has asserted that

> it is almost impossible to define Turkey as belonging to one region or continent: Turkey is an Asian country, a European country, a neighbour to the African continent with direct attachment to the Eastern Mediterranean, a Balkan country, a Middle Eastern Caucasian central Asian country, a Caspian country and indirectly a Gulf country (because of our connection with the Gulf through Iraq).

Thus, because of its geographic position, Turkey can be classified as an insulator. And although it is not yet a regional power because its neighbours in these regions do not view it as the regional leader, it is worth emphasizing that Turkey is striving to become a regional power. Its actions in the regional dynamics, as well as the energy tool that it uses to achieve this, will be analysed in the following chapters.

Another category of states, which will aid the analysis of Turkey's foreign policy, is that of 'pivotal state', and is defined as 'a key country whose future may not only determine the success or failure of its region but also significantly affect international stability' (Chase et al. 1999: 9).[4] Based on considerations of US strategy, developing states can be pivotal for a variety of reasons (not all of which have to be present): some are geo-strategically important for the US, they have uncertain futures because they are poised between potential success and possible failure, their actions have the potential to be beneficial or harmful for their regions, and they can play a key role in global negotiations on environmental and human rights issues, among others (Chase et al. 1999: 6–7). Therefore, given its size, population, geostrategic position on the straits of Constantinople, economic potential and capacity to affect regional issues (Chase et al. 1999: 9), Turkey can be classified as a classical example of a pivotal state.

4 These authors develop the concept of 'pivotal states' from an American perspective in order to give advice to the US government in foreign policy issues. They have identified the following pivotal states: Indonesia, India, Pakistan, Turkey, Egypt, Algeria, South Africa, Brazil and Mexico (Chase et al. 1999: 8).

3 Turkey's Main Foreign Policy Aims

By giving a brief overview of Ankara's contemporary official foreign policy goals, the focus lies on the general and regional foreign policy goals and relations with the following countries/regions will be examined: the South Caucasus, Central Asia, the Middle East, the EU, and Russia, all of which are close to Turkey in geographic, economic, historical and cultural terms. A special emphasis will be placed on Turkey's aim to position itself as a regional power and as an influential actor vis-à-vis the countries in these regions. The description of Turkey's main foreign policy aims will not include an analysis of the domestic factors that determine these policies. It will suffice to assess the main foreign policy goals, as stated in official documents of the Turkish Ministry of Foreign Affairs and declared by government representatives, as well as the actual foreign policy actions of Turkey vis-à-vis these countries, as presented in expert analyses.

3.1 General Principles of Turkey's New Foreign Policy

In general, according to Soysal (2004: 37), 'geography and history are still the most important factors that determine Turkey's role in world politics.' In geopolitical terms, since its consolidation as a republic and with the Western-oriented reforms of Atatürk, Turkey has been an ally of the West, backing it against the Soviet Union during the Cold War and joining the North Atlantic Treaty Organization (NATO) in 1952. Additionally, it had a pro-Israel stance, thus carrying out a passive foreign policy towards the Turkic-speaking Central Asian republics and its neighbours in the Middle East (although there was some cooperation on the Kurdish question with other countries with large Kurdish populations, such as Iraq, Iran and Syria).

With the Justice and Development Party (Turkish acronym AKP) in power since 2002, there has been a change of direction in this foreign policy trend. Some authors speak of a transformation from the Kemalist conservatism in foreign affairs to a new role as a pivotal actor on the global stage (Martin 2004: 5). In this respect, the so-called 'civilizational geopolitics'[5] ideology has permeated Turkish foreign-policy thinking up to the point that Davutoglu has 'cast Turkey as the leader of its own civilization (Bilgin/Bilgic 2011: 192). Kramer (2010a: 1) asserts that Turkey perceives itself no longer as a peripheral state of the European or western system but as the centre of a great region that stretches from Central Asia to North Africa. Therefore,

> Turkey should make its role of a peripheral country part of its past, and appropriate a new position: one of providing security and stability not only for itself, but also for its neighboring regions (Davutoglu (2008b: 79).

Turkey's increasingly assertive stance in its neighbouring regions has been furthermore guided since 2002 by the so-called 'strategic depth' doctrine, which was developed by Davutoglu. This doctrine basically states that 'a nation's value in world politics is predicated on its geo-strategic location and historical depth' (Walker 2007). In this line of thought, Turkey is endowed with geopolitically strategic assets, such as its geographic location between Europe, the Caucasus and the Middle East, its control of the Bosporus and the Dardanelles Straits, the historical legacy of the Ottoman Empire, and its cultural and historical connection with the Balkans, the Middle East and Central Asia. These factors confer upon Tur-

5 Bilgin and Bilgic (2011: 182) present the AKP's foreign policy as framed in the so-called 'civilizational geopolitics', whose basic tenets are 'the "centrality of God" in understanding how the world works, considering geography and culture as determinants of world politics, understanding civilizations as self-contained units […]'. Moreover, civilizational geopolitics have '(re)shaped the boundaries that unite/divide Turkey and Central Eurasia, with as yet not fully known implications for Turkey's international relations' (Bilgin/Bilgic 2011: 192). In this sense, Turkey's civilizational basin includes the former Ottoman territories plus other bordering regions in the Caucasus and Central Asia, populated by Turkic and Muslim people.

key a multiple identity as a European, Asian and Middle Eastern country (Kramer 2010a: 2). Moreover, similar to the Neorealist logic in the International Relations literature, the 'strategic depth' doctrine

> advocates seeking to counterbalance Turkey's dependencies on the West by courting multiple alliances to maintain the balance of power in its region [...] so that it can maintain optimal independence and leverage on the global and regional stage (Walker 2007).

In sum, '[t]he "strategic depth" doctrine calls for an active engagement with all regional systems in Turkey's neighborhood, while being sensitive to American and European interests in these regions' (Walker 2007). Since 2009, when Davutoglu became Foreign Minister of Turkey, he has reinforced this new foreign policy of engagement with the region and the strategy of asserting Turkey's interests in the countries of the region. Thus, 'in the final analysis, "strategic depth" envisions a Turkey that would transform itself into a global actor rather than a regional or junior partner to the United States' (Walker 2007). In this regard, Davutoglu (2008b: 77) asserted that Turkey should play the role of a global actor by 2023, the one hundredth anniversary of the establishment of the Turkish Republic.

This new Turkish foreign policy trend has been perceived by the US and the EU as an alienation from the West and has even been labelled by some critics as Neo-Ottomanism[6]. In this regard, Prime Minister Recep Tayyip Erdoğan has asserted that '[t]his is not a romantic neo-Ottomanism: It is realpolitik based on a new vision of the global order' (Rettman 2011). Moreover, Turkey denies being an insulator state and has instead tried to create an understanding of a larger Eurasian region in which it is centrally placed (Buzan/Wæver 2003: 486; Davutoglu 2008b: 79).

The guiding precept of Turkey's new foreign policy, namely the demand of stability and prosperity in the region through cooperation between states (Kramer 2010a: 2), is to be achieved through five principles: (1) establishing a balance in Turkey between security and democracy, (2) following a 'zero problem policy toward its neighbors', (3) engaging actively in dealing with regional conflicts, thus developing relations with all relevant actors in the Balkans, the Middle East, the Caucasus, Central Asia, as well as with the EU, NATO and the West in general, (4) adhering to a multidimensional foreign policy, thus its relations being complementary with global actors and not in competition with each other, and (5) conducting a active diplomacy with the assertion of its influence in diverse international organizations (Davutoglu 2008b: 79–82). Novikova (2011: 134) ads: '[t]o create a new image of Turkey as an emerging, self-confident world power.'

In this line of thought, Davutoglu asserted that '[t]he main element in Turkey's foreign policy in last six to seven years is "integrity, comprehensiveness and the understanding of not seeing anything as alternative to something else"' (Today's Zaman 2009). Thus, officially Turkey is a country that employs a

> multi-dimensional, goal-oriented, balanced and humanitarian foreign policy with a view to restoring and maintaining peace, enhancing the stability and prosperity in the world and particularly in its vicinity (Turkish Embassy in the United States of America 2011).

Leaving aside Turkey's broad and propagandistic aims of peace and prosperity in the world, it is interesting to note Ankara's emphasis on the multidimensionality of its foreign policy, thus making it clear that it strives to play an active role in the affairs of its bordering regions.

In practice,

> Turkey's global role has shifted from a Western geo-strategic military deterrent to an exemplary model of a Muslim-majority, secular, and democratic nation. By broadening its horizons and seeing the positive role that it has to play in Europe, the Middle East, and Central Asia, Turkey is begin-

6 The flourishing of the neo-Ottoman philosophy coincides with the AKP's rise to power in 2002 and is associated with Foreign Minister Ahmet Davutoglu. 'In his writings [...] Davutoglu proposes the principles of Turkey's neo-Ottoman foreign policy based on the concept of geographic and historical depth' (Torbakov 2007: 13). Thus, the 'neo-Ottomanist' foreign policy 'is resolutely proactive and strives for the strategic outreach within what its proponents describe as the Ottoman geopolitical sphere' (Torbakov 2007: 5).

> ning to realize its full potential as a versatile multiregional and increasingly powerful international actor (Walker 2007).

It is important to consider that Turkey's ties with the West continue to be strong: Turkey is still a partner in NATO where it maintains the biggest army after the US and it is still negotiating to join the EU (The Economist 2010: 8), but it has expanded its geographic areas of interest. All in all, it can be said that Turkey seeks to successfully combine its 'new geo-strategic position, its traditionally Western-oriented foreign-policy priorities and its crucial interest in maintaining an economically rewarding relationship with Russia' (Jung/Piccoli 2001: 194) to create a multi-vector foreign policy. Thus, this research will place a special emphasis on Turkey's relations with its immediate neighbours in Europe, the Middle East and the post-Soviet countries.

3.2 Foreign Policy Aims in the Region

In accordance with the general principles of Turkey's foreign policy mentioned above, engagement with the regions surrounding it and its immediate neighbours is seen in Ankara as crucial. In this sense, Davutoglu (2008b: 96) has stated that 'Turkey needs to deepen its participation in regional matters.' The adjacent regions to Turkey—the South Caucasus and the Middle East, as well as Central Asia, which shares cultural and historical links with Turkey—can be categorized as part of the bigger region Eurasia. And after the disintegration of the Soviet Union, Turkey has pursued more assertively to establish close relations with Central Asia and the Caucasus. In this regard, 'Turkey increasingly perceives itself as the second actor after Russia in terms of its role, involvement, and significance in [these regions]' (Novikova 2011: 134).

3.2.1 The South Caucasus

Because of its proximity to Turkey, but especially because of its energy resources the South Caucasus[7] represents for Ankara a very important area in terms of foreign affairs. Azerbaijan for instance produces much of the oil and gas that is transported to Turkey, and Georgia is a transit country of these pipelines. According to Bacik and Aras (2004: 350),

> Turkish policy toward the region has been motivated by its search for energy resources, desire to decrease Russian military forces to the level dictated by CFE and by its linguistic, cultural and historical ties with the peoples of the region.[8]

Therefore, Turkey's policy in the South Caucasus is first of all focused on playing an increasingly active role in the region and accomplishing 'a plural regional order that is based on loosening Russia's grip over the ex-Soviet Turkic Republics [...] of Caucasus' (Iseri/Dilek 2011: 46). Nevertheless, Turkey is not yet 'a dominating foreign actor in [this] area. Its strategic interests and claims to a role of regional power to some extent contradict or overlap Russian strategic interests' (Novikova 2011: 135).

Ankara's relations with Armenia have been the most tense and complicated in the region. This country 'plays the role of an "irritant" for Turkey and is considered by Turkey a natural obstacle to the advancements of its interests in the South Caucasus' (Novikova 2011: 147). Moreover, the diplomatic relations between both states have been inexistent during the past couple of decades. Turkey's border with this country has remained closed since 1993 following Armenia's occupation of Azeri territory during the Nagorno-Karabakh war.[9] Nevertheless, there has recently been a shift in Turkish-Armenian relations,

7 The South Caucasus is located between the Black Sea and the Caspian Sea and comprises Georgia, Armenia and Azerbaijan. It is deliberately defined separately from the North Caucasus, which comprises the Russian Republics of Dagestan, Chechnya, Ingushetia, Ossetia-Alania, Kabardino-Balkaria, Karachay-Cherkessia and Adygea.

8 CFE refers to the Treaty on Conventional Armed Forces in Europe.

9 The Nagorno-Karabakh region is an Armenian-majority enclave in Azerbaijan, which aims to become autonomous. After the fall of the Soviet Union, this region self-proclaimed its independence as the Republic of Nagorno-Karabakh and Armenia assisted it militarily against the Azerbaijani forces. The conflict between Armenia and

when on 6 September 2008 the Armenian president, Serzh Sargsyan, invited his Turkish counterpart, Abdullah Gül, to visit Armenia to watch a football match between both national teams (Babali 2009). Moreover, in line with Ankara's so-called zero problem neighbourhood policy, in October 2009 Turkey and Armenia agreed on a protocol[10] to normalize their years-long frozen relationship and open their common border (Bilgin 2010: 118). Although this protocol is still awaiting endorsement from both parliaments (Iseri/Dilek 2011: 49)—and Turkish Prime Minister Erdoğan now states that Turkey will not ratify the protocol until Armenia withdraws from the occupied territories (Paul 2010) –, this agreement between both parties can already be seen as a significant step taken in the direction of normalization of relations.

On the other hand, Turkey's relations with Azerbaijan have been quite close—although the latter has carefully balanced its relations with Russia, Turkey and Iran.[11] The most prominent policy of Turkey towards Azerbaijan has been its backing in the Nagorno-Karabakh issue, for which Baku has treated Turkey as 'first among equals' (Chase et al. 1999: 99) and has supported Ankara's bid to be the primary export route for Caspian Sea oil. A recent disruption in this usually friendly relationship occurred when Turkey signed the protocol for normalization of relations with Armenia in 2009. During this period Azerbaijan withdrew its support for the Nabucco project and Ankara therefore 'swiftly returned to its former policy line and recognized Azerbaijani claims over the lands under the occupation of Yerevan' (Iseri/Dilek 2011: 50).

Regarding Georgia, Turkey's foreign policy has been of cautious involvement and pragmatic relations. For instance,

> [i]mmediately after the end of the Russian–Georgian five-day war in August 2008, Prime Minister Erdoğan of Turkey initiated a 'Caucasus Stability and Cooperation Platform [CSCP]' (Novikova 2011: 144)[12],

thus attempting to play a more pro-active role in the South Caucasus. The CSCP

> offered Turkey an opportunity to restore stability in the area and confirm the importance of Georgian–Turkish relations [since] Georgia is the only direct corridor to Azerbaijan, the Caspian energy resources and the Turkic Republics in Central Asia (Fotiou 2009: 7–8).

In this context, it is hard to ignore that Turkey sees in Georgia a way to bypass Armenia as a transit country for oil.

In sum, 'Turkey's relations with Azerbaijan and Georgia are relatively clear and interrelated: Turkey considers these two states as its younger partners' (Novikova 2011: 142). Moreover, because of the oil and gas pipelines in the region, Georgia and Azerbaijan are tied to Turkey, thus increasing their interdependence in the economic, and therefore political, realms.

3.2.2 *Central Asia*

With the disintegration of the Soviet Union, the newly independent republics of Central Asia[13] became an area of great interest for Turkey, not only because of the geographic proximity and the common lin-

Azerbaijan over the Nagorno-Karabakh region has remained frozen since 1994, when a cease-fire was negotiated by the parties, Russia and the Minsk Group (Encyclopaedia Britannica 2011).

10 The protocol signed by Turkey's and Armenia's officials in 2009 states that both sides agree 'to open the common border within two months after the entry into force' and 'implement a dialogue on the historical dimensions [...] including an impartial scientific examination of the historical records' (European Parliament 2009).

11 Azerbaijan has represented a contended issue between Turkey and Iran ever since the fall of the Soviet Union, where both countries compete for economic and political influence (Kramer 2000: 144).

12 The initiative for the CSCP was presented by the Turkish government on 13 August 2008 as an attempt to initiate dialogue and negotiation between Russia, Georgia, Turkey, Azerbaijan and Armenia. Three main issues were seen as a priority: the opening of the Armenian–Turkish border, the resolution of the Nagorno-Karabakh issue and the resolution of Georgian–Russian dispute (Fotiou 2009: 3, 18).

13 The region of Central Asia comprises five ex-Soviet Republics, namely Kazakhstan, Uzbekistan, Turkmenistan,

guistic roots and culture (with the exception of Tajikistan, whose language and culture is closer to the Iranian Farsis), but also because of its energy resources. Although Russia has managed to assert its influence in this region more strongly than Turkey, the latter attempts to serve as a model for the countries of the region. In this respect, Kramer (2000: 97) asserts that, since Turkey feared the Islamization of Central Asia right after the end of the Cold War, it presented itself as a Western model for the region. It did so by 'promoting a far-reaching Central Asia policy that aimed at turning the region into a sphere of special Turkish influence' (Kramer 2000: 97), taking the role previously represented by Russia. In this context, Turkey established the Turkish International Cooperation and Development Agency (TIKA) in 1992 'to assist the Central Asian republics and Azerbaijan in their transformation' (Bilgin/Bilgic 2011: 186), as well as the Black Sea Economic Cooperation (BSEC) organization which plans to export Caspian energy resources via the Black Sea. Moreover, 'Turkey hosted the first Turkic-Speaking States Summit of Heads of State and Government' in the same year (Bilgin/Bilgic 2011: 186). Nevertheless, this policy of engagement in the region failed somewhat and only Turkmenistan and Kazakhstan, located on the western part of Central Asia, have been closer to Turkey. Therefore, the state's involvement in the region has not been as active as in the Caucasus. To some extent, it can be argued that Ankara's foreign policy toward Central Asia during the 1990s was an instrument to restore its political and strategic importance for the West, and not a real engagement with the region.

Recently, Ankara has (re-)discovered Central Asia as the region where Turkey can truly claim its civilizational geopolitics because of language, race, ethnicity and culture (Cohen 2011: 222). Therefore, Turkey's economic and diplomatic presence in the region has been growing with a

> new strategy of expanding cultural, scientific and economic relations with the Turkic republics [which] has shown an interesting mix of old pan-Turkist schemes and modern transnational interactions' (Jung/Piccoli 2001: 194).

There are nevertheless challenges to Turkey's aims in this region, since Russia's political, economic and cultural influence in Central Asia is still strong.

As with the relations with the South Caucasus, Ankara's foreign policy in Central Asia also concentrates on a particular economic issue, namely energy resources. Already in 1994, during the second Turkic Summit in Istanbul, the leaders of Turkey, Azerbaijan, Kazakhstan, Kyrgyzstan, Turkmenistan and Uzbekistan discussed, among other issues, oil and natural gas pipelines. The agreed document

> noted that oil and gas ought to be exploited and transported to the world via the most economic route and in the shortest time and 'welcomed the work being carried out among interested countries on natural gas and oil pipelines to be built extending to Europe and the Mediterranean via Turkey' (Winrow 1995: 29–30).

3.2.3 The Middle East

In the 1990s, Turkey was a regional power that did not play a leadership role on behalf of the Middle Eastern region[14] (unlike Egypt). Some authors even asserted that 'Turkey's democratic, free-market policies have not inspired much imitation in the region' (Chase et al. 1999: 98). It therefore traditionally played the role of '"bridge" or a "barrier" between the Middle East and the West' (Walker 2007).

This has nevertheless changed in recent years and Turkey now attempts to increase its presence in the region and play the role of a catalyst. According to Bilgin and Bilgic (2011: 192), since the AKP seized power in 2002 'Turkey offers itself as a model for democratic reform and modernization, but at the same time, a construct for conserving Islamic values'. They further argue that the AKP has framed its foreign policy towards the Middle East in the so-called 'civilizational geopolitics' described above. In this respect, Walker (2007) asserts that

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Kyrgyzstan and Tajikistan.

14 The region of the Middle East comprises Jordan, Lebanon, Syria, Iraq, Iran, Israel, Palestinian Authority, Saudi Arabia, Kuwait, Oman, Yemen and the United Arab Emirates.

> [t]he most dramatic shifts in Turkish foreign policy have been witnessed within the Middle East, where the historically close relationship with Israel has been de-emphasized while former enemies such as Iran and Syria have been openly courted.

Moreover, Turkey now attempts to bring the principal actors together to transform the region and to play a key role as mediator in some conflicts. In this respect, there have been recent Turkish foreign policy initiatives to assist in the Israeli–Palestinian peace process, a situation that is in striking contrast with Turkey's historical neglect of the Middle East (Walker 2007). Moreover, with the recent social protests that have spread across this region, Turkey first adopted a foreign policy of cautious support of the demonstrators and then gradually moved to openly criticize some regimes such as that of President Bashar Assad in Syria.

According to Davutoglu (2008b: 84), nowadays 'it is important for Turkey to further establish its position in the Middle East' based mainly on four official principles. The first one is security for the entire region and not just for some groups or countries. Second, dialogue is the means of solving crises and Turkey should play the role of facilitator. The third principle is economic interdependence in the region and finally cultural coexistence and plurality among the countries of the region (Davutoglu 2008b: 84–85).

Moreover, when analyzing Turkey's relations with the Middle Eastern countries, there is a topic that cannot be left out: the Kurdish issue.[15] According to Bill Park (2005: 11), this is one of the key elements that have ensured Ankara's entanglement in Middle Eastern politics. After the American invasion of Iraq in 2003 and the intensified control that Iraqi Kurds have gained in northern Iraq, Ankara has aligned its position on Iraq with those of Syria and Iran (Park 2005: 41) because all of these countries share an interest in suppressing the possible gain in autonomy of their Kurdish minorities. Turkey is not willing to accept the emergence of an autonomous Kurdish state in northern Iraq, since this could have an impact on its own Kurdish population living in south-eastern Turkey or even give them support in their own desires of autonomy.

Thus, currently Turkey's main focus in the region is placed on its neighbouring states of Iran, Iraq and Syria (Cohen 2011: 221). Regarding Iran, Turkey's relations with this neighbour were seldom good in the past because of several points of friction:

> rivalry in Azerbaijan and Central Asia; Iranian suspicions of Turkish support for Azerbaijani pan-Turkists who would favour union with what is now Iranian Azerbaijan; and Turkish suspicions of Iranian support for the [Kurdistan Workers' Party] PKK and for Islamic radicals (Chase et al. 1999: 99).

Since the AKP has been in power,

> Turkey has tried to maintain a delicate balance between not openly contradicting U.S. policy towards Iran, and seeking to actively maintain economic and political connections with its largest and most powerful Middle Eastern neighbour. The AKP has increasingly emphasized the need for Turkey to have good relations with Iran and downplayed international concern over a nuclear Iran (Walker 2007).

Ambassadorial posts in both countries were filled in 2001 (vacant since 1997) and Turkey initiated 'security meetings' with Iran (Bilgin/Bilgic 2011: 185). Ankara has furthermore recognized Iran's right to develop nuclear power for peaceful purposes (in contradiction to the US and EU positions). Additionally, Ankara's leadership role was highlighted when, together with Brazil, it tried to mediate in the tensions between the West and Iran over its nuclear ambitions. In this regard, Cohen (2011: 220) asserts that recent policy differences between Turkey and the US over Iran and Turkey's relations with other Middle Eastern countries 'reflect Turkey's emergence as a self-confident, relatively prosperous regional power, with ambitions to carve out an independent sphere of influence.' Moreover, Turkey and Iran

15 Among Turkey's ethnic groups, the Kurdish is the biggest, making up 18% of Turkey's population (CIA 2011). This Kurdish minority has sought to gain more autonomy, sometimes using violent means. This group is also scattered in the northern part of Iraq, the north-eastern part of Syria, and the western part of Iran (Park 2005: 11–12).

share a common concern over the PKK[16] and therefore signed in 2004 'a joint commitment to security cooperation [...] in the struggle against the PKK' (Walker 2007).

Turkey has also played a more assertive role in its relations with Syria, since in 2008 it sought to mediate the Syrian–Israeli conflict over the Golan Heights (Cohen 2011: 221). On the economic side, Turkey and Syria have also concluded a free trade agreement. Until recently, these close relations were a proof of Turkey's engagement with the region's regimes. Nevertheless, with the protests seen lately in Syria (as well as in other Middle Eastern and North African countries), there has been a change in these friendly relations. Ankara has increasingly criticized Syrian President Assad and the Baath regime, and it has made explicit that it wants 'Syria to immediately move to a multiparty system, to hold free and fair elections and to end emergency rule' (Today's Zaman 2011a). Moreover, Davutoglu has asserted that 'we wish [...] the immediate launch of a reform process in Syria and an end to violence. We are ready to do whatever is within our capacity in order to achieve that' (Today's Zaman 2011c). This can be seen as a new type of engagement in the region, where Turkey tries to position itself as a role model of democratic state, and thus securing its influence in the region for the future, by supporting the oppositional movement.

Regarding its relations with Iraq, Turkey's primary concerns over this country concentrate on 'the rising PKK terror in the region and the likelihood of Northern Iraq becoming its breeding ground' (Davutoglu 2008b: 86). Ankara has therefore attempted to build a common stance against the PKK together with the Iraqi government and to 'find a solution that will be acceptable to different ethnic and sectarian groups in Kirkuk' (Davutoglu 2008b: 86). Moreover, Turkey's economic ties with Iraq have boomed in recent years, including construction projects as well as the re-opening of the Kirkuk–Ceyhan oil pipeline.

3.3 Foreign Policy Aims vis-à-vis the EU

Ever since its proclamation as a republic, Turkey has been Western-oriented in its foreign relations and Europe has therefore played a central role in Turkey's foreign policy aims. Since 1963, when Turkey became an associated member of the EU, its main aim has been to gain full membership in the EU. While negotiations are still going on, this regional bloc has provided Turkey with an average of 1 billion US dollars per year as assistance to meeting the accession requirements and Turkey is already part of a customs union with the EU (Cohen 2011: 224).

Nevertheless, the pace of the accession process has been remarkably slow. Since the beginning of formal negotiations on 4 October 2005, only 13 out of the 35 chapters of EU accession requirements have been opened (Pop 2010). There have also been some obstacles on Turkey's aim to join the EU, such as the long standing state of confrontation with Greece. This has been characterized by the conflict regarding the sovereignty rights in the Aegean Sea (with oil and gas resources) and the unresolved dispute over Cyprus[17]. According to some analysts, 'Cyprus is now the biggest single obstacle to Turkey's EU hopes' (The Economist 2010: 10) since Turkey refuses to recognize Greek Cyprus[18], which is an EU member. 'Eight chapters remain frozen until Turkey moves on the Cyprus issue, by, for instance, letting ships and planes from the Greek Cypriot part come to Turkish ports and airports' (Pop 2010). The Turkish–Greek

16 The PKK is the Kurdish acronym for the Kurdistan Workers' Party. It 'was founded in 1984 in Syria's Bekaa Valley. Since 1984, it has targeted Turkey's security forces (including village guards), governmental personnel, and civilians mainly in the Southeast, but also in major cities elsewhere in Turkey' (Bilgin/Bilgic 2011: 185).

17 Cyprus came under British administration in 1878. When it became independent in 1960, problems started to develop between the Greek-Cypriot majority and the Turkish-Cypriot minority in the island, leading to the invasion and occupation of the northern (Turkish-minority) part by Turkey in 1974. An independent Turkish Republic of Northern Cyprus was then created by the Turkish minority and has only been recognized by Turkey (neither Azerbaijan nor any Turkic-speaking state of Central Asia have recognized this Republic) (The Economist 2010: 10).

18 In November 1963, President Makarios of Greek Cyprus proposed to amend the Cypriot constitution, a situation which angered the Turks and led to a crisis between Greece and Turkey (Ahmad 2004: 32). Since then, Turkey refuses to recognize Greek Cyprus as an independent state.

relations are probably the most critical aspect of Turkish foreign policy mainly because of the history that these countries share (Soysal 2004: 41–42).

It is interesting to observe that a constant feature in Turkey's relations with the EU is the so-called 'Sèvres Complex'[19], which is described by Park (2005: 15) as a 'virtual siege mentality'. This is present in Ankara's relations with the EU, the Cyprus issue, and the tensions with Greece over the Aegean. Moreover, Turkey's relations with states such as France have been further influenced by the Armenian factor, which has been denoted by these European states as 'one of the major hidden obstacles to Turkey's membership' (Novikova 2011: 145). There have thus been repeated declarations by heads of state from France, Austria, the Netherlands and Germany opposing Turkey's entry in the EU (The Economist 2010: 4), which have slowed the negotiations of accession. This has had an effect inside Turkey, where the population is disenchanted and less eager to join the bloc. However, recent Eurobarometer polls show that 'more than half of the Turkish population continues to support accession' (Cohen 2011: 218). And although this issue has recently lost support among the politicians (in the election campaign), the accession to the EU is still officially Turkey's main foreign policy goal. But Turkey's strategy in the accession process has changed as well and it has adopted a more pragmatic approach to this issue, in accordance with its 'strategic depth' doctrine (Kramer 2010a: 1).

Although it is very unlikely that Turkey will join the EU in the short and medium terms, 'Ankara's economic bonds with Europe are substantially stronger than those that are evolving with Islamic states' (Cohen 2011: 225). In this respect, 'Ankara calculates that Turkey's increasing presence in Asia will contribute to its request for the [EU] membership' (Iseri/Dilek 2011: 42), as well as the energy issue which will be analysed in the next chapters.

3.4 Foreign Policy Aims vis-à-vis Russia

Historically, Turkey's relations with Russia have always been tense mainly because of the competition for influence in the Caucasus, the Balkans and Central Asia, as well as for the Black Sea ports. According to Cohen (2011: 224), Turko–Russian historical hostilities ended with the fall of the Soviet Union and since the 1990s the Russian–Turkish relationship has been growing due to the economic interests of both countries involving trade, energy, foreign direct investment and tourism. Nowadays Russia is Turkey's number one trading partner, with oil and natural gas forming the basis of these economic relations. Turkey is the third largest importer of Russian gas after Germany and Italy and therefore depends on Russia for almost two thirds of its gas imports. Furthermore, around one third of its oil imports come from Russia (Babali 2009).

On the political side, it can be said that Russia represents for Turkey an interesting type of ally and at the same time antagonist in the region. On the one hand, 'President Gül's characterisation of Russia and Turkey as "neighbouring states" during his visit to Russia is indicative of Turkey's willingness to warm its relations with Russia' (Fotiou 2009: 6). In this sense, and in line with Turkey's 'strategic depth' doctrine, Ankara sees in Russia a natural ally in Eurasia when dealing with the EU, thus advocating a policy of 'cooperation in purely strategic terms' (Novikova 2011: 138). This cooperation is principally seen in the fight of internal separatist movements and terrorism. In this respect, in 1999 both countries signed the Joint Declaration on the Fight against Terrorism and in 2002 they concluded 'important security agreements' (Bilgin/Bilgic 2011: 186).

19 The 'Sèvres Complex' refers to the Treaty of Sèvres, drafted by the allies in 1920 to dismantle the Ottoman Empire (there would be a truncated Turkish state in central Anatolia, an expanded Greek presence in Anatolia, a large Armenian state would be created, and the European states would acquire territory in the Aegean and the Mediterranean). This treaty was superseded by the 1923 Treaty of Lausanne, due to Kemal Ataturk's victory in the war of independence (1920–1923) (Park: 2005 14).

On the other hand, another type of Russo–Turkish relationship has also been seen. 'With the dissolution of the Soviet Union, Turkey has begun to transform its relationship with the Russian Federation from enemy state to rival regional power' (Walker 2007). And

> [w]hile Turkey and Russia have worked to develop and maintain normal and pragmatic relations in recent years, their competing interests in the mutually shared areas of their environs have led to often tense relations (Walker 2007).

For instance, while

> the Russian and Turkish foreign policy agendas concerning the Caucasus, the Black Sea and the Middle East partially overlap in a number of issues, they also counter each other: in the Caucasus, both Russia and Turkey emphasise the preservation of stability, however they compete for regional hegemony (Fotiou 2009: 6–7).

Although both countries agree on the combat of terrorism and separatism 'their positions differ in the cases of South Ossetia, Abkhazia and Nagorno-Karabakh' (Fotiou 2009: 7).

4 Energy Context and Turkey's Geostrategic Position as a Transit Country

Having presented Turkey's location in the world between different regions and its desire to become a regional power, as well as its main foreign policy aims vis-à-vis its neighbours, this chapter will concentrate on the means that Ankara uses to achieve these goals. The emphasis will be placed on Turkey's role as a transit country for energy resources. For this aim, the EU's energy balance will be described emphasizing its dependence on oil and gas imports, for instance from Russia, the Caspian Sea and the Middle East. As a necessary next step, it will be noted that Turkey lies in a strategic geographic position between the EU and its oil and gas suppliers. Therefore, Turkey's role as a transit country for energy resources flowing to the EU will be described.

4.1 Europe's Energy Context

Energy resources have been a crucial element in the economic development of states ever since the industrial revolution of the 19th century. Displacing coal as the main source of energy in the 20th century, oil and natural gas have played a key role in the industrialization and urbanization processes going on in the world, as well as in the transportation of goods and generation of electricity. However, proven reserves of oil and natural gas are geographically quite unevenly distributed and have moreover been depleted at a rapid pace. There are therefore only a few regions and countries that still have a surplus of these hydrocarbons, such as the Persian Gulf states like Iran, Iraq, Kuwait and Saudi Arabia, African states like Nigeria, Libya and Algeria, and Russia and some CIS countries like Azerbaijan, Kazakhstan, Turkmenistan and Uzbekistan.

Given this context, it is interesting to take a look at the EU, an actor that depends to a great extent on external sources of energy to fuel its growing economy. Some analysts point out that the 'EU's chances of obtaining energy security through self-sufficiency are admittedly low' (Tekin/Williams 2009: 339) and therefore its need for external sources of hydrocarbons will rise.

In 2010, the EU consumed 662.5 million tonnes of oil (16.4% of the world total oil consumption) and 492.5 billion m^3 of natural gas (15.5% of the world total gas consumption) (BP 2011b: 11, 23). Although these figures have not risen significantly during the past five years, it is crucial to note the imported percentage and the countries of origin of these hydrocarbons. The main potential suppliers of oil and natural gas for the EU are located in regions surrounding it, such as Norway, Russia, the states in the Caspian Basin (Azerbaijan, Kazakhstan, Turkmenistan, Iran), and Middle Eastern and North African states (Iraq, Saudi Arabia, Qatar, Algeria, Egypt, and Libya). Tables 1 and 2 (in Annex) show the (potential) oil and natural gas suppliers to the EU with their respective reserves and production capabilities.

The EU highly relies on external sources of hydrocarbons to cover its internal demand and is therefore dependent on the import of oil and natural gas to sustain its economy. According to calculations of the EU Commission (2010: 13), the EU's import dependency[20] on oil in 2007 was 82.6%, and on natural gas 60.3%. For an overview of Europe's actual main sources of oil and natural gas, see Table 3 (in Annex). Therefore, '[e]nergy security has emerged in recent years as one of the cornerstones of the [...] EU's foreign policy' (Pardo 2010: 643).

It is also interesting to consider the projections of future energy consumption and imports in the EU. In order to comply with its energy demand growth and its climate strategy, the EU needs to gradually

20 Import dependency shows the extent to which a country relies upon imports in order to meet its energy needs and is calculated by the European Commission (2010: 3) as net imports divided by gross inland consumption (which is the quantity of energy consumed within the borders of a country) plus bunkers (the quantities supplied to seagoing ships).

consume a higher share of renewable energy, as well as natural gas thereby reducing the consumption of coal and crude oil. Because of this, many authors agree that 'Europe requires a multilateral approach to energy security' (Keppler 2007: 7). According to some analysts, 'natural gas can play an important role as a fuel for the development of a sustainable energy future over the coming decades' (Eurogas 2010: 5) because of its low CO_2 emission rate. Since the natural gas demand in the EU is forecasted to grow[21] by 14% to 23% until 2030 and its import dependency to increase to around 70% (Eurogas 2010: 2, 9), Brussels has included the topic of gas supply security in its energy policy. As a result, the producing countries of natural gas (such as Russia, Iran, Qatar, Turkmenistan, Kazakhstan, Uzbekistan, Algeria, Egypt and Libya), as well as the transit countries, could play a bigger role in the EU energy market. It will only be a matter of assessing which natural gas suppliers are more reliable and which transit routes represent the most cost-effective and secure way for the EU to have access to gas.

Regarding the EU's suppliers of oil and natural gas, Russia has a dominant position; for instance, in 2007, 40.8% of the gas imported by the EU came from Russia (European Commission 2010: 14). Moreover, 'Russia's privileged position in Europe and the European neighborhood is highly linked to its ability to keep Caspian gas under its control' (Bilgin 2009a: 4487). Therefore, many authors agree that the EU has gradually become more dependent on Russian gas (Söderbergh et al. 2010: 7827).

This situation by itself is not damaging to Europe; nevertheless, in recent years it has become clear in the EU rhetoric that Russia does not enjoy a reputation of a trustworthy energy supplier (although the Kremlin insists that even during the Cold War it did not stop supplying hydrocarbons to the West). Western analysts point out that Russia 'has become more assertive in its foreign policy and in its aim of monopolising energy supplies to the west since the late 1990s' (Pardo 2010: 643), and that energy, apart from being its main export industry, provides political leverage in its relations with the EU and the post-Soviet republics (Ericson 2009). Other authors argue that Russia has often used natural gas as a political weapon (Goldman 2008: 136–169) and as a foreign policy instrument to 'punish' disobedient states in its 'near abroad', such as Ukraine, Belarus, Latvia and Georgia (Babali 2009). Both the suspension of Russian gas deliveries to Ukraine in January 2006 and January 2009, as well as of oil deliveries to Belarus in winter 2006/07, have highlighted the fragility of the European energy supply situation (Keppler 2007: 6). The situation might become even more complicated in the long-run:

> Of less symbolic but potentially greater impact is the Russian effort to diversify their exports to Asia. Of even greater concern, however, is the fact that Russia's gas production is stagnating (Keppler 2007: 17).

In sum, the EU's problem of energy supply security revolves around the fact that the EU as a whole consumes more hydrocarbons than it produces; a trend that is projected to continue. Thus, the EU needs to import these hydrocarbons from states in Eurasia, the Middle East and North Africa, many of which are considered unstable or unreliable. Moreover, the alleged risk of dependence on Russian gas has motivated the EU to officially state that

> [d]iversification has become the key direction in ensuring energy security by seeking to increase the share of renewables in the energy balance and increasing the share of non-Russian gas delivered by routes outside Russia's control (Baev 2010: 14).

It therefore

> faces a fragile position from which to obtain a diversified and stable energy supply [...] in the context of increasing world demand for scarce resources situated in a contested area of influence (Pardo 2010: 650).

21 Because of the increasing gas demand in the EU and its declining internal production, 'the currently contracted gas supply cannot meet gas demand in the longer term and so new imports will be necessary from 2012 onwards' (Eurogas 2010: 9).

In this context, the Caspian Basin's[22] hydrocarbon reserves may play a crucial role in satisfying the energy needs of the EU. The IEA (2010: 10) has forecasted in its New Policies Scenario that Caspian natural gas could potentially supply part of Europe's gas needs, since the Caspian region is projected to increase its gas production from 159 billion m^3 in 2009 to over 310 billion m^3 in 2035. Moreover, the region's exports of this hydrocarbon are expected to grow from less than 30 billion m^3 in 2009 to 130 billion m^3 in 2035. Therefore, Bilgin (2009a: 4482) asserts that 'the best strategy, and what seems more likely, for the EU is to include at least two countries from Azerbaijan, Turkmenistan, Iran and Iraq within its natural gas supply system'. However, Caspian energy producers like Azerbaijan, Kazakhstan and Turkmenistan have a limited number of options when it comes to export routes. From a geographical point of view, the possible routes are the Chinese, the Georgian, the Iranian and the Russian. Moreover, when taking into account third countries, Turkey plays a crucial role as a transit country connecting Caspian hydrocarbon producers with the consumers in Europe.

As an example of the EU's policy in this respect, the option of a 'fourth gas corridor' (Norway, Algeria and Russia being the other three corridors) to supply its energy needs with gas from the energy-rich Caspian states or the so-called 'southern' route has been considered (Locatelli 2010: 960). Even European Commission President Jose Manuel Barroso (2008) asserted that the EU energy strategy should secure gas supplies from the Caspian states and more specifically from Kazakhstan and Turkmenistan. But there are geopolitical, as well as economic factors that present a challenge to this option. Among the latter is the availability of natural gas that is supposed to flow through the 'fourth gas corridor'; but more important for this research are the geopolitical aspects, such as the transport of this gas via the Caucasus, or the involvement of other regional actors like Turkey or Iran who are capable of affecting the strategies of the gas producing states in the Caspian Basin.

4.2 Turkey's Geostrategic Position and Role as a Transit Country

Having described the dependence of the European countries on imported oil and natural gas, and that the transport routes of the energy resources are not only an economic but also a political issue, it is crucial to take a closer look at the transit routes for energy resources to Europe. According to Gochitashvili (2004: 22), '[t]hanks to their special geopolitical location Georgia, Azerbaijan and Turkey in coalition with other Caspian and Balkan countries may be capable of guaranteeing gas supplies to the European market.' Special emphasis will be placed on a key player in the energy dynamics of the region, namely Turkey, which is geo-strategically situated as an 'energy corridor' between the energy-rich Middle Eastern, Caspian, and Central Asian countries, as well as Russia, and the consumer markets in Europe. Turkey has moreover access to the Black Sea and the Mediterranean Sea, and controls the passage between them through the Bosporus and Dardanelles Straits.

During the Cold War, Turkey was seen as situated in a highly geostrategic position in the East–West military confrontation. After the fall of the Soviet Union in 1991, Turkey's geographic position has changed and it now borders three post-Soviet states: Azerbaijan, Georgia and Armenia, besides its historical neighbours in the Balkans and in the Middle East, and new challenges have arisen in this region, where Turkey is again of great importance to different actors surrounding it. One area where Turkey is seen as a crucial actor because of its geographic position is energy. According to Mañé-Estrada (2006: 3783), Turkey 'becomes the link between the European Union and its two "natural" areas of influence geo-energy wise: [...] the Southern shore of the Mediterranean and Russia.' Specifically, 'Turkey has been a major transit point for seaborne traded oil and is becoming more important for pipeline-traded oil and natural gas, with significant volumes transported westward to Europe' (EIA 2011: 1) and can therefore take advantage of its position as a transit corridor for energy resources to assume the role of energy hub[23] by gathering gas inflows from Azerbaijan, Iran, Iraq, and Russia. Thus,

22 The Caspian Basin consists of parts of Russia, Azerbaijan, Kazakhstan, Turkmenistan, Uzbekistan, and Iran.

23 An energy hub is a country that buys energy resources in its borders and then re-exports them to other purchas-

> [i]n the context of the move towards a multi-centered energeopolitical order where Russia and China, as energy superpowers, rival the US and the EU, some actors like Turkey have found themselves at the center of attention as energy hubs (Coşkun/Carlson 2010: 209).

Therefore, because of its pivotal location

> Turkey will continue to attach great importance to the passage of pipelines through its territory for the transport of oil and natural gas from Iraq, Iran, the Caucasus, and Central Asia to European markets (Soysal 2004: 39)

opening a new set of options for Turkey's energy and foreign policies.

Turkey does not possess big reserves of petroleum or natural gas and therefore has to import these hydrocarbons in order to meet its rising internal demand. As of January 1, 2011, Turkey's proved oil reserves were estimated at 36.8 million tonnes, located mostly in the south-east region. The oil production peaked in 1991 at 4.2 million tonnes per year, and then declined each year until bottoming out in 2006 at 2.2 million tonnes per year. Since then, there has been a slight increase in oil production, reaching nearly 2.6 million tonnes per year in 2009 (EIA 2011: 1). Turkey thus has to import 90% of the oil required for its internal consumption, the majority of it from Russia and the rest from Saudi Arabia, Iraq, Libya and Syria.

Regarding natural gas, as of 1 January 2011 Turkish reserves of this hydrocarbon were estimated at 6.1 billion m^3. It therefore 'produces a very small amount of natural gas, with the total production amounting to 0.7 billion m^3 in 2009' (EIA 2011: 5). Turkey has to rely heavily on imports to meet its growing domestic demand. These imports come via pipeline primarily from Russia. 'Between 60–65% of natural gas consumed in Turkey comes from two pipelines with Russia' (Coşkun/Carlson 2010: 213), 'with Gazprom sending gas to north-west Turkey via the Balkans as well as to central Turkey via the Blue Stream pipeline' (EIA 2011: 5). Other sources of gas flow to Turkey from Iran and Azerbaijan. Turkey also imports liquefied natural gas (LNG) from Algeria and Nigeria, whose 'supplies are delivered through long-term contracts, generally for between 15 and 25 years' (Coşkun/Carlson 2010: 213). Turkey has in general decided to increase the share of natural gas in its domestic energy consumption and has sought to diversity the sources of supply. It has thus 'signed energy import deals with Algeria, Egypt, Iran, Iraq, Kazakhstan, Nigeria, Qatar, Russia, Turkmenistan, Uzbekistan and Yemen' (Hill 2004: 213).

Despite lacking large reserves of hydrocarbons, Turkey does play a crucial role in the energy supply-demand dynamics of the region because of its geostrategic location as a transit country for energy resources. 'Turkey lies near regions possessing over 70% of the world's proven oil and gas reserves' (Roberts 2004: 1). Therefore,

> [g]rowing volumes of Russian and Caspian oil are being sent by tanker via the Bosporus Strait to Western markets while a terminal on Turkey's Mediterranean coast at Ceyhan allows the country to export oil from northern Iraq and Azerbaijan (EIA 2011).

As stated by Coşkun and Carlson (2010: 208), in the context of new energy geopolitics, the pipeline routes that transport oil and natural gas have become the subject of geopolitical competition between states aiming for power and influence, besides economic advantage. This in turn provides Turkey not only economic gains with the transit fees that it charges, but also geopolitical power in the form of a strategic instrument to gain influence in the region and to advance its political aims.

There is a growing dependence of actors such as the EU on Russian, Caspian, Central Asian and Middle Eastern hydrocarbons, which makes Turkey's role even more important for energy consumers, since it is seen as 'one of the most stable of all potential transit states' (Coskun 2010: 76). In this respect, Mañé-Estrada (2006: 3783) asserts that

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ers. In doing so it sets the selling conditions (theoretically) independently from the original producers and final buyers. Another component of an energy hub is the bigger infrastructure that is constructed for the production of petrochemicals for export, which Turkey aims to achieve (Kramer 2010b: 8).

> [b]ecause of its geographical position, and due to the current design of the oil and gas pipeline's network, and of the shipment routes for hydrocarbons from the Mediterranean, Persian Gulf and Russia to Europe Turkey holds the key that will grant admittance into Europe to most of the Russian, Central Asian, Persian and Mediterranean gas and oil. In fact, the estimation is that by the year 2020, Turkey will be processing the surplus of the approximately 120 [billion m^3] of gas that will arrive into the country.

In this respect, 'the EU has recognised Turkey's potential value as a secure and independent route for importing non-Russian energy supplies' (Tekin/Williams 2009: 337), and that it 'could constitute an option towards greater diversification of export routes to the Union and therefore more energy security' (Tekin/Walterova 2007: 85). In this regard, the EU officially stated in the 2004 Progress Report on Turkey that 'Turkey will play a pivotal role in diversifying resources and routes for oil and gas transit from neighbouring countries to the EU' (European Commission 2004: 116).

Turkey is not only important to energy consumers such as the EU, but also to producing countries such as Russia and the ones in the Caspian Basin. According to Tekin and Williams (2009: 342), Russia 'view[s] Turkey's land mass [...] as an alternative to Ukraine' to transport its energy resources through this transit corridor to Europe. Nevertheless, since Russia borders the EU, exports large quantities of hydrocarbons to this region and has a pipeline infrastructure of its own,

> Turkey is [...] more likely to compete with Russia for the transit of Caspian exports than to become its energy transit route. Adding to Turkey's disadvantage is the fact that it is largely dependent on Russia for its own natural gas imports'(Tekin/Walterova 2007: 89).

Regarding Middle Eastern oil and gas producers, Iran, Egypt, Syria and Iraq consider using Turkey as an important transit country to the West. On the other hand, Qatar, the United Arab Emirates and Oman have access to other export routes besides the Turkish one (Tekin/Walterova 2007: 91).

In sum, as Babali (2009) asserts, 'Turkey is increasingly at the crossroads of the world energy trade': it is positioned between oil and natural gas producers in the Caspian basin, Russia as well as the Persian Gulf, and the consumers of these hydrocarbons in Europe. Moreover, because of the fact that

> a great deal of the oil from former Soviet territories (between [99.6 and 129.5 million tonnes per year], to be re-exported by Turkey) comes to Europe via the Bosporus Strait [...] it is very much possible that in the near future, this country, although not a producer, might become one of the main (re)exporters of gas and crude oil of the region (Mañé-Estrada 2006: 3783).

In this context, it is clear that Turkey is becoming a crucial partner in the EU's energy policy. As Mañé-Estrada (2006: 3784) argues,

> Turkey is the energy agent that amalgamates the pan-European security community and helps to palliate the loss of weight of the regional agents of the Euro-Mediterranean area, while compensating for the excessive influence of those from the Russian Federation.

Taking this into account, she even speaks of a pan-European geo-energy space that covers the EU, Russia and Turkey as a new way of understanding the energy policies of the region (Mañé-Estrada 2006: 3373).

As can been observed, the strategic geographic position of Turkey in the transit route for energy resources that bypasses Russia, gives it a specific bargaining power vis-à-vis energy consumers (such as the EU member states) and energy producers (such as the ones located in the Caspian basin). Therefore, according to Coskun (2010: 76), Turkey has 'appeared as one of the main actors in regional and global energeopolitics'.

5 Turkey's Energy Transit Options and Energy Strategy

The above-mentioned analysis of Turkey's geographic position as a transit country for energy resources will be useful to understand how Turkey designs its energy strategy and which pipeline options it chooses. Therefore, this chapter will first present an overview of the main oil and gas pipeline options that are either already operational or under discussion by the involved parties, and which to some extent involve Turkey. The emphasis will be placed on the pipelines that transport oil and gas from the Caspian Basin, Russia, the Middle East and Central Asia to Turkey and/or to Europe. To this end, basic information regarding each pipeline, such as the route, the length and capacity, the sources of the oil and gas, the status of the pipeline and the role played by Turkey, will be presented.

In the second step, the official energy strategy of the Republic of Turkey will be described in order to understand what this county's goal is in terms of its role as an energy transit country. The focus lies on the energy strategy regarding oil and natural gas supply and their transportation routes.[24] This will enable the assessment of the consistency of Turkey's energy strategy with its main foreign policy aims.

5.1 Turkey's Pipeline Options

Because of its geographic location between fossil fuel producers and consumers, Turkey has a significant interest in participating in oil and gas pipeline projects that pass through its territory in order to obtain, not only economic gains from transit fees, but also political leverage over its partners. Moreover, the construction of pipeline infrastructure through Turkey is in line with Ankara's goal of becoming an energy hub. It is therefore crucial to first describe the main features of the oil and gas transit pipelines[25] in order to then analyse them in the context of Turkey's energy strategy. The main pipelines have been organized into five regions: the Caspian Sea Basin, the Middle East, Russia, inner Turkish, and to Europe. They can be viewed in a synthesized form in Tables 4 and 5 (in Annex).

5.1.1 The Caspian Option

Baku–Tbilisi–Ceyhan (BTC) Oil Pipeline

The BTC oil pipeline was commissioned on 28 May 2006 by the Baku–Tbilisi–Ceyhan Pipeline Company (BTC Co.), which is an incorporated joint venture company made up of 11 shareholders and managed by BP, its largest shareholder[26]. By 2008 it was already carrying 49.8 million tonnes of oil per year, and in 2009 its capacity was successfully augmented, reaching a capacity of 59.8 million tonnes (Ministry of Energy and Natural Resources 2011b). The 1,768 km long pipeline (EIA 2011: 3) transports oil from the offshore Azeri-Chirag-Guneshli oil field[27] via Georgia to the Turkish port of Ceyhan for further export. It 'was designed initially to transport Azeri oil, but has enough capacity to also ship crude from other Caspian producers, especially Kazakhstan' (Perovic/Orttung 2009: 119). Although it was planned that the Kazakh Kashagan oil field[28] would supply the BTC with oil carried by tanker across

24 Other energy sources, such as coal, lignite, hydro, nuclear, solar and wind, are mentioned in Turkey's energy strategy (Ministry of Foreign Affairs 2011), but will not be covered in this paper.

25 A transit pipeline is defined as 'an oil or gas pipeline which crosses another "sovereign" territory to get its throughput to market [...]; for any transit pipeline to be built requires an agreement between the pipeline owner/operator and the government of the sovereign entity, which may be national or regional' (Stevens 2009: 1).

26 The eleven BTC Co. shareholders are: BP (United Kingdom): 30.1%, State Oil Company of Azerbaijan (SOCAR) (Azerbaijan): 25%, Chevron (USA): 8.9%, Statoil (Norway): 8.71%, Türkiye Petrolleri Anonim Ortaklığı (TPAO) (Turkey): 6.53%, Eni (Italy): 5%, Total (France): 5%, Itochu (Japan): 3.4%, Inpex (Japan): 2.5%, ConocoPhillips (USA): 2.5%, and Hess Corporation (USA): 2.36% (BP 2011a).

27 The Azeri-Chirag-Guneshli field is estimated to have between 0.7 and 1.2 billion tonnes of oil (IEA 2008: 8) and it is operated by the Azerbaijan International Operating Company (AIOC) with BP as the operative leader.

28 The Kashagan offshore oil field is believed to be the largest known oil field outside the Middle East and the fifth

the Caspian Sea, it has encountered some problems and the production start-up has been postponed to October 2013. Nevertheless, once this field is operational, it will have a projected production of 18.4 to 22.4 million tonnes of oil per year in phase 1, with peak production of 74.7 million tonnes of oil per year in phase 2, planned for 2019.

The US had a particular interest in backing and promoting the construction of this so-called Turkish route against others, such as the Iranian or the Russian, to transport Caspian oil to Europe (Peimani 2001: 2). The main reason for this is that the BTC corridor is the first major oil pipeline in this region that circumvents Russia. Turkey as well as the Caucasian states, Azerbaijan and Georgia, shared this interest and therefore participated in the project. Turkey moreover supported this pipeline because it bypasses the transportation of oil through the Bosporus Strait. In this respect, Kramer (2000: 107) assures that Ankara played the card of the Turkish Straits to promote this pipeline against the increase in the traffic of oil tankers from the Russian port of Novorossiisk or from Georgia's port of Supsa. Turkish leaders stated the possible environmental and human risks associated with the transportation of oil through the straits because of their location near the densely populated city of Istanbul (although the Montreux Convention of 1936 stipulates that Turkey should allow free passage through the straits to anyone during peace). Moreover, Turkey

> will collect USD 140 to 200 million in the first 16 years of the Project and USD 200 to 300 million in the 17th to 40th years period depending on the amount of transported oil, as 'transit fees and operations services payments' (Baku–Tbilisi–Ceyhan Project Directorate 2011).

Although the EU did not directly promote the construction of the BTC pipeline, the 'BTC oil pipeline [...] is a vital part of unlocking the energy riches of Central Asia and in diversifying the European oil supply routes' (Keppler (2007: 16). It plays nowadays a big role in the transportation of oil from the Caspian fields in Azerbaijan and Kazakhstan to Turkey and further to the world markets by tanker.

Baku–Tbilisi–Erzurum (BTE) Gas Pipeline

Since 2006 the BTE pipeline, also called South Caucasus gas pipeline, has been transporting natural gas from the Sangachal terminal in Baku (where the natural gas from the Shah Deniz field[29] is stored and processed) to Georgia, and since July 2007 further to Turkey. The 692 km long BTE that runs parallel to the BTC pipeline has been constructed by the South Caucasus Pipeline Company (SCPC)[30], which is an incorporated joint venture company made up of 7 international shareholders, and is operated by BP and Statoil, its largest shareholders (BP 2011c).

During the first quarter of 2011, the throughput of the BTE pipeline was 5.5 billion m^3 per year (BP 2011d) and there is the project to triple the gas volume exported through it to over 20 billion m^3 per year. This would follow the expansion of the BTE pipeline as part of the Shah Deniz Full Field Development project, which would involve the laying of new pipeline across Azerbaijan and the construction of two new compressor stations in Georgia. At the border between Georgia and Turkey, the pipeline is projected to link into other new pipelines to provide gas to Turkey and the EU (BP 2011c). Moreover, the pipeline can potentially be connected to Turkmen and Kazakh producers through the Trans-Caspian gas pipeline project.

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largest in the world in terms of reserves. It is located off the northern shore of the Caspian Sea near the city of Atyrau. The Agip Kazakhstan North Caspian Operating Company (Agip KCO) consortium was replaced in January 2009 by the North Caspian Operating Company (NCOC), which includes Kashagan and other fields in the area, such as Aktote, Kairan, and Kalamkas. The NCOC is led by Total, Eni, ExxonMobil, Shell, and KMG, each with a 16.8% share, ConocoPhillips with an 8.4% share, and Inpex at 7.6%. The recoverable reserves are estimated at 1.5 billion tonnes of oil (EIA 2010b: 3).

29 The Shah Deniz field, located offshore in the Caspian Sea near Baku, is estimated to contain 35 trillion m^3 of natural gas and has been the largest discovery of a natural gas since 1978. Phase 1 was completed in 2006 and phase 2 is expected to be completed in 2016 (EIA 2010a: 3–4).

30 The SCPC shareholders are: BP (technical operator—25.5%), Statoil (commercial operator—25.5%), Azerbaijan SCP Ltd. (10%), LUKOIL (10%), NICO (10%), Total (10%), and TPAO (9%) (BP 2011d).

Trans-Caspian Gas Pipeline
The Trans-Caspian pipeline is a proposed corridor for natural gas from Türkmenbaşy (Turkmenistan) to Baku (Azerbaijan), beneath the Caspian Sea. It may also include a connection between the Tengiz field in Kazakhstan to Turkmenistan. In Baku it would be linked to the BTE pipeline to carry the natural gas to Turkey in order to finally reach Europe through the projected Nabucco pipeline. If completed, it is expected to be nearly 2,400 km long and to have a capacity of up to 30 billion m^3 per year.

Nevertheless, there have been repeated setbacks mainly because of the dispute over the legal status of the Caspian Sea[31] and thus opposition of Russia and Iran to the construction of a submarine pipeline in the Caspian Sea (EIA 2011: 7). These countries, being circumvented by this pipeline project, see their interests endangered and therefore assert that there are environmental risks related to the construction of a submarine pipeline in the Caspian Sea. On the other hand, Turkey and the EU continue to advocate for the completion of this project since they would highly benefit from Turkmen and Kazakh natural gas supplies.

5.1.2 *The Middle Eastern Option*

Iraq–Turkey (Kirkuk–Ceyhan) Oil Pipeline
The Iraq–Turkey oil pipeline is Turkey's oldest pipeline. Since 1977 it has been carrying oil from Kirkuk in Northern Iraq to Ceyhan in Turkey (Ministry of Energy and Natural Resources 2011b). This 970 km long pipeline has a capacity of approximately 19.9 million tonnes of oil per year (Kramer 2010b: 25).

This pipeline's problem is that it has been regularly interrupted since the 1990s because of Iraq's internal political issues and Turkey's tensions with the PKK in its south-eastern provinces (Kramer 2010b: 25). Moreover, since the US invasion of Iraq in 2003, this country's oil infrastructure has come under more frequent attacks, forcing it to suspend the flow of oil on numerous occasions.

Iraq–Turkey Natural Gas Pipeline Project
The Iraq–Turkey natural gas pipeline is proposed to run parallel to the Kirkuk–Ceyhan oil pipeline (its length has not yet been specified) and to transport approximately 10 billion m^3 of gas per year from the north-eastern part of Iraq. The feasibility studies have been negotiated by TPAO, TEKFEN and BOTAS. The ultimate purpose of the project is first of all to transport Iraqi gas (Kurdish gas and/or gas from the Akkas field[32]) to Turkey and subsequently to Europe. This was decided with a Memorandum of Understanding signed on August 7, 2007 by the Ministry of Energy and Natural Resources of Turkey and the Iraqi Oil Minister (Ministry of Foreign Affairs 2009). Currently, there is still no determinate date for the beginning of construction of this gas pipeline.

Iran–Turkey Natural Gas Pipeline
Turkey is the only considerable importer of Iranian gas (Babali 2009), and Iran in turn is the second largest gas supplier to Turkey. In 1996, both countries signed a 25-year agreement to build natural gas pipelines. One has been completed from Tabriz (Iran) to Erzurum (Turkey) and started deliveries of gas in 2001 (Hill 2004: 233–234), with a capacity of 10 billion m^3 of natural gas per year (Kramer 2010b: 27).

But Turkey's energy relations with Iran are not as smooth as with other suppliers. According to Babali (2009), 'Iran often demands prices higher than those of alternative suppliers, and gas quality and quantity often fall below the terms agreed'. Moreover, Iranian supplies have been often disrupted because of disputes between the two countries or in winter when Iran's internal gas demand increases. Additionally, several explosions on the pipeline near the Iran–Turkey border have disrupted supplies temporarily in the past.

31 There is disagreement among the five littoral states of the Caspian Sea—Russia, Azerbaijan, Iran, Kazakhstan and Turkmenistan—over its legal status, mainly on whether it is a sea or a lake. The reason is that this would make a difference as to how its seabed, and thus its resources, would be distributed among these states.

32 The Akkas field in Iraq has been estimated to contain 60 billion m^3 of gas (Kramer 2010b: 26).

Persian Natural Gas Pipeline Project
The so-called Persian Pipeline is a natural gas pipeline project planned to carry Iranian gas from the South Pars field to Europe through Turkey. The first step was made in 2008, when Ankara and Tehran signed a Memorandum of Understanding to build the pipeline. The projected capacity of this 3,300 km long pipeline is 37–40 billion m^3 of natural gas per year.

This pipeline project would serve Turkey's interest of becoming an energy hub as well as a transit country for Iranian gas flowing to Europe, since it is also planned to possibly continue the pipeline until Greece and Italy. Nevertheless, some challenges, such as the economic sanctions imposed on Iran by the US, are still to be overcome before 2014, the expected date of starting the construction.

Arab Natural Gas Pipeline
The 1,200 km long Arab natural gas pipeline is supposed to deliver 10.3 billion m^3 of natural gas per year from Egypt to Jordan and Syria (Kramer 2010b: 28–29), and according to the agreement with Turkey, it should reach Turkish customers by 2011. According to BOTAS (2008), a Framework Agreement was signed by Turkey and Egypt in 2004 stating that Egypt would export through a still-to-be-constructed pipeline 2–4 billion m^3 of natural gas to Turkey and 2–6 billion m^3 to European markets through Turkey. Later on, a Memorandum of Understanding was signed in 2006 to continue cooperation and collaboration on this pipeline project and feasibility studies have been conducted. Nevertheless, as Kramer (2010b: 29) asserts, the actual capacity of this pipeline is much lower, since only about 1 billion m^3 per year flow through this pipeline to Syria.

5.1.3 The Russian Option

Blue Stream I and II Natural Gas Pipelines
The Blue Stream I sub-sea pipeline was constructed to deliver gas from Stavropol Krai in Russia, under the Black Sea, to the Durusu terminal in Turkey. With a length of 1,213 km, its full capacity is 16 billion m^3 of Russian gas per year. This pipeline, whose partners are Gazprom, Eni and BOTAS, represents a crucial source of gas to Turkey since it delivers around 31% of its energy demand. Moreover, according to Bacik and Aras (2004: 346), the Blue Stream project has from the very beginning had more important concerns than merely economic ones. For Turkey, political events in the Caucasus including the Chechen war and the Nagorno-Karabakh and Georgian–Abkhazian conflicts play a significant role in the decision of energy routes and it therefore has sought to avoid the passage of the much-desired energy resources through these territories. Thus, the direct link between Russia and Turkey through the Black Sea seems as a strategic option for Turkey to obtain its required natural gas from Russia with the least possible dangers and uncertainties. However, although it has been operational since 2003, there has already been a price dispute (which delayed the official inauguration ceremony to 2005) between both countries. This is a strong sign of the fragility of this pipeline option.

Recently, Russia and Turkey have discussed a potential Blue Stream II pipeline, which would be an extension of Blue Stream I to connect Russia with Hungary, from where gas would flow to Slovenia, Croatia and Italy. Nevertheless, Moscow decided to shelve this project.

> Having failed, after much lobbying, to persuade Ankara to endorse a plan to lay a second thread under the Black Sea to raise the annual capacity of the original Blue Stream pipeline from 16 to 30 [billion m^3], last summer Moscow has unveiled the alternative 'South Stream' gas pipeline project (Torbakov 2007: 8).

Therefore, no concrete agreement on the length, costs, capacity or date of start of operation of the Blue Stream II pipeline exists yet.

South Stream Natural Gas Pipeline Project
The South Stream gas pipeline attempts to connect Russia with Europe's consumers by shipping Russian natural gas to Bulgaria through Turkey's exclusive economic zone in the Black Sea. This pipeline project, led by Gazprom and Eni, is proposed to have a capacity of 60 billion m^3 of gas per year (Coşkun/Carlson 2010: 215). Moreover, it is expected to cost between 19 and 25 billion Euros (Sidar/Winrow 2011:

55) and 'will not commence operating until at least 2015' (DeLay 2011a: 6). Recently, the consortium was joined by OMV (which is also a partner in the Nabucco gas pipeline project), Slovenia, Croatia and EdF from France (Coşkun/Carlson 2010: 215).

It is the big competitor of the Nabucco pipeline project advanced by the EU. Russia argues that it supports this pipeline project in order to avoid the recurring gas disputes with Ukraine—since nowadays around 80% of the gas that Russia exports to European customers passes through Ukrainian territory—and, together with the Nord Stream Pipeline through the Baltic Sea to Germany, as part of its pipeline diversification strategy in order to avoid transit bottlenecks in Ukraine (Baev 2010: 14–15). However, according to Locatelli (2010: 967), the South Stream pipeline project has been set up by Russia in order to compete with Nabucco for the route of gas transport from the Caspian Basin to Europe. Although 'Gazprom says its project is more viable than Nabucco', many analysts point to the problems that South Stream faces such as the high costs (Garakanidze 2011: 4).

Although it competes directly with the Ankara-backed Nabucco project, 'Turkey and Russia signed a deal promising Turkish support for South Stream' in 2009 (Today's Zaman 2009) and in December 2011 Turkey's energy minister, Taner Yildiz sent Vladimir Putin a note confirming its permission to Russia to build the South Stream pipeline through Turkey's exclusive economic zone (Kononczuk et al 2012). 'Moscow managed to secure Turkish consent for this construction by offering it additional volumes of gas through the extra trunk of the Blue Stream pipeline' (Baev 2010: 19). Moreover, Ankara has recently authorized the Russian gas monopoly, Gazprom, 'to conduct offshore research in the Black Sea along the projected route of the South Stream pipeline' (Garakanidze 2011: 4).

The exact route of this pipeline project and its future development are still unknown since it is yet in the planning phase and the final investment decision is presumed to take place in late 2012 and construction is expected to commence in 2013 (Sidar/Winrow 2011: 55).

5.1.4 Pipelines from Turkey to Europe

Nabucco Gas Pipeline Project

The ambitious Nabucco project is the proposal to build a 3,300 km long natural gas pipeline from Turkey through the Balkans to Austria. This project is supported by the Turkish BOTAS, the Bulgarian Bulgargaz, the Austrian OMV, the Hungarian MOL, the Romanian Transgaz, and the German utility RWE (Coşkun/Carlson 2010: 215). It is planned that close to 2,000 km will run through Turkey, taking initially Caspian gas (mainly from Shah Deniz 2 in Azerbaijan) and then possibly from Turkmenistan, Iran, Iraq and Egypt, to Bulgaria, Romania and Hungary ending in the Baumgarten gas hub in Austria.

The Nabucco pipeline project is supported by the EU since it is seen as the element missing to complete the project of a Southern Energy Corridor, which includes the BTC and the BTE, and as a way of diversifying the sources and routes of gas supply away from Russia. With its projected capacity of up to 31 billion m^3 per year, it will be the main pipeline to achieve Europe's energy independence goal. Turkey's interest in Nabucco is closely related to that of the EU's, since Turkey desires to position itself as an indispensable transit country. This furthermore represents the main element in Ankara's aim of becoming an energy hub for natural gas flowing from the Middle East and the Caspian Sea basin to Europe.

Nevertheless, the realization of this pipeline project has been faced with serious challenges. One of them is that 'the objectives for the project have continued to shift, forcing the consortium to re-set its timetable repeatedly and to adjust its strategy accordingly' (DeLay 2011b: 7). Thus, the construction start-up date has been once again pushed from 2011 to 2013 and it is expected to start pumping gas in 2018. Regarding the costs, according to recent reports,

> the initial estimated project cost of 7.9 billion euros [...] is no longer realistic. Observers now anticipate that the pipeline, including the planned feeder line to the northern Iraqi border, will cost around 12–15 billion euros (DeLay 2011b: 7).

Long-term political commitments have also been missing. And although on June 9, 2011 the Project Support Agreements have been signed between Nabucco Gas Pipeline International GmbH and the responsible ministries of the five transit countries—Austria, Bulgaria, Hungary, Romania and Turkey (Pipelines International 2011b)—, '[t]he big problem for Nabucco has been its inability to secure long-term agreements for supplies from Azerbaijan, Iraq—and preferably in the long run—Turkmenistan' (DeLay 2011b: 8). And there are still many doubts about the reliability of this project as well as its capacity to transport the required gas to meet European demand. According to Locatelli (2010: 965),

> the construction of additional gas pipelines must be envisaged to make this project credible, in particular the Transcaspian under the Caspian Sea, which would carry gas from Turkmenistan as far as the South Caucasus Pipeline [BTE].

There are further economic risks that should be taken into account, such as the actual volume of the gas reserves in the countries bordering the Caspian (Azerbaijan, Turkmenistan and Kazakhstan) and their capability to start production. These countries do not have the necessary gas reserves to supply the Nabucco pipeline on their own (see Table 2 in Annex); therefore, any disruption in one of these countries could have an enormous impact on the pipeline supply as a whole. Kramer (2010b: 21) also asserts that Nabucco lacks a fundamental requirement for its realization, namely a binding engagement of the parties that will finance its construction (like the European Investment Bank and the European Bank for Reconstruction and Development), as well as the contracts for the supply and consumption of the natural gas.

Regarding Azerbaijan, its Shah Deniz 2 field, with a projected production of 16 billion m^3 per year for the year 2017, is supposed to provide natural gas to the European market through the Nabucco pipeline. Nevertheless, only 10 billion m^3 of gas per year of this field might be available for Nabucco since 6 billion m^3 per year have already been promised to Turkey and it will not come on-stream until 2017 (DeLay 2011b: 7). Moreover, the consortium developing Shah Deniz 2 is also weighing other pipeline options besides Nabucco, such as the Interconnector Turkey–Greece–Italy, the Trans-Adriatic pipeline and the South-East Europe pipeline proposed by BP (DeLay 2011c: 8). In this respect, SOCAR's president, Rovnag Abdullayev, said in November 2011 that 'the Shah Deniz consortium would decide within a year on which route to choose for the export of gas to Europe.' (Coe 2011: 4) Additionally, Russia and Iran are also interested in the resources of Shah Deniz 2. Therefore, since there are still no concluded agreements regarding the destination of this gas there can be no investment agreements and thus the production of gas cannot begin either (Kramer 2010b: 20). Even if these 10 billion m^3 per year from Shah Deniz 2 are secured, the question is left as to the origin of the remaining 21 billion m^3 (Ferguson 2011b: 6). In this respect, although the 'Nabucco Gas Pipeline (NGP) consortium has said it will not seek throughput from Iran under current political conditions and that it views Azerbaijan and Iraq as its initial sources of natural gas', Turkish Energy Minister Taner Yildiz has recently 'said that his country was mulling plans to seek gas from Iran as well as Iraq and Turkmenistan' (DeLay 2011d: 8).

Regarding gas from Kazakhstan and Turkmenistan for Nabucco, Locatelli (2010: 966) points out, that the serious legal and fiscal instability which still exists in these countries that could result in delays in the start of production of their fields. Furthermore, there is the uncertainty about the availability of Turkmen gas since there are still obstacles to the construction of the Trans-Caspian gas pipeline mainly because of the dispute over the legal status of the Caspian Sea. Turkmenistan has also fixed contracts with China and Russia to deliver certain amounts of gas, which makes it more difficult to believe that it will have any sizeable quantity of gas left for the Nabucco pipeline (Locatelli 2010: 968). Moreover, according to Garakanidze (2011: 4) '[t]here is little chance that Turkmenistani gas can be transported across the Caspian Sea to Azerbaijan for loading into a pipeline to Turkey in the near future'. Regarding Kazakhstan, its officials have asserted that it will join the Trans-Caspian gas pipeline 'only if Turkmenistan provides gas first and if the EU covers the cost of construction' (Sigov 2011: 5). Thus, the uncertainty regarding the gas reserves and the capability to start production in the near future, together with the possibility that the Central Asian states can export their gas to other markets (like Russia, India, China or Pakistan), are nowadays the biggest impediments to the Nabucco project.

The Nabucco gas pipeline project is the core of Turkey's aspiration to become a key transit country for the redistribution of Caspian gas to Europe. It is furthermore, a central piece of the Southern Energy Corridor that the EU promotes to secure its natural gas supply. However, there are some problems and challenges within this pipeline project that may hinder its realization. It thus remains to be seen how the negotiations will develop in the future.

Interconnector Turkey–Greece–Italy (ITGI) Gas Pipeline Project

The ITGI gas pipeline project, led by the Italian Edison, the Greek DEPA and the Turkish BOTAS, is an extension beneath the Adriatic Sea from Greece to Italy of the Interconnector Turkey–Greece (ITG). This pipeline, whose construction is projected to start in 2012, will be 590 km long in its onshore part in Greece, and 210 km long in its offshore segment (Pipelines International 2011a). The Interconnector Turkey–Greece has already been receiving 750 million m^3 of gas per year from the Shah Deniz 1 field via the BTE pipeline since 2007. When the expansion of this pipeline to Italy is completed (expected in 2015), 11 billion m^3 of gas per year should be flowing through the ITGI (Kramer 2010b: 19), with approximately 3 billion m^3 per year for Greece and 8 billion m^3 per year for Italy. Moreover, gas supplies to Italy are projected to increase to 15 billion m^3 per year (Coşkun/Carlson 2010: 215).

Together with the Nabucco natural gas pipeline, the ITGI is supposed to be part of the 'fourth gas corridor' promoted by the EU. Turkey has also a big interest in the realization of this project since it will confirm Turkey's key role as a transit corridor for gas flowing to Europe.

Anatolian Transit Gas Pipeline Project (TANAP)

In October 2011 Turkey and Azerbaijan signed a number of agreements regarding prices, supply volumes and transit of gas which Azerbaijan exports to Turkey. It was also agreed that 10 billion m^3 of Azeri gas would transit Turkey annually and reach the borders of Greece and Bulgaria but there was no specification of the transit pipeline to be used for this end (Jarosiewicz 2011). Later, in November 2011 the Azeri state oil company SOCAR and its Turkish counterpart BOTAS announced that they will form a consortium to build a pipeline that will carry natural gas from Azerbaijan across Turkey to Europe. The route of this pipeline has not yet been specified, but is expected to have a minimum capacity of 16 billion m^3 of gas per year, which is the volume of gas expected to be produced in Shah Deniz 2 (from these, 6 billion m^3 have already been promised to Turkey and the rest will be transported further to Europe using either the Nabucco pipeline, the ITGI, the Trans Adriatic pipeline or BP's proposed South-East Europe pipeline) (Coe 2011: 3).

This pipeline project will represent a serious challenge to the Nabucco pipeline project since it will cross Turkey from east to west (as the Nabucco route does). And some analysts regard it as a fifth option to the Shah Deniz 2 gas if it is completed by 2017 as planned. It has been furthermore speculated that BOTAS and SOCAR's plan is a preliminary step to BP's pipeline project to transport gas from Turkey to Europe. If this turns out to be the case, the Nabucco project would lose all support.

5.1.5 Internal Turkish Pipelines

Trans-Anatolian (Samsun–Ceyhan) Oil Pipeline Project

The Trans-Anatolian oil pipeline is being constructed and will be operated by the Trans-Anatolian Pipeline Company (TAPCO), composed of the Italian Eni, the Turkish Çalık Enerji and the Russian Rosneft and Transneft. When finished (presumably in 2012), this 550 km pipeline will stretch across Turkish territory from the Black Sea (Samsun) to the Mediterranean Sea (Ceyhan) and will carry Russian and Kazakh crude oil (Heinrich 2011: 19). Its maximum designed capacity is 74.7 million tonnes of oil per year, but the envisioned capacity is 49.8 million tonnes per year.

It is clear why Turkey supports the so-called Samsun–Ceyhan pipeline project. It is part of Ankara's strategy of decreasing the amount of oil passing through the Bosporus and the Dardanelles Straits since, according to some calculations, this pipeline would reduce oil tanker traffic in the Bosporus by up to 50% (EIA 2011: 3), and therefore increase Turkey's transit revenues. It furthermore serves the objective of transforming Turkey into an energy hub, by transporting Caspian and Russian oil through Turkey to the Mediterranean Sea and thus providing the opportunity to re-export this hydrocarbon to the world markets.

5.2 Turkey's Energy Strategy

According to Babali (2009), '[e]nergy dominates Turkish strategic thinking' and it is therefore crucial to analyse its energy strategy in order to find out if it is used by Ankara to attain its foreign policy aims. In order to understand the energy strategy of the Republic of Turkey, it is first of all important to take into account the geographic position of this country described in the previous chapter. It lies between two of the world's biggest deposits of oil and natural gas—the Caspian Basin and the Middle East- and one of the biggest oil and gas consumer regions of the world—Europe, thus rendering it a status of transit country for these energy resources. Turkey itself is a big energy consumer, with a projected demand growth in the energy sector of 6–8% per year. The fossil fuels like oil and natural gas will continue to play a big role in this energy mix, while the interest in alternative sources of energy increases only slowly (Kramer 2010b: 14). Turkey has traditionally depended on the petroleum of the Middle East and the gas of Russia, but desires to reduce this dependence on these supplies. It has therefore been increasingly looking at the oil and gas reserves of the Caspian Sea (mainly from Azerbaijan and Kazakhstan) as sources of energy supply. Thus, one of the key imperatives of Turkey's energy strategy is to secure long-term supplies of energy resources for internal consumption and to diversify the sources of supply to reduce import dependency (Kramer 2010b: 14). As can be observed, Turkey's energy strategy revolves around three main pillars: to ensure diversified, reliable, and cost-effective energy supplies for domestic consumption, to liberalize its energy market, and to become a key transit country for oil and gas flowing to Europe and ultimately an energy hub (Babali 2009).

Turkey is an important transit corridor for oil and natural gas from Russia, the Middle East and the Caspian Basin that are transported to Europe either through its straits between the Black and the Mediterranean Seas or through its landmass. As its official Energy Strategy (Ministry of Foreign Affairs 2011: 3) states, the Turkish Straits (Bosporus and Dardanelles) are of particular importance, since around 3.7% of the world's daily oil consumption is shipped through them and this amount is projected to increase in the next years. Nevertheless, Ankara asserts that this passage is a very risky and dangerous because of the large amount of tanker traffic, the materials being transported and the physical characteristics of these straits located close to populated areas, as well as because the amount of oil that can be transported is limited. Moreover, the passage of oil tankers

> through the Bosporus Strait does not generate any revenue for Turkey as, according to the 1936 Montreux Convention on international navigation rights, it cannot receive transit fees from ships (Peimani 2001: 53).

Therefore, Ankara cannot utilize this passage for its goal of becoming an energy hub. Thus, in order to reduce the risk of a humanitarian and environmental catastrophe—and to gain economically through the charging of transit fees –, Turkey supports in its energy strategy the construction of alternative pipelines for oil and natural gas across its country in order to bypass the straits.[33] This endows it moreover with geopolitical power.

Another aim of Turkey in terms of energy strategy, and that is closely connected to its foreign policy aim of becoming a regional power, has been summarized by the Turkish Ministry of Energy and Natural Resources (2009: 10) in its Strategic Plan 2010–2014: 'to make [Turkey] the leader of its region in energy and natural resources'. Moreover, as stated in its energy strategy released in January 2011, '[t]he primary aim of Turkey is to realize its own energy security, and then the second objective is to contribute to Europe's energy security' (Ministry of Foreign Affairs 2011: 1), thus becoming an energy hub and

33 As a measure to avoid the risky passage of the increasing tanker traffic per day through the Bosporus Strait, in April 2011 the Turkish Prime Minister Erdoğan announced a plan to construct a canal that crosses Turkish territory. The construction of this 45–50 km long canal is claimed to be 10 billion US dollars (Ferguson 2011a: 3).

an energy corridor[34]. In this sense, according to the Ministry of Foreign Affairs of the Republic of Turkey (2009: 6), 'Turkey's objective is to become Europe's fourth main artery of energy supply following Norway, Russia and Algeria', which 'will open a new avenue for cooperation between Turkey and the EU'.

Thus, pipelines through which oil and gas flow to and through Turkey are the crucial elements in Ankara's energy strategy. In this regard, Turkey has achieved to gain revenues from transportation tariffs and regional influence through the control of transportation routes (Hill 2004: 213). For instance, the shortest route for Caspian oil to Europe is

> overland through the Caucasus by pipeline or rail, by tanker across the Black Sea, and from there to the Mediterranean. On the Black Sea, the Russian ports of Novorossiisk and Tuapse and the Georgian ports of Batumi and Poti are the main existing and potential termini for oil pipelines or rail tankers from the Caspian [...]. Turkey, however, [...] offers an overland route from the Black Sea to the eastern Mediterranean, with alternative overland routes to the Aegean and the Adriatic across the Balkans (Hill 2004: 215).

The major pipeline projects (realized and proposed) are the tools which will help to 'enhance Turkey's role as an important and reliable transit country on the East–West as well as North–South energy axis' (Ministry of Foreign Affairs 2011: 1). In this context, a central element of the East–West Energy Corridor, also called the Silk Road of the 21st Century, is the BTC oil pipeline, which can transport up to 59.7 million tonnes per year (Ministry of Foreign Affairs 2011) while bypassing the Turkish straits. It has been quite successful because it has managed to expand its oil sources to include also Kazakhstani ones. In addition to this pipeline, Turkey supports the Trans-Anatolian (Samsun–Ceyhan) oil pipeline, which is also meant to bypass the Bosporus and Dardanelles Straits by transporting oil from the Turkish Black Sea coast to the Mediterranean coast. With respect to oil from the Middle East, Turkey continues to count on its oldest oil pipeline, namely the Iraq–Turkey oil pipeline, despite the constant sabotage activities that it has suffered on Iraqi territory.

Regarding natural gas pipelines, the BTE pipeline is at the core of Turkey's energy strategy and carries gas from Azerbaijan to Turkey's city of Erzurum. According to the Turkish Ministry of Foreign Affairs (2009: 4), this pipeline is the first leg of the Trans-Caspian Natural Gas Pipeline Project, which is projected to receive this hydrocarbon from Kazakhstan and Turkmenistan. The particular interest of not only Turkey but also EU members in this project is that it represents an alternative supply source and route for the energy needs of these countries. The main natural gas pipelines from the Middle East mentioned in Turkey's official energy strategy are the Arab Natural Gas Pipeline, carrying gas from Egypt to Turkey and beyond, the Iraq–Turkey natural gas pipeline, projected to carry oil from Iraq to Turkey alongside the existing Kirkuk–Ceyhan oil pipeline, and the Persian natural gas pipeline (Ministry of Foreign Affairs 2009: 5).

Moreover, according to Kramer (2010b: 5) since the mid-1990s Turkey's government has made efforts to establish its country as an important player in the European energy policy. Turkey is thus projected to develop as an energy hub and a central energy corridor for oil and natural gas flowing from the energy-rich regions of the Caspian, the Middle East and Russia to Europe, the so-called 'fourth gas corridor'. In this respect, it is important to point out the Southern Europe Gas Ring Project as a crucial part of Turkey's energy strategy because it will interconnect the pipeline networks of Turkey, Greece and Italy (Ministry of Foreign Affairs 2009: 4). Here, the Turkey–Greece Interconnector is the basis for the future expansion of this pipeline network to the ITGI, which will transport Caspian and Middle Eastern gas to Europe via Turkey, contributing thus 'to the EU's energy supply security and [to the] EU's goal [of diversifying] both energy sources and routes' (Ministry of Foreign Affairs 2011). In the context of this corridor, probably the most controversial natural gas pipeline project is the Nabucco gas pipeline, which aims to transport Caspian natural gas via Turkey to Romania, Bulgaria, Hungary and Austria. As stated

34 An energy corridor, contrary to an energy hub, is a country that basically provides transit services for energy resources and charges a fee for this, but it does not participate in the decisions regarding delivery conditions and demand provisions (Kramer 2010b: 8).

in its energy strategy (Ministry of Foreign Affairs 2009: 5), Turkey supports this project because it is situated in the centre of it and thus places it in a privileged position in its relations with the EU to negotiate other matters in its favour. Nevertheless, this project has encountered some obstacles which were mentioned above. Given these challenges, Turkey has also given its support to the direct competitor of the Nabucco project, namely the South Stream natural gas pipeline proposed by Russia, complicating the situation even more due to the indeterminacy of which pipeline project will prevail in the end. Moreover, in November 2011 Turkey has announced its support to the TANAP gas pipeline project, which is also regarded as a competitor to the Nabucco gas pipeline as well as to the ITGI.

In sum, Turkey has two noteworthy goals in its energy strategy: to reduce its dependence on energy imports of a single supplier (such as Russia for natural gas) and to turn the country into a transit corridor and an energy hub, primarily through the construction of pipelines linking hydrocarbon reserves in the countries bordering Turkey with the consumers in Europe and through the modernization of the Ceyhan port in the Mediterranean. Through the completion of the pipeline projects cited in its energy strategy (Ministry of Foreign Affairs 2011: 4), Turkey anticipates that '6 to 7% of global oil supply will transit Turkey and that Ceyhan will become a major energy hub and the largest oil outlet terminal in the Eastern Mediterranean'.

As can be observed, the Turkish port of Ceyhan is increasingly playing an important role in Turkey's strategy of becoming an energy hub because of the high quantities of oil that are transported to this point and re-exported from here (Kramer 2010b: 18). With its strategy, Ankara stresses

> the importance for the West of having a terminal for Caspian oil in a NATO country such as Turkey. Therefore, the Turkish proposals for the transportation of Caspian Sea oil involve tankers departing from Georgian ports, off-loading at Turkish Black Sea ports in order to then be transported via pipeline across Turkey or through pipelines that extend directly from Azerbaijan and go through Georgia and Turkey, terminating in Ceyhan (Hill 2004: 217).

This port is thus an important outlet for Caspian oil exports (through the BTC pipeline) and Iraqi oil shipments from Kirkuk (EIA 2011: 4), and it is a fundamental element of the Samsun–Ceyhan pipeline project. Additionally, Ceyhan is accessible even for the biggest tankers and Turkey is seeking to build several refineries in this port in order to add revenue beyond transit fees and to export the processed oil. As has been stated by the Turkish Ministry for Energy and Natural Resources (2011b), the Samsun–Ceyhan oil pipeline will serve both objectives of reducing 'environmental risks associated with the tanker traffic through [the] straits, and [...] making Ceyhan an energy center' by receiving crude oil from Baku, Samsun and Kirkuk. Moreover, regarding natural gas, Ankara has the goal of converting Turkey into 'a natural gas trade hub in the medium- and long run' (Republic of Turkey Ministry for Energy and Natural Resources (2011a).

6 Assessment of the Link Between Turkey's Energy and Foreign Policies

This chapter analyses if and to what extent Turkey uses its position as a transit country for hydrocarbons as a tool to achieve its foreign policy aims and if these aims also reciprocally influence its energy choices. In order to achieve this, Turkey's energy strategy will first be situated in the geopolitical context of the regional energy dynamics. In a second step, the implementation of this strategy will be assessed to discover what was achieved and what could not materialize. It is through this analysis that an answer to the research question presented in the Introduction is given, thus assessing the consistency of Turkey's energy strategy with its main foreign policy aims as well as the use that Turkey makes of its energy strategy and pipeline options to achieve its foreign policy goals vis-à-vis its neighbours. Moreover, an analysis of the short and long term sustainability of Turkey's energy strategy will be provided, as well as of the challenges that Turkey faces in reaching its aims.

6.1 Energy Strategy in the Geopolitical Context of the Regional Energy Dynamics

In geopolitical terms, Turkey is a country that is not confined to a specific region or regional complex. It is in fact located between different regions (Europe, Russia, the South Caucasus, Central Asia and the Middle East) and has thus political and economic relations with all of them. As was indicated in previous chapters, geopolitics is playing an increasingly central role in Turkey's energy and foreign policies since it has sought to take advantage of its geostrategic location to position itself as a regional power that interacts with the countries in the neighbouring regions.

Given the contemporary energy landscape, where consumers and producers of oil and natural gas are interdependent, transit countries like Turkey can gain economic and political leverage from its geostrategic position in these energy dynamics. This situation is reflected in Turkey's energy strategy, where Ankara is directly aiming to become the main transit country for Caspian and Middle Eastern energy resources that Europe imports, gaining not only economic profits from the transit fees and the pipeline construction, but also political leverage in its relations with both producers and consumers. It moreover strives to play a central role in the regional energy dynamics by becoming a regional energy hub. This second part of Turkey's energy strategy is, according to Coşkun and Carlson (2010: 214) 'not so much an energy issue as it is a geopolitical issue'.

6.2 Implementation of the Energy Strategy

Having presented Turkey's official energy strategy, it is important to analyse which of its elements and goals have been achieved in practice and which ones not and why. The implementation of an energy strategy clearly does not depend solely on Ankara's political will. There are a number of other factors and actors that should be taken into account to understand what opportunities and challenges Turkey faces.

As was stated before, Turkey's energy strategy can be summarized as aiming to ensure diversified, reliable, and cost-effective energy supplies for domestic consumption, to liberalize its energy market, and to become a key transit country for oil and gas flowing to Europe, and ultimately an energy hub (Babali 2009). These goals can thus be divided into internal and external. In order to analyse their success, it is necessary to look at the pipelines supported by Turkey that have materialized. Moreover, the reasons for the failure of other pipeline options will also be discussed.

Regarding the internal goals, Turkey officially supports the construction of oil and gas pipelines from the Middle East and the Caspian to its territory in order to fulfil its goal of covering its domestic consumption of these resources. Two important oil and gas pipelines, BTC and BTE respectively, have been constructed in the last decades to transport Caspian oil and gas to Turkey. Moreover, Turkey has received, since the 1970s, oil from Iraq (Kirkuk–Ceyhan pipeline) and gas from Iran (Tabriz–Erzurum pipeline). And it is currently negotiating projects to construct gas pipelines from Iraq, Iran (Persian natural gas pipeline) and from Egypt (Arab natural gas pipeline). Although Turkey has the aim of diversifying its gas sources away from Russia, an important pipeline that delivers Russian gas to Turkey exists (Blue Stream), there is a potential project (Blue Stream II) that might increase this dependence if developed. When looking at Ankara's goal of diverting the passage of oil through the Bosporus and Dardanelles Straits, it can be said that Turkey has been successful in promoting the construction of the Trans-Anatolian oil pipeline from Samsun to Ceyhan, which is projected to be operational in 2012. Thus, concerning Turkey's internal energy strategy goals, it can be observed that it has been quite successful in diversifying its sources of oil and gas supply and in receiving the necessary resources for its domestic consumption from the Middle East, Russia and the Caspian region, while at the same time diverting the passage of oil through its straits.

Coming to the external goals of Turkey's energy strategy, there are a series of pipelines that Turkey promotes in order to achieve its goal of being the main transit country for gas flowing to Europe. In this regard, the BTC and BTE pipelines have not only served the purpose of attending Turkish domestic oil and gas demand, but are also part of a wider project destined to connect the Caspian producer countries with the consumers in the West. In this strategy of bypassing Russian routes, Turkey plays a successful role as a key transit country. Moreover, Turkey's official energy strategy supports the construction of three other prominent gas pipelines to increase the connection between producers and consumers while performing the role of transit country for them: the Trans-Caspian (projected to run beneath the Caspian Sea from Turkmenistan to Azerbaijan and further to Turkey), the ITGI (projected to run from Turkey to Italy), Nabucco (projected to run from Turkey to Austria) and TANAP (projected to run from Azerbaijan through Turkey to finally reach Europe). While the ITGI is widely supported by the countries involved, the materialization of the Nabucco and Trans-Caspian pipeline projects has encountered some difficulties. For instance, the Trans-Caspian pipeline's major obstacles are the unresolved status of the Caspian Sea and the opposition of Russia and Iran to its construction. On the other hand, the obstacles that the Nabucco pipeline faces are the lack of long-term agreements from the gas suppliers as well as the uncertainty regarding the actual volume of their gas reserves and their production capability. It therefore remains to be seen if these pipeline projects will come into operation and contribute to Turkey's role as a transit corridor.

Faced with these difficulties, Turkey has recently expressed its support for the Russian-backed South Stream natural gas pipeline project. This apparent contradiction in Turkey's energy policy regarding the Nabucco and South Stream projects has been pointed out by Iseri and Dilek (2011: 48), since they argue that 'Turkey has actually been bidding on two different horses running in the very same race'. In this respect, Turkey's officials have repeatedly asserted that the natural gas deals with Russia 'will help make Turkey a regional energy hub but will not change its commitment to the Western-backed Nabucco pipeline project' (Today's Zaman 2009). Nevertheless, Turkey's decision entails serious consequences for Nabucco, which is supposed to deliver gas to the same consumers as the South Stream pipeline. While South Stream has already secured the supply of natural gas to be transported to Europe (from Russia), the Nabucco consortium is still confronted with many problems and uncertainty regarding the suppliers. Moreover, three of the Nabucco consortium members—Bulgargaz, OMV and MOL—also signed up to the South Stream project, jeopardizing the Nabucco project even more. If the construction of the South Stream pipeline would be launched before the Nabucco partners agreed on a final deal, it would make this pipeline redundant and unnecessary (Heinrich 2011: 20). On the other hand, it can also be argued that no matter which of these pipelines prevails, Turkey might be a winner in any case, since in both pipeline projects it will perform the role of transit country for energy resources to the EU.

As can be observed, the success of the different pipeline projects in which Turkey is involved is closely linked to its goal of becoming an energy hub. In order to achieve this aim, for which the Caspian option has been the starting point (Kramer 2010b: 17), Turkey is trying to build the necessary infrastructure in its Mediterranean port of Ceyhan. Currently two international pipelines carrying oil to the port of Ceyhan are operating, namely the BTC from the Caspian Sea and the Kirkuk–Ceyhan from the Middle East. And together with the Trans-Anatolian oil pipeline, which will carry by 2012 oil across Turkey, Ankara aims to be a step closer to its aim of transforming Ceyhan into an energy hub. Regarding gas,

> [w]ith the 2007 launch of Azerbaijani gas exports to Europe through the Turkey–Greece gas pipeline interconnector, Turkey has begun to realize its goal of becoming an energy bridge for gas supplies from the Caspian region to Europe (EIA 2011: 5).

Nevertheless, until now the only corridor for Caspian gas flowing through Turkey to Europe is the Interconnector Turkey–Greece. Therefore, one cannot yet speak of Turkey as being an energy hub or a crucial energy corridor for resources going to Europe. What can be observed is Turkey's aim and strategy of becoming such a hub and the decisions that it has taken in international negotiations regarding the pipeline options that lead to this goal. It remains to be seen how the most controversial pipeline project, namely Nabucco, will develop in order to see if Turkey realizes its aim of becoming an energy hub. All of this makes it clear that the success of Turkey's energy strategy depends not only on its own will and support, but also on that of other geopolitical dynamics and the strategic calculations of other regional actors.

6.3 Consistency of Turkey's Energy Strategy with its Main Foreign Policy Aims

As Kramer (2010b: 7–8) asserts, the energy supply of states does not depend solely on economic issues, but is a crucial topic of political and strategic considerations. The decisions in energy policy made by countries are to a large extent guided by geopolitical strategies. For instance, as Bacik and Aras (2004: 347) point out 'there is a new regional division line in the region, which is associated with energy projects'. And Turkey is not an exception in this trend. The link between energy and foreign policies is not an entirely new phenomenon in Turkey. According to Hill (2004: 211), since the early 1990s the main goals of Turkey's foreign policy in its region have been 'to secure new energy supplies, and to establish itself as the transit country for energy flows from the Caspian to consumer markets in Europe' and nowadays '[e]nergy issues are of critical importance to Turkey and are closely tied to its foreign policy' (Hill 2004: 211).

According to Bilgin (2009), different reasons—such as geopolitical, environmental, economic and security—have forced Turkey to adopt a 'neopolitical approach to increase its energy transit role on the one hand, diversify suppliers and resources on the other.' It follows that Turkey's foreign policy is also shaped along neopolitical lines, with new energy policies and initiatives in accord with the foreign political aims. Although the economic viability of the transit pipelines as well as the availability of sufficient reserves in the producing countries are important factors, for this study the crucial elements are the geopolitical and foreign affairs motivations that lead Turkey to choose to support some pipeline options above others.

There is much evidence pointing to the fact that a significant element determining Turkey's energy decisions is its foreign policy agenda. This has even been explicitly stated in its energy strategy. In this respect, Coşkun and Carlson (2010: 210) argue that Turkey's goal of becoming an energy hub 'is somewhat unusual in an energy strategy, as it is more a matter of foreign policy than domestic energy policy. However, it shows how the government is trying to use energy for political purposes' although it 'implements energy as a strategic foreign policy tool, yet with a retroactive characteristic mainly arising from past discrepancies' (Bilgin 2010: 113). This goal can ultimately be interpreted in geopolitical terms, being the roles of energy transit country and energy hub strategic instruments that Turkey uses to advance its foreign policy aims. In Turkey all projects with foreign participation in the oil or gas sectors are discussed taking into consideration what consequences they will have for its foreign policy interests and what effects they will have on its regional power status (Kramer 2010b: 14). Moreover, according to Kramer (2010b: 17), Turkey pursues a multidimensional approach to achieve its goal of becoming an energy hub. Therefore, once again the link between energy and foreign policy can be traced since, in line with Foreign Minister Davutoglu's 'zero conflicts with neighbours' foreign policy, Turkey maintains all possible transport options for energy resources open, ranging from the Caspian Basin region to the Middle East and Russia.

In this context, Turkey has been increasingly using its position as an energy corridor between east and west to promote its own interests. Ultimately, one of Turkey's main foreign policy goals, namely to become an active regional actor, is also pursued using the energy tool. Ankara has entered into numerous energy negotiations with some of its neighbours in Europe, the Middle East, the Caspian and Russia, consequently strengthening its political relations with them. For this aim, it has employed pipeline politics, thus favouring some pipeline projects that transit Turkish territory at the expense of others, depending on its political will and calculations.

However, not only is Turkey's energy policy guided by its foreign policy objectives. The influence of Turkey's energy policy can also be projected in its foreign policy. And although it is usually difficult to distinguish clearly which policy area influences the other, there are some distinct cases where Turkey has changed its foreign policy vis-à-vis a historical rival due to energy interests, such as in the case of Greece, and others where the historic foreign policy prevailed in spite of strong energy interests, such as in the case of Armenia.

In order to better understand how Turkey's energy policy is linked with its main foreign policy aims, a more detailed analysis of these findings will be presented for the following regions: the EU, the South Caucasus, Central Asia, the Middle East, and Russia. As will be shown there is interdependence among both the energy and the foreign policy spheres in Turkey.

6.3.1 The EU

Regarding Turkey's relations with Europe, it is important to observe an interesting issue manifested in Turkey's energy strategy, namely the link between energy and Ankara's foreign policy goal of joining the EU. In this regard, it has been officially stated that 'Turkey has also started talks with the EU on Turkey's membership to the Energy Community in September [2010]' (Ministry of Foreign Affairs 2011: 4). It is believed in Ankara that the opening of the energy chapter will 'pave the way for the success in negotiations with the EU on Turkey's membership to the Energy Community' (Ministry of Foreign Affairs 2011: 4).

In this line of thought, given that crucial oil and gas pipelines for the European consumers pass, or are planned to pass, through Turkey, Ankara attempts to gain political leverage vis-à-vis its European partners in other bilateral issues. Turkey's energy strategy attaches special importance to ensuring that the natural gas that flows to Europe passes through Turkey and it hence supports the ITGI, the Nabucco and the TANAP gas pipeline projects. These are considered to play a crucial role in Turkey's aim to gain political influence in Europe and in the region (Coşkun/Carlson 2010: 214). Since Ankara is aware of how important it is for the EU to open a 'fourth corridor' of natural gas supply that bypasses Russia, the Turkish government has expressed vehemently that it will condition its participation in the Nabucco project to the progress of the energy chapter in the EU accession talks, thus using its energy transit role as a tool to push for its foreign policy aim of joining the EU. In this respect, Prime Minister Erdoğan said in 2009: '[i]f we are faced with a situation where the energy chapter is blocked, we would of course review our position [on Nabucco]' (Vucheva 2009).

Additionally, Turkey's foreign relations with the EU and with some of its member states are also influenced by energy calculations. For example, in Turkey's relation with Greece energy interests have prevailed over historical political discrepancies. It has been described how Turkey's relations with Greece have gone through tensions in the past decades due to the Cyprus issue. However, regardless of this there is energy cooperation between both countries, such as in the Interconnector Turkey–Greece and the Nabucco gas pipeline project. Therefore, the energy and foreign policy priorities of Turkey vis-à-vis Europe can be understood as favouring the overall goal of joining the EU and thus supporting energy projects that also involve Greece.

6.3.2 *The South Caucasus and Central Asia*

Although many historical and cultural issues are regarded as unifying elements between Turkey and the South Caucasus and Central Asia, the contemporary strategic importance of these regions for Ankara can be assessed mainly regarding energy issues. Buzan and Wæver (2003: 422) assert that '[t]he main prize in the geopolitics of Central Asia and the Caucasus is control of the transportation of oil and gas' and that

> [t]he struggle is basically about the politics and economics of competing pipeline projects to connect Caspian basin hydrocarbon resources to world markets, whether via Russia and the Black Sea, via the Caucasus and Turkey, via Iran, via Afghanistan, or via Kazakhstan to China.

Turkey is not the exception in this trend and '[i]t wants to participate in developing and marketing the large oil and gas resources located in the Caspian Sea region, mainly in Turkmenistan, Kazakhstan, and Azerbaijan' (Kramer 2000: 101). These three states see a greater value in Turkey as a transit corridor for their energy resources if they aim to by-pass Russian territory to reach global energy markets than the Middle Eastern countries do.[35] This key difference visibly affects Turkey's role and bargaining power in its relations with these countries, leaving it in a more powerful position vis-à-vis the Caspian ones. This is one issue that permits Turkey to use its geographic location to promote its energy strategy and thus its foreign policy goals in its relations with these countries.

Nevertheless, 'the South Caucasus has not yet become a priority in Turkish foreign policy' (Novikova 2011: 150), but it is gaining increasing importance due to the potential gains from the transport of Caspian energy resources to Turkey and further to Europe. Therefore, by

> [b]uilding up its relations with [Azerbaijan and Georgia], Turkey reaches its own strategic goal of transforming into a Caspian energy resources hub and enlarging energy transit to some European states. The same communications provide Turkey with direct access to the Central Asian states (Novikova 2011: 142).

Along with Turkey's policy of zero problems with its neighbours came a new energy discourse in which Azerbaijan was no longer seen as the most important energy partner, but as one among others like Russia, Turkmenistan, Iran, Iraq, Qatar and Egypt (Bilgin 2010: 118). However, the wide political and economic cooperation between Turkey and Azerbaijan cannot be ignored and this country is still one of Turkey's closest allies in the region.

> In regards to Turkish–Georgian relations, it could be mentioned that Turkey uses Georgian territory to transit Azerbaijani and Kazakh energy resources and to create a 'Turkic belt' that would serve as a transit corridor for Turkish goods to Azerbaijan and Central Asia. In addition, the strengthening of the Turkish position in Georgia balances the increased Russian influence in Armenia (Novikova 2011: 143).

On the other hand, the tense relations with Armenia have also been reproduced in Turkey's energy choices, since Ankara—following Azerbaijan's example—sought in the past decade to bypass Armenian territory in the oil and gas pipelines flowing from the Caspian Sea like the BTC and the BTE, which instead travel through Georgian territory. This decision has the economic disadvantage of making the pipelines' route longer. Nevertheless, historical factors and political calculations led Turkey to exclude Armenia from these projects (Peimani 2001: 78), and partly because of the priority that Azerbaijan enjoys in its relations with Ankara. As can be observed, Turkey's foreign relations with the countries in neighbouring regions, in this case Armenia, have a big impact in its energy decisions and projects. Ankara's decision to support the BTC route that bypasses Armenia represents a good example of an energy choice based upon foreign policy calculations, as well as of the use of energy as an instrument to promote its foreign policy aims.

35 The Middle Eastern producers such as Saudi Arabia, Iran and Kuwait have access to the world markets by sea, whereas the Caspian states are landlocked (Kramer 2010b: 10). Therefore, for the Middle Eastern countries, the export of their oil and gas through Turkey is a secondary option.

Following the analysis of the role played by oil and gas pipelines in advancing Turkey's foreign policy objectives, it is crucial to assess the Nabucco gas pipeline project. As has been stated before, this pipeline lacks some fundamental economic features to be realized such as the absence of a binding agreement on the financing of the pipeline and of contracts specifying the suppliers of the gas. But most prominent have been the political obstacles to the implementation of this project. For instance, Turkey's relations with Azerbaijan, including energy issues, overlap with the Nagorno-Karabakh conflict and Turkey's position on it (Kramer 2010b: 21). Baku has become uncertain about Turkey's unconditional partnership and loyalty with Azerbaijan after Ankara tried to normalize its relations with Armenia in October 2009. However, more recently Turkish Prime Minister Erdoğan publicly stated that

> straightening out Turkish–Armenian relations is not as important as settling the Nagorno-Karabakh dispute; without the settlement of this conflict, the normalization process between Armenia and Turkey is impossible (Today's Zaman 2011b).

It can therefore be observed how in Turkey's foreign policy, political and economic relations with Azerbaijan are more important than the ones with Armenia (although Azerbaijan still remains wary of the Turkish–Armenian relationship). Nevertheless, Turkey is playing a dangerous balancing act in the region because the closer it gets to Armenia, the more it will alienate Azerbaijan, thus losing a crucial provider of gas for the Nabucco pipeline.

6.3.3 *The Middle East*

The Middle East is a key region where the link between Turkey's foreign and energy policies can also be observed. Since the AKP has been in power, Turkey's relations with the Middle East have gained in quality (Kramer 2010b: 25), owing much of this change to the benefit that Turkey can gain from the energy negotiations with this region. The main countries in which Turkey is interested from the energy point of view are Iraq, Iran, Syria and Egypt, since it is with them that it has completed and on-going pipeline negotiations.

An example of this can be seen in the attempt of the Turkish government to improve its relations with the Iraqi central government as well as with the government of the Kurdish autonomous region in Northern Iraq, since Ankara aims to construct a gas pipeline from this region to Turkey, as well as to guarantee the safe passage of oil through the existing Kirkuk–Ceyhan pipeline. Given the instability in Iraq since 2003, Ankara has increasingly advocated its aim of security of supplies and of the transportation of oil and gas from this country to Turkish territory.

The relations with Iran since 2002 have been characterized by Turkish rhetoric about cultural affinity, with the aim of completing a series of energy agreements concerning the 'exploration and production of natural gas by Turkish companies in Iran, and transportation of Iranian natural gas to Europe via Turkey' (Bilgin/Bilgic 2011: 189). In this respect, Turkey desires to complement the existing Iran–Turkey natural gas pipeline with the Persian natural gas pipeline project, which is expected to connect Iran's South Pars gas field with Turkey, thus reinforcing the newly-founded friendly relationship between these countries.

The link between energy and foreign policy is also observed in Turkey's relations with Syria and Egypt. These countries are connected through the Arab natural gas pipeline, which was supposed to deliver by 2011 Egyptian gas to Turkey. The importance of this pipeline for Ankara lies not only in its capacity to supply Turkish internal demand but also in its potential to further supply the Nabucco gas pipeline to Europe. By improving its relations with all of these states, Turkey attempts to position itself as an important economic—and increasingly political—partner in the Middle East. Ankara's pipeline politics in the region can be seen as a tool to achieve this aim.

6.3.4 *Russia*

Finally, in Turkey's relations with Russia energy once again plays an important role. The analysis of the link between Turkey's energy and foreign policies towards Russia is twofold. On the one hand, some energy decisions have helped Turkey in its aim of perceiving Russia as an ally in Eurasia with whom it can cooperate in different political issues. In recent years, Turkey has changed its foreign policy stance towards Russia. With Turkey's 'strategic depth' doctrine, the relationship with Russia has concentrated on cooperating on key economic and political issues such as trade and the fight of terrorism and separatism. This situation goes hand in hand with the energy aspect. Turkey is highly dependent on Russian gas since it constitutes 64% of Turkish gas consumption (Bilgin 2011: 88). Moreover, Turkey is linked to Russia by way of the Blue Stream natural gas pipeline and both countries have cooperated in the Trans-Anatolian pipeline project and in the projected development of the Blue Stream II pipeline. Additionally, Ankara has recently asserted its permission for the Russian-backed South Stream pipeline project to pass through its exclusive economic zone. With these energy decisions, Turkey has strong incentives to maintain a cooperative energy relation with Russia in order to confirm its friendly political relations with this country.

On the other hand, Russia and Turkey are also competing for influence in the Caucasus and Central Asia. According to Bilgin and Bilgic (2011: 187), '[i]n foreign policy toward Russia, Gül [(2002–2003)] and his successor Recep Tayyip Erdoğan (2003–present) have pursued policies that advance the project of transforming Turkey into an energy hub.' It is also clear that Ankara's aim has been to diversify its sources of gas supply away from Russia, which has also been in accordance with the EU's energy strategy. In this regard it has expressed its commitment to different pipeline options from the Caspian Sea that bypass Russia, such as BTC and BTE, as well as other pipelines where Turkey acts as a transit corridor for gas flowing to Europe while bypassing Russian territory, namely the ITGI and Nabucco.

As can be observed, Turkey's foreign policy towards Russia is strongly linked to energy concerns. However, it is still not clear in which direction Ankara is tilting: towards closer energy and political cooperation with Russia, or away from it and closer to the energy and political projects of the West.

6.4 Short and Long Term Sustainability

It is well known that '[p]ipelines are an expensive means of fuel export, and they make sense only if they are used for large long-term exports' (Peimani 2001: 97). Therefore, it is interesting to make an analysis of the short and long term sustainability of Turkey's energy strategy in order to assess if it does contribute to the attainment of its foreign policy aims in the short and long terms.

In the short term, Turkey may profit from the dependence of other states on oil and natural gas since there is a strong interest on the part of the energy consumers to build pipelines—some of them crossing Turkish territory—to transport these resources. However, it is important to have in mind that the global reserves of oil, and to a lesser degree of natural gas, are decreasing steadily, and although new fields have been discovered in the past decades, there are still difficulties regarding their exploitation. Moreover, the EU is planning to increasingly support renewable energy sources, thus contributing to the projection that the major increase in energy demand in the future will not be in Europe, but in Asia. Since these global energy dynamics could have in the long term a negative impact on oil and gas pipeline projects supported by Turkey, some authors argue that Turkey's westward vision in terms of pipelines does not have a long-term sustainability.

Moreover, Winrow (2006) argues that there are still some challenges to Turkey's aim of becoming an energy hub. He asserts that it is still difficult for Caspian oil and natural gas to reach the EU through Turkey because of Russia's historical control over many transportation routes for these hydrocarbons. In terms of oil, it will all depend on the role played by Ceyhan as a port for oil to be re-exported to world markets. Therefore, the completion of the Samsun–Ceyhan pipeline is crucial, as well as the security situation in Iraq (Winrow 2006: 6). In terms of natural gas, a pipeline infrastructure is needed for gas to pass through Turkish territory and further to Europe, therefore turning Turkey into an energy hub. At present, only the BTE is functioning, while plans have been approved to expand the Arab Gas Pipeline from Syria to Turkey and the ITGI is expected to be completed in 2015. Since Iraq is still quite unstable, the plan to build a natural gas pipeline from this country to Turkey has not yet been realized. The same applies to the Nabucco gas pipeline project, which still faces considerable challenges regarding its investors and the suppliers of its gas. Moreover, the dispute around the legal status of the Caspian Sea poses a serious challenge in the short run to the prospect of transporting Turkmen gas across it through the Trans-Caspian gas pipeline.

In the mid to long term, this situation might change if some pipeline projects like Nabucco and the Trans-Caspian gas pipeline materialized, since Turkey would then be closer to its goal of becoming an energy hub. Moreover, even if the Nabucco project is not realized, Russia is very interested in diversifying the routes for its gas flowing to Europe (and has therefore supported the South Stream and Nord Stream gas pipeline projects). In this regard, Turkey has already used this situation in its favour by offering Russia the right of usage of its exclusive economic zone in the Black Sea for the construction of the South Stream pipeline, thus positioning itself as a transit country for Russian gas flowing to Europe. Turkey is taking a multilateral approach in its energy decisions, by simultaneously supporting two rival projects that could advance its desire of becoming an energy hub. Although there are still numerous challenges to overcome, some authors, such as Winrow (2006: 8), are optimistic about Turkey's chances of becoming a gas hub in the long term.

6.5 Challenges to Turkey's Energy Strategy

Alongside Turkey's strength as a country located in a strategic geographic position in the transit corridor for oil and gas flowing from the producers in the Middle East and the Caspian to Europe, there is a series of internal and external challenges to Turkey's energy strategy. These make it vulnerable in the attainment of its foreign policy goals using the energy tool.

The Turkish Ministry of Energy and Natural Resources (2009: 9) has reflected on its vulnerabilities and presented in its Strategic Plan 2010–2014 the main threats to its energy strategy: the high rate of import dependence of oil and natural gas for Turkey's domestic consumption, the competition between the pipelines that Turkey supports, the political instabilities in the region, and the contradiction between the energy policies of other countries with the target of Turkey of becoming an energy hub, among others. These internal and external challenges to Turkey's energy strategy are more thoroughly presented below.

6.5.1 Internal Challenges to Turkey's Energy Strategy

The most significant internal challenges to Turkey's energy strategy concern the ability of producer countries to extract oil and natural gas in sufficient capacity for Turkey's domestic consumption and for the export to Europe, the competition between the pipelines it supports, and the insecurity of the pipelines in its Kurdish territory. Regarding the first challenge, it is clear that in order to fulfil its goal of becoming an energy hub, Turkey

> must be able to import enough gas to satisfy both domestic demand and any re-export commitments as well as provide enough pipeline capacity to transport Caspian and Middle Eastern gas across Turkey to Europe (EIA 2011: 6).

Nevertheless, it has been observed that Turkey's domestic demand of energy resources is increasing, thus jeopardizing its surplus capacity. Moreover, as Kramer (2010b: 9) argues, Turkey can only reach its goal of becoming an energy hub when the port of Ceyhan in the Mediterranean attains a relevance that is comparable to that of an international spot market for oil. It will take some time to achieve this due to the still relatively minor quantity of oil that reaches the markets via Ceyhan.

With respect to the second challenge, if one looks at the political and economic aspects of the pipeline options that Turkey supports, it becomes obvious that some of them compete with each other. The most well-known example of pipeline rivalry in the natural gas sector is between the Nabucco and the South Stream pipeline projects. By supporting both competing projects, Turkey has built an energy strategy with multiple partners, leaving the window open for different pipeline options to materialize, while assuring its participation as a transit country in each of them. With this energy policy, it can be observed that

> [t]here is a lack of coherent strategy on the part of Turkey as the government is looking at short-term objectives such as trying to increase the speed of EU accession negotiations, negotiate a low price for Azerbaijani gas, and to keep on good relations with Russia (Coşkun/Carlson 2010: 217).

Thus, although there are many doubts as to the extent to which rival pipeline projects can be supported by the same country, the Turkish Foreign Minister Davutoglu challenges this scepticism. He stresses

> that Turkey is not a place for rival projects but complementary ones, while noting that Turkey will serve as a secure energy route, strengthening both regional economic integration and global economic structure (Today's Zaman 2009).

Davutoglu furthermore highlights that by getting involved in both major energy projects, South Stream and Nabucco, Turkey wants to send the message that:

> Yes, we have EU orientation. No one can have doubts over our NATO membership, but this geography necessitates running policies that integrate all global and neighborhood actors (Today's Zaman 2009).

Although the plausibility of developing all projects is remote, it will become clear in the future if and how the different projects materialize.

Additionally, there is doubt regarding the effectiveness of Turkey's policy of linking its support for Nabucco with its accession process to the EU. In this respect, Kramer (2010b: 21) argues that these attempts have not been so successful even though Prime Minister Erdoğan stated in 2009 that Ankara's support for Nabucco could be conditioned to the EU's abandonment of its resistance to open the energy chapter in the accession negotiations with Turkey. Turkey's position on this issue may even prove counterproductive, since the EU might perceive Ankara's readiness to link political issues with energy concerns as a policy similar to the one Russia pursues (and which is precisely the reason why the EU wishes to diversify its sources of energy supply and the routes of transportation).

Coming to the third internal challenge, Turkey faces instability in its Kurdish regions in the southeast, where the Kurdish separatist movement is rooted. Since 1984, the PKK has led an armed insurrection and terrorist activities against the state 'targeting pipelines and other energy projects in its attacks' (Hill 2004: 231). For example, in 1996 the PKK's leader, Abdullah Öcalan, stated that this group 'would not permit any pipelines from the Caspian to run across Kurdish territory' (Hill 2004: 231) and the next year this group blew up a small oil pipeline from one of Turkey's domestic fields. The potential pipelines that could be attacked are the Kirkuk–Ceyhan pipeline, BTC, and BTE, as well as the Trans-Anatolian and Nabucco pipelines when they are completed. This situation would entail big economic—and possibly even political—problems for Turkey. Therefore, as stated by Hill (2004: 231), 'Turkey's most serious domestic security problem [...] affects it energy security, commercial interests, and larger geopolitical goals.'

6.5.2 External Challenges to Turkey's Energy Strategy

When analyzing the external challenges to Turkey's energy strategy, two factors have to be taken into account: the other regional actors' interests and strategies, and the structural problems and insecurity in the bordering regions. Both of these elements will be presented next.

Firstly, Turkey is just one of many players in the region, all of which have their own political and economic interests when negotiating the pipeline projects. The energy strategies and policies of states, as well as the transportation routes, are decided not only based on an economic rationale, but mostly on political motivations. There is therefore a high politicization of the energy resources of the Caspian and of Central Asia, where not only the littoral states but also major powers such as Russia, the US and European countries want to project their influence and participate in the decision-making process of the destination of these resources. In this respect, Kramer (2010b: 17) asserts that with all the options it faces, Ankara must take into account not only economic and energeopolitical, but also global and regional geostrategic factors. Among the global players that attempt to influence the energy transport decisions in the region are the US and the EU. At the regional level the main actors are Russia and Iran, as well as Turkey's neighbours in the Caspian region. This same geopolitical struggle appears to exist regarding the energy resources of Iraq and Iran, the export of which is still full of uncertainty and obstacles.

Not only does Turkey depend on energy resources from Russia, the Middle East and the Caspian Basin to fuel its growing economy, but it also relies on Europe's dependence on fossil fuels to achieve its aim of becoming an energy hub. This makes Turkey vulnerable from both sides of the energy equation: the demand from Europe and the supply from the producers in the Caspian and the Middle East. Therefore, a serious constraint to Ankara's energy strategy and aim to become a regional natural gas hub is the impossibility of relying on its own resources and capabilities to realize its goals. According to the projections for the next two decades, Turkey's role as a transit country seems assured. Nevertheless, if Europe's policies of reducing the consumption of fossil fuels and increasing the use of other energy sources such as renewable and nuclear succeed, then Turkey's importance vis-à-vis the EU will fade away gradually. As can be observed, since Turkey must be aware of the interests of other actors in the region as well as of its own foreign policy aims and negotiate with them accordingly, the achievement of its goals may be challenged since this depends on many issues out of Ankara's control.

Secondly, apart from the other actors' interests and strategies, there are structural issues in the region that also represent a challenge to Turkey's aims in terms of its energy and foreign policies, such as instability in the Middle East and in the South Caucasus, Iran's controversial position in the region, the unresolved status of the Caspian Sea, and Russia's foreign and energy policies in the region.

Instability in the Middle East

The current general social unrest in the Middle East, especially in Egypt, Libya and Syria, is in itself a challenge to Turkey's foreign policy in the region because of the friendly relations it had been cultivating with the regimes in these countries. Moreover, economic problems that Ankara is already facing have to be taken into account, for instance insecurity for Turkish companies doing business in these countries and the potential interruption of oil and gas pipeline deals that were negotiated with the regime that was recently toppled in Egypt and the challenged regime in Syria.

Regarding Iraq, its oil plays a major role in the international energy markets (owning almost 9% of the world's total oil reserves) as well as for Turkey, which receives oil since the 1970s from Iraq. And if the Nabucco project materializes, Iraq may also become one of its main gas suppliers. Nevertheless, Northern Iraq (where Turkey's oil and gas interests lie) is still unstable and insecure because of the undefined status of the Kirkuk region, which is disputed between different ethnic groups. The pipelines in this region are constantly subject to attacks. Hence, this represents a significant challenge to Turkey's energy strategy.

Iran's interests are concentrated on enhancing its status in Central Asia and in transporting the region's energy resources through its own territory to the international markets. Thus, this represents one of the biggest challenges to Turkey's role as a transit country in the region, its commercial interests and its geopolitical goals over the long term. This is due to the fact that Iran offers the most competitive transportation route for Caspian oil to world markets (Hill 2004: 232). Iran also 'restricts Ankara's room of manoeuvre in the region when the Iranian interests come into play, for instance regarding the Caspian Sea or gas pipeline proposals' (Kramer 2000: 115) because of Turkey's energy dependence on this actor. At present, the American Iran–Libya Sanctions Act[36] targeted towards Iran has undermined its potential as an exporter and transport route; nevertheless, this situation might change in the future with a transformation of regime in this Middle Eastern country or a revision of the US policy in this respect

36 'The Iran-Libya Sanctions Act (ILSA), signed into law by President Clinton on August 5, 1996, requires the president to impose at least two out of seven possible sanctions on citizens or companies who have made investments over $20 million in Iran's oil and gas industry that "directly and significantly contribute to the enhancement of Iran's ability to develop" its petroleum resources' (Hill 2004: 232).

(for example as a consequence of the pressure of US oil companies operating in the Caspian region). This would certainly represent a challenge to Turkey's energy strategy and expectations.

On the other hand, Iran is also regarded in Ankara 'as an important economic partner not only for its energy potential' (Kramer 2000: 143), but also because it lies on the potential route for Caspian hydrocarbons (especially natural gas from Turkmenistan) and this is in line with Turkey's goal of diversifying its sources of natural gas away from Russia. Having the world's second biggest natural gas reserves, Iran is very valuable to Turkey's goal of becoming an energy hub and transit country for resources since it may be a potential supplier of gas to Nabucco. However, there are two challenges to this prospect. First, Kramer (2010b: 27) asserts that, although Iran possesses the world's second largest natural gas reserves, its export potential is relatively narrow due to the growing internal demand of the subsidized gas. Second, due to the US economic sanctions, Iran has difficulty in closing energy deals with other parties.

Uncertainty and Instability in the Caspian Basin Area

Turkey's energy strategy is furthermore challenged by the uncertain energy potential and actual production levels in the Caspian producer countries. Thus, the Nabucco pipeline project is still missing official agreements on the supply of gas as well as indeterminacy regarding the capacities of the suppliers. The long awaited commitment from Azerbaijan to supply gas from its Shah Deniz 2 field has not yet been provided. And Azerbaijan's participation is furthermore crucial because 'it would open the door to the construction of a feeder pipeline across the Caspian Sea for Turkmenistani gas' (DeLay, 2011c: 8). Moreover, Turkmenistan's final commitment to supply its gas for the Nabucco pipeline is also missing and it has already signed energy agreements with Russia, Iran and China, thus reducing the chances that it will provide gas to this pipeline. Because of this, Nabucco's start of construction has been postponed several times. And there are other rivalling pipeline projects, such as TANAP, the ITGI, the Trans-Adriatic pipeline and the South-East Europe pipeline, that are also awaiting for approval.

Moreover, the supply of Kazakhstani oil from the Kashagan offshore field to the BTC pipeline has not yet been secured. Firstly, the start of construction of this field has been once again pushed back to 2013. And even when this field starts production, the question remains as to the transportation across the Caspian Sea since the littoral states (Russia, Kazakhstan, Turkmenistan, Iran and Azerbaijan) have not yet agreed to the way the sea and its resources will be divided among them. Russia and Iran are against the construction of both trans-Caspian pipelines to transport oil from Kazakhstan and natural gas from Turkmenistan to Azerbaijan. This represents one of the main political obstacles to the realization of this goal. On the other hand, the option of transporting the oil via tanker between both sides of the Caspian Sea entails economic difficulties, since it would require high investments in the transportation infrastructure and the construction of loading establishments (Kramer 2010b: 19).

In addition, regional instability in the Caucasus and Central Asia is one of the greatest threats to the achievement of Turkey's energy goal of positioning itself as a safe and stable passage of oil and natural gas to Europe. However, the Caucasus, and to some extent also Central Asia, are politically quite unstable. Examples of these tensions in the Caucasus include

> the undeclared war between Armenia and Azerbaijan over the political jurisdiction of Nagorno-Karabakh, the war between Georgia and Abkhazia, and the outbreaks of war between Russia and Chechnya in the North Caucasus (Hill 2004: 230),

as well as the Russian–Georgian war of 2008. These tensions might endanger the on-going and planned pipelines that pass through this area, such as the BTC and the BTE, and may lead to the interruption of the flow of oil and gas to Europe. Moreover, the companies participating both in the production of the hydrocarbons or in their transport may be wary of these projects and ask the governments 'to shoulder a considerable part of the pipeline costs' (Kramer 2000: 108), which would diminish the economic gains of Turkey.

Russia's Foreign and Energy Policies

Russia's energy and foreign policies in the Caspian region represent a big threat to Turkey's aims of positioning itself as a transit country for the region's hydrocarbons and as a regional power in the South Caucasus and in Central Asia. In recent years, Russia has been attempting to reinforce its status of regional leader, as well as its privileged position in the transportation of energy resources from the Caspian Basin and Central Asia. Thus, 'Turkey's and Russia's ultimate strategic objectives in the energy sphere are diverging rather than converging' (Torbakov 2007: 7) and there is therefore an on-going rivalry between them in these regions.

Regarding Turkey's energy relations with Russia, there has been a tough geopolitical competition in the energy field resulting from the different positions they maintain with respect to the pipelines through which the Caspian energy resources should flow. As Hill (2004: 239) asserts, 'Turkey and Russia are potential but, for the immediate future, uncertain partners in the developing pipeline and energy networks in the broader Caspian region.' On the one hand, both countries are interdependent since Turkey is largely dependent on Russia for its own natural gas imports (Tekin/Walterova 2007: 89) and Russia in turn sees in Turkey a potential transit country for its South Stream pipeline project. On the other hand, since Russia borders the EU, exports large quantities of hydrocarbons to this region and has a pipeline infrastructure of its own, 'Turkey is [...] more likely to compete with Russia for the transit of Caspian exports than to become its energy transit route' (Tekin/Walterova 2007: 89).

Thus, when making decisions about energy pipeline options, Turkey has to take into account Russia's stance in the region. In this respect, Russia strongly prefers that the pipelines that transport Caspian hydrocarbons pass through its territory. Therefore, according to Kramer (2000: 115) 'Russia constitutes the main obstacle to the realization of Turkey's energy-related regional interests'. For instance, Russia has clearly stated its negative position towards Nabucco by questioning its feasibility. Its gas monopoly, Gazprom, has furthermore finalized a non-binding deal with Azerbaijan to receive in the long term 13 billion m^3 of gas per year from Shah Deniz 2. This would obviously jeopardize Nabucco's supply of gas (Kramer 2010b: 22). It remains to be seen until what point both countries can cooperate in energy matters and to what extent Russia is really a threat to Turkey's energy goal in the region.

7 Conclusions

Turkey is a country that is increasingly exploiting its geostrategic location in the world between hydrocarbon producers and consumers, and negotiating international oil and gas pipeline deals. Moreover, in the foreign policy realm Ankara is attempting to play a more active role in its neighbouring regions. Taking these elements as a base, this working paper took the endeavour of searching for an answer to the puzzle as to the extent to which Turkey uses its energy strategy as a tool to promote its foreign policy aims, as well as the extent to which both policy areas influence each other.

After conducting an analysis of the consistency of Turkey's energy strategy and pipeline decisions with its main foreign policy aims vis-à-vis its neighbours, taking into account its geostrategic location and the European energy dynamics, a series of conclusions have been reached. First of all, the main argument of this study was confirmed: Turkey is using its geopolitical position as a transit country for energy resources as a tool to attain its foreign policy objectives. This can be observed in its support for pipelines leading to Europe and bypassing Armenian territory. Moreover, another interesting finding of this research is the influence that energy calculations also have on Turkey's foreign policy. For instance, Ankara has actively cooperated with Greece on energy issues such as the Interconnector Turkey–Greece and the Nabucco gas pipeline project, thus favouring them above the historical political discrepancies between both countries. Therefore, as can be observed there is interdependence between both foreign and energy policies in Turkey.

Regarding Turkey's geopolitical context, it was pointed out that the EU is projected to be more dependent on imports of oil and natural gas from Russia, the Caspian, the Middle East and North Africa in the next decades. In this context, the pipeline infrastructure that transports those resources to Europe, while bypassing Russia, has become a key asset where Turkey plays a prominent role. In this respect, Turkey is seeking to exploit its strategic geographic location between the hydrocarbon consumers in the EU and its producers in the Middle East and the Caspian Basin, to gain political and economic leverage vis-à-vis these actors in order to push for its foreign policy objectives.

Additionally, Turkey's regional power ambitions are to some extent pursued through its energy strategy. In this regard, Turkey's multidimensional foreign policy approach and its 'strategic depth' doctrine have been reflected in its energy strategy, since one of the means implemented by Ankara to achieve its multilateral foreign policy of involvement in different neighbouring regions such as Europe, the South Caucasus, the Middle East and Central Asia, has been the energy one. Turkey has thus expressed its support to numerous oil and gas pipeline projects stretching from the Middle East, Russia and the Caspian Sea basin, as well as to gas pipelines connecting Turkey with Europe. It is worth noting that this multilateral energy policy is tightly connected to its goal of becoming a regional power, since by cooperating in energy issues and negotiating energy deals, Ankara also strengthens its political relations with the countries in these regions. Nevertheless, although Turkey has shown more activism in the South Caucasus, Central Asia and the Middle East, its desires to become a regional power are severely challenged by the fact that the countries in these regions still do not see it as the regional leader. Thus, Turkey can be categorized as an insulator in the meaning of Buzan/Waever (2003), located between diverse regions and as a striving regional power.

Moreover, the consistency of Turkey's pipeline decisions and strategy of becoming an energy hub with its foreign policy aims was shown. The most prominent example in this regard is Ankara's support of four pipeline projects aiming to transport natural gas to the European market through Turkish territory: Nabucco, ITGI, TANAP and the Persian natural gas pipeline. If materialized, these pipelines would not only convert Turkey into an indispensable energy transit corridor for the EU, but would also provide Ankara with more leverage in the accession negotiations with the EU. Another pipeline that would indirectly boost Turkey's potential as a gas transit country for Europe is the Trans-Caspian gas pipeline, since it would feed the existing BTE to supply the Turkish and (potentially) the European markets, thus contributing to Ankara's aim of becoming an energy hub. It was also shown that Turkey has supported and achieved the completion of two oil pipelines that terminate in the port of Ceyhan, namely the Kirkuk–Ceyhan pipeline and the BTC. And it has successfully negotiated with Russia the construction of the

Trans-Anatolian pipeline that will carry Russian and Kazakh oil from Samsun to Ceyhan. Turkey's support for these projects represents a big step in Ankara's aim of converting Ceyhan into an energy hub. Nevertheless, as was mentioned before, the Nabucco pipeline project as well as the Trans-Caspian and the Persian gas pipeline projects still face considerable obstacles, which lead to the supposition that in the short run Turkey is still far from reaching its goal of becoming an energy hub.

In addition, with its choice of oil and gas pipeline routes, Turkey favours relations with some countries, as opposed to others. For instance, Ankara's active promotion of the construction of the BTC and BTE pipelines is an example of how Turkey strengthened its relations with Azerbaijan and Georgia. Moreover, with the designed route of these pipelines specifically through Georgia and not through Armenia (which would have been more economically efficient), Ankara showed once more that its energy choices are in line with its foreign policy goals and priorities. In this respect, Turkey values its foreign and energy relations with Azerbaijan more as those with Armenia, and thus favours the energy projects that reinforce its relations with Azerbaijan. Additionally, Turkey endorses the construction of gas pipelines through its territory to Europe, such as the ITGI, Nabucco and TANAP, as a way of reaffirming its intention to join the EU. In this respect, Turkey's aim is to position itself as a crucial gas transit country for Europe in order to gain leverage in the accession negotiations. The case of Russia is special since Turkey has had to some extent incompatible energy and foreign policies towards this partner. On the one hand, Ankara seeks cooperation with Moscow on regional security and economic issues. This is reflected in the energy sector with Turkey's approval for the South Stream gas pipeline to pass through its exclusive economic zone. On the other hand, Turkey and Russia see each other as rivals for regional leadership in the South Caucasus and in Central Asia, and Turkey seeks to diminish its dependence on Russian natural gas. Therefore, Turkey has sought to support pipeline projects that bring it closer to the hydrocarbon producers in other regions, as well as pipelines that bypass Russian territory like BTC, BTE and Nabucco. It was thus shown how Turkey uses energy transit as a tool to achieve its foreign policy aims vis-à-vis its neighbours.

This research has moreover pointed out the challenges that Turkey faces in reaching its goal of becoming a regional power and of asserting its influence in the neighbouring regions by means of the energy tool. It is true that Turkey is in the process of constructing a significant network of oil and gas pipelines connecting it to the producers in the Caspian, the Middle East and Russia, with completed pipelines such as BTC, BTE, Blue Stream, Kirkuk–Ceyhan oil pipeline and Tabriz–Erzurum gas pipeline, and pending projects like Nabucco, ITGI, TANAP, Persian natural gas pipeline, Arab natural gas pipeline and the Trans-Anatolian oil pipeline. Nevertheless, the link to Europe is still missing to a certain degree. The implementation of the Nabucco, ITGI or TANAP pipelines might change this situation, but until then it is difficult to say that Turkey has achieved its aim of being an energy hub and a crucial corridor for hydrocarbons flowing to the EU. It was also shown how the success of Turkey's strategy of becoming an energy transit corridor and an energy hub, as well as its goal of using this strategy to promote its foreign policy aims, depends to a great extent on the choices and strategies of other actors such as the Caspian and Middle Eastern states and the energy companies that operate there. In this respect, the case of Russia is crucial since this country is very actively seeking to maintain its influential position in the post-Soviet space, including the energy sector. Moreover, the present instability in the Middle East, especially in Iraq, Syria and Egypt, as well as Iran's nuclear ambitions and the Nagorno-Karabakh conflict, all contribute to the insecurity of the pipelines that originate in or pass through these regions.

In conclusion, it can be said that there is a strong interdependency between Turkey's energy strategy and chosen pipelines and its foreign policy goals vis-à-vis actors like the EU, Russia, and the states in the Middle East, the South Caucasus and Central Asia. Nevertheless, because of the above-mentioned challenges, in the short run Turkey will not achieve all of its energy strategy goals, thus hampering its ambition of becoming a regional power. Although there are also some challenges in the long run, like the changing energy dynamics in Europe, if the Nabucco and Arab natural gas pipelines materialize, Turkey will become less dependent on Russian gas and will enhance its role as one of Europe's main transit countries for energy resources, which will strengthen its position in the EU accession negotiations. And this might additionally represent a step forward in Turkey's aim of becoming a regional power.

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Annex

Table 1: Proved Oil Reserves* and Production of Potential Suppliers to EU, End 2010

Region	Country	Oil reserves		Oil production	
		Thousand million tonnes	Share of total	Million tonnes	Share of total
OPEC		**146.0**	**77.2%**	**1623.3**	**41.5%**
	Saudi Arabia	36.3	19.1%	467.8	12.0%
	Iran	18.8	9.9%	203.2	5.2%
	Iraq	15.5	8.3%	120.4	3.1%
	Kuwait	14.0	7.3%	122.5	3.1%
	United Arab Emirates	13.0	7.1%	130.8	3.3%
	Qatar	2.7	1.9%	65.7	1.7%
	Algeria	1.5	0.9%	77.7	2.0%
	Libya	6.0	3.4%	77.5	2.0%
Europe and Eurasia		**19.0**	**10.1%**	**853.3**	**21.8%**
	Russian Federation	10.6	5.6%	505.1	12.9%
	Azerbaijan	1.0	0.5%	50.9	1.3%
	Kazakhstan	5.5	2.9%	81.6	2.1%
	Norway	0.8	0.5%	98.6	2.5%

* BP defines 'proved oil reserves' as those quantities that geological and engineering information indicates with reasonable certainty can be recovered in the future from known reservoirs under existing economic and operating conditions.
Source: BP 2011b: 6, 10.

Table 2: Proved Natural Gas Reserves and Production of Potential Suppliers to EU, End 2010

Region	Country	Natural gas reserves		Natural gas production	
		Trillion m^3	Share of total	Billion m^3	Share of total
Middle East		75.8	40.5%	460.7	14.4%
	Iran	29.6	15.8%	138.5	4.3%
	Iraq	3.2	1.7%	1.3	—
	Qatar	25.3	13.5%	116.7	3.6%
	Saudi Arabia	8.0	4.3%	83.9	2.6%
	United Arab Emirates	6.0	3.2%	51.0	1.6%
	Kuwait	1.8	1.0%	11.6	0.4%
Europe and Eurasia		63.1	33.7%	1043.1	32.6%
	Russian Federation	44.8	23.9%	588.9	18.4%
	Azerbaijan	1.3	0.7%	15.1	0.5%
	Turkmenistan	8.0	4.3%	42.4	1.3%
	Kazakhstan	1.8	1.0%	33.6	1.1%
	Uzbekistan	1.6	0.8%	59.1	1.8%
	Norway	2.0	1.1%	106.4	3.3%
Africa		14.7	7.9%	209.0	6.5%
	Algeria	4.5	2.4%	80.4	2.5%
	Egypt	2.2	1.2%	61.3	1.9%
	Libya	1.5	0.8%	15.8	0.5%

Source: BP 2011b: 20, 22.

Table 3: Source of EU Crude Oil and Natural Gas Imports in 2007

Country	EU oil imports	EU gas imports
Russia	34.0%	40.8%
Norway	15.5%	26.7%
Algeria	—	16.9%
Saudi Arabia	7.2%	—
Iran	6.2%	—
Nigeria	2.8%	5.1%
Libya	10.2%	3.3%
Kazakhstan	3.4%	—
Egypt	—	1.9%
Qatar	—	2.4%
Total imports	**542,735,600 tonnes**	**303,670 million m^3**

Source: European Commission 2010: 14.

Table 4: Existing and Potential Oil Pipelines Involving Turkey

Pipeline	Route	Length/ Capacity	Oil sources	Status	Turkey's role
Baku–Tbilisi–Ceyhan (BTC) pipeline	Azerbaijan (Baku)–Georgia (Tbilisi)–Turkey (Ceyhan)	1,768 km/1.2 million barrels/ day	Azerbaijan (Azeri-Chirag-Guneshli oil field), Kazakhstan	Operating since 2005	Internal consumption and transit country (charging transit fees)
Trans Anatolian pipeline	Samsun–Ceyhan (inside Turkey)	550 km/1.5 million barrels/day (designed capacity), 1 million barrels/day (envisioned)	Russia, Kazakhstan	Scheduled to be operational in 2012	Supported by Turkey because it by-passes the Bosporus and Dardanelles Straits
Kirkuk–Ceyhan pipeline	Iraq (Kirkuk)–Turkey (Ceyhan)	970 km/1.6 million barrels/ day	Iraq	Operating since 1977	Final destination of Iraqi oil

Source: BP 2011a; Ministry of Foreign Affairs 2009; Ministry of Foreign Affairs 2011; Energy Information Administration 2006.

Table 5: Existing and Potential Gas Pipelines Involving Turkey

Pipeline	Route	Length/Capacity	Gas sources	Status	Turkey's role
Trans-Caspian Gas Pipeline project	Turkmenistan, Azerbaijan, Georgia, Turkey	2,400 km/30 bcm/year*	Kazakhstan-Turkmenistan	Project	Final destination of Kazakh and Turkmen gas
South Caucasus Pipeline (SCP)	Azerbaijan (Baku)–Georgia (Tbilisi)–Turkey (Erzurum)	692 km/20 bcm/year	Azerbaijan (Shah Deniz)	In use since 2006	Supplies Turkish market; linked to Turkish gas distribution system
Interconnector Turkey–Greece–Italy (ITGI)	From Turkey (Karacabey Pig Station)–Greece (Komotini). Extension beneath the Adriatic Sea from Greece to Italy of the Turkey–Greece Natural Gas Pipeline (operational since 2007)	Turkey–Greece: 296 km; Greece–Italy: 807 km/Approx. 12 bcm/year	Caspian and Middle East	Construction scheduled to begin in 2012 and operation for 2015	Turkey is a transit country for gas to Europe
Nabucco Project	Turkey (Georgian/Turkish border and Iraqi/Turkish border)–Romania–Bulgaria–Hungary–Austria (Baumgarten gas hub)	3,800 km/25.5–31 bcm/year max. [Half to the transit countries and the rest distributed from the Baumgarten hub to Austrian, German and Italian markets]	Principally Azerbaijan and Turkmenistan, but also could be Kazakhstan, Iran, Iraq, Egypt	Engineering studies underway. Construction is scheduled to start in 2013 and first gas is projected to flow in 2017.	Turkey is a transit country for gas to Europe
Blue Stream I	Russia–Black Sea–Turkey	1,213 km/16 bcm/year	Russia	In use since 2003	Supplies Turkish market
South Stream	Russia–Black Sea–Bulgaria–1) Serbia, Hungary, Austria, 2) Greece, Italy	900 km/63 bcm/year	Russia, Central Asia	Projected completion in 2013	Use of Turkey's exclusive economic zone
Baku–Tbilisi–Erzurum (BTE) pipeline	Azerbaijan–Georgia–Turkey	691 km/6.6 bcm/year (phase I)	Azerbaijan (Shah Deniz 1)	Operating since 2007	Final destination of Azeri gas
Anatolian Transit Gas Pipeline Project (TANAP)	Azerbaijan–across Turkey–Europe	16 bcm/year	Azerbaijan (Shah Deniz 2)	Not known	Transit country and final destination of Azeri gas

continued overleaf

Table 5: Existing and Potential Gas Pipelines Involving Turkey (continued from previous page)

Pipeline	Route	Length/Capacity	Gas sources	Status	Turkey's role
Iran–Turkey pipeline	Iran (Tabriz)–Turkey (Erzurum)	2,577 km/10 bcm/year	Iran	In use since 2001	Supplies Turkish market and potentially Europe (through Nabucco pipeline)
Persian natural gas pipeline project	Iran (South Pars)–Turkey. Possibly Turkey–Greece and Italy	3,300 km/37–40 bcm/year	Iran	MoU between Turkey and Iran signed in 2008. Expected to be operational in 2014	Supply Turkish market and possibly go further to Greece and Italy
Iraq–Turkey Natural Gas Pipeline project	Iraq–Turkey	NA km/Approx. 10 bcm/year	Iraq	Delayed	Supply Turkish market
Trans-Caspian Natural Gas Pipeline Project	Turkmenistan–Turkey–Europe	NA km/30 bcm/year (16 bcm/year to Turkey, 14 bcm/year to Europe)	Turkmenistan	Project	Supplies Turkish market and Turkey as transit country
Arab Natural Gas Pipeline	Egypt–Jordan–Syria. Possibly to Turkey and Europe	1,200 km/10 bcm/year. 2–4 bcm/year to Turkey, and 2–6 bcm/year to Europe through Turkey	Egypt	Built until Syria. Projected to be extended until Turkey. Conduction of feasibility studies	Projected to supply Turkish market and Turkey as transit country

* bcm means billion cubic meters.

Source: Locatelli 2010: 965; BP 2011c; BP 2011d; Pardo 2010: 652; EIA 2011: 7; BOTAS 2008; Nabucco Gas Pipeline 2011; Ministry of Foreign Affairs 2009; Ministry of Foreign Affairs 2011; Pipelines International 2010.

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