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INFLUENCE OF FOREIGN POLICY IN TURKEY'S ROLE AS A TRANSIT
GAS HUB COUNTRY IN EASTERN MEDITERRANEAN NATURAL GAS
BONANZA

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DOĞU AKDENİZ DOĞALGAZ YATAĞINDA TÜRKİYE'NİN MERKEZ GAZ
GEÇİŞ ÜLKESİ ROLÜNE DIŞ POLİTİKANIN ETKİSİ

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ACRONYMS

BCM	Billion cubic meter
EEZ	Exclusive Economic Zone
EMRA	Republic of Turkey Energy Market Regulatory Authority
EIA	Energy Information Administration
EOKA	Ethniki Organosis Kypriou Agoniston
EU	European Union
GASC	Greek Administration of Southern Cyprus
IEA	International Energy Agency
JDP	Justice and Development Party
LNG	Liquid Natural Gas
NG	Natural Gas
TCF	Trillion cubic feet
TMT	Turkish Resistance Organization
TPAO	Turkish Petroleum Corporation
TRNC	Turkish Republic of Northern Cyprus
UN	United Nations
UNCLOS	United Nations Convention on the Law of the Sea
USA	United States of America

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ABSTRACT

Widely known as the Ibn Khaldun says that geography is destiny, in our modern world, I believe that geography of a country would only be a denominator, yet the foreign policy absolutely is the numerator of the equation. Moreover, I believe that the geography of a country gains meaning with the power of its foreign policy. To that end, this paper aims to research the influence of the foreign policy of Turkey for its aim on being an energy hub, in more micro view, for to be a transit natural gas hub.

As an energy import dependent country, Turkey is predominantly shaping its foreign policy according to her energy policies. On the other hand, Turkey's strategic position in the world, from geopolitical perspective, have induced Turkey to experience versatile foreign policy.

The first chapter of this paper gives brief information for the subject. The second chapter includes the basic definitions and findings of the Eastern Mediterranean natural gas deposit. The second chapter also includes my research question and the methodology of this thesis. The methodology is based on the literature review. The third chapter is about the foreign policy of Turkey from 2010 to 2018 towards the countries concerned and key findings of the foreign policies. Conclusion includes the outcomes and responds the research question.

ÖZET

Ibn-I Haldun'un coğrafya kaderdir söylemine yönelik inancım bu denklemden payın dış politika, coğrafyanın ise paydası olduğu yönündedir. Bir ülkenin coğrafyasının geliştirdiği dış politika ile anlam kazandığına inanmaktayım. Buna göre, bu tez Türkiye'nin Doğu Akdeniz doğal gaz enerji havzası ile enerji merkezi ülke olma idealindeki ve hatta daha mikro olarak bir doğal gaz merkez geçiş ülkesi olma yolunda dış politikanın etkisini araştırmıştır.

Doğal gaz ithalatçısı bir ülke olarak Türkiye dış politikasını belirleyen ana unsurların başında enerji politikaları gelmektedir. Öte yandan, Türkiye'nin dünyadaki benzersiz konumu, jeopolitik açıdan Türkiye'yi dinamik dış politikalar deneyimlemesine neden olmuştur

Tezin birinci bölümü konu hakkında özet bilgi vermektedir. Tezin ikinci bölümünde ise terimsel bağlamda tanımlamalar yapılmıştır. Bununla birlikte araştırma sorusu ve yöntem de tezin ikinci bölümünde bulunmaktadır. Tezin üçüncü bölümünde, ilgili ülkeler ile Türkiye'nin 2010 – 2018 yılları arasında geliştirmiş olduğu dış politika incelenmiştir ve sonuçlar bulgular kısmında açıklanmıştır. Tezin sonuç kısmında, erişilen bulgular eşliğinde araştırma sorusuna cevap verilmiş ve neticeler belirtilmiştir.

1. INTRODUCTION

Turkey had crucial stages in foreign policy after the election of Justice and Development Party in 2002. Westernism of Turkey gradually converted to the identity politics which the pioneering motivator is the internationalism of Islam. Within this perspective, relations with EU and neighborhoods had been profoundly affected by the time.

Since petroleum and coal energy consumption has been declining globally, natural gas consumption is augmented in the world and the era has been changed to natural gas. There is no doubt that accessing to resources is as important as demand. (Ediger, 2008)

Turkey, with having the strength in the geopolitical status, has an aim to position herself as a transit hub country in the region. The aim of being a transit hub country in the region significantly came to order together with the Justice and Development Party period and foreign policies of Turkey had considerably been formed concerning energy issues. JPD's foreign policy was mainly determined by Ahmet Davutoğlu. Before and during his ministry, Ahmet Davutoğlu was well known as the master builder in foreign policy. (Özpek & Demirağ, 2012)

Since the beginning of the power of JDP, energy policies of Turkey were shaped between Russia and Caucasian region. As having lack of resources, to supply the domestic demand, Turkey became an import dependent country and the main import country was Russia. Until 2010, natural gas issue was not a chess game for Turkey yet starting with the discoveries in Eastern Mediterranean it became a chess game.

There is no doubt that being an energy transit hub will positively effect Turkey's economy, strengthen her geopolitical and geostrategic status in the region but more on that Turkey's growing population and economy needs more cost-effective sources for heating, electricity and workforce.

As a new source, Eastern Mediterranean gas resources are highly essential concerning the energy supply security of Turkey since Turkey's natural gas sources are limited and highly import dependent to Russia.

Since the natural gas dispute markedly started by 2010, at this paper my aim is to research the effect of foreign policy of Turkey in Eastern Mediterranean natural gas bonanza until 2018. I used literature review for analyzing the foreign policy implications in Eastern Mediterranean natural gas region as the subject requires informative research rather than quantitative methods since the field is the sea itself.

This study has focused on the Eastern Mediterranean region and Turkish foreign policy over the riparian states thus other natural gas resources are left out of the scope such as Caspian Sea gas, Russian gas, Iranian gas and Syria as a riparian state. By the reason of the civil war in Syria, the developments on the subject remained limited hence only the developments in the country have been taken into consideration.

2. EASTERN MEDITERRANEAN NATURAL GAS DEPOSIT AND TURKEY AS A TRANSIT GAS HUB COUNTRY

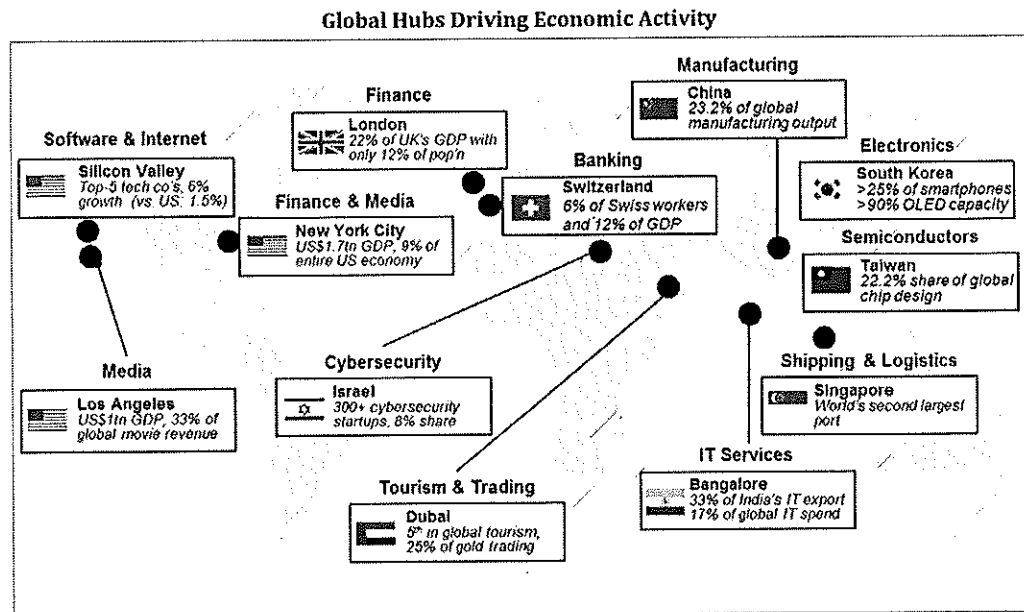
2.1. Basic Definitions

This thesis emphasizes the importance of the foreign policy of Turkey in Eastern Mediterranean natural gas deposit. Thence, it is highly important to clarify the meaning of the elements that affect the policies towards this energy reserve. To that end, following terms will be clarified below. I) Gas Hub Country II) Turkey as a Transit Gas Hub Country III) Natural Gas IV) Energy Supply Security and Distribution Policies.

2.1.1. Gas Hub Country

In today's neoliberal globalization era, countries are rather interrelated in both economic and political matters. With the neoliberal globalization, as much as free trade and convertibility of money, the accessibility of capital and free movement has increased its importance. From nations to every single person in the world, all are seeking ways for minimizing the costs, increasing the efficiency and accessing the goods and services faster than ever. Starting with neoliberalism, world has step into a new period where people have become empirical elements. Free markets have been formed and in respect to the country's own interests, wide range of products and services have reached people around the world. (Shaikh, 2007)

Terminologies in world politics and business have been developed in respect to the economic developments in the world. Kelly, described the hub as "*special nodes that are part of a network located in such a way to facilitate connectivity between interacting places.*" (Kelly, 1998) Regarding this definition, it will not be wrong to say that a hub is the key element of a supply chain in world trade. Mainly, a hub is the place that embrace and utilize the sources in the most efficient way for use of its own interest as well as others, thus, becomes eminently important for economic development of the countries. (Greater Pacific Capital, 2019)



Sources: OECD, AngelList, Taiwan Semiconductor Association, Statista, US Bureau of Labour Statistics, Various Press Articles, Academic Paper by Ogawa Kouichi

Figure 1: Global Hubs

As shown in Figure 1 (Greater Pacific Capital, 2019), a hub either could be a city like Dubai, that had become a tourism and trade hub in Middle East with its privileged foreign trade area policies, or as a nation like China that had become a manufacturing hub with its labor force. The competitive advantages of countries discussed by Michael Porter, asserts that the competitiveness of a nation may vary due to the alternative industries that needs alternative understandings. (Porter, 1990)

Even though the literature defines hub terminology in different perspectives as a logistic point or as a production point, there is no specific definition for a gas hub. Several studies done by the Oxford Institute for Energy Studies brought a new approach for determining the factors for being gas hubs in Europe. Study primarily focused on the liberalization of the market. (Heather, 2010)

According to IEA study done for Asia, in order to build up a well-functioning gas hub, following institutional and structural requirements must be done; (Kate, Varró, & Corbeau, 2013)

- Liberalization of the market
- Separation of the commodity – gas to be transported and gas to be used internally
- Price deregulation
- Enough network capacity
- Considerable demanding consumer
- Involvement of financial institutions

Since these requirements are not certain for any country aiming to be a gas hub, it can surely be exemplified as the least requirements to be done.

2.1.2. Turkey as a “Transit Gas Hub” Country

Geography has important impacts on politics and economy. In today’s world, geopolitics claims in a deterministic approach that every geographical region has its own strategic, economic and political advantages and disadvantages. Geography effects the power of the country in political, economic and security wise therefore it also influences states foreign policies.(Tamçelik , 2011) Nevermore, geographical locations and geopolitical locations have not the same meanings where geopolitical locations refer to strategically highly important locations.(Akdemir & Kuşçu, 2012) Countries that are connecting other territories have always become in the eye of the world. Scholars have named these locations as “economic geographies” to emphasize the importance of these territories in trading. (Bearce & Fischer, 2002)

With the liberalization timeframe of Turkey in 1990’s, U.S.A President Bill Clinton had led the secretary of commerce to work on “Big Emerging Markets” project and developed a policy for investing those markets. According to this policy Turkey had named as an emerging economy and took its place in the emerging market countries right beside Brazil, China and Mexico. (Garten, 1996)

Turkey as her geographical location has been a bridge between Europe and Asia throughout the history. In the ancient times, Anatolia was the gate of silk road opening to Europe. Regarding this bridge concept, it will not be wrong to say that

- Turkey has right over the location that connects petroleum to industry which means east to west and resource to capital. Turkey's aim of being an energy hub in the region has increased its importance with the completion of gas and oil pipelines, LNG terminals and other ongoing investments in various sources such as nuclear.

Turkey has various senses in world politics as global actor, middle power, pivotal state or regional power. Whether which of these senses are used, there is no doubt that Turkey has a strategic role in world politics with its geopolitical importance. (Koutri, 2011) According to International Business Report, Turkey had been named as being a significant player for transforming to an industrialized country and will have a critical role and impact on Mediterranean, Middle East and West Asian regions. (Wührer, Bilgin, & Karaosmanoğlu, 2011)

Energy hubs are defined as the central places that accumulates, transforms and transfers multiform of energies. (Geidl, et al., 2007) Bilgin, asserts that energy hubs can be identified under three parts as an *energy corridor* which the territory is being exploited by its geographical advantages as a connector, as an *energy hub*, which the territory is being exploited yet also exploits the resource in trade perspective and as an *energy center* which the territory gains full respect of investment in all energy sources and becomes an energy center. (Bilgin, 2010) In that sense, Turkey is currently can be regarded as an energy transit country for natural gas whereas starting with the export facilities to Europe and the new discoveries in the Eastern Mediterranean, Turkey has become a candidate for being a gas hub in the region.

Turkey's aim for being an energy hub in the region endorsed by the leaders of the energy industry. At the 7th Istanbul Finance Summit, Mark Moody-Stuart the Former President of Royal Dutch Shell Company stressed the Turkey's geopolitical position in the world and said "*Turkey continues to maintain its importance as a transit country for natural gas and oil. It is highly possible that Turkey could become an energy business hub like Singapore in the medium term*". (BYEGM Press Review, 2016)

A year after, IEA Chief Executive Dr. Fatih Birol did an interview with Sabah newspaper correspondent Elif Binici. At the interview, he strongly emphasized on the desire and will of Turkey for being an energy hub in the region. He focused on the liberalization policies saying that Turkey had done liberalization movement as enacting law on natural gas in 2001 for to be an energy hub in the region. (BYGEM - Press Review, 2017)

Turkey's will on being a transit energy hub in the region had strongly highlighted by the President Recep Tayyip Erdoğan at 22nd World Petroleum Congress in Istanbul. President Erdoğan emphasized the importance of the projects as Tanap and Turkish Stream for European gas demand and focused on the opportunities for the energy supply security of the region. (Hafizoğlu, 2017)

(Baily & Montalbano, 2017) asserts that the main characteristics of hubs can be identified in “*Core Competency*” which focuses on the competitive advantage of the place, “*Access to Funding*” which highlights the importance of ease of financing for investors, “*People*” which highlights the importance of leadership and skilled labor force, “*culture*” which shows the common values, “*business capabilities*” which focuses on the ease of business interactions, “*Sophisticated demand*” and “*infrastructure provision*”.

To this end, regarding to Turkey's aim on being a transit energy hub, it is clear that Turkey has strong competency with her privileged geographical location, skilled labor force, and significant demand both for internal use and export and infrastructure.

For all that, the foremost requirement, which is the liberalization of the market is still the weakest point of Turkey for being a regional gas hub.

Gas trade in Turkey have been majorly done by BOTAŞ which is a state-owned enterprise, established in 1974 with respect to the agreement between Turkey and Iraq for delivering the crude oil to country.

In respect with the rising demand of Turkey, BOTAŞ started natural gas transportation in 1986. Starting with the liberal policy implications, in 2007 Turkey

changed the law for the trade of natural gas in domestic market. Thereby, being a sole carrier ended yet the situation has not been changed so far. (BOTAŞ, 2019)

According to the energy report provided by EMRA, BOTAŞ is the only company that has the export license and still dominates the whole market; thus, the price of the gas is determined by the government. (EMRA, 2019)

Company Name	Amount	Share (%)
BORU HATLARI İLE PETROL TAŞIMA A.Ş.	42.631,93	84,65
ENERCO ENERJİ SANAYİ VE TİCARET ANONİM	1.922,88	3,82
AKFEL GAZ SANAYİ VE TİCARET ANONİM ŞİF	1.697,55	3,37
BOSPHORUS GAZ CORPORATION ANONİM ŞİD	1.551,15	3,08
BATI HATTI DOĞALGAZ TİCARET ANONİM ŞİF	910,39	1,81
KİBAR ENERJİ ANONİM ŞİRKETİ	820,33	1,63
EGE GAZ ANONİM ŞİRKETİ	380,12	0,75
AVRASYA GAZ ANONİM ŞİRKETİ	262,39	0,52
SHELL ENERJİ ANONİM ŞİRKETİ	183,84	0,37
Total	50.360,58	100

Figure 2: Natural Gas Import Amounts by Companies

Torun asserts that the price of natural gas is correlated with foreign exchange rates and crude oil in Turkey, whereas the decline in the prices of crude oil or exchange rates does not have an impact on the price of natural gas since the increase in the cost of energy puts heavy financial obligations on BOTAŞ. (Torun, 2017)

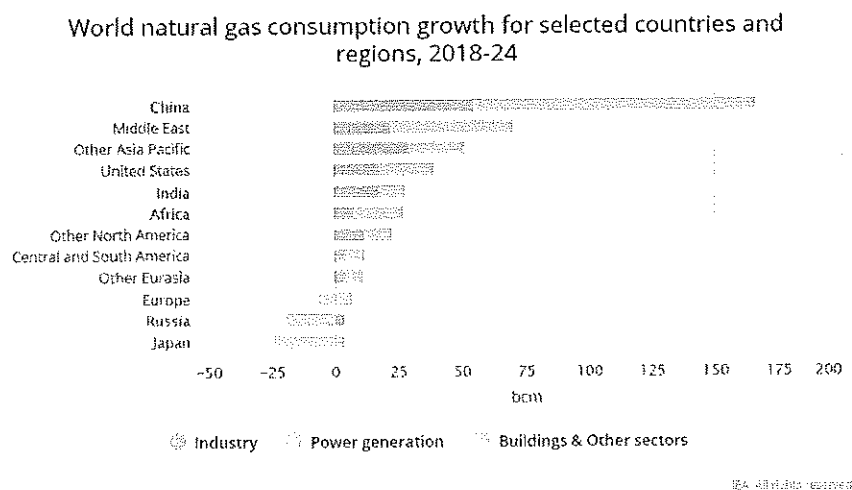
2.1.3. Natural Gas

Energy is the most fundamental element for living creatures in the world. Like human being who feed themselves to generate power, states in the world uses energy to function and develop their economy and welfare of the society. (Özdemir, 2009)

Natural gas has become very substantial for countries with its privileged characteristics. Hydrocarbon based natural gas resources are type of fossil fuels that is found in the form of large volumes of gas, cramped in the gaps of porous rocks

underground or above the oil deposits. Natural gas is scentless and lighter than air and because its chemical structure is simple it has high inflammability, combustion is easy and full combustion takes place. Since the combustion is so easy, it generates high efficiency and this specification leads to create high economic competitive advantage. Comparing to other fossil fuels, natural gas is less harmless to environment and to human being. Since the transportation is done by pipes, it does not create any other additional cost to importer countries. On the other hand, because natural gas thermal conductivity is high, it easily and briskly warms where it is used so this attribute reveals the efficiency of using natural gas as a primary energy source in the industry and heating. (Akmercan Gaz Doğalgaz, 2018)

According to British Petroleum, natural gas reserves of the world has become 196.9 trillion m3 in the world. 38.4% of this reserve is found on the Middle East, 31.9% is found on the CIS, 9.2% is found on Asia Pacific, 7.3% is found on Africa, %7.1 in North America, 4.2% in Mid and South America and 2% is found in Europe. (BP, 2019) Having looked at natural gas consumption at figure 1, for the world we may say that there is a significant rise in the demand. IEA presumes that there will be 1.6% rise in the global natural gas market demand in the following 5 years of time. (International Energy Agency, 2019)



Source: Market Report Series: Gas 2019

Figure 3: World Natural Gas Consumption

The above chart shows us the consumption growth by countries as where they mostly use natural gas. China with its developing economy is the top importer in the world and a dominant key player in gas market for shaping the gas policies. Graph shows that the importance of natural gas in the various consumption forms. As China mainly uses natural gas for buildings, it is seen that the natural gas is mainly used for power generation purposes in the Middle East and for industry purposes in United States. This variety also shows the importance of the resource as how it can contribute to the need of the world.

With the rising consumption and demand, countries have accordingly working on to structure their energy policies and every new discovery at natural gas reserves is becoming an important issue both for the energy dependent countries and for the exporters.

2.1.4. Energy Supply Security, Distribution Policies and Turkey

Every organism in the life needs energy for its existence, so do the nations. Post-Fordist era have showed us how we are dependent and needy to “petroleum-based” energy resources not only because our primary source of energy at industries have become petroleum based but also the heating system in our daily life has changed due to environmental politics. Knowing that everything has an end, it is crucial for countries to search for new forms of energies. International Energy Agency has defined energy supply security as; “*the uninterrupted availability of energy sources at an affordable price*”. According to the IEA, energy supply security can be analyzed in two parts as “*long- term supply security*” which concerns planned investments in the light of economic developments and “*short-term supply security*” which concerns with proactive reaction in case of a spontaneous shifts in the market. (IEA, 2019)

Just before the First World War, in order to make British royal navy faster than German's, Winston Churchill had decided to transform the royal navy with the ships that are using oil rather than coal. Those years it was seemed as a

revolutionary decision and it is accepted as the starting point of the security of energy. (Yergin, 2006)

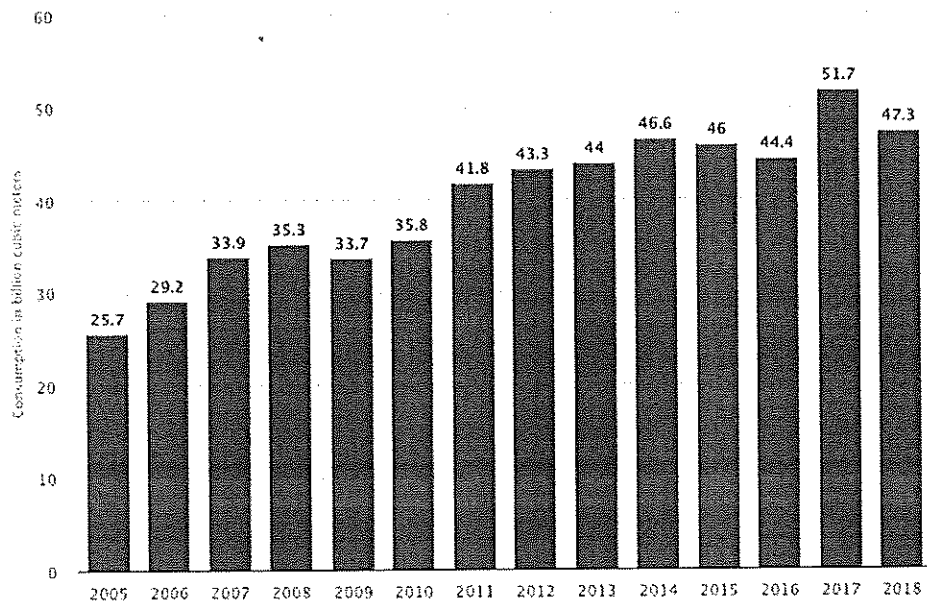
Scholars claims that energy market dynamics are very variable thus to generate policies regarding to energy supply security is both a must for a country and is a very tough issue. Regarding to this concept, Asia-Pacific Energy Research Council has developed four “A” variables to utter the energy supply security. These variables are stated as; “*Availability*” which is mainly geological, “*Accessibility*” which is geopolitical, “*Affordability*” which is related with the economics and “*Acceptability*” which is environmental and social. (Hughes & Shupe, 2010)

Daniel Yergin, at his “Energy Security Markets” presentation has uttered that the four variables form of the energy supply security is divergent by countries. For developed countries, energy supply security means as the affordability and availability whereas for the exporter countries it means the security of the resource. (Yergin, 2015)

Energy supply security and distribution are two inseparable elements. Since energy resources are placed in various locations all over the world, the distribution of these resources is particularly important with the security.

The Ministry of Energy and Natural Resources of Turkey states that the main aim of the Turkish energy policy for 2023 is to sustain the austerity and efficiency of energy and maintain the energy security buy reducing the dependency. (ETKB, 2019) Since Turkey is not having a problem in the supply of the demand in natural gas, ministry took precautions in order to secure the availability in case of a sudden unexpected activity. Ministry fostered the private sector for establishing a storage and regasification unit and first unit, which is a floating unit, was opened in Aliğa, İzmir and the second one was opened in Hatay. ETKB is currently working on the third storage unit which will be the first underground unit in Salt Lake, Turkey.

Looking at the consumption figure shown below (Tiseo, 2019), we can see that the consumption in natural gas by the years augmented notably in correlation with the completion of gas pipelines through Turkey.



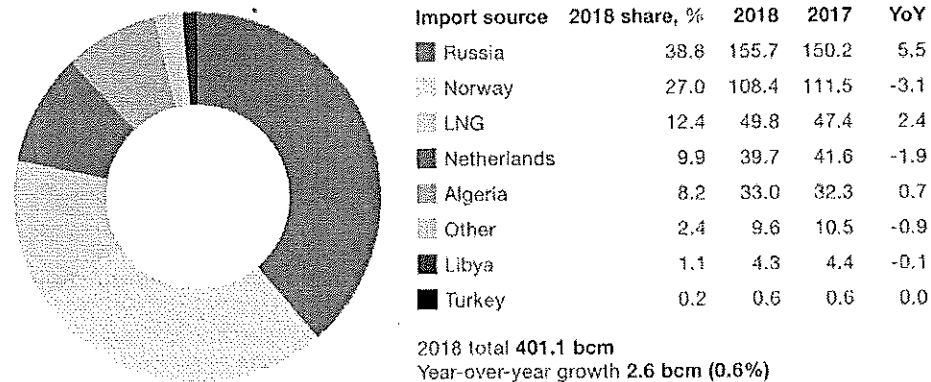
© Statista 2019

Figure 4: Natural Gas Consumption Turkey

Since Turkey is the route opening to Europe, it is substantial to understand the European gas market and the needs to develop efficient and stable policies.

Looking at the European countries demand and imports we see that there is a significant rise in the demand of natural gas. The main supplier countries are Russia and Norway for European Union. The main importer countries are Germany, Italy and France with a total amount of 190.5 bcm. As shown in the figure 5 below, Germany is the top importer country with 19.7% share in Europe, Italy follows with 15.9% and France is with 11.9%. (Dediu, Czajkowski, & Kiewra, 2019) World Energy Outlook presumes that Russia is going to be the top gas exporter country to Europe by 2040 (Zeniewski, 2019)

Natural gas net imports to Europe, bcm



McKinsey
& Company | Source: Energy Insights EU PipeFlow; EntsoG; ALSt; AGSI

Figure 5: Europe Natural Gas Imports

For the purposes of energy supply security, EU is shaping its policies for a consistent supply regarding its welfare. Currently, EU's energy import dependency for natural gas is 66%. This makes EU a significant market in the eye of the suppliers, for the only one, which is Russia. Since Russia is the only supplier for six EU member states, supply security issue is a very important matter for EU and "Accessibility" to new resources with new suppliers is taken as a priority for its common interest. (European Commission, 2015)

The historical development of natural gas in Turkey started with the first natural gas imported from Soviet Union to Turkey on 1987 under the gas purchasing agreement signed by BOTAS (state owned Petroleum Pipeline Corporation) with SOYUGAZ EXPORT for 25 years. In order to increase the resource variety and secure the energy supply, Turkey had signed another gas purchasing agreement with Algeria on 1988 and the first LNG terminal opened in 1994. Right after the establishment of the first LNG terminal, Turkey signed 22 years of gas purchasing agreement with Nigeria then signed another gas purchasing agreement with Iran on 1996. Turkey then signed 25 years of contract with Russia which enables provision of the gas by pipes from Black Sea region which is called as Mavi Akım pipeline and with this agreement Turkey had succeeded to supply from four different sources. (Gazbir, 2018)

Starting with the liberalization period in Turkey, Law No.4646 on the Natural Gas Market enacted and Turkey signed a new gas purchasing agreement with Azerbaijan on 2001. Turkey had done the first export to Greece on 2007 by BOTAŞ and this was the starting point of the aim of being an energy hub for Turkey. (Gazbir, 2018)

The latest pipelines are as follows in the below map. (ETKB, 2019)

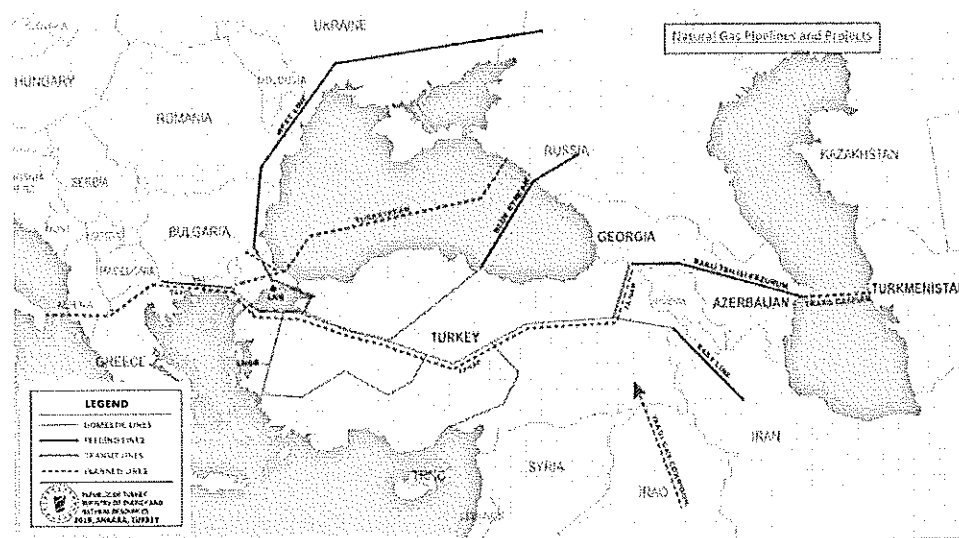


Figure 6: Turkey Natural Gas Pipelines

There are six active pipelines that are currently working and one pipeline that is under construction.

Length and the coverage are as follows; (ETKB, 2019)

- **RUSSIA – TURKEY NATURAL GAS PIPELINE**

This pipeline covers 845 km of route that enters Turkey from Bulgarian border and reaches to Ankara via route Ambarlı, İstanbul, İzmit, Bursa and Eskişehir.

- **BLUE STREAM GAS PIPELINE (MAVI AKIM)**

This pipeline carries 16 billion cubic meters of natural gas to Turkey depending to the agreement signed between BOTAŞ and Gazexport in 1997. This gas is transferred from Russia under Black Sea. Blue Stream pipeline enters Turkey from Samsun and reaches to Ankara via route Amasya, Çorum, Kırıkkale.

- **EASTERN ANATOLIAN NATURAL GAS MAIN TRANSMISSION LINE (IRAN-TURKEY)**

This pipeline came into effect in 2001 and covers 1491 km of route that enters Turkey from Ağrı Doğubeyazıt and reaches to Ankara via Erzurum, Sivas and Kayseri. The pipeline carries 10 billion m³/year regarding the agreement signed by Iranian and Turkish government in 1996.

- **BAKU - TBILISI – ERZURUM NATURAL GAS PIPELINE (BTE)**

This pipeline started to build in 2004, with the agreement signed by Turkish and Azerbaijani government to supply the natural gas, produced from Caspian Sea. In respect to this agreement, BOTAŞ and SOCAR signed a gas purchase agreement lasting 15 years for 6.6 billion m³ in 2001. The project completed in 2007 and first gas has been received successfully.

- **TRANS – ANATOLIA NATURAL GAS PIPELINE (TANAP) PROJECT**

After the completion of the Baku-Tbilisi-Erzurum natural gas pipeline, a new agreement was done with Azerbaijan for supplying additional 6 billion m³ of natural gas. Furthermore, in order to carry the 10 billion m³ of Caspian natural gas, an additional agreement signed by both parties to establish a new pipeline that connects Turkey with Europe. With this intergovernmental agreement laid the foundation of TANAP. The aim of TANAP is to bring the natural gas from Shah Sea Phase 2 to Turkey and export it to Europe by connecting to Trans Adriatic pipeline, so this project has a significant importance on Turkish natural gas export. Gas flow started in 2018 and export is expected to be done by 2020.

- **TURKSTREAM GAS PIPELINE PROJECT**

It's a two-way pipeline that connects Russian natural gas with Turkey and to Greece and Bulgaria via Turkey. The projected capacity is 15.75 billion m³ and project is expected to go live by the end of 2019.

• TURKEY - GREECE GAS PIPELINE PROJECT

Within the European Union's INOGATE (Interstate Oil and Gas Transport to Europe) the first phase of the south Europe gas ring is the Turkish – Greek interconnection pipeline. The intragovernmental agreement had done in 2003 to ensure the supply of natural gas and a natural gas purchasing agreement with 15 years of time signed by BOTAS and DEPA. Project had been planned to extend the pipeline to Italy and an agreement signed between Turkey, Greece and Italy for this new "Poseidon" pipeline route. This route has become essential for southern gas corridor in Europe.

According to the latest data provided by EMRA, Turkey had imported 50.360,58 million cm³ of natural gas in 2018. The 46.95% of this import was done from Russia. Below figure shows the allocation of the total amount of gas imported by countries within the last decade. (EMRA, 2019)

Countries	Russia		Iran		Azerbaijan		Algeria		Nigeria		Other*		Total	Change
Years	Amount	Share (%)	Amount	Share (%)	Amount	Share (%)	Amount	Share (%)	Amount	Share (%)	Amount	Share (%)	Amount	(%)
2008	23.159	62,01	4.113	11,01	4.580	12,26	4.148	11,11	1.017	2,72	333	0,89	37.350	4,21
2009	19.473	54,31	5.252	14,65	4.960	13,83	4.487	12,51	903	2,52	781	2,18	35.856	-4
2010	17.576	46,21	7.765	20,41	4.521	11,89	3.906	10,27	1.189	3,13	3.079	8,09	38.036	6,08
2011	25.406	57,91	8.190	18,67	3.806	8,67	4.156	9,47	1.248	2,84	1.069	2,44	43.874	15,35
2012	26.491	57,69	8.215	17,89	3.354	7,3	4.076	8,88	1.322	2,88	2.464	5,37	45.922	4,67
2013	26.212	57,9	8.730	19,28	4.245	9,38	3.917	8,65	1.274	2,81	892	1,97	45.269	-1,42
2014	26.975	54,76	8.932	18,13	6.074	12,33	4.179	8,48	1.414	2,87	1.689	3,43	49.262	8,82
2015	26.783	55,31	7.826	16,16	6.169	12,74	3.916	8,09	1.240	2,56	2.493	5,15	48.427	-1,7
2016	24.540	52,94	7.705	16,62	6.480	13,98	4.284	9,24	1.220	2,63	2.124	4,58	46.352	-4,28
2017	28.690	51,93	9.251	16,74	6.544	11,85	4.617	8,36	1.344	2,43	4.804	8,7	55.250	19,2
2018	23.642	46,95	7.863	15,61	7.527	14,95	4.521	8,98	1.668	3,31	5.140	10,21	50.361	-8,85

Figure 7: Natural Gas Imports of Turkey

Within the latest amount of the imported gas, Turkey has exported 673,3 million cm³ to Greece by BOTAŞ. Since the total amount is just 1% of the total import "Turkey plays and will play an essential role for being a hub in the region as Europe's demand is also rising and the accessibility will be much easier.

Following chart shows the amounts of natural gas that is being exported to Greece, starting from the beginning of export. (EMRA, 2019)

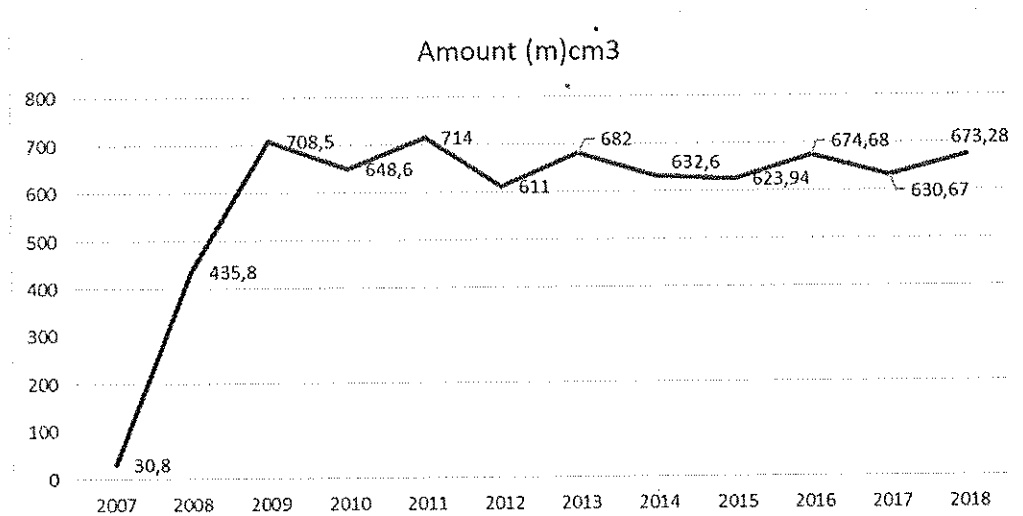


Figure 8: Turkey's Natural Gas Exports to Greece

Within the long-term time period, Turkey has become highly dependent to Russian gas thus new sources have become vitally important considering energy supply security and national interest. On the other hand, with the new sources and pipelines, the distribution capacity of Turkey has been increased and Turkey could export more than it has been doing by now.

Being an energy hub will not only steam up the energy supply security of Turkey and invigorate the business with Europe but also it will enable to distribute the supply risk and strengthen Turkey's geopolitical and economic distinctiveness in the region.

2.2. Eastern Mediterranean Natural Gas Deposit

Whosoever commands the sea commands the trade;

Whosoever commands the trade of the world commands the riches of the world

And

Consequently, the world itself.

SIR WALTER RALEIGH¹

There is hardly a sophisticated place than on earth. Eastern Mediterranean region had been in the eye of every civilization at every time.

The Mediterranean region is accepted from Tunisia the Cape Bon to Italy the Cape Lilibeo and the eastern part from Mora is called Eastern Mediterranean. The region is just in the middle of trade routes thus it makes the region both politically and economically strategic. The region had been under the greatest civilizations in time to time as Alexander the Great Empire, Roman Empire, Persian Empire and Ottoman Empire and has a legacy of all empires ruled the region. Starting from the Cape Bon, the region has become very important place since it covers more than 400 billion m³ of crude oil reserves and 85 trillion m³ of natural gas reserves. (Tuğrul, 2018)

According to US Geological Survey It has been said that the reserve has a potential of natural gas between 122 and 223 trillion cubic feet which is 6315 bcm in Eastern Mediterranean. There is no doubt that the region will be the limelight of the world. (Shama, 2019)

Eastern Mediterranean is geopolitically important as the trade between Far East and Europe is done via this route. Moreover, according to European Parliament 2017 Energy Report, 280 billion m³ of natural gas had been discovered in Tamar-Israel on 2009, 620 billion m³ of natural gas in Leviathan field on 2010, 140 billion m³

¹ Sir Walter Raleigh is a British writer, sailor and adventurer. He had knighted by the Queen Elizabeth 1. (Latham, 2019)

of natural gas in Aphrodite-Cyprus on 2011 and 850 billion m3 in Zohr-Egypt on 2015. (Şahin, 2015)

All these three fields supply piquant amount of natural gas that Europe and other energy dependent countries need, and the southern gas corridor had become eminently important for the delivery of the gas and obviously for Turkey. For Europe, Eastern Mediterranean gas absolutely is an opportunity for their supply security and energy market. For Israel and Egypt, issue became more commercial and resource security oriented as they will be the exporters. For Cyprus Island, both for Turkish and Greek Cypriots interests, the issue became more tortuous than ever at their history. At this part I will put the case clearly by fields and will pass to the research question accordingly.

2.2.1. Cyprus Island

Cyprus Island is the third biggest island in the Mediterranean after Sardinia and Sicily. The civilization of the island last up to Bronze Age. The island was conquered by Persians in 526 BC then conquered by Alexander the Great and became a part of Ptolemaic Egypt. (Ker-Lindsay, 2011) Every empire in the history in Middle East, Europe and Asia in the region had an impact and serious interest on Cyprus Island as to economic, cultural and geostrategic conditions.

Energy case have been in the heart of every country that has coast to Eastern Mediterranean. To secure the political and economic interest of coastal countries on their coastlines an agreement developed by United Nations as the Law of the Sea and this agreement signed by coastal countries that have clearly defined the limits and capabilities of the situations for any coastal country might face.

Depending to United Nations Convention on the Law of the Sea Article 55, the Exclusive Economic Zone, will be named as EEZ hereafter, *“is an area beyond and adjacent to the territorial sea, subject to the specific legal regime established in this Part, under which the rights and jurisdiction of the coastal State and the rights and freedoms of other States are governed by the relevant provisions of this*

Convention” (United Nations) Since EEZ is concerned with the natural resources of a coastal country, the law has a certain clause limiting the maximum range with 200 miles from the baseline.

The evolution of the energy dispute started when the Greek Administration of Southern Cyprus², will be named as GASC hereafter, have declared EEZ for 200 miles to UN starting from March 21, 2003 on behalf of the whole Cyprus Island. Moreover, GASC have signed EEZ agreements with other coastal countries as Egypt and Lebanon respectively. Within this concept the Greek parliament have enacted petroleum law on 2007 and made agreements with Delek and Noble Energy for searching natural resources at the field. (Kedikli & Taşkın, 2015)

At the time, as shown in the Figure 9, the region had been divided into 12 blocks, in 2013 Noble Energy had announced that they discovered almost 5 trillion cubic feet, which equals to 141.58 billion m³ of natural gas in the Aphrodite field block 12. (Roberts, 2014)

After discovering a natural gas resource in the block 12, GASC had tendered the blocks 2,3,9 and 11 for new discoveries to international oil and gas companies. (Kedikli & Taşkın, 2015)

² After the Turkish military intervention in 1974, the island divided into two parts as Southern and Northern Cyprus. In 1975 at Vienna Convention, and the Turkish Cypriots were moved to northern part of the island where the Greek Cypriots moved to southern part. (MFA, 2011) On November 15, 1983 the leader of the Turkish Cypriots, Rauf Denktaş had declared the sovereignty of the northern part as “Turkish Republic of Northern Cyprus”. Southern part remained as Republic of Cyprus as it had been established by the agreement in 1959 and has named as it is in the international arena. Since Turkey does not recognize Republic of Cyprus as a legitimate nation, it has been named as “Greek Administration of Southern Cyprus”.

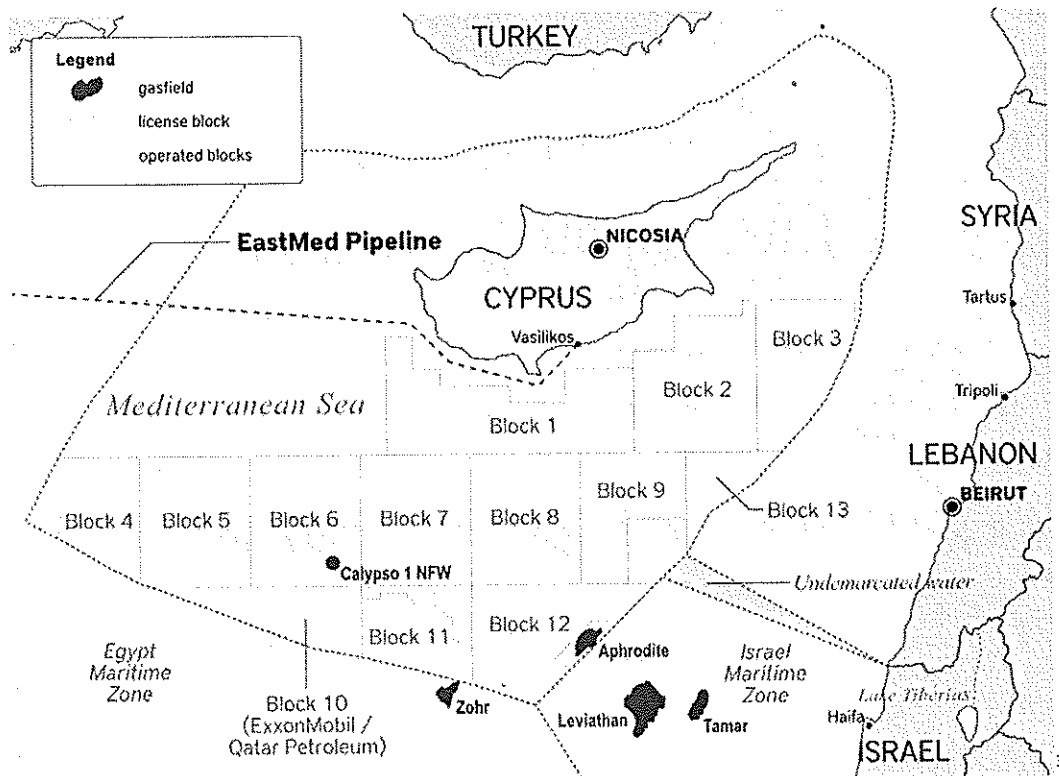


Figure 9: Blocks in GASC

After the exploration at block 12 Aphrodite field, Noble energy declared that the potential gas reached is projected to be 4 tcf which is to be 113 bcm. (Noble Energy, 2013)

In 2018, Eni, the Italian company had discovered a field which looks like Zohr field in terms of geology. After the exploration the company had declared they found a significant amount of gas at the field. The field named “Calypso” at block 6 and the amount that which is said to be between 170 bcm – 227 bcm (CyprusMail, 2018)

In 2019 the energy minister of GASC Georgios Lakkotrypis had said that a new discovery has been done by ExxonMobil at block 10 and a very notable amount of

³ Map provided by Petroleum Economist shows the island as Cyprus yet this situation is not valid from Turkey's perspective and the island should be represented as GASC and TRNC. Source: *Petroleum Economist* (Butt, 2019)

gas had been discovered. The amount that was said to be around 140 to 230 bcm (PHYS, 2019)

The field named as “Glaucus” and the estimation would be around 4.55 tcf which is to be 128 bcm (REUTERS, 2018)

2.2.2. Israel – Tamar & Leviathan Fields

The evolution of the natural gas history starts in 1999 when Noa field was discovered. The field was the first natural gas reserve found in the Israel territory. Right after this discovery, in the southeast of the field Noa, a new reserve had been discovered and named as Mari-B, containing 45 bcm of natural gas. The field was commercialized in 2004 by building up a production platform. The reserve is used for internal needs and no export were done. After these explorations, Israel government signed agreements with companies Delek Drilling, Avner and Noble Energy, assigning them to explore for natural gas. On January 2009, Tamar-1 field was discovered by Noble Energy containing 240 bcm of natural gas. This was the largest discovery until then. Just after this huge reserve a minor reserve was discovered in Dalit field containing 8 bcm of natural gas. In 2010, the very largest field was discovered by the cooperation of Noble Energy, Delek Drilling and Ratio Oil. It was called as Leviathan field. The first announcement was done as the reserve contains about 450 bcm of natural gas yet after a time the reserve revealed that it contains 500 bcm. It has been said that the Leviathan field is the largest reserve that has been discovered in the world in the last 20 years. Currently, as shown at the Figure 8, Israel has six discovered reserves and has around 900 bcm of natural gas which made Israel a very key player in the natural gas market. (The Ministry of Energy, 2019)

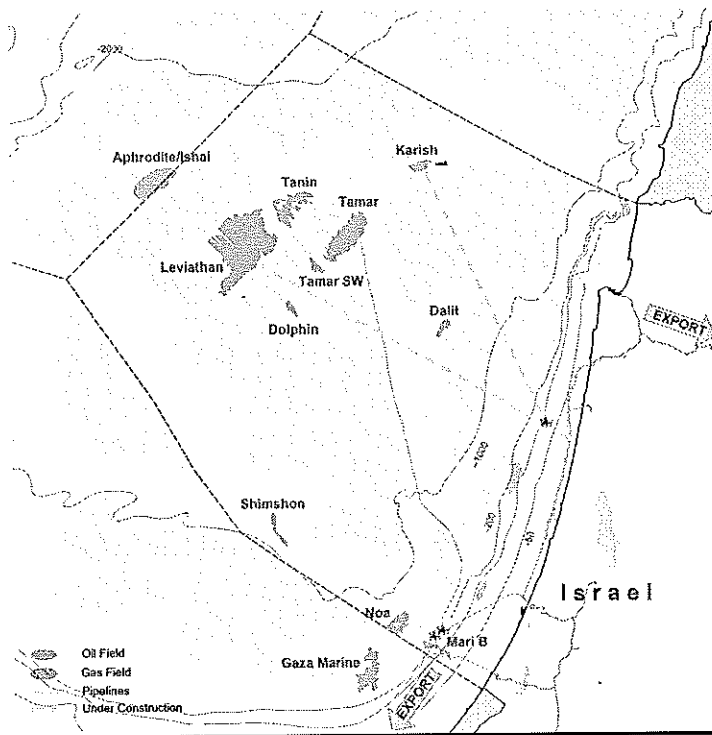
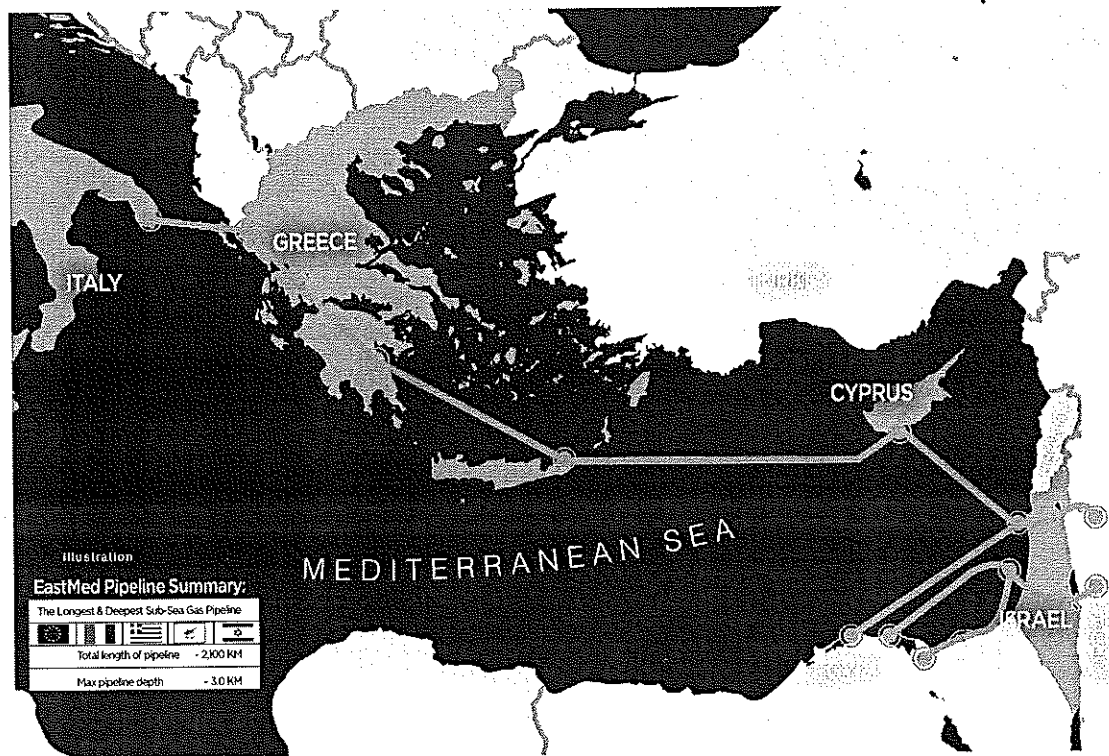


Figure 10: Israel Gas Field

Having the largest discovered reserve in the region, Israel made its first significant gas export agreement with Jordan on September 2016 securing 15 years of sales with about 10 billion dollars. According to the agreement, the flow is expected to be start on 2019 and 45 bcm of gas export will be done for 15 years. (Pamir, 2017)

Starting with the commercialization of the resource, Israel have sought to find ways to deliver the gas to Europe and worked on a project named as EastMed pipeline. According to this project, shown by the below figure, the aim is to connect Israel gas with GASC gas and flow through Greece to Italy. The amount of gas that will be provided to Europe was very noteworthy for their energy supply security and variety of the supply sources thus in 2015 EastMed pipeline was accepted as a “Project of Common Interest” (Ministry of Energy, 2019)



⁴Figure 11: EastMed Pipeline

2.2.3. Egypt – Zohr Field

Since 1880's Egypt had been in the eye of the petroleum world with the first crude oil explored and taken out from Ras Gemsah field. Since then Egypt had several explorations both in crude oil but also in natural gas according with the latest developments in the world. The natural gas production of Egypt is not a new issue. The country has a background of 30 years in natural gas production and export. As part of an Eastern Mediterranean region, a key player in natural gas as and as an exporter, Egypt started to seek new sources as their natural gas reserves were started to decrease by 2010. (Sartori, Colantoni, & Paceviciute, 2016)

The history of Zohr lied to 2012 when Egypt government opened a tender for exploration in Nile Delta that includes 15 blocks. Eni, an Italian oil & gas company

⁴ Map provided by the Israel Ministry of Energy shows the island as Cyprus yet this situation is not valid from Turkey's perspective and the island should be represented as GASC and TRNC.

was one of the participators of the tender had attained the block 9. Field was discovered by Eni an Italian oil & Gas Company in 2015. Since the expectation was not so high considering the discovered reserves in Eastern Mediterranean, company announced the greatest reserve that had been found in the region until that time. (Alfieri, 2019) The giant gas discovery in Zohr field made Egypt a definite supplier of 850 bcm of natural gas and this made Egypt certainly the key player in the region. (ENI, 2019)

2.2.4. Syria

Syria has a limited resource on natural gas reserves. Country is on the Arab gas pipeline route which connects Lebanon, Israel, Jordan and Egypt so plays a significant role in the region. According to EIA, Syria is strategically very important for energy transits. The latest report as of 2011 the known reserves of natural gas in Syria is utmost 240 bcm. Comparing to other natural gas producers in Middle East respectively as Iran, Qatar, Saudi Arabia, Oman, Bahrein, Kuwait and Israel, Syria is taking 8th place just before Israel. (EIA, 2011)

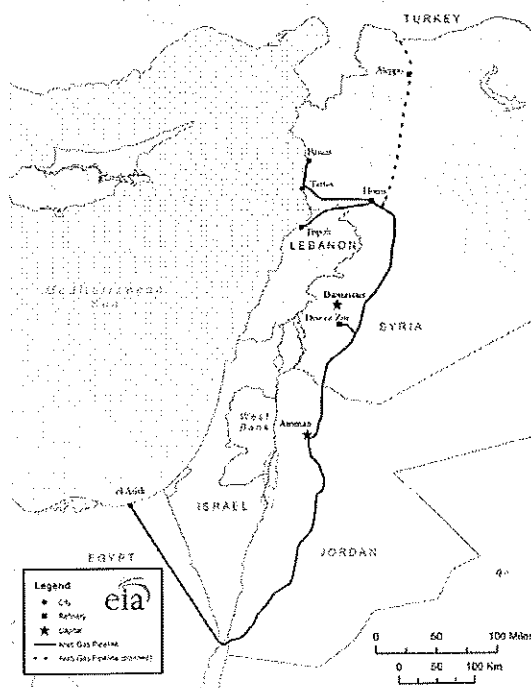


Figure 12: Arab Gas Pipeline

Since the civil war destroyed all developments in the country just before the civil war, Syria had signed several agreements with countries for natural gas cooperation. For instance, Syria signed an agreement with Azerbaijan in 2010 for transferring the Azeri natural gas via Turkey. On the other hand, Syria had done an agreement with Iran and Iraq in 2011 for building the “Islamic Gas Pipeline” (EIA, 2011)

In 2007, Syrian government opened a bid for explorations in Eastern Mediterranean but could not be successful on return. The secondary bid was opened in 2012 yet because of the civil war in Syria, bid was cancelled due to security purposes. (El-Katiri & El-Katiri, 2014)

2.2.5. Lebanon

Although it is just near by the Leviathan basin, Lebanon is the last player entered the gas bonanza in Eastern Mediterranean due to its political turmoil with Israel according to the dispute on the overlap of the fields. After 2017, Lebanon had signed agreements with TOTAL, ENI and NOVATEK and started offshore explorations. (Weiss, 2019) According to Lebanese authorities the presumed amount of natural gas is around 25 tcf which is 708 billion m3. (EIA, 2014) Nada Boustani, Lebanon’s Minister of Energy and Water have done a press release and said that depending to the seismic studies the authorities are so positive. The drilling is expected to be started by the end of 2019 thus no exact amount is discovered as of 2019 August. (WIDDERSHOVEN, 2019)

2.3. Research Question

Up to this point, I have pointed out the key elements of Eastern Mediterranean natural gas bonanza. I have not mentioned neither Turkey’s interest nor Turkey’s interrelations with the countries in the region. The reason behind is to show solely the matter of fact and the current situation from the riparian countries point of view.

Since Silk Road Turkey had been a transit country for various products and services in the region. From the beginning of 2000’s Turkey has a strong will for being an

energy transit hub and is working hard for the energy policies for two decades. Being an energy transit hub is not only important for supply security of Turkey but is also strategic for the diversification of the sources and in economic contribution. Finally, there is no doubt that being an energy transit hub will strengthen Turkish foreign policy and so the geopolitical position as a result.

Consolidating the amounts discovered at the reserves in Eastern Mediterranean region, it is crucial for Turkey to discuss for being the transit country to Europe as she has already existing pipelines, whereas the riparian countries are working on to build up a new pipeline called as East Med.

Scholars have agreed on that the energy and foreign policy are interrelated because the mutual interests at economic relations promotes peace and prevents disputes between nations. (WINROW, 2017) Since the assumptions presume that the energy demand will continuously rise, steady access to energy sources is vitally important for countries development and security. (Erdoğan, Gedikli, & Genç, 2018)

From this point of view, I would like to raise my research question as “Has Turkey ensured a foreign policy for being an energy transit hub on Eastern Mediterranean natural gas bonanza after 2010?”

Since Turkey is highly an energy import dependent country and position herself as a strong candidate for being an energy hub, this research question is important to apprehend the foreign policy that Turkey has been developing in the last decade. The paper will include literature review and the news in the press. The conclusion will provide the results with whys and wherefores of the research question.

2.4. Methodology

The methodology of this study will depend upon the “Five Principles of Foreign Policy” presented by Prof. Dr. Ahmet Davutoğlu⁵. He remarked the five principles of Turkish foreign policy as; (Davutoğlu, 2008)

- Legitimacy of the political regime;

Focuses on the balance of security and democracy. It is strongly suggested to provide initially the internal security in terms of the freedom and human rights.

- Zero problem with neighborhoods;

Focuses on resolving the problematic issues with neighborhoods and building trust.

- Developing relations with neighborhoods and beyond;

Focuses on developing relations not only with the neighbors but also around the region. This principle reflects the centric approach of Davutoğlu’s foreign policy. At this stage Turkey is positioned as a regional power, central country.

- Adhesion to multi-dimensional foreign policy;

Focuses on making Turkey collateral with global actors as a strategic partner.

- Rhythmic diplomacy;

Focuses on the diplomacy by developing the contributions and increasing the involvement in international projects, meetings.

From this point, I will analyze the Turkish foreign policy in natural gas sphere according to Davutoğlu’s five principles on Turkish foreign policy. My study will include literature review, news in local and foreign presses and studies done by independent institutions.

⁵ Prof.Dr.Ahmet Davutoğlu is the former minister of foreign affairs and former prime minister of Republic of Turkey. (TBMM, 2019)

3. TURKISH FOREIGN POLICY ON EASTERN MEDITERRANEAN NATURAL GAS BONANZA 2010-2018

Turkish natural gas demand has been rising significantly in the last decade. As discussed previously, Turkey imports natural gas via pipelines and as LNG via shipments. According to the data below, the gas trade runs through with Russia, Azerbaijan, Iran, Algeria and Nigeria. The foreign policy of Turkey in natural gas have been shaped around these countries. (EMRA, 2019)

Imported Natural Gas by Source Country between 2010-2018 (Million Sm ³)								
Countries	Russia	Iran	Azerbaijan	Algeria	Nigeria	Spot LNG	Total Amount	Change (%)
Years	Amount	Amount	Amount	Amount	Amount	Amount		
2010	17.576	7.765	4.521	3.906	1.189	3.079	38.036	6,08
2011	25.406	8.190	3.806	4.156	1.248	1.069	43.874	15,35
2012	26.491	8.215	3.354	4.076	1.322	2.464	45.922	4,67
2013	26.212	8.730	4.245	3.917	1.274	892	45.269	-1,42
2014	26.975	8.932	6.074	4.179	1.414	1.689	49.262	8,82
2015	26.783	7.826	6.169	3.916	1.240	2.493	48.427	-1,7
2016	24.540	7.705	6.480	4.284	1.220	2.124	46.352	-4,28
2017	28.690	9.251	6.544	4.617	1.344	4.804	55.250	19,2
2018	23.642	7.863	7.527	4.521	1.668	5.140	50.361	-8,85

Figure 13: Turkey's Natural Gas Imports from 2010 to 2018

Still now, Turkey is highly dependent to Russia for natural gas. The total share of the import is 53.53% and done by pipelines thus the relations with Russia is the substantial part of Turkish foreign policy. (EMRA, 2019)

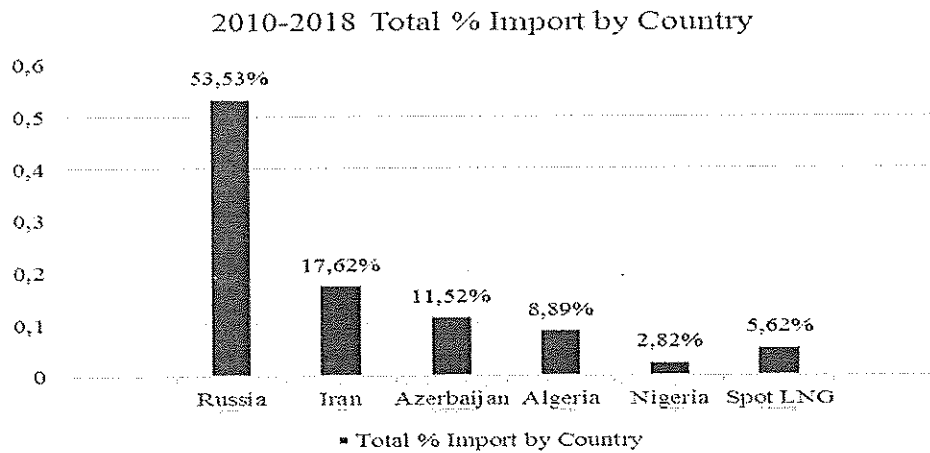


Figure 14: Total Share of the import of Natural Gas by Countries in Turkey

Energy policy of Turkey and foreign policies have been linked together and Turkey has formed its foreign policies in energy sphere in respect with its geopolitical perspective. (Wigen, 2012) This geopolitical approach formed Turkish policy in energy sphere, the pipeline agreements were signed to supply the internal demand. On the other hand, using the geopolitical advantage the projects were developed to make Turkey an energy hub. (Austvik & Rzayeva, 2017)

The year 2008 was a turning point for many of the countries in the world. The surge of the mortgage crisis in USA had hit the Europe as well. While the economy was shaking with the lack of liquidity and financial matters in most of the world, a new crisis that effected Europe through its veins that had emerged at the end of 2008. Russia cut off the gas flow to Ukraine at the beginning of January 2009. As Ukraine was the feeding line of natural gas for Europe, this crisis had appeared the importance of energy supply security. EU and countries had started discussions on seeking diverse routes. (İşeri, 2014) These ongoing discussions on new routes had led Europe to head Turkey, supporting Tanap and Nabucco projects. (Oğan, 2009)

At the time of these continuous debates, new discoveries in Cyprus Island in Eastern Mediterranean had impressed both EU and Turkey. This new potential source discovered in Eastern Mediterranean had become the new agenda for EU and Turkey for the purposes of energy supply security. In 2009, when the first source found in Tamar region and then the biggest source found in Leviathan region,

neither EU nor Turkey was so involved in the subject since the gas owned by Israel is used for its internal demand and have contracts with Jordan for the rest. On the other hand, there was no possible route to Europe to transfer the Israeli gas at that time, yet the Aphrodite gas field had changed the dynamics in the Eastern Mediterranean natural gas bonanza.

Turkish foreign relations had officially obtained a new way in 2009 at the time Ahmet Davutoğlu was appointed as minister of foreign affairs. Davutoğlu, was the key person in JDP as foreign relations consultant and had been the minister of foreign affairs until 2014 then took the prime minister role until 2016 in the parliament. There is no doubt that his policies had opened new routes in Turkish foreign policy. As being a professor in international relations, Davutoğlu have released notable articles and studies on new Turkish foreign policy before and during his ministry.

Theoretically, Davutoğlu era was formed around the “*strategic depth*” notion. This terminology generated by Davutoğlu, imposes the importance of the history and culture and highlights that these elements should take place actively in Turkish foreign policy criticizing the elitist policies remaining from the Kemalist ideology. (Davutoğlu, 2013)

Tuğtan asserts that Davutoğlu’s foreign policy was not rational and concept depended on being a central country by highlighting the Islamic identity in Middle East, Africa and Eurasia with considering the legacy of Ottoman Empire. On the contrary of general Turkish foreign policy, which was formed around *Kemalist* idea, Davutoğlu had seized on a notion of “*Surrounding*” and “*Comprehensive*” idea which framed the “*Zero Problems with Neighborhoods*” policy that had left its mark as a utopian understanding to that period. (Tuğtan, 2016)

Tarcan et al asserts that Davutoğlu policies were idealist and Turkey’s relations with Greece had gained acceleration and this reflected positively on the trade numbers. (Tarcan, Akgüller, & Işık, 2018) Although Davutoğlu period and policies

have appreciated considerably, on the contrary many people had blamed him for worsening the relations. (Ceylan, 2014)

Davutoğlu's foreign policy vision was to open a new way of understanding in a centric approach. Consequently, this centric approach appeared as maintaining the internal security as well as maintaining the security of neighborhoods in the region and show Turkey as a global power in the region or so called as a core country. (Davutoğlu, 2008)

Davutoğlu had highlighted the issue as;

“Turkey's aim is to intervene consistently in global issues using international platforms, which signifies a transformation for Turkey from a central country to a global power. It should also be underlined that this transformation is the result of the performance of all actors involved in foreign policy.” (Davutoğlu, 2008)

In the energy sphere, Turkey had aimed to be an energy hub for many years. Relevant years of this thesis, Turkey had three ministers of energy and natural resources. Two ministers, Taner Yıldız and Dr. Berat Albayrak, were the ones that majorly formulated the energy policies at this moment in time. According to the strategic report done by the ministry, Turkish energy diplomacy in international projects are listed as; (Strateji Geliştirme Başkanlığı, 2017)

- Win-Win Principle
- Supports both Turkey's and regions energy supply security
- Supports the regional peace

Eastern Mediterranean is a very sensitive area and issue for Turkey. Not only because the natural gas reserves that discovered so far but mainly because of the existence of TRNC and national sovereignty. Turkey is the only coastal country that has the longest coast to Eastern Mediterranean.

As the discoveries had been started by Israel at Tamar region, Turkey had not been involved in the matter until GASC had signed EEZ with Israel in 2010. (UN, 2010)

Until that time TPAO⁶ was in a cooperation with ExxonMobil for gas explorations in Black Sea region yet they terminated the exploration agreement in 2012. By the time being, regarding with the developments in Eastern Mediterranean, TPAO had transacted a deal with Shell for the exploration in Mediterranean. (Gürel, Mullen, & Tzimitras, 2013) Starting with this agreement Turkey officially landed on the Mediterranean Sea for gas explorations. TPAO had done seismic data collection activity in 2014 in Eastern Mediterranean and TRNC coast yet these activities did not give any fruit at the end. (TPAO, 2013) Since then, TPAO continued its facilities in the explorations.

As shown by the figure below, the exploration activities had gained an acceleration in the sea after 2013. (TPAO, 2019)

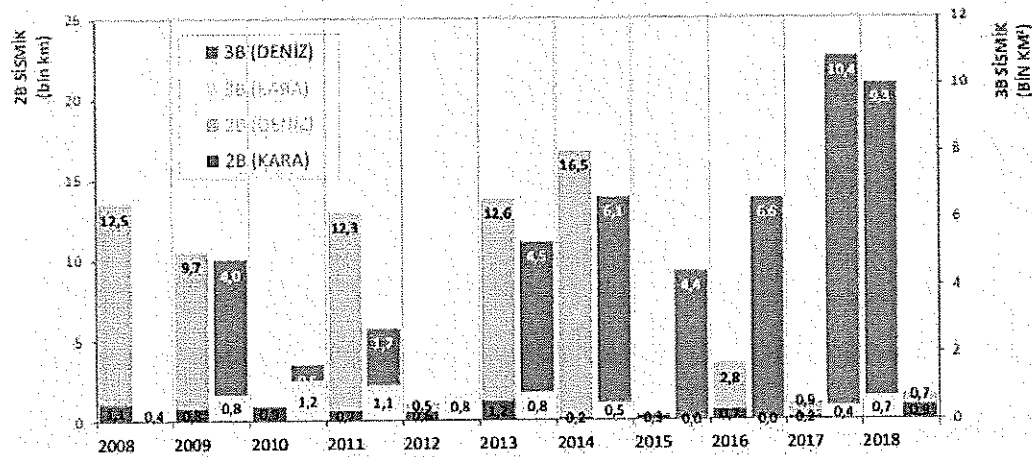


Figure 15: TPAO Exploration Activity Between 2008 – 2018⁷

Regarding to the latest discoveries done in the region, specifically around Cyprus Island, Turkey had attached importance on exploration activities and within this concept TPAO bought the first deep sea drilling ship, Fatih, and started its first drilling activity in Alanya -1 reserve. (TPAO, 2019)

⁶ TPAO is a state-owned enterprise that runs for the exploration of natural gas and oil both in domestic and internationally.

⁷ The blue 3B reflects sea, light blue 3B reflects ground, light green 2B reflects sea and dark 2B reflects ground.

EEZ issue brings another dispute for Turkey between Greece in terms of her sovereignty in Aegean Sea. According to UNCLOS, the territorial sea is limited with 12 miles thus Turkey did not be party to the treaty and did not declare EEZ neither in Aegean nor in Mediterranean, yet even Turkey was not a party, she declared EEZ for 200 miles in Black Sea in 1986 since the treaty allows coastal countries to declare an EEZ even if they are not a party. Moreover, since Turkey is not a party of the treaty, she does not have right to raise a claim to the council. Regarding to the energy issue in Eastern Mediterranean Turkey had only signed a continental shelf agreement with TRNC in September 2011 and did not signed any other agreement with any riparian countries. (Ece, 2017)

Below figure shows the existing blocks and companies working the field. Accordingly, regarding to UNCLOS, Turkey is claiming that GASC abuses the Turkish continental shelf and remarking that she has her rights in the blocks 1,4,5,6 and 7. (GEFIRA, 2018)

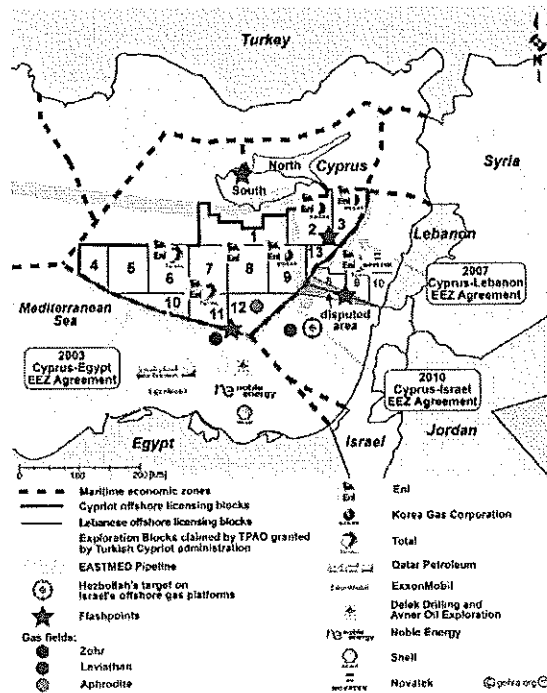


Figure 16: EEZ and NG blocks in Eastern Mediterranean

Since Turkey had warned GASC several times on the delimitation of the EEZ, the process had continued, and Turkey showed an antagonist approach and isolated rather than applying multi-dimensional foreign policy and rhythmic diplomacy.

Doster asserts that Turkey could not prevent GASC to develop relations over the Eastern Mediterranean gas and became unsuccessful on the practice except sending a drilling ship to Mediterranean. (Doster, 2012)

Instead of developing multi-dimensional foreign policy in the region to secure Turkey's interest on the gas trade, Turkey had invested drilling and seismic vessels with an amount of minimum 560 million USD. In addition, until now Turkey had not found any resource since the vessels started to work in the field. (Psaropoulos, 2018)

Moreover, opposing to the relations between Israel, Egypt, Greece and GASC Turkey had strengthened its ties with Russia and at the very beginning of 2017, President Vladimir Putin signed the Turkish Stream Project which will provide Russian gas to be carried under Black Sea to the European part of Turkey to Ipsala then export to Europe. The first phase of the pipeline which includes the sea part were finished by 2018 April and the total project is expected to be finalized by the end of 2019. (Al Jazeera, 2018)

Until this extent foreign policy analysis will be done by country wise as Turkey & TRNC - GASC relations, Turkey – Israel relations, Turkey – Egypt, Turkey – Lebanon and Turkey – Syria relations within the energy frame.

3.1. Turkey & TRNC - GASC Relations 2010-2018

To illustrate the relations with TRNC and GASC initially we need to understand the recent history behind the scene. Turkey and TRNC relations had been in the eye of international arena since the sovereignty of TRNC yet the history lies to Ottoman Empire.

Ottoman Empire conquered Cyprus from Venetians and ruled the island for three centuries until 1878 when Ottoman Empire had ceded the administration to Britain with the condition of securing Ottoman Empire's sovereignty rights. (MFA)

Cyprus had a high importance in British politics as Britain aimed extend her political and economic relations and gain upper hand in Mediterranean. Cyprus was the third base after Gibraltar and Malta that reaches to India thus Cyprus had an outstanding importance for having the control in the region. Therefore, after 1925 Britain had changed the status of Cyprus to British Crown Colony and this had led the island to become a British colony until 1959. (Vatansever, 2010)

Having the administration of the island had strengthened Britain's hand in the region and taking the advantage of the chaos of the 1st World War, on 5 November 1914, Britain annexed the island justifying the involvement of Ottoman Empire to the 1st World War. (Satan, 2012)

In the 1st World War, Ottoman Empire was in the side of central powers who were Germany, Austria-Hungary, Bulgaria and Italy⁸ at the beginning and allies who were Britain, France, Russia and Italy. Ottoman Empire who previously ceded the administration of the island had become in conflict with Britain. Knowing the Greek's aim of ENOSIS⁹ Britain had improved her relations with Greece and in exchange for involving the 1st World War with allies, Britain granted to give the island to Greece. Since this partnership was propped up by the Prime Minister, the king refused the offer. (Ker-Lindsay, 2011) Yet the Greek Cypriots in the island were extremely striving for ENOSIS and consequently these attempts turned out to be bloody actions and Greek Cypriots and Turkish Cypriots became professed enemies. (Çelik)

Meanwhile, in 1947 Greece had declared that Cyprus as a Greek island must unite with Greece and applied to United Nations in 1948 for unification using their self-determination right and did a referendum in the island in 1950. This referendum

⁸ Italy had involved in allied powers after 1915. (Tepe, 2016)

⁹Greece aim for annexing Cyprus island and creating a wider Greek community in the region (Işık, 2018)

led the island to become an international issue. When Greece application was refused by United Nations, Greece and Greek Cypriots were turned out to form an armed force. (Keser, 2011)

3.1.1. Bloody Christmas 1963 and Kumsal Massacre

The turning point of the history in the island started at the beginning of 1960's. Even though the independent country had been established, it couldn't be long lasting due to the ENOSIS intention of Greek Cypriots and resistance of Turkish Cypriots to become minority hence, the tension between the two parties had risen and led bloody conflicts. A well-known journalist of London Daily Express based in Cyprus and author of "The Genocide Files" Harry Scott Gibbons mentions his book that the Bloody Christmas case caused a genocide for Turkish Cypriots. (Gibbons, 2001)

Ker-Lindsay in his book emphasizes on the disagreement between Greek Cypriots and Turkish Cypriots started because of the sharing of municipalities of the cities in the island. Since the counterparts more or less agreed on the division of armed forces as 60% Greek Cypriots and 40% Turkish Cypriots, the division of administration had increased the tension. This disagreement led to a political row and President Makarios was trying to find a solution in return for Greek Cypriots interest thus he desired to change the constitutional amendment. This thinking was strictly refused by Turkish government. President Makarios then requested help from Greece. Greece government also had said that this could arise a serious problem by sending a strictly confidential memo to Makarios in 1963. Despite Turkey's and Greece warnings Makarios continued his plans for amendment in the constitution. At the time when Karamanlis government fell, Makarios worked on a draft of amendment and with the help of Britain he declared the thirteen articles. The articles were almost destroying the Turkish Cypriot existence in the constitution consequently Turkey rejected the amendments. These developments had fused the irrevocably situations in the island. (Kerr-Lindsay, 2011)

According to the Akritas¹⁰ Plan, more than 20,000 armed EOKA forces had been transferred to the island for possessing Nicosia and destroying Turkish Cypriots villages. The plan was clearly saying that in any case of resistance of Turkish armed forces or any civil Turkish Cypriots will be attacked. In 1963 December 21, two Turkish Cypriots were killed at the Greek Cypriot police control by Greek police. That day TMT fought with Greek Cypriots and the fire had spread out to the whole island. Coming to the 24th December, Greek Cypriots killed 31 Turkish Cypriots. (Hazou, 2013). Same day at Kumsal Nicosia, Greek Cypriots attacked to the house of retired brigadier general Nihat İlhan and killed his wife and three children while they were hiding in bathroom tub. (Keser, 2011) This violence by Greek Cypriots were placed as Bloody Christmas in the history and became the milestone of changing the politics in the region.

Since the dispute became harsh between the two parties, United Nations decided to intervene and sent peacekeeping force to Cyprus. When Makarios announced the annihilation of the treaty of guarantee and the agreements that had been signed, the Turkish Cypriots then declared the Turkish Cypriot administration in 1967. The crisis between the two parties had lasted until 1974. In the meantime, a military coup done in Greece 1973. Greece policy was towards to ENOSIS and they were thinking that Makarios was becoming far from this idea thus, the military regime decided to turn out the government, Makarios, by using EOKA-B armed force. This became a great threat for Turkish Cypriots for their warm existence in the island. When this military regime had done military coup in Cyprus, Turkish government as a guarantor state had intervened the situation depending to the treaty of Zurich and London, article 4, and Turkish military expedition done on 20 July 1974. Turkish community declared their independence as Turkish Federated State of Cyprus in 1975 and became Turkish Republic of Northern Cyprus as an independent, sovereign state on 15 November 1983.

¹⁰ The code name of Polycarpus Yorgadjis, former EOKA gunman and Minister of the Interior (Gibbons, 2001)

Until then the history writes the undecipherable dispute in the island and inhumanities over Turkish Cypriots concerning isolations and embargos. (Arik, 2011)

3.1.2. Turkey & TRNC – GASC Energy Relations

The resolution in Cyprus between Greek Cypriots and Turkish Cypriots continues under the guarantee of Turkey, Greece and UK and since then it had become an obstacle for Turkey in the international arena. The most widely known is EU accession. Turkey had been a part of discussion aiming to have a resolution with a dual government in equal representation. (Republic of Turkey Ministry of Foreign Affairs) As the discussions on the island continues, GASC had become EU member as “Republic of Cyprus” including the whole territory of the island by the Treaty of Accession 2003¹¹. In view of the facts, Turkish Ministry of Foreign Affairs had declared that Republic of Cyprus does not represent Turkish Cypriots thus will not be recognized by Turkey. (Republic of Turkey Ministry of Foreign Affairs, 2004) The Prime Minister Recep Tayyip Erdoğan had said in a speech; *“Since there is a rule on not to have a border issue, how come GASC had been accepted as a member?”* (Hürriyet, 2004) Since this question had been raised, there was no concrete step taken by Turkey. This question had surely brought up the idea of common interests of the countries.

The turning point of the relations started in 2008 when Akel leader Christofias elected in GASC. Together with the leader of TRNC, Mehmet Ali Talat, both had agreed on common denominator which reflected to a statement on May 2008. (Ramming, 2008) As discussed in Chapter 2, despite this peace wind, GASC had signed EEZ with Israel and opened blocks for gas exploration considering the whole island. The peace wind lasted until Christofias’s declaration on energy sphere that started to stress the relations. In 2011, Akel leader Christofias had done a speech at New York University saying that they could open more blocks for exploration.

¹¹ https://eur-lex.europa.eu/eli/treaty/acc_2003/act_1/pro_3/sign

(REUTERS, 2011) This issue is substantially important as there is a collide in EEZ's with Turkey.

As GASC had divided the area into 12 blocks and started licensing a new dispute had arisen as to maritime jurisdiction. After being member of EU, GASC had signed EEZ's with Israël, Lebanon and Egypt on behalf of the whole island itself. Before these agreements in 2004, disregarding TRNC's existence, GASC had declared EEZ in the region. On March 2, 2004 Turkey delivered a note stating her *ipso facto* and *ab initio* rights. The situation in Eastern Mediterranean gets multidimensional case. First it has been seen that GASC had taken steps disregarding TRNC's political existence and juristic rights. In addition, blocks 1,4,5,6,7 overlaps with Turkey's maritime zones. (Kedikli & Taşkın, 2015)

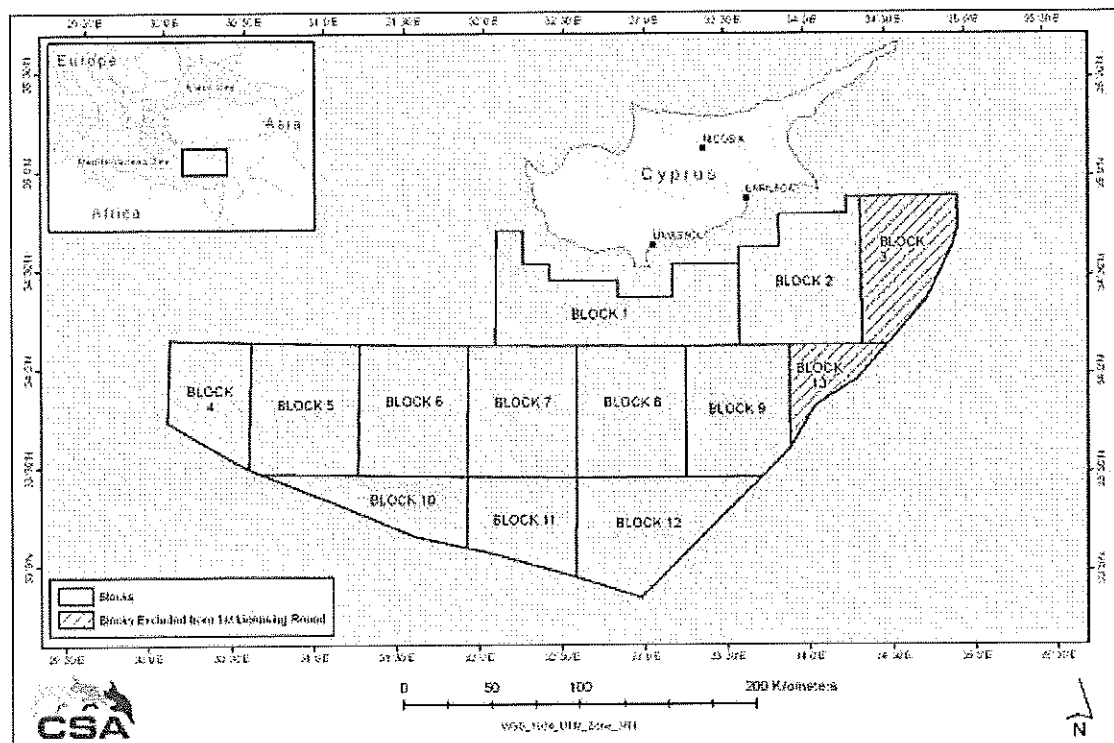


Figure 17: EEZ of GASC for hydrocarbon licensing¹²

¹² (Ministry of Commerce, Industry and Tourism of the Republic of Cyprus, 2008) Map shows the island as Cyprus yet this situation is not valid from Turkey's perspective and the island should be represented as GASC and TRNC.

According to Necdet Pamir's presentation in the Union of Chambers of Cyprus Turkish Engineers and Architects both Turkey and TRNC have exceptions on GASC explorations as to signing deals on behalf of the whole island leaving out TRNC interests. (Pamir, 2017)

Since Turkey did not be a part of UNCLOS, considering the continental shelf, the overlap of the areas is shown as in the below figure. Turkey finds GASC's EEZ declarations considering the whole island nugatory depending to the Article 121 which limits the role of the islands. (Erciyes, 2019)

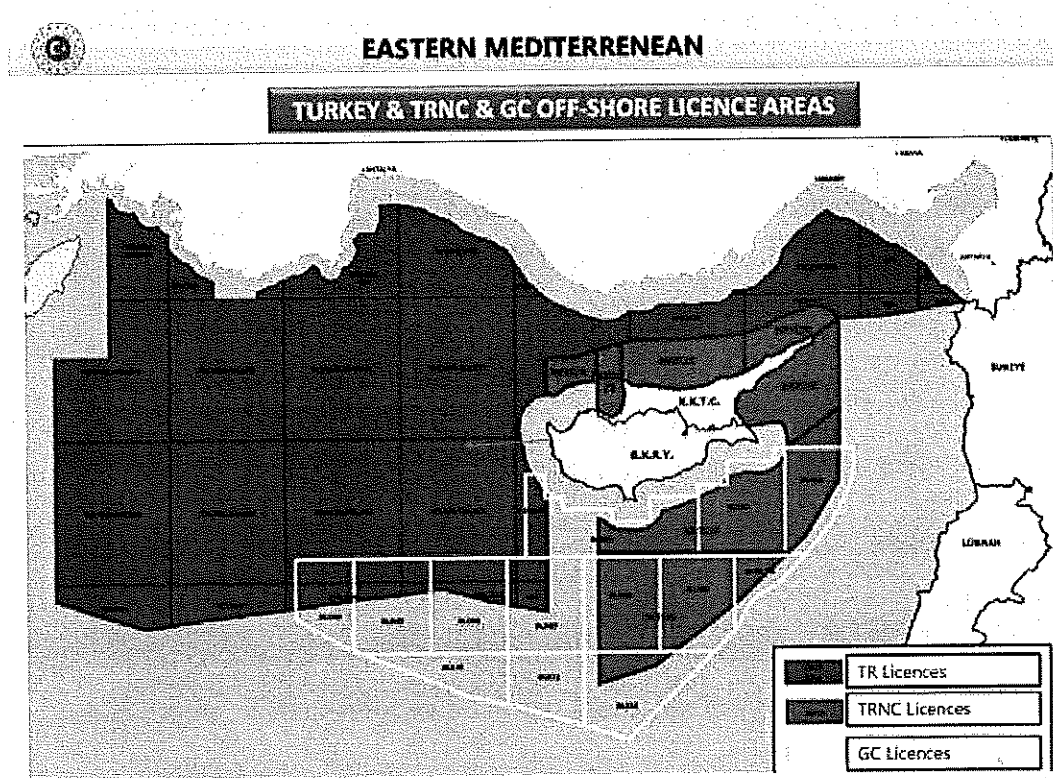


Figure 18: Turkey & Trnc & Gasc Off-Shore Licence Areas.

In return of these developments TRNC gave Turkey exploration licenses by signing “Oil Field Services and Production Sharing Agreement” in 2011. Minister of Energy and Natural Resources Taner Yıldız stated that Turkey will cooperate with TRNC for exploration. (Kıbrıs Postası, 2011) Correspondingly, in 2012 Turkey started its first drilling operation in TRNC in land. The drill named as Türkyurdu-1 was told to be a research that would last from 3 to 6 months.

Taner Yıldız had done a speech concerning on the importance of the drilling operation and said; (CNNTürk, 2012)

“We will search for our own oil, our own natural gas. I must say in advance; in the first sounding, statistics in the world reveal the probability of finding a ratio of one thousandth. So, this oil may not come out of the well. However, it will reveal the entire geological structure and underground map of the TRNC”

After the continental shelf agreements, Turkey had started explorations in Eastern Mediterranean near Alanya and Antalya by sending her own drillship Fatih. (TPAO, 2019)

3.2. Turkey – Israel Relations 2010-2018

Turkey and Israel relations had shown great development in 1990's. Starting with the peace process in the Middle East, Turkey and Israel relations had become closer and two countries had favored bilaterally. Israel's disaster aid in 1999 Marmara Earthquake had valued in a great sympathy from Turkish people. (Türkmen, 2010) Regarding the military cooperation between two states, the relations and collaboration in cultural and scientific level was also very glaring. Starting with the election of JDP the foreign policy of Turkey and the relations with Israel had changed to a new direction. Relations with Israel became more apparent since JDP comes from a “national outlook” that carries an Islamic vision which embraces antisemitism speeches where the former Welfare Party had left as a legacy. (Özcan, 2005)

Uslu asserts that the political elites of JDP and leaders have had antagonist speeches towards Israel several times as stressing their real thoughts and feelings revealed from Israel and Palestine crisis. (Uslu, 2010)

Relations got more stressful and started to crackle visibly after the meeting done by Ankara with the leader of HAMAS, Khaled Meshaal in 2006. At that time, the Prime Minister of Israel had declared his opinion on bilateral relations with Turkey might get damaged due to this meeting via his spokesperson. (Sekulow, 2016) Israel had declared its displeasure for Turkey in terms of security perspective.

Oğuzlu asserts that the Bush presidency had an impact on the distortion of two countries relations. US government starting from 2006 had explicitly supported Israel for its battle against Hizballah and Hamas and convinced Israel that they do not need Turkey's involvement in the region. The Bush administration had featured Turkey as a mailman that carries the information from west to east, especially to opposing camps or vice versa. Regarding the idea of being the regional core country or pivotal state, not surprisingly the JDP government had refused this cast distinctively that the Bush administration had constructed. (Oğuzlu, 2010)

Tür highlights that comparing to 90's foreign policies, Turkey had succeeded in being an actor in the region that communicates with all neighborhoods in the beginning of 2000's. As the new foreign policy implications of JDP, Turkey had undertaken as mediator country and started to handle the relations between Israel and Syria. This had significantly reinforced the power of Turkey in the Middle East. These normalized relations between Israel and Turkey had lasted until the Cast Lead operation to Gaza. (Tür, 2013)

After the backward of Israel troops from GAZA in 2006, HAMAS had won the elections in Palestine. USA, EU and Israel had applied sanctions on Palestine since they both see HAMAS as a terror threat by its radical Islam identity. The conflict between HAMAS and Israel was balanced by the mediation of Egypt and both Palestine and Israel accepted the ceasefire. Despite this positive improvement in the region, Israel organized a military operation to take up a HAMAS member in GAZA in November 2008 claiming and insisting on that the military operation did not violate the ceasefire yet after this development HAMAS announced that the ceasefire was ended. At the time Palestine used the hand-made rockets made by HAMAS towards Israel, considering self-defense Israel started an operation to

Palestine. This operation was called as Cast Lead and known as GAZA War as Israel showered casts over the people in Gaza. The operation lasted for 22 days 2158 Palestinians were dead, more than 11,000 houses were destroyed. (Al Jazeera, 2014)

Israel's disproportional force on Palestine people and Operation Cast Lead to Gaza had been strike out and condemned visibly several times by Turkish authorities. With the new Turkish foreign policy vision, Turkey had shown an identity based foreign policy which the motivator mainly based on religion. There is no doubt that the turning point had become the World Economic Forum at Davos in January 2009. The President of Israel, Shimon Peres the Prime Minister of Turkey Recep Tayyip Erdoğan were together in a discussion of Gaza. While coming to the end of the discussion, the Prime Minister Recep Tayyip Erdoğan had persistently took the floor and said these words to Shimon Peres;

“When it comes to kill, you know how well to kill. I know how you shot and killed the kids in the beaches. I have heard specific words from two of your Prime Ministers saying how they feel happy when they enter Gaza on the top of tanks. I condemn those who claps this cruelty. To clap the people who killed the kids and people is a crime against humanity.”

Recep Tayyip Erdoğan then finished his words accounting Israel as barbaric state and gave examples from the Old Testament saying not to kill and left the discussion while every leader was still at the panel. (World Economic Forum, 2009)

This fortuitous event had rebound both national and in the world press. One of the major news channel CNN TURK in Turkey had released the news as “ Crisis at Davos” (CNN TURK, 2009) Deutsche Welle had put up the news as “ Erdoğan Left the Davos” (DW, 2009) NTV had put up the news saying that the world press had criticized the leaving of Erdoğan from the meeting. (NTV, 2009)

Days after the Davos crisis, the Prime Minister Recep Tayyip Erdoğan had a visited Iran and done a press conference at Tehran Embassy. He strongly mentioned that the speech towards to Shalom was not planned and declared that Turkey is a

democratic, secular and social state that still runs the EU accession timeframe. (Hürriyet, 2009) The saying of EU accession and democracy, was an account of showing the world that Turkey was still heading the West. The Prime Minister Erdoğan's manner embraced by many right-wing people from Turkey as a common attitude and protests Israel on Gaza issue have spread around the country.

Güler asserts that the manner of Prime Minister Erdoğan was a show to straighten up his credit in the eye of Turkish people since the authorities had continued to develop relations in military sphere yet the Israeli authorities had showed solicitudes on the relations with HAMAS and Ankara. (Güler, 2019)

The rising tension between two countries had exploded on May 31, 2010 when Israel opened fire in international sea against Mavi Marmara Flotilla that was filled with civilians carrying humanitarian aid to Gaza. 10 people died and 490 people had wounded. (140Journos, 2017) This was the breaking point of the relations with Israel for Turkey. Right after the incident, Turkey had solicited serious apologize from Israel and pecuniary compensation for the families of the victims and downgraded the ambassador level by dispersing the news of the secret United Nation's Palmer Report. (Huber, 2012) The relations between two states had come up in the most stressful level, USA government had contributed to normalize the relations between Turkey and Israel, yet it left serious damages and Ankara continued showing its great support towards Palestine. In June 2011, Prime Minister Recep Tayyip Erdoğan had liken the situation of Gaza with Istanbul in terms of destiny and showed that JDP rows in the same boat with Palestine people. This had led up to internationalize the matter. For all the broken relations, Turkey had continued its military cooperation with Israel for purchasing military armament. (Özcan, 2018)

From a diplomatic perspective, the Prime Minister of Israel, Binyamin Netanyahu, had apologized 2 years after the incident via calling the Prime Minister Recep Tayyip Erdoğan saying that joint composition had done for pecuniary compensation. (BBC, 2013)

Even though the relations had been demolished; the two country continued its business relations. As shown by the figure below it has been clearly seen that despite the crisis in Davos and Mavi Marmara flotilla incident, those years the trade had been augmented and not affected from the political crisis. (Republic of Turkey Ministry of Trade, 2019)

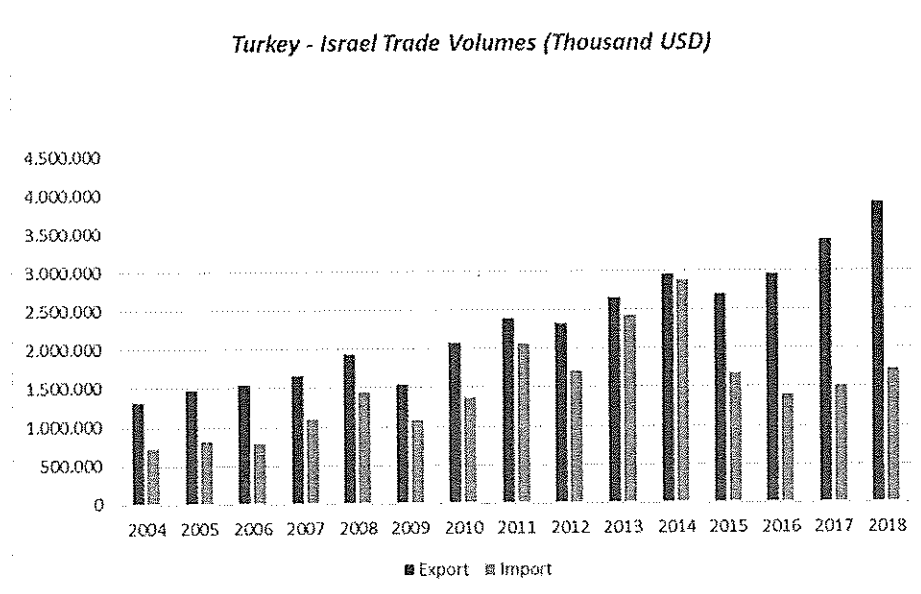


Figure 19: Turkey – Israel Trade Volumes

During all the latest advances in the timeframe, Israel had signed a bilateral agreement with GASC or so-called Cyprus government for the delimitation of the EEZ. (UN, 2010)

This development had been received in an offensive manner by Turkey from Israel as Turkey is a guarantor state in Cyprus dispute. The EEZ agreement was approved by the parliament in GASC in 2011. Since then Israel and GASC had formed a commission to deliver the Eastern Mediterranean gas to Europe via GASC. (Sabah Gazetesi, 2011)

Stergiou asserts that in order to export the gas to Europe, because of the security issues and diversification of the routes Israel had a determination for building a pipeline to Turkey rather than building up a LNG terminal and shipping the gas, but

because of the political dispute between GASC and Turkey that would not seem to be possible. (Stergiou, 2016)

Tamçelik and Kurt highlights that Israel's aim was to possess the field thus they adjusted the policies between to a strategic level GASC and signed EEZ agreement. Notwithstanding Turkey had declared that the EEZ should be done due to the equity principles, since the Eastern Mediterranean has a specific condition by the riparian states yet couldn't succeed preventing the agreement done with Israel. With a countermove Turkey had signed maritime boundary agreement with TRNC to formulize her existence on Eastern Mediterranean. Despite all these, it had been seen that Turkey couldn't develop a proactive solution towards Israel and consequently to GASC. (Tamçelik & Kurt, 2014)

Özertem states that Turkey had developed a combative manner rather than building up a diplomacy in Eastern Mediterranean. (Özertem, 2016)

Kasapoğlu criticized Davutoğlu's foreign policy approach as obstructive for repairing the relationships with Israel since the close relations with HAMAS and identity based political vision. (Kasapoğlu, 2012)

Nonetheless, the existence of the remarkable amount of gas discovered in Eastern Mediterranean had whet Israel's appetite for the trade as well as the EU for the supply security and the trade ways were negotiated in USA-EU Energy Council. Since USA companies were on the field of exploration, with EU's participation USA became referee. In 2014, Madeleine Albright¹³ mentioned that Turkey's geopolitical position would the best option for the transport of the gas hence it would be an opportunity to develop the interstate relations. (Zemach, 2016)

On the other hand, during the conflict between Israel and Turkey, Russia had been questing ways for boosting its military existence in Mediterranean by supporting Syrian regime and providing military armament thus all the calculations had changed to a new direction. (Aydın & Dizdaroğlu, 2018)

¹³ Former United States Secretary of State.

The conflict between Israel and Turkey had resolved with the compensation agreement in 2016. (Republic of Turkey Ministry of Foreign Affairs) The first visit was done by the Israel Ministry of Energy, Yuval Steinitz. The minister had said that there is very notable amount of natural gas discovered in Eastern Mediterranean which is a great opportunity for trade and to export it to Europe by using diverse routes. To this extent building up a pipeline to Turkey would be very efficient and this idea had gained support from USA as Michael Leigh says from the German Marshall Fund. (BBC, 2016)

Çelikkol highlighted the Israel's natural gas reserve and the importance of the natural gas trade. Thus, ties the normalizing relations to this extent. (Çelikkol, 2016)

Tziarras and Mitchell states that Israel had showed several actions for normalizing the relations with Turkey, yet Turkey had opposed to Israel's intention regarding to the new foreign policy vision of JDP. (Tziarras & Mitchell, 2015)

By the time being, Israel was seeking ways to export the gas and had done agreement with Jordan yet more wished to come. There were four major possibilities for the transport. The first one was building up an LNG terminal, liquidizing the natural gas and ship. Second option was to agree with Egypt and GASC and build up a pipeline and export the gas via the united pipeline. Third, build up a pipeline to Jordan and connect it to the pipeline previously built yet this option was not so preferential. Last choice was to build up a pipeline to Turkey. This option was the most preferential with the less cost and quick built in pipeline. The project was estimated to cost only for 2 billion USD and could easily connect to TANAP for the export. On the other hand, the Arab Gas Pipeline that supplies Egyptian gas to Israel had destroyed several times by ISIS after the election of Abdel Fatah al-Sisi in Egypt. This had also made Israel to think the importance of security of the pipeline that is to be built in the future. (IndraStra Global Editorial Team, 2015)

3.3. Turkey – Egypt Relations 2010-2018

Turkey and Egypt have a long history background that lies to Ottoman Empire. Egypt foreign policy had long been formed on the ideas of the leader that came into power thus its foreign policy could shift easily. Since Egypt had changed its regime as republic after Egypt revolution, it has been definite that Egypt was ruled in autocracy. In the late 90's to the fall of Hosni Mubarak, Egypt had developed close ties with United States, Israel and Turkey as well. Egypt and Turkey relations had become closer as two countries signed free trade agreement in 2004. (Kalaycı, 2018) Since these positive developments had been seen in diplomatic arena, Egypt was also concerning its valuable existence in Eastern Mediterranean thus signed EEZ agreement with GASC in 2003. (UN, 2003)

When Tarek el-Tayeb Mohamed Bouazizi set himself on fire on December 2010 in Tunisia, neither Egypt nor the region would be the same ever after, consequently Turkey and Egypt relations had gained a new dimension with the so-called Arab Spring. During the protests Turkish Ministry of Foreign Affairs had declared a notice regarding Egypt as a friendly state and brother country. (Republic of Turkey Ministry of Foreign Affairs, 2011)

With the election of Mohammad Morsi in 2012, Egypt and Turkey had become closer. Egypt government had nullified the EEZ agreement done with GASC had terminated the EEZ agreement signed with GASC and Israel. (Tarakçı, 2013)

After the military coup in July 2013 the close relationship between Egypt and Turkey had been interrupted. The Prime Minister Recep Tayyip Erdoğan had criticized EU for not remarking the case as coup and showed his support Morsi. (BBC, 2013)

Despite the negative diplomatic atmosphere, trade had been continued with Egypt. As shown by the below figure, it has been seen that the trade between two countries had slightly affected yet even to the political turmoil it had boosted as of 2015. (TUIK, 2019)

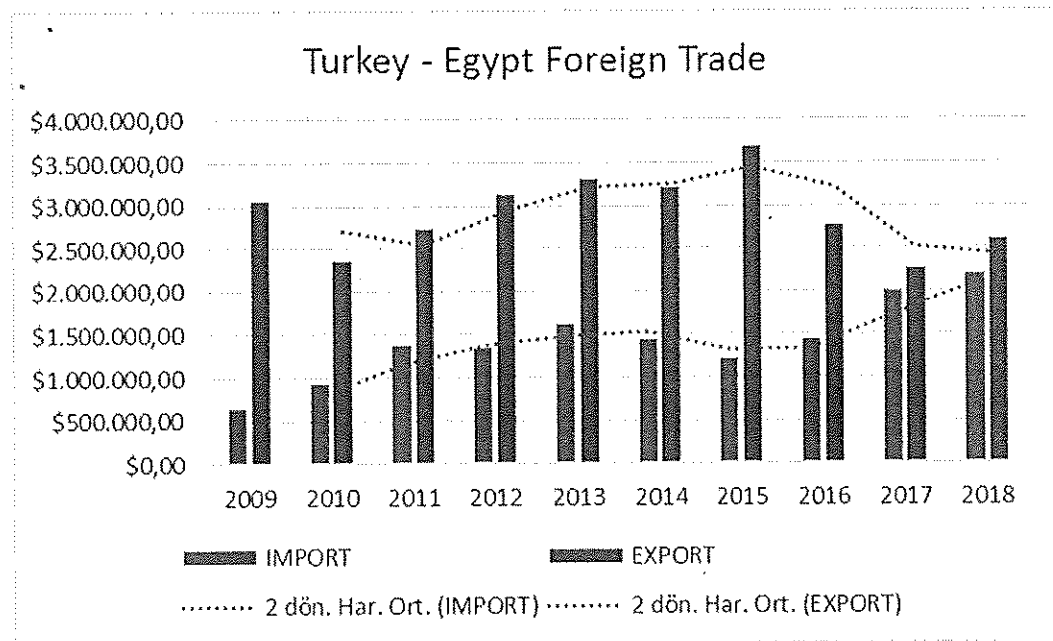


Figure 20: Turkey - Egypt Trade Volumes

Back to the point, after the coup, Egypt had called Turkish ambassador in Cairo to the Egypt Ministry of Foreign Affairs and had been declared to him as “*persona non grata*” thus the level of representation downgraded to chargé d’affaires and asked to leave the country in six days. Correspondingly, Turkey had declared the Egypt ambassador as “*persona non grata*” and downgraded the level of representation to chargé d’affaires. (Republic of Turkey Ministry of Foreign Affairs, 2013) With the latest ideas in the foreign policy, Turkey and Egypt had prominently broke up their relationship.

With the election of Abdel Fatah al-Sisi, Egypt had shown a very active foreign policy with GASC and both countries had become closer in matter of energy. First, al-Sisi had signed a Common Unitization Agreement in 2013. (Cyprus Mail, 2014) Right after the agreement leaders of Greece, GASC and Egypt had come together in a trilateral meeting in Cairo and agreed on a joint plan for natural gas explorations in Eastern Mediterranean. As Egypt was having an economic crisis on those years, new sources would bring a potential export to the country. (Reuters, 2014)

Since Turkey is not a signature party of UNCLOS, it has been clearly observed that the delimitation off EEZ by GASC had been done easily as GASC and Egypt both are signatory parties of the agreement. Meanwhile, the relations with Egypt had worsening bilaterally. Turkish President Recep Tayyip Erdoğan alleged the Egypt leader al-Sisi as “*putschit*” leader at a given interview to Al-Jazeera. (TheNewArab, 2016)

Egypt had become a close ally with Greece and GASC. In 2015, together with Israel and GASC, three country had adhered naval exercise and right after Egypt signed a trilateral agreement with Greece and GASC for energy cooperation. (Egyptian Streets, 2015)

Turkey had commented this activity as opposing to herself as creating an ally who are against Turkey because of the problems with three countries yet both Egypt, Greece and GASC denied that this cooperation is just a matter of a common interest. (Shay, 2018)

3.4. EastMed Pipeline Project

As discussed previously in chapter 2, the discovery of the Zohr field had changed the dynamics in Eastern Mediterranean. The field was the largest natural gas reserve that had been discovered after Leviathan field and brought up a new dimension on the region. Since then, Egypt, Israel and GASC have sought new ways to export the gas to Europe. First countries have thought to build up a pipeline from GASC to Egypt and liquidize the gas in the LNG terminals and ship, yet this found risk in terms of the rising terrorism in the region. From GASC perspective, as its aim also was being a hub in the region, a pipeline towards to Egypt will not reinforce its importance. Turkish pipeline option was the best logical option whereas there the political dispute between GASC and Turkey would make it nearly impossible. (Ampartzides, 2018)

In 2015 Italy, Greece and GASC agreed on a pipeline which is called EastMed Pipeline that will carry the Eastern Mediterranean natural gas to Europe via Italy.

The project had also been supported by EU in terms of common interest. The Project involves of 1300 km offshore and 600 km onshore with nearly 2000 km pipeline and got 2 million Euro support from EU fund. (IGI Poseidon)

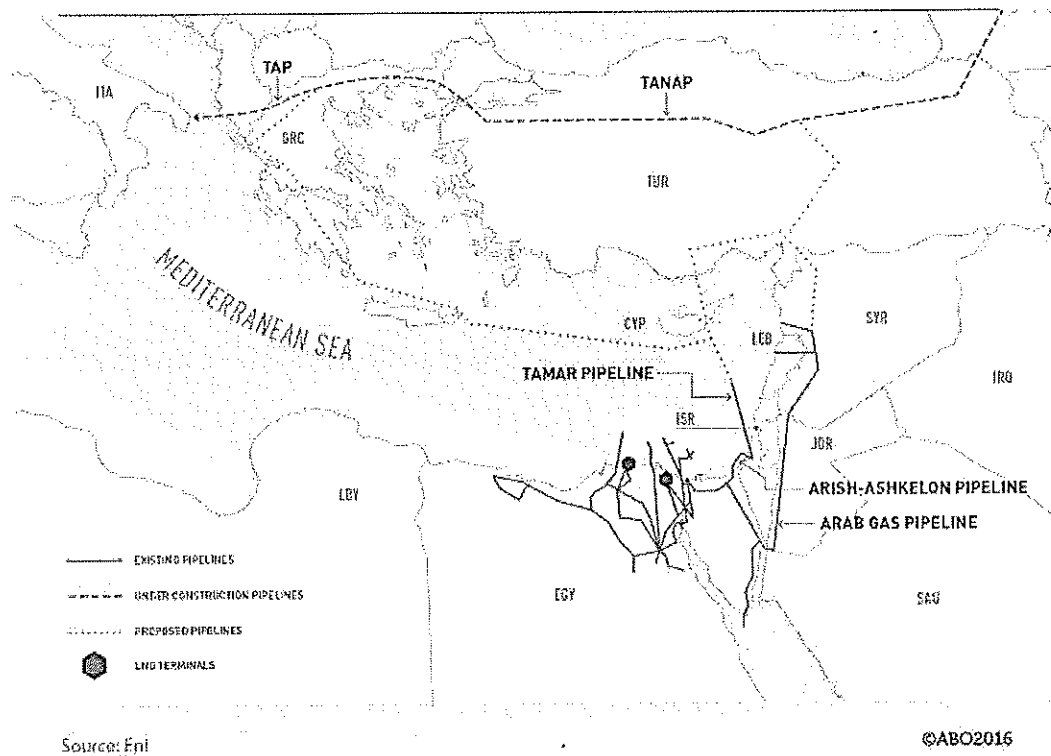


Figure 21: EastMed Pipeline Project (Naim)

The EastMed pipeline assumed to carry total amount of utmost 16 bcm/year. Beside the amount that the pipeline will carry, there are some serious technical problems in the project. First, the pipeline assumed to be built up between GASC and Crete-Greece is under 3000 meters of depth of the sea and the geological conditions is not so promising since the surface nestles seismic activities. Second, the estimated cost of the project is around 7 billion USD yet according to the authorities the project cost could increase up to 10 billion USD. Finally, the project could end within 7 years. (Ellinas, 2018)

Regarding the idealist foreign policy approach of Turkey in the region as; supporting Muslim Brotherhoods in Egypt, Palestine issue with Israel and confronting the GASC in Cyprus dispute, countries do not want Turkey to be involved in the EastMed project. (Kamran, 2019) In addition, Greek policies for the

extradition of Turkish soldiers who sought asylum after 15th July coup attempt, had worsened the relationships between Turkey and Greece. (BBC News, 2017)

At the end of 2018, the Prime Minister of Israel, Greece and Cyprus had conveyed the importance of the EastMed pipeline and agreed on signing the joint agreement yet there could be two challenges that the project might face. The first challenge was the security issue since there is an ongoing dispute between Lebanon and Israel thus Hezbollah would be a significant threat. The second challenge was Turkey since Turkey warns GASC as she could use military force. (Freidman, 2019)

The project is highly endorsed by European Union since the EU is highly dependent on Russian gas and has a will to reduce the dependency. The EU Commission asserts that the Eastern Mediterranean gas is strongly important for increasing in variety of the sources and from the rewarding amount of supply. Since EU had faced with the pestilent policy of Russia, the Union will be to reduce the dependency to the Russian gas by the Eastern Mediterranean gas. (Winrow, 2018)

Since the project is highly supported by the parties, it also has risks in terms of cost and geology. Plus, the route could also clash an EEZ problem with Turkey and the pipeline will require special pipes due to the extreme depth of the sea as 4km. (Pamir, 2017)

3.5. Turkey – Lebanon Relations 2010 – 2018

Lebanon existence at this issue is closely tied with Israel since two countries had been in a war right after the assassination of the Prime Minister of Lebanon, Rafiq Hariri. The existence of Hezbollah had been a serious security threat for Israel. (Global Conflict Tracker, 2019)

Orhan states that until 2000 the relations with Lebanon and Turkey had been hindered due to the circumstances of the Syrian and Israeli invasions to the country. With the election of JDP in 2002, the identity vision of JDP foreign policy had affected the relations. Both countries had a common sense towards Israel's negative

foreign policy. By the time of war between Israel and Lebanon, Turkey had pumped economic aid to Lebanon and showed its political support. (Orhan, 2010)

In 2010, Turkey and Lebanon had bilaterally revoked visas. (Republic of Turkey Ministry of Foreign Affairs) Additionally, both countries had signed Free Trade Agreement on November 24, 2010. Since the agreement was approved by Turkey in 2013, the approval of Lebanon is pending. (Republic of Turkey Ministry of Trade, 2019)

Valori asserts that Lebanese authorities are keen to transfer the gas by connecting the Arab Gas Pipeline¹⁴ to Turkey via Syria, but this would also create another challenge since the continuing conflict between Egypt and Turkey and the ongoing war in Syria. (Valori, 2019)

The literature on Lebanon and Turkey relations in natural gas issue is rather limited and there was no additional news launched at this subject since there was a civil war in Syria and the concentration of these two countries were more on the ongoing war. Yet in 2019, the Foreign Minister of Turkey, Mevlüt Çavuşoğlu had visited Lebanon and had expressed Turkey's intention for solidifying the trade relations with Lebanon. (Hurriyet Daily News, 2019)

3.6. Turkey – Syria Relations 2010-2018

Turkey and Syria have a long historical background which was generally designated as problematic starting from the sovereignty of Syria with Hatay problem, supporting the counter parts in cold war, the water issue and Syrian's support on PKK terrorist organization. (Ağır & Atılgan, 2017) The civil war in Syria, which started in 2011 right after the Arab Spring, had changed Turkey's perspective more on national security issues. Before 2011, Turkey and Syria relations were in a positive development period both with the support of Besar Esad and JDP government. Starting with the free trade agreement signed by parties, the economic relations barely improved. In 2008, Turkey had taken the mediator role between

¹⁴ <http://www.gmfus.org/publications/lebanon-next-eastern-mediterranean-gas-producer>

Syria and Israel for peace talk. When Israel done the the Cast Lead operation over Gaza, as discussed previously, Turkey's relations with Israel came up to a breaking point and within that frame Turkey and Syrian relations had been promptly improved. In October 2009, Turkey had Syria had done a High-Level Strategic Cooperation Council with the participation of ministers from both sides and consequently parties accepted bilaterally revoke the visas. (Benek, 2016) After this council, a joint statement had published by the foreign ministry and according to the joint statement, Turkey and Syria had agreed on linking the gas pipelines. (Republic of Turkey Ministry of Foreign Affairs , 2009) The economic relations as shown by the data below, had started to improve right after the free trade agreement. (Republic of Turkey Ministry of Trade, 2019) Turkey's export commerce had notably increased.

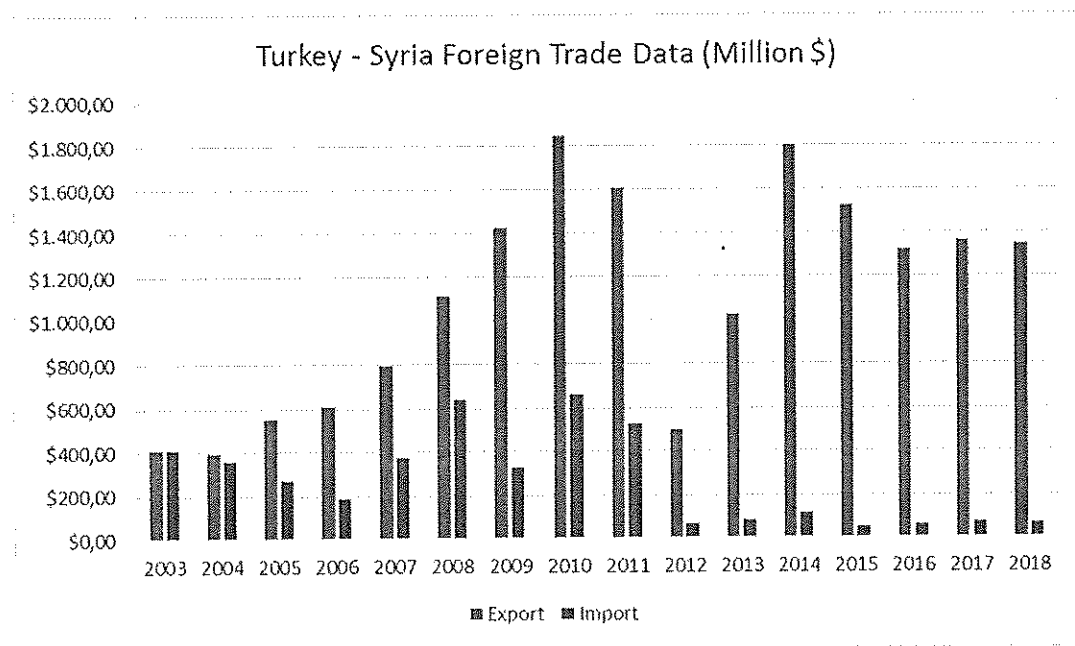


Figure 22: Turkey – Syria Trade Volumes

When the protests in the streets against to Esad regime in Syria started at the beginning of 2011, the panorama had captured the headlines in Turkey. The protests had led its place to bloody actions thus Turkey had appealed a reform in Syria and Foreign Minister Ahmet Davutoğlu went to Damascus for a resolution, yet a resolution was not happened. Consequently, on August 15th Turkish government

declared that Turkish government suspended every economic and political relations with Syria. (Al Jazeera, 2014) Until that extent the relations related with the natural gas issue at this thesis, there was no further steps taken rather than the memorandum of understanding.

3.7. Turkey Internal Challenges 2010 – 2018

From 2010 to 2018 Turkey had faced many significant changes and challenges in the internal politics. Related with the subject of this thesis I listed the key train of events that had an effect on Turkey's Foreign Policies on energy issue in Eastern Mediterranean as below.

- Davos Crisis 2009
- Mavi Marmara Flotilla 2010
- Operation Euphrates Shield 2016 – 2017
- Operation Olive Branch 2018

As discussed earlier, Davos Crisis and Mavi Marmara Flotilla case had broken the Israel and Turkey relations in a very solid way and in return Israel had done EEZ agreement with GASC thereby GASC started explorations in the field. Since this development had made Israel and GASC as allies, Europe still had remarked its support to Turkey.

Considering the high dependency to Russia, EU had been seeking ways to enhance its energy supply security and it has been seen that EU had given support to Turkey for being an energy hub and the transit country for delivering the natural gas. These supports were stated on European Commission reports on yearly basis.

Having looked at the European Commission progress report in 2011, the essence of supply security was highlighted and Turkey's cooperation with Azerbaijan was welcomed. (European Commission, 2011)

European Commission progress report in 2013 emphasizes that Turkey's geopolitical position is very important for EU's energy supply security and supports Turkey's role for being an energy hub. (European Commission, 2013)

European Commission had also mentioned the completion of Tanap and the progress of Turkish Stream projects were welcomed in positive manner. On the other hand, commission stressed out that Turkey did not fulfill the responsibilities among Cyprus issue. Since Turkey had declared her endorsements towards the resolution in Cyprus, the meetings in Geneva in Jan 2017 and Crans-Montana in July 2017 were left insoluble and Turkey did not clear all the hurdles against GASC for the transportation of goods and services according to the Additional Protocol to the Association Agreement. (European Commission, 2018)

It has been clearly seen that from European Union point of view, Turkey had been endorsed on being a transit energy hub depending on her privileged geopolitical position.

By the time Turkey has gone in rapid changes domestic political issues. The conflict in Syria had taken the entire agenda in foreign policy. Concerning the national security issues in Turkish border and depending on the article 51 on the UN charter, for the first time after the Cyprus Peace Operation, Turkey started the cross-border Operation of Euphrates Shield in Syria, starting from Cerablus, aiming to clear Rakka from the control of ISIS and Menbij from the control of YPG. Taking the control of the area and eliminating the terrorist groups had a high importance in terms of energy issues in the Mediterranean. Consequently, after the operation Turkey had 71 martyrs yet cleaned the eastern part of the Euphrates River and the south border excluding Afrin. (Özalp, 2018)

Since Turkey had managed to clear the area from terror threats, Afrin which was under control of PYD was still not controlled and played an important role for Turkey in terms of national security and preventing the existence of terrorist groups in Eastern Mediterranean energy corridor. Turkey revolved the security threats with United States requesting to stop supporting armament to PYD & PKK terrorist

forces, yet these negotiations did not come into a conclusion thus Turkey planned the Operation Olive Branch together with Free Syrian Army on January 20, 2018. The reason why the operation had named as Olive Branch was to show the real intention of Turkey which is just on security matters and not an occupation of Syrian lands. (Siyaset Dergisi) The operation had ended on March 24, 2018 when Afrin was fully taken under control. According to the Turkish Armed Forces Turkey had 54 Turkish soldiers martyred. (Evrensel, 2019)

Turkey's aim in the operation is analyzed as both domestic and geopolitical as to strengthen her existence in Syria for becoming an indispensable actor in the region and show her deterrent forces majorly to United States as to cease the armament support to YPG. (Kasapoğlu & Ülgen, 2018)

The Operation Olive Branch had captured the headlines in the world news since two NATO allies had met in the region. The first three news that were headlined in United States respectively in CNN, Wall Street Journal and The New York Times were with negative perception and sided. On the other hand, one news that was headlined by The Washington Post was neutral. Analyzing the British media, it has been seen that The Times had used a neutral headline, yet it was sided but three other media organs used neutral headlines as BBC, Reuters and Dailymail. (Küçükvardar & Arslan, 2018)

3.8. Key Findings

With all the information regarding the subject, the key findings are stated as below.

- There is a considerable natural gas demand in Turkey and in the European region.
- Though the conflicts with riparian states, EU had endorsed Turkey for being an energy hub in the region.
- The network capacity in Turkey is enhancing with the completion of the pipelines of TANAP & Turkish Stream.
- Though Turkey had enacted the law on natural gas in 2001, no further steps had been taken for liberalizing the market as still the dominator of the market is BOTAŞ.
- Turkey had not taken diplomatic steps to make a collaboration in Eastern Mediterranean natural gas with Israel, Egypt and GASC instead Turkey had showed its intention on being alone for the exploration and only did an agreement with TRNC.
- Turkey had bought a drillship for exploration and started explorations in Mediterranean.
- According to Davutoğlu's five policies, Turkey had followed idealistic, identity based foreign policy, yet this policy had weakened the relations with neighboring countries.
- Instead focusing on Eastern Mediterranean gas in the meantime Turkey had strengthened the relations with Russia.
- Turkey had become predominantly dependent to Russian gas.
- Davutoğlu's five principles of foreign policy had failed on Eastern Mediterranean natural gas issue as Turkey had not generated neither multi-dimensional foreign policy nor rhythmic diplomacy in the region and had not developed conciliatory gestures with neighboring countries since the principle focused on "*zero problems with neighborhoods*". Instead,

depending to the identity-based, idealist policies, it has been seen that Turkey had become more antagonist on the issue.

- The conflict with Egypt plays a significant role on the issue for being a transit hub in the region.
- The conflict with GASC currently blocks the path for reconciliation in the region.
- The conflict with Israel after 2009 had made Turkey's hand weakened in the Eastern Mediterranean natural gas issue as Israel had collaborated with Turkey's encounters.
- Syria Civil War and Operations of Euphrates and Olive Branch changed the dynamics in the region. Turkey's foreign policy had been re-shaped and Turkey focused more to national security issues in the border.

4. CONCLUSION

Energy is and will always be the highlighting issue for all the countries in the world as well as for Turkey. Depending to the findings it has been seen that Turkey, unfortunately did not performed constructive foreign policy in Eastern Mediterranean region. If we think that Eastern Mediterranean gas bonanza is a cake, Turkey is still been trying to grab a pie alone, yet the situation shows us that this approach would only harms to Turkey in terms of foreign relations and her status in the issue. On the other hand, overlapping of Turkish continental shelf with blocks declared by GASC is causing a serious problem in terms of national security and interest and Turkey must promptly bring this issue into world's agenda in United Nations.

Coming up to 2019, a major development in the region was the exploration of new reserve in Cyprus Island by the cooperation of Exxon Mobil and Qatar Petroleum. The forecasted amount is about to be 226 bcm which is the largest amount found in Cyprus Island at block 10. (Koukakis, 2019) Correspondingly, Turkey warned GASC for the exploration and the licenses and move her vessels in the Mediterranean Sea for gas explorations.

Conflicts with Israel started after Davos Crisis and idealistic, identity generated politics towards the conflicts were harmed to the issue and resulted a cooperation done by Israel with GASC. Furthermore, the identity politics and vision as supporting Muslim Brothers played an important role in building policies with Egypt and that also created negative effect on the gas dispute.

Davutoğlu's and consequently JDP's idealist foreign policy on being a central power in the region led Turkey to behave in an antagonist manner and this had resulted serious conflicts with neighboring countries. The military operations in Syria had left Turkey to become isolated in the energy issue in the region since the first and foremost issue became national security and Turkey have had serious problems with her allies.

Regarding to Davutoğlu's five principles, Turkey failed on succeeding for building well-managed foreign policies in natural gas dispute. First, Turkey had involved in the matter late, since the discussions were started in 2010, Turkey's involvement to the issue was not on time and acted as solely regarding to the conflicts with all the riparian states. This shows that the "zero problem with neighborhoods" had failed and this failure had harmed to this issue. On the other hand, unfortunately Turkey couldn't develop rhythmic diplomacy as mooted the issue to world agenda and failed in developing multi-dimensional foreign policy with EU and riparian states.

By not having any endorsement from riparian states and staying far from EU, Turkey, unfortunately stayed alone in the region.

Moreover, a growing rapprochement between Turkey and Russia through the recent years is striking and this calls attention to a new research whether there is an effect of Russia for hindering Turkey's involvement in the gas issue as Russia is the main exporter of gas for Turkey and also the biggest exporter for EU as well. Russia's involvement in Eastern Mediterranean and close relations with GASC also has to be analyzed. Considering the military partnership between Russia and GASC for using the military ports in Paphos is strikingly important. (DW, 2015)

Eastern Mediterranean natural gas basin has high importance for Turkey's national interest. It will enrich Turkey's diversity of resources and will boost Turkey's geopolitical importance in the region. Concerning the gas reserves both in Israel, GASC and in Egypt, it has been clear that the relations with Egypt and Israel should immediately be normalized and Turkey must build a peace in the region.

GASC plays important role in the issue, dispute between TRNC also concerns Turkey and Turkey should protect her national interests at this dispute.

Since Syria does not have any exploration in Eastern Mediterranean due to the war, there are other actors in the region whose aim is to be the main natural gas producer. Qatar is the second largest natural gas producer and exporter. The major export route is Asia. (NS Energy, 2019)

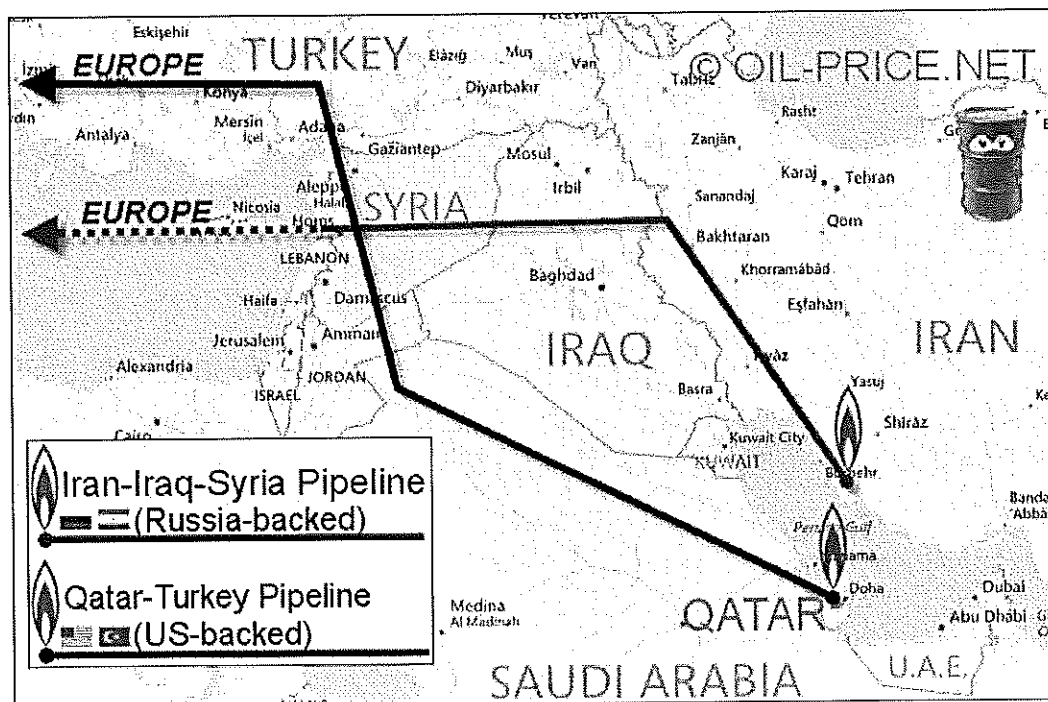


Figure 23: Projected Pipelines in Middle East

According to the above figure, considering the largest gas reserves in the region it is highly important to note that Iran and Qatar are very important countries for natural gas. The aim of both countries known as to export their gas. (Austin, 2015)

Since Turkey's most source is coming from Russia, considering the energy supply security, diversity and enriching the strategic status, the relations with Iran and Qatar plays an important role of being an energy transit hub in the region and Turkey should have a B plan in case of EastMed signing by the parties as it was planned.

As a latest development Turkey had signed a continental shelf agreement with Libya. As expected, Turkey had faced with negative manners by the sides of the project yet the agreement has a high importance on controlling and having a voice in the region. As seen by the below figure the continental shelf lies just on the way of EastMed project. (Cohen , 2019)

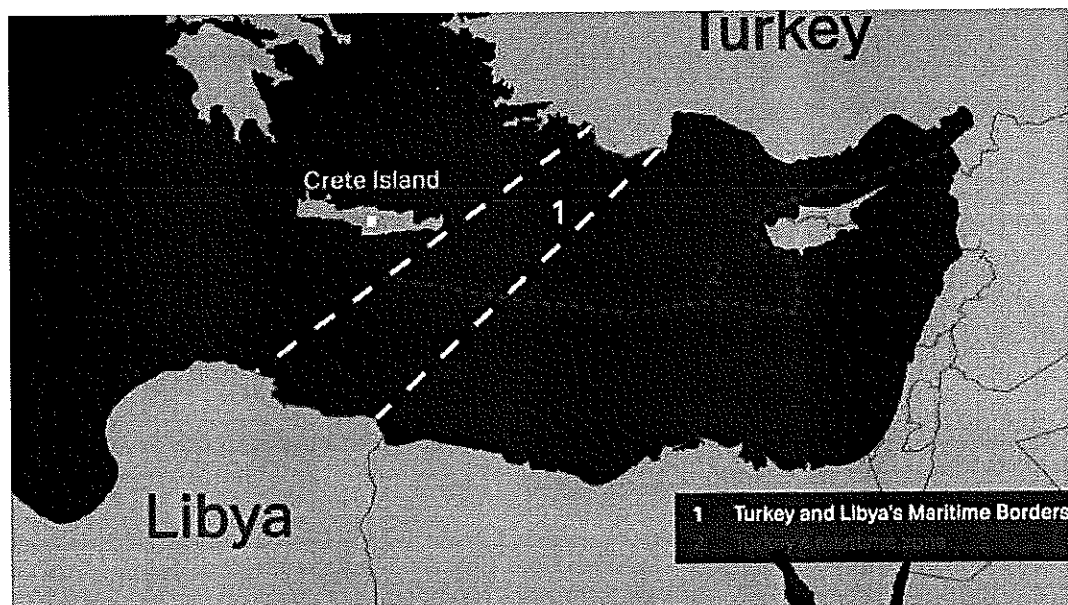


Figure 24: *The Maritime Zone Between Turkey and Libya*

EastMed pipeline had been signed between Greece, GASC and Israel at the beginning of January 2020. Thus, this continental shelf agreement plays an important role in the issue. Israel's Minister of Energy had given a speech to Reuters saying that they have an intention to cooperate with Turkey if also Turkey wants. (EuroNews, 2020)

Considering Turkey's aim for being an energy hub in the region, with having the superior geopolitical location, it is for Turkey's national interest to normalize the relations as soon as possible with neighboring countries and set up a peaceful atmosphere. Finally, the real gas game has just begun with these recent, hot developments in the region and it has been clearly seen that this game wouldn't be played without Turkey.

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