

IMPACT OF EUROPEANIZATION OF TURKISH ENERGY POLICIES ON  
TURKEY-EU RELATIONS

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## ABSTRACT

### IMPACT OF EUROPEANIZATION OF TURKISH ENERGY POLICIES ON TURKEY-EU RELATIONS

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The objective of this study is to examine the impact of Europeanization of Turkish energy policies on Turkey-EU relations. In order to do so, the thesis focuses mainly on Europeanization as a concept and Europeanization of foreign policy as important features in explaining the changes in the Turkish energy policies. While doing so, first this study tries to explore the European Union energy policies and make an overview of the EU energy production and consumption situation within the energy distribution of the world. Second, the study looks through the Turkish energy policy framework and provides a portrait of Turkey as a key player between energy producer and consumer countries. Also, the relation of Turkish energy policy and EU energy policy are evaluated with respect to the questions: “to what extent Turkish energy policies are Europeanized? And what are the possible impacts of Turkish energy policies and their Europeanization of Turkey’s quest for the membership?” For the first question Europeanization is discussed mainly by Radaelli’s definition. The review of the literature and the interviews show that Turkey has contributed much to its Europeanization process regarding the energy policies, and Turkish energy policy making reveal distinctive characteristics of Europeanization. However, for the second question, studies exhibit that there is a discrepancy of ideas among scholars and it is important to counterbalance them properly.

**Key Words:** EU Energy Policy, Turkish Energy Policy, Europeanization

## ÖZ

### TÜRK ENERJİ POLİTİKALARININ AVRUPALILAŞMASININ TÜRKİYE-AB İLİŞKİLERİNE OLAN ETKİSİ

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Tezin amacı; Türk enerji politikalarındaki Avrupalılaştırmanın Türkiye-AB ilişkilerine olan etkisini incelemektir. Bu amaca yönelik olarak tezde; Türk enerji politikalarındaki değişimi Avrupalılaştırma ve dış politikanın Avrupalılaştırması kavramlarıyla incelenmiştir. Bunu yaparken öncelikle AB enerji politikaları ve AB'nin dünyadaki enerji üretim ve tüketim konumları karşılaştırmalı olarak tartışılmıştır. İkinci olarak, enerji üreten ve tüketen ülkelerin tam ortasında yer alan Türkiye'nin enerji politikaları jeopolitik çerçevede incelenmiştir. Türk enerji politikaları ve AB enerji politikaları arasındaki ilişki incelenirken; Türk enerji politikalarının hangi bağlamda Avrupalılaştığı ve bu durumun Türkiye'nin üyelik sürecine olası etkileri açısından ele alınmıştır: Türkiye'nin enerji politikalarındaki Avrupalılaştırma tartışılırken Radaelli'nin Avrupalılaştırma tanımı dikkate alınmıştır. Literatür taraması ve yapılan mülakatlar göstermiştir ki Türkiye'nin Avrupalılaştırma süreci enerji politikaları üzerinde çarpan etkisi yaratmıştır. Fakat enerji politikalarındaki mevcut değişikliğin üyeliğe olan etkisi konusunda fikir ayrılığı mevcuttur. Bu konudaki tartışmalar dikkatli ve dengeli bir dille anlatılmıştır.

**Anahtar Kelimeler:** AB enerji politikaları, Türkiye'nin enerji politikaları, Avrupalılaştırma

*To my lovely family,*

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## **CHAPTER 1**

### **INTRODUCTION**

Energy, in this study the term ‘energy’ will be limited to oil and gas, is one of the most important key concepts of the current policies and economical strategies. With the Industrial Revolution and the transformation of production processes, energy has become more important both in the economies and international policies. Especially today, reaching and controlling the energy resources are two significant policy structures for nations. For those energy-rich countries, keeping these energy resources and using it as a political power are among top priorities. Apparently, energy related strategies are mainly shaped in accordance with a country’s situation as an importer or exporter. If the country is net exporter, then it has to create its energy policies attentively. The same attitude should be taken if a country is located in an energy-rich region. The main principal, then, is to remember the fact that energy related strategies and policies have international dimension and interdependent in nature.

In this sense, Turkey is a good example to analyze. As a country situated between energy producer, and energy consumer countries Turkey stands as a key player within this region. Turkey, candidate state of the EU, is also an import dependent country, develops its energy policies within the framework of its geopolitics.

In this descriptive study, Turkey’s Europeanization process will be examined regarding the changing elements of its energy policies. At the end of the research, two important questions will be tried to be answered: 1) to what extent Turkish energy policies are Europeanized? And 2) what are the possible impacts of Turkish energy policies and their Europeanization on Turkey’s

quest for the membership?

The main structure of this study is shaped to examine; European Union Energy Policy, Turkish Energy policy, and Relation of Turkish Energy Policy and EU Energy Policy.

First chapter of the study is separated into three parts. In the first part; an overview to the EU energy production and consumption situation within the energy distribution of the world will be presented. The main aim of this part is to elaborate on EU's import dependence on energy and their effects to overcome possible negative consequences of this dependence. In the second part, there will be a brief analysis on the historical evolution of the initiatives to establish a common EU energy policy. The last part of the first chapter will include specific overviews of the current EU energy policies with regards the external threats.

Second chapter aims to provide a parallel understanding between energy policies of Turkey and the EU. In this part, Turkish energy policies will be evaluated in relation to its energy production and consumption situation. This part will be basically composed of statistical data and special report results. The second part of this section will particularly project Turkey's energy policy within its neighbourhood. This part will portray Turkey as an import-dependent but strong country with a number of pipeline projects.

The last chapter of the study is designed to analyse the relation of Turkish energy policy and EU energy policy. This chapter will be delineated as the follows: Europeanization as a concept, Europeanization of Turkish foreign policies and Turkish energy strategies in relation to the EU. Europeanization will be discussed mainly as a top-down (downloading) process and bottom-up (uploading) process. Radaelli's definition will be the reference point and

Turkish case will be analysed accordingly.

Europeanization of Turkish foreign policy will include a short projection of the last twenty years. In this part, both internal and external dynamic will be evaluated as important determinants of foreign policy. Particularly Turkey-EU relations will be summarised and the signs of 'Europeanization' within the Turkish foreign policy will be presented. In the last part of this study Europeanization of the Turkish energy policies will be streamlined in two subtitles: similarities between Turkey and EU regarding the energy policies and energy as a trump for Turkey's full membership to the EU. Study will be enhanced by demonstrating different approaches and discrepancies. In order to foster the study, two interview records will be used.

## **CHAPTER 2**

### **EUROPEAN UNION ENERGY POLICY**

#### **2.1 An overlook to the EU energy production and consumption situation within the energy distribution of the World**

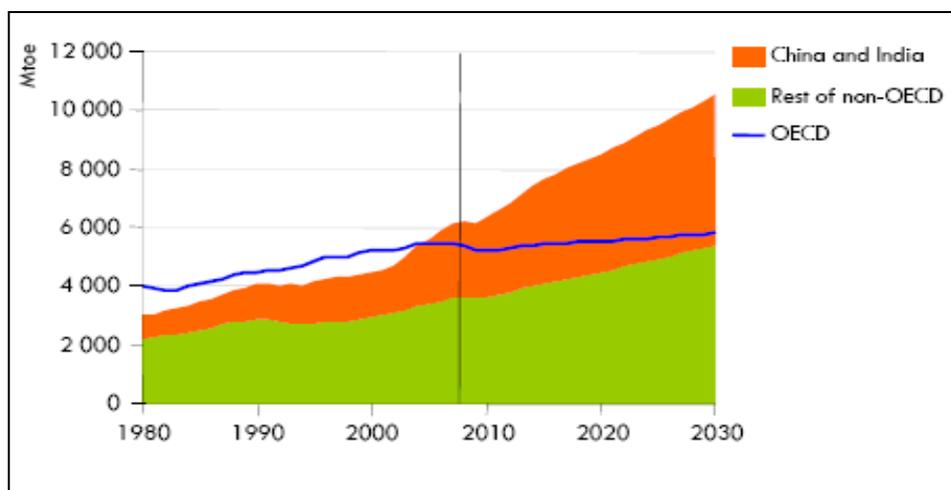
Energy is the most significant ‘cause’ to change and transform the societies as a whole. Today, the reliance on the finite hydrocarbon resources stands as a risk, especially, for the industrious states. The European Union, composed of most industrious states, is today the World’s largest energy consumer without its own significant reserves (İpek, 2006, pg. 6). Noël claims that: “Over the past 40 years, natural gas consumption has grown steadily in Europe, and much faster than primary energy consumption. Since the mid-1970s, imports have covered all this growth. In 2007, Europe imported 300 billion cubic metres (bcm) of gas, accounting for 60% of consumption” (EU Energy Policy Blog, “How Dependent is Europe on Russian Gas?” 2008). Increasing consumption rates and the issue of import dependence has also been accentuated in several EU official papers and strategy documents. To illustrate, according to the EU Commission’s Annex Green Paper, more than half (54%) of gas consumption was coming from outside of the EU (2006, pg. 9). Professor Pınar İpek had also anticipated that “on current trends, gas imports, would increase to 80 % in the next 25 years” (2006, pg. 6). This situation becomes even serious considering the oil consumption. As stated in the Annex to the Green Paper, “EU’s import dependency is high for the oil and net oil imports account for %81 of oil consumption” (2006, pg. 9).

Therefore, there are two major points to identify: the picture of the energy consumption and the gap between consumption and production rates in the EU (which leads to import dependence). Following will give a very brief analysis with the intention of addressing how import dependent is the EU.

As an importer, EU meets its internal natural gas and oil needs from different suppliers. Accordingly, “45 percent of EU oil imports originate from the Middle East, and 40 percent of gas imports originate from Russia, 30% from Algeria, and 25 % from Norway” (Euractive, “Geopolitics of EU Energy Supply”, 2007). While in 2005, “of overall European Union gas supplies, 25 per cent came from Russia and 14 per cent from North Africa; of oil supplies, 31 per cent came from the Middle East and North Africa and 27 per cent from Russia” (Youngs, 2009, pg.2). In brief, the EU is an important energy consumer and importer within the world. At this point, the general projection of the world energy consumption becomes significant.

With respect to the statistics, world energy consumption (although slowed down in the year 2008) has increased since 1980; in the fig.1 the world primary energy demand can be seen. This Table shows that non-OECD countries account for 93% of the increase in global demand between 2007 and 2030, driven largely by China and India (World Energy Outlook, 2009, pg.3).

Table 1 World primary energy demand in the Reference Scenario



Source: IEA World Energy Outlook, Presentation to the Press Conference, London, 2009

Importantly, China and India have become one of the significant players regarding the general energy demand within the world (Table1). As Tony Hayward, international energy expert mentions:

All the net growth in energy consumption came from the rapidly industrializing non-OECD economies, with China alone accounting for nearly three quarters of global growth. For the first time, non-OECD energy consumption surpassed OECD consumption (2009, pg.1).

Hence, developing economies become more important in analyzing world's energy production and consumption rates.

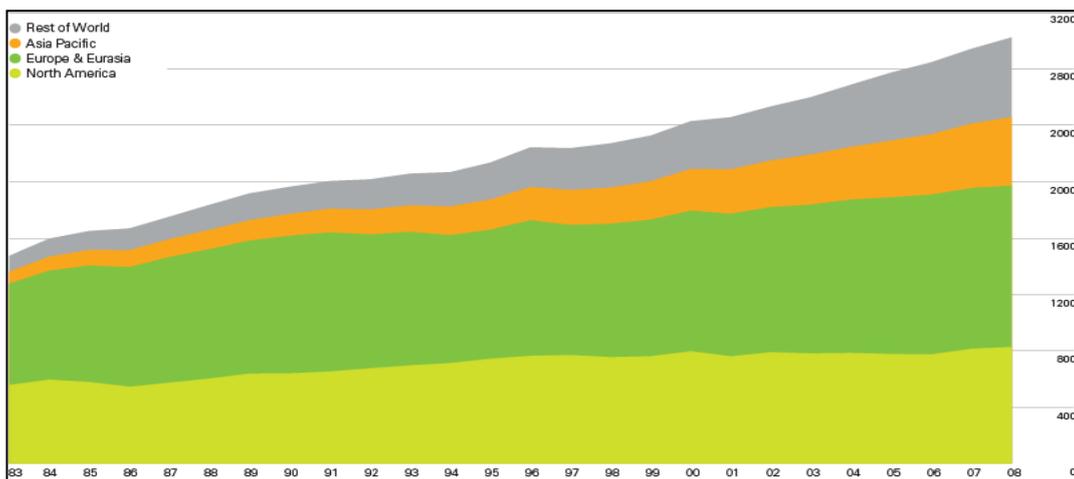
It is argued that the world's need for oil and gas will increase in future, same points can be found in EU Commission's Annex to the Green Paper; "energy demand continues to rise in virtually all regions of the world and total energy consumption in 2030 to be almost 60% higher than it was in 2002 (2006, pg. 4). On the other hand, the studies reveal that the year 2008 stood out with the lower numbers (compared to the 2001). BP explains the situation as in the followings:

World primary energy consumption grew by 1.4% in 2008, below the 10- year average. It was the weakest year since 2001. Oil remains the world's dominant fuel, though it has steadily lost market share to coal and natural gas in recent years. Oil's share of the world total has fallen from 38.7% over the past decade. Oil consumption and nuclear power generation declined last year, while natural gas and coal consumption, as well as hydroelectric generation, increased (2009, pg. 42).

All in all, energy consumption rates followed a rather progressive process since 1980's. Except from some decreasing numbers of the last one to two years period, general anticipation about the energy consumption rate is a constant increase.

Table 2 shows natural gas consumption by area, which composes one of the pillars within the world energy consumption. As mentioned, there is a growth in the natural gas consumption rates.

Table 2 Natural gas consumption by area



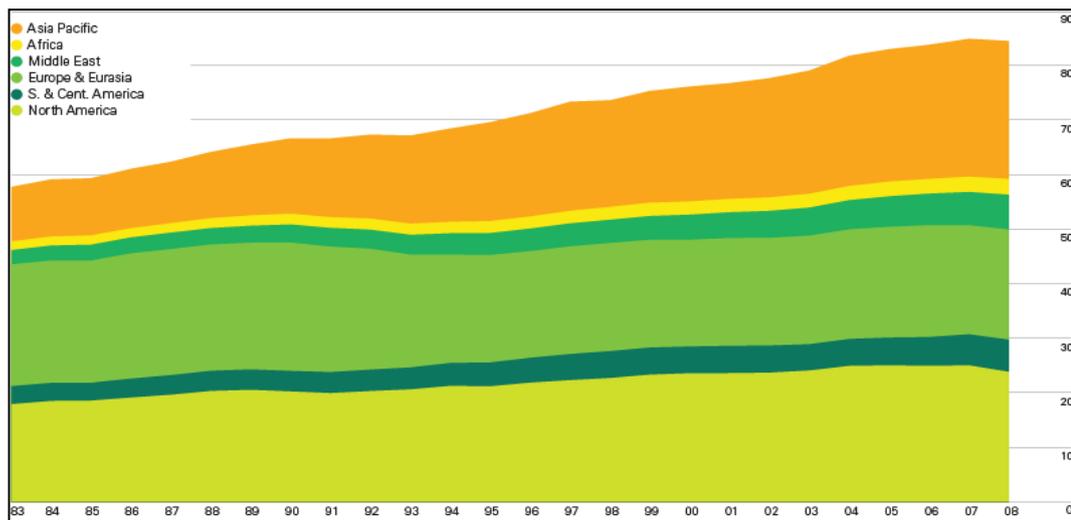
Source: BP Statistical Review, 2009

With regards to these Tables, in the BP reviews it is indicated that:

World natural gas consumption grew by 2.5% in 2008, below the historical average. Growth was broadly distributed, although only North America and the Middle East saw above average growth in aggregate. China accounted for the largest increment to gas consumption, while Russia recorded the decline (BP Statistical Review, 2009, pg.7).

An increase is observed in the Europe and Eurasia regions especially between the years 1983-2008. Table 3 indicates the recent changes in oil consumption by area.

Table 3 *Oil* consumption by area



Source: BP Statistical Review, 2009

With regards to these Tables, in the BP reviews it is indicated that:

World oil consumption fell by 420,000b/d, the largest decline since 1982.OECD consumption fell by 1.5 million b/d, driven by a decline of nearly 1.3 million b/d in the US. China again recorded the world's largest incremental growth, rising by 260,000b/d. Consumption growth was above the 10-year average in the exporting regions of the Middle East, south and Central America, Africa and the former Soviet Union (BP Statistical Review, 2009, pg. 7).

Both oil and natural gas consumption Tables are important indicators showing the general framework of the world's energy consumption tendencies. The projections on energy production and consumption trends are crucial determinants of energy strategies and assumptions for specific regions, especially for the EU.

The essence of the issue can be best demonstrated by highlighting first, world's consumption rates and second EU's situation within the energy distribution of the World. As Ayhan puts it "in the global scale, world's petroleum consumption is 87 million barrels per day (2009, pg.157). Also, "in addition to the USA (21 million barrels per day), China is the second most important consumer (7.8 million barrels per day) and Japan (5.2 million barrels per day), is the third" (BP, Statistical Review, 2008, pg.11). Compared to the rest of the world, the EU portrays an important picture of energy production and consumption rates.

The situation for the EU-27 is rather different due to its asymmetrical relation between its own production and consumption rates. According to the recent studies, at the end of 2008 the EU has 6.3 thousand million barrels of proved reserves of oil (BP, 2009, pg. 6). Moreover, production rates are not nourishing hopes, for example; the total share of oil production for the year 2008 is 2.7 %, while on the other hand the consumption rate is 17.9% for the same year (BP, 2009, pg.8). The same situation can be observed regarding the natural gas. At the end of 2008, the EU has 2.87 trillion cubic metres of proved reserves of gas (BP, 2009, pg. 22). The gap between the consumption and the production exist in the case of the gas, too. According to the BP Statistical Review for 2009, the total share of gas production is 6.2% and the total share of the gas consumption is 16.2 %. Apparently, this gap signals an indispensable situation of import dependence.

Besides, import dependency is a real threat for the EU considering the limited variety (or dominance) of supplier countries. For Ayhan, “growing dependence of the EU on oil and natural gas imports due to its rising consumption and decreasing production comes out as a security problem (2009, pg.157). Some EU scholars also accentuate the import dependence as: “longer-term prospects are by no means more promising, since the EU’s dependence on imported energy (mainly natural gas) may raise from 50 % at present to about by 70 % by 2030” (Inotai, 2008, pg1). All the numbers indicate that the EU is not sufficient to meet its internal energy demand, because there is a gap between the domestic production and consumption rates. In addition, this gap naturally create an import process (if we ignore the accelerated initiatives towards alternative energy projects) within which a really limited variety of suppliers serve. There are also security concerns about this process, bolstering the uncertainty among the member states towards the supplier countries. Hence, this process contains security concerns and requires longer term plans and strategies. The needs to meet the general energy demand and possible security dimensions of the issue have engendered the EU officials to develop effective energy policies and strategies.

Likewise, due to the increase in the energy consumption, in general, the need to define the priority strategies has emerged within the EU. As mentioned in EU Commission’s report ‘Energy Corridors’, “in several publications and reports the key strategies and policy objectives are formulated as: to enhance security of energy supply, to strengthen the internal energy market and to develop sustainable energy markets” (2007, pg.15). Import dependence and the concerns for the security of supply repeated by some scholars as an urgent situation. İpek claims that: “there is an urgent need to promote diversity of energy type, country of origin and transit” (2006, pg.6). At this point it may be beneficial to remember the events in the years 2006, 2007 and 2009. These years were important for addressing important events justifying the motivations behind formulating “security” objectives regarding the energy supply. As

highlighted by Barçın Yinanç, policy and economy reporter, the concept of security of supply has become one of the priority issues and the EU changed its directions “when Russia turned off the gas to Ukraine because of a pricing disagreement it sent shivers across Europe where customers are largely dependent on Russia to keep warm” (2008, pg. 48). Indeed, the EU’s dependence to the imported energy (particularly to the Russian gas) is a question mark in the case of urgency. On the other hand, there are problems other than the import dependency and security issues. In addition to its energy dependency EU also has to face the adverse effects of climate change and high prices in the energy markets (Ayhan, 2009, pg.158). Union tries to address all of those challenges in their strategy papers

All in all, as current trends show the EU’s energy profile is described by a gap between the consumption and production rates. This gap leads to import dependence and as Commission’s Energy Report mentions “it carries some political and economic risks” (2007, pg.3). EU officials endeavour to enhance existent strategies, and try to develop new measures for future energy demand. European Energy Transport trends 2030 Report is a good example to explore the initiatives.

According to the European Energy and Transport trends 2030 Report, conducted by the European Commission Directorate-General for Energy and Transport, the energy baseline scenario has been re-defined (the first baseline scenario was defined in 2003 and updated in 2005). Baseline scenario is important because it provides certain policy tracks in building future policies, and “it constitutes the basis for policy analysis in addition to its function as a projection on the basis of current trends and policies” (2008, pg. 19). Moreover, baseline scenario is a reference point for further policies regarding energy policies and development. What is more, baseline scenario is not a forecast, but a simulation of how the EU energy system would evolve on the basis of a continuation of past trends without consideration of market failure

(EC Directorate-General for Energy and Transport, 2007, pg. 19). In this study the report will be used to highlight major striking points and reflect the general picture of the energy situation of the EU-27.

The overall results of the baseline scenario highlights the facts that total EU-27 energy requirements will continue to increase up to 2030 and in 2030 primary energy consumption is 11% higher than in 2005 (2007, pg. 12). While primary energy consumption increases, oil will be kept as the most important fuel. Despite this situation, “oil exceeds the current level by only 6% in 2030” (EC Directorate-General for Energy and Transport, 2007, pg. 12). Therefore, natural gas demand will increase by 71 Mtoe<sup>1</sup> up to 2030 and import dependency will continue to grow to reach 67% in the same year, which is up 14 percentage points from today’s level (EC Directorate-General for Energy and Transport, 2007, pg.13).

As a result, the EU energy production and consumption situation within the energy distribution of the World reveals the fact that, regarding the oil and natural gas consumption rates, EU is one of the leading importers in the world. This means that, there is a significant gap between the production and consumption rates of the Union. As seen in the reports and analyses, there are many concerns about the energy future of the Union, the most preeminent ones are increasing import dependence and security of supply. Also, recent analysis and statistics boost the idea that EU needs to create new strategies so as to prevent possible energy crises in future. These concerns had been realised long time ago; however, efficient strategies emerged only after 2005. For example, Council of the European Union has adopted oil stocks directive in 2009 so as to meet the challenges mainly stem from the import dependence. According to this directive, member states have to maintain oil and petroleum stocks and

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<sup>1</sup> Million Tons of Oil Equivalent

intended to improve the functioning of current EU oil stocks mechanisms, so as to ensure the availability of oil in the event of a crisis (Council of the European Union, 2009, pg. 2). Consequently, European Energy policies, reflects an important picture where huge gas and oil consumption rates, energy dependency (one of the major challenges in itself) and decreasing level of production exist as a future sources of concern.

## **2.2 The history of the initiatives to establish a common EU Energy Policy**

As mentioned, the scope of this study is limited to analyse energy policies about natural gas and oil. However, it is of vital importance to address the emergences of the European Coal and Steel Community (ECSC) and European Atomic Energy Community (EURATOM) as the preeminent initiatives conducted by the European Economic Community (EEC).

Common energy policies in the EC/EU have traditionally been rather insignificant despite the paradox of the three original treaties, the ECSC and EURATOM, both concerned energy (Matlary, 1997, pg. 14). After signing the treaty of Paris in 1951, the European Coal and Steel Community was established with the general aim to organize the production and free access of coal and steel within the member states. The very intention of this institution was to develop policies controlling the distribution of the coal and steel. In other words, “the focus of the ECSC was on how to manage coal and steel production in Europe in both its political and its economic implications, and not on creating a comprehensive energy policy” (Matlary, 1997, pg.16).

EURATOM was also established more or less for the similar purposes; that is, to coordinate the use of nuclear energy peacefully. Accordingly, as stated at the preamble of the EURATOM Treaty: “The role of EURATOM was thus that of creating the conditions ‘necessary for the development of a powerful nuclear industry which will provide extensive energy resources’ (Europa, *Treaty*

*establishing the European Atomic Energy Community (Euratom)*, 2007). However, because of several political uncertainties, and ‘oil and gas’ as relatively cheaper sources of energy; the ECSC and EURATOM lost priority. Hence, “both the ECSC and the EURATOM treaties have been rendered obsolete, since the ascendance of oil and gas as the dominant energy sources” (Matlary, 1997, pg.18). In addition, neither the ECSC nor the EURATOM included a special ‘energy chapter’ because no member states were ready to give up their authorities over the energy policies (Ergün, 2007, pg.3).

The years 1973 and 1979 were particularly important not only for the European countries, but also for the rest of the world. In effect, the political disorders and societal troubles during these years were influential for the future energy policy settings. Khazar Ibrahim argues that: “The most troublesome times for Europe regarding energy security were in 1973 and 1979, after the war in the Middle East and the revolution in Iran” (2007, pg.95). Accordingly, such external shocks had led the Member Countries to search for new protectionist policies/resolutions as a whole. For example, Arzu Yorkan points out that: “after these entire crises the EEC, for the first time, had to set common strategies in the field of energy policy” (2009, pg.26). Both ECSC and EURATOM initiatives were very important. In the first resolution, the Council had decided to set an Energy Committee to control and coordinate the energy policies of the member states (European Year Book, 1974, pg.507). In addition, it was stated that: “In December the Council went on to lay down the 1985 objectives of the Community energy policy; in this connection it approved a resolution on a Community programme of action for the rational utilization of energy” (European Year Book, 1974, pg.507). In this resolution, “the Council attempted some quantification of objectives, proposing for 1985 a reduction in imported energy dependence to 50 percent involving increased reliance on solid fuel, natural gas and, in particular, nuclear energy” (Daintith and Hancher, 1986, pg. 28).

After the second oil crisis, new initiatives were taken place by the Council in order to define both the orientation and the targets for the following years. As stated by Daintith and Hancher, “In May 1980 the Council, this time with 1990 as its target date, adapted 1974 objectives. In 1980, it asked the Commission to *measure the convergence* of Member States policies by reference to certain defined *orientations*” (1986, pg. 29). At the end of the day, the member states emphasized that: “maximum reliance should be placed on the price mechanism and Market forces should be supplemented, where appropriate, by effective fiscal incentives and administrative measures” (Council of Europe Parliamentary Assembly Documents Working Paper, 1981, pg. 24). Since then, the member states made an effort to restrict the import and boosted the development of domestic production (Yorkan, 2009, pg.26).

During 1980’s the Commission was highly motivated towards creating a single market. The very intention was to improve the European economical development on the one hand and to support international efficiency on the other. Apart from that, new measures taken in the internal energy market were also important. As Pointvogl argues, “developments in the internal energy market regarded by many scholars as the most important legal instruments of the Union’s energy policy” (2009, pg 5708). Considering the internal energy market policy, none of the combinations were nourishing hopes. The challenge was the fact that, “European energy markets were considered to be among the most difficult to change, traditionally characterized by a heavy government hand in the form of strong national energy policies” (Matlary, 1997, pg.21). Still some developments in the way to establish a common energy market were possible to observe in the 1980’s. As Pointvogl says: “Despite the start of a common approach to energy policy with the ECSC and the EURATOM, only the most important developments in the period after 1985 are presented” (2009, pg.5708). Adoption of the Single European Act and completion of Internal Market seems to be important for the EU energy policy. However, the Single European Act did not involved directives on the energy policies; Pointvogl

states that:

it was (and still is) characterised by its main competencies in environmental and competition issues, and although mentioned in the White Paper on *Completing the Internal Market*, the energy market was omitted from the internal market programme until 1988 (2009, pg.5708).

Indeed, “due to its nature as a challenging policy area for the member states, composing a common energy policy was not easy at all” (Ergün, 2007, pg.4).

In the 1990’s political and economical attitudes towards the energy policies have been changed because of the market liberalization and the end of the cold war period. Changes in the market approaches and strategies have been explained in detail by Dieter Helm as: “The new market philosophy, with itself that competition was the most effective way to allocate resources, motivated the twin pillars of policy in the 1980’ and 1990’s: privatisation and the promotion of competition” (2002, pg.175). This approach included the idea to take the initiative, like planning the framework of the energy policies, from the government and eventually give it to the private sector. In other words, “governments control the *‘framework’* within which markets operate, whether or not they choose to recognise this explicitly and provide a strategic framework” (Helm, 2002, pg.175). On the whole, competition oriented energy policies were dominant during the 1980’s and 1990’s, including its own arguments and justifying premises.

Moreover, 1990’s were particularly important due to the fall of the Union of Soviet Socialist Republics (USSR) signalling the end of the Cold War period. “The end of the cold war was influential over the EU member states to initiate a number of measures so as to protect the energy security as a whole” (Yorkan, 2009, pg.27). Since then, preventing possible future conflicts in the energy policies has been the prior target among the member states, and a number of co-operations and mechanisms have been initiated. For example, the Energy

Charter Treaty (December 1994) is of vital importance as a political and legal instrument, “established to provide non-discriminatory and market-based conditions for international energy co-operations” (Ergün, 2007, pg.78). Energy Charter Treaty, performing as a platform to foster the rule of law in the energy related policies, has been active since 1998 and Turkey is one of the leading members. Currently a Turkish diplomat (Selim Kunalalp, Ambassador and Head of the Turkish Permanent Delegation to the European Union) has been elected as the new chairman of the Energy Charter Conference (Today’s Zaman, “*Kunalalp bcomes head of Energy Charter Conference*” 10 April 2010). Energy Charter Conference is of vital importance because it is the governing body of the Energy Charter process.

With the beginning of the 21<sup>st</sup> century “the desire to create a common energy policy for Europe has become core to the political agenda of the European Union” (Prange-Gstöhl, 2009, pg.5296). One of the most remarkable attempts is the Green Paper “Towards European Strategy for the Security of Energy Supply” prepared by the European Commission in 2000. On 8 March 2006, the European Commission published the Green Paper, *A European Strategy for Sustainable, Competitive and Secure Energy*, and identified six priority areas. Two of the most important priorities were competitiveness and enhanced internal market. As Prange-Gstöhl, claim: “The *Green Paper* accelerated the hype around this topic and provided a new momentum to energy policy” (2009, pg.5296). Diversification of energy resources and maintaining security of supply has recently been in the agenda. The year 2007 was of special importance due to the Commission’s emphasis on ‘coherent EU external energy policy’ as an indispensable part of the Union’s ‘Energy Package’ (Prange-Gstöhl, 2009, pg.5296). A number of initiatives have been taken for last ten years and Pointvogl argues that: “recently, attempts to create a more European approach to energy policy accelerated the process, namely after the informal Hampton Court Summit in 2005, with the resulting publication of a Green Paper” (2009, pg. 5708).

Considering the year 2008, modifications can be observed in the priority areas of the energy strategies. The main emphasis is on the “Energy Security”, which also boosts the argument that Energy is a multidimensional and international in nature. Arzu Yorkan argues that the very emphasis on the Energy Security may be analyzed within the following points:

On the one hand there are increasing energy prices, lack of common energy policy of the Union, increasing demand rates of the developing countries such as China, India and Latin America countries; on the other hand, political instabilities in the Middle Eastern countries, latest situation in the Caucasus region, Russian energy policies, terrorist attacks towards infrastructures and external factors such as global warming are all threaten Union’s energy security (2009, pg.34).

According to the *EU Energy Security and Solidarity Action Plan: 2<sup>nd</sup> Strategic Energy Review*, “Energy security is an issue of common EU concern. With the integration of energy markets and infrastructures within the EU, specific national solutions are often insufficient. And while each Member State is in the first instance responsible for its own security, solidarity between Member States is a basic feature of EU membership” (2008). Accordingly, the EU’s 2020 energy strategies are impressive, which actually include famous “20-20-20” strategies.

Within this framework, the Union has set a number of targets for the specific year 2020, including: sustainability, competitiveness and security of supply, by reducing greenhouse gas emissions by 20%, increasing the share of renewables in the energy consumption to 20% and improving energy efficiency by 20% (EC, 2008). Obviously, the Union is concerned about both external/physical effects and political instabilities. The scope of the strategy review is constructive towards building working targets within a specific deadline. As a matter of fact, with this study EU reflects its enthusiasm to solve energy related

issues and to arrange actions plans in advance. As mentioned previously with different perspectives and latitudes the Union is lack of a working energy tradition however for at least a decade the situation has been in change. As stated in the strategy paper: “The EU needs to intensify its efforts in developing an effective external energy policy; speaking with one voice, identifying infrastructure of major importance to its energy security and then ensuring its construction.” (2008). All in all, the Commission seems to enhance its attitudes towards the energy policies as an important policy tool and to the new investment projects in the framework of infrastructure and the energy industry. At the end of the strategy review this involvement can be perceived as a need to develop “effective external energy policy; speaking with one voice” (2008) so as to defend energy-related crisis in the future. Noticeably the EU has started to pay more attention on the energy policies as the review includes: “The Commission will identify the concrete mechanisms necessary for ensuring transparency between Member States and the EU, so that a common message can be constructed” (2008). Hence, in order to keep up this approach the Commission may go on to prepare strategic papers in the framework of sustainable, affordable, renewable and environment-friendly energy policies.

Last but not least, since the establishment of the EU a number of core questions remained undefined regarding developing common energy policies apart from action plans/strategies. Due its multidimensional nature (in terms of the types of the energy source, supply source and pipeline policy) it is still tough to identify working policy implementations on European energy policy. For example, according to the Commission’s Stock taking document ‘Towards a new Energy Strategy for Europe 2011-2030’, there are several gaps despite of regular energy reports and strategy documents. To be more precise, the stock document addresses the fact that: “the current state of implementation of European energy legislation is overall poor” (2010, pg.4). In other words, EU is strong in preparing strategy documents and specific targets; however, weak in the implementing part of it. As a natural result of poor implementation,

internal energy market does not function at all (Commission, 2010, pg.4). In addition, the report specifically makes a point of lack of a European infrastructure framework, weakness of the coordination of the external dimensions of the EU energy policy, and inefficiency of innovation activities and spending. Still, as Göktuğ Kara argues: “Energy is such a powerful theme able to influence and even change the economies and lives of the community. Energy-based societies will be emerged in fifty years and, EU, at least, expresses a will to challenge the future energy problems” (interview, 2010). These issues should be kept in mind when analyzing current EU energy policies.

Consequently, the history of the initiatives to develop a common EU Energy Policy reflects an important picture. Since the establishment of the EC/EU, creating common energy policies has always been in the policy agenda. Yet, today what is seen is a series of strategies and policy frameworks, that is, the notion of creating common energy policies is still in progress even though well-written strategy documents and statistical reviews have been conducted regularly. As Inotai argues:

Despite all supporting elements in the last decades, member countries have not yet been able to agree on a common energy policy, and not even to eliminate national barriers or to transfer national decision-making competence to community level (2008, pg.1).

Therefore, it may be argued that the EU does not have concrete energy policy and all the studies are in the process of making.

### **2.3 EU Energy Policies and Specific Dynamics / External Threats**

Energy strategies are mainly shaped in accordance with domestic need, supply security, environmental factors, sustainability, and importantly with import-export situation. In the case of the EU, import dependence is the number one factor that is most likely to affect the future policies.

As discussed, EU is a net importer, in which “of overall European Union gas supplies, 25 per cent came from Russia and 14 per cent from North Africa; of oil supplies, 31 per cent came from the Middle East and North Africa and 27 per cent from Russia” (Youngs, 2009, pg.2). In a more strategic landscape, by 2030 EU is assumed to be even more import dependent for its gas and oil consumption. Additionally, baseline scenario indicates that: “import dependence continues growing to reach 67% in 2030, which is up 14 percentage points from today’s level (2007, pg.13). As discussed in the former parts, import dependency and limited suppliers have led the Union to re-define its priorities on the energy policies. Import dependence and all the other effects have led the Union to maintain working external energy policies. Indeed the stock taking document also accentuates that “the EU has no choice but to ensure that its energy policy has a strong and coherent international dimension and to integrate energy into its external policies and actions” (2010, pg.7).

Integrating energy into the external policy is important especially in the case of supply security issues, due to the fact that energy as a policy tool may be a threat in some cases and the issue of supply security may become a problem. The concerns become even striking if the issue is the monopoly of producers.

In this framework, it is important to remember the conflicts between Russia and Ukraine in 2006 and 2009. These crises, “resulted in significant supply disruptions for several member states, raising awareness that dependence on

Russia has increased Europe's geopolitical vulnerability" (Baran, 2007, pg.132). Indeed, these developments underlined the importance of stable external policies and "the great importance of oil and gas producers in influencing the policies of consumer states" (Marquina, 2008, pg.54). Debates between Russia and Ukraine were significant factors proving how possible to transform regular diplomatic relations into a bottleneck, although; Russia, in this particular event, "is not really interested in fighting an energy war" (Bourke, 2008, pg.2). Emre Engür, international energy expert; claimed in the interview that: "After the Ukraine crisis Russia also lost considerable market opportunities because EU had focused on the Nabucco Project as an alternative to the Russian gas" (2010). Also these crisis "raise the important issue of transit which the EU needs address" (2010, pg.7). Therefore, with these important conflicts the negative sides of import dependence and monopolization of energy producer countries come to the fore. One of the most important solutions is to have stable and harmonized external energy policy.

Both the diplomatic crisis and the dominance of the energy exporter countries have stimulated the Union to approach other producer regions, in other words, EU tries to provide diversification of resources. Accordingly, the EU has tried to develop new strategy papers and action plans for the Central Asia and the Caspian Region.

Regarding the strategy approved in June 2007 by the Council, from the beginning that the EU had to establish a regional political dialogue, start a European Education Initiative and an EU Rule of Law Initiative, and establish regular human rights and energy dialogues with Central Asia states (Council of the EU, 2007, pg.). In the Annex of the EU and Central Asia: Strategy for a New Partnership, the Council clearly expressed that: "The EU will conduct an enhanced regular energy dialogue with Central Asian States in the framework

of the Baku Initiative<sup>2</sup> (2007, pg.12). This rapprochement policy of the Union particularly towards the Central Asia and the Caspian region, and developing new norms regarding the external energy relations are nothing but pure reflections of EU's energy' concerns.

Union is developing relations particularly towards the Central Asia and the Caspian region, by its 'external energy policy', also European Neighbourhood Policy is the other important cooperation tool. As Prange-Gstöhl mentions: "notably, one of the main pillars of the EU's external energy policy is the objective of energy market integration- rather than only bilateral or multilateral co-operation- with the EU's Eastern and South Eastern neighbours and the 'neighbours of the neighbours'" (2009, pg.5297). In this sense it is also important to remember the EU energy cooperation with the ENP countries. As states in Commission's Staff Working Document:

A Memorandum of Understanding (MoU) on Energy with Ukraine was signed at the 2005 EU-Ukraine Summit, while MoUs have been signed or are being developed with other strategic energy partners covered by the ENP (Azerbaijan and Algeria). (2006, pg. 5).

Especially the Mediterranean region is worth touching due to its energy producer countries and geographical proximity to the Europe. Thanks to the Barcelona Process<sup>3</sup> relations with the Mediterranean countries have been developed positively. Sohbet Karbuz also highlights the importance of the region as: "It is highly probable Algerian, Libyan and Egyptian gas exports to

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<sup>2</sup> Energy Co-operation between the EU, the Littoral states of the Black and Caspian Seas and their Neighbouring countries, launched at the energy Ministerial conference held in Baku in November 2004.

<sup>3</sup> The Barcelona Process, also known as the Euro-Mediterranean Partnership, constitutes the policy of the European Union towards the Mediterranean countries. Its purpose is to strengthen the links between the Union and the partner countries, whilst encouraging closer ties among the Mediterranean countries themselves.

See: [http://europa.eu/scadplus/glossary/barcelona\\_process\\_en.htm](http://europa.eu/scadplus/glossary/barcelona_process_en.htm)

the EU will overtake Norway around 2025” (2010, *EU 4 SEAS Energy and Transportation Cooperation Conference*, Slide 27). He further claims that the EU must develop energy strategies including the South and the East Mediterranean countries because of their strategic importance and concludes that: “To diversify, the EU must fully engage S&E MED countries, which offer enormous potential for European energy security” (2010, *EU 4 SEAS Energy and Transportation Cooperation Conference*, Slide 30). Turkey, due to its geographical location, is one of the most important countries in the Mediterranean region and it can be a key player regarding developing energy policies.

Therefore, EU endeavours to ameliorate its external energy policies by flourishing new and stable strategies and by approaching other regions. Even though it is well aware of the facts that import dependence, for gas at least, some specific regions will keep its importance (due to the plethora of the resources and some other bureaucratic concerns).

Last but not least, because of Caspian region and Mediterranean regions’ importance Turkey stands out with her strong potential as an energy hub between Europe and energy producer countries. Indeed, “a strategic partnership built on such an external policy between the EU, Turkey, and the Caspian countries will offer security and predictability for all sides by spreading the economic risks for new investments” (İpek, 2006, pg.8). Hence, EU rapprochement towards new producer regions strengthens Turkey’s role as an energy hub.

To conclude, the European Union’s approach to develop energy strategies stems from the facts that: EU import dependency, lack of market competition (particularly in the fields of gas and oil), the needs to diversify the general resource providers and supply security. The very need to diversify the resource

suppliers has to do with the Russian energy policies, depicted by Zeyno Baran; “Russian power and influence is no longer measured in ballistic missile accuracy or bomber production but in miles of pipeline construction and barrels of oil per day exported, and for Europe, this energy invasion has already begun” (2007, pg.131). In this sense, EU’s approach to the Central Asia and the Caspian region becomes significant. Developing new forms within the ‘external energy policy’ and European Neighbourhood Policy are significant facts to study on. All in all, the Union seems to have a long way to go regarding sustainable and secure energy policies.

Last but not least, EU Energy Policies are analyzed under three main headings: An overview to the EU energy production and consumption situation within the energy distribution of the world, the history of the initiatives to establish a common EU energy policy and EU’s energy policies to find new resources and means to access the energy resources.

In the first part of the study it was mentioned that EU’s energy consumption profile, mostly regarding oil and gas, is not nourishing hopes. Indeed, the European Union’s characteristic as an energy importer (EU is one of the most significant energy importers in the world because more than 50 per cent of its energy is provided from the other countries) requires a definition of common energy strategy for future. As a matter of fact, EU’s energy consumption and production situation within the world is a common indicator that the EU is about to face the problem of energy dependency and security of supply. In this context, EU Commission’s target for sustainable, competitive and secure energy policy is understandable. According to Göktuğ Kara; “European Commission tries to answer the following questions: 1) within the energy framework, how long can EU survive with the existing expenditure polices? 2) To which extent can the EU use resources around it in its most effective way? and 3) How can the EU minimize the environmental effect of carbon based

economy?'. All those questions are some way or another pave the way for a new structural thinking, in other words, lead to the concentration more on the concepts of sustainable and cheaper energy resources and security of supply.

The historical evolution of the attempts to establish common EU energy policies may be summarized in decades. Decades were characterized by the political and economical events during those years. For example, while in the 1970's 'geopolitical sense' was dominant in the energy policies (Youngs, 2009, pg.6), 1980's establishing common energy market was one of the top priorities. Moreover, during 1990's two dominant factors were influential over energy policies. On the one hand, in the 1990's political and economical latitudes were in change by the wave of market liberalization and on the other hand, the end of the Cold War was effective on the policy-making structures as a whole.

The last part of the section accentuated EU's energy policies and Specific Dynamics / External Threats. Under this heading, establishing EU energy policies have been explained by EU import rates, EU import dependency, security of supply, and sustainable energy resources. Also, the reasons to develop external energy policy have been explained. In addition, some examples of supply security threats and EU's new approaches towards supply diversification have been delineated carefully. Therefore, it is possible to argue that EU experienced the negative effects of the supplier monopoly and partially improved itself in two ways. First, the Union emphasized the importance of stable external energy policies (because EU is aware of the fact that, it will be import dependent for some regions due to their natural plethora and has no choice but to maintain stable external energy policies) and also the importance of diversification of the supplier. Second, member states remembered how interdependent and liable the energy policies are.

To conclude, although there are working papers and strategy plans for the future of energy situation, EU's need to define a 'common' energy policy, as a way of guarding itself from the risks of being import dependent in the near future, is still eminent.

## CHAPTER 3

### TURKISH ENERGY POLICY

#### **3.1 An overview to the Turkish energy production and consumption situation**

Turkey is an important player located at the centre of energy resources and the importer countries. Three fourths of the world's proven oil and gas resources are located in the regions neighbouring Turkey (Ministry of Foreign Affairs, 2006, pg.2). Considering the increasing demand on the Middle East and Wider Black Sea energy resources Turkey becomes more significant as an energy gateway.

On the other hand, Turkey is a net importer country and itself a major market for regional producers (Roberts, 2004, pg. 18). In other words, with a young and growing population, low per capita electricity consumption, rapid urbanization and strong economic growth, Turkey, for nearly two decades, has been one of the fastest growing power markets in the world (Demirbaş, 2001, pg.1877). As Selma Stern puts forward; "The gap in Turkey's energy supply and demand is the key element which determines Turkey's energy policy. As a country with an emerging and rapidly growing economy, Turkey at the same time is facing a rising growth in its demand for energy" (2004, pg.1). Besides Turkey's role as a transit country, latest numbers show that it is indispensable for Turkey to develop new policy priorities so as to meet the general energy demand especially in terms of gas and oil.

Turkey is one of the major European states with respect to its population<sup>4</sup> and the area<sup>5</sup> that it occupies. Additionally, Turkey's economic development has been in progress since two decades. As Turkey's economy expanded in the last years (gross domestic product, for current price, is 953 974 million TL<sup>6</sup>), the consumption of oil has increased (Selma Stern, 2004, pg.2). Due to this consumption raise in oil and gas in general, observing the current statistics and production-consumption rates become more significant. According to Oğuz Türkyılmaz, global economic crisis has affected Turkish energy consumption rate in the first half of the 2007 and 2008; that is, while energy consumption rate in 2006 was 99,5 Million Mtoe, in 2007 it increased 8 percent and reached to 107,6 Million Mtoe, in total (2009, pg. 2). Despite Turkey's consumption volume of 107, 6 Million Mtoe, only 25.5 percent of it can be produced with domestic energy resources (Türkyılmaz, 2009, pg.9).

Table 4 Turkey's primary energy production and the demand rates in Mtoe (2007)

Resources	Coal	Wood +Plant	Petroleum	Natural Gas	Renewable	Electric	Total
Primary Energy Production	14.797	4.995	2.241	827	4.592	0	27.453
Proportion in production %	<b>53,9</b>	<b>18,2</b>	<b>8,2</b>	<b>3,0</b>	<b>16,7</b>	<b>0,0</b>	<b>100,0</b>
Primary Energy Demand	30.909	4.995	33.310	33.953	4.592	-134	107.625
Proportion in demand %	<b>28,7</b>	<b>4,6</b>	<b>30,9</b>	<b>31,5</b>	<b>4,3</b>	<b>-0,1</b>	<b>100,0</b>
Percentage of production to meet demand	47,9	100,0	6,7	2,4	100,0	0,0	25,5

Source: Oğuz Türkyılmaz, "Türkiye'nin Enerji Görünümü" 2009 pg.5

<sup>4</sup> According to the 2009 census data, Turkish population is 72 561 312 See: Turkish Statistical Institute [www.tuik.gov.tr](http://www.tuik.gov.tr)

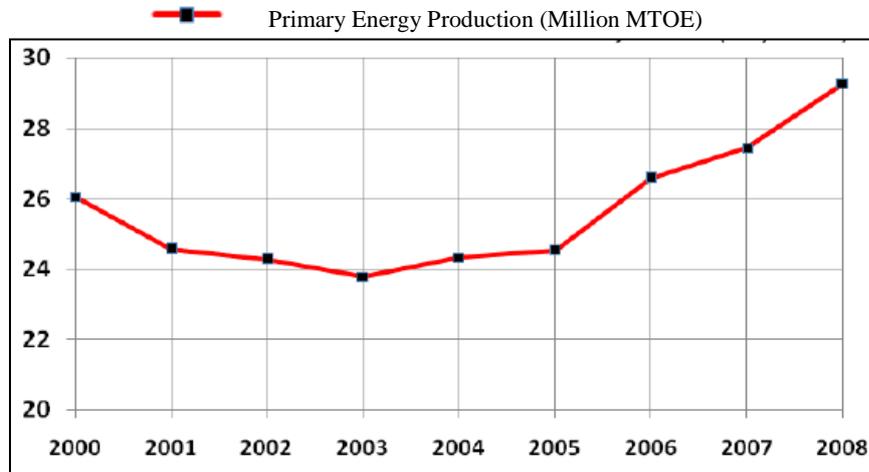
<sup>5</sup> According to the General Command of Mapping-Turkey, Turkey occupies 783.562 square kilometres in area See: [www.hgk.mil.tr](http://www.hgk.mil.tr)

<sup>6</sup> Turkish Statistical Institute, news release for the gross domestic product fourth quarter 2009. Release date:31 March 2010.

To better illustrate Turkey's energy production and consumption rates, it is important to streamline the statistics. Table 4 indicates that Turkey's primary energy production for 2007 is approximately 27.5 Mtoe and the great majority of this production consists of coal. Among the indigenous production, the share of hydraulic and other types of renewables are %17 of the total energy production, while this rate represents %4.3 of total energy demand.

In 2008 there was a slight change in the energy consumption rate, in other words, energy consumption rate was 108<sup>7</sup> Million Mtoe, in 2008, while energy production rate was 29 Million MTOE in total (Ministry of Energy and Natural Resources, 2010, pg.13). In order to see the Table 5 shows the production of primary energy resources between the years 2000-2008, and the import rate of the primary energy demand.

Table 5 Primary Energy Resources Production (2000-2008)



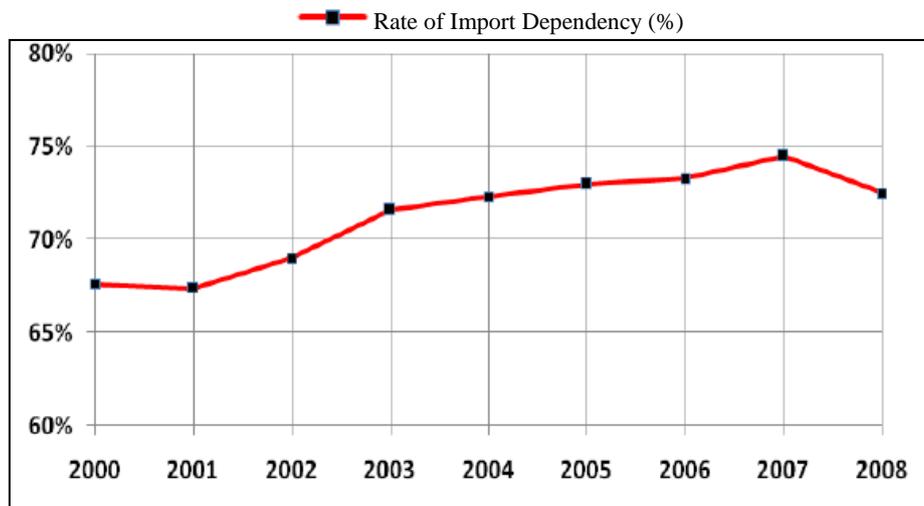
Source: Ministry of Energy and Natural Resources, Strategic Plan for 2010-2014

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<sup>7</sup> According to BP Statistical Review of World Energy June 2009 report, Turkey's total energy consumption is equal to 102.6 Mtoe in 2008. Nevertheless in this thesis study the statistics of Ministry of Energy and Natural Resources and World Energy Council will be referred for Turkey.

Although between the years 2007 and 2008 there has been an increase regarding primary energy production, Turkey is an import-dependent country and far away from meeting its own energy needs with domestic production. Table 6 demonstrates the import dependency of Turkey.

Table 6. Rate of Import Dependency (2000-2008)



Source: Ministry of Energy and Natural Resources, Strategic Plan for 2010-2014

Although energy consumption is a sign of industrial development, in Turkey the situation does not fall fully into line with that statement. Due to lack of adequate domestic energy resources and similar usages in the production processes, Turkey's import dependency for natural gas and oil has increased in recent years. According to the "Strategic Plan 2010-2014" prepared by Ministry of Energy and Natural Resources, Turkey's import dependency is about 73 percent (pg. 14). Turkey's over dependence on the external resource can be compare to the similar situation within the EU. Indeed, it may be important to remember the statistics of the EU energy production-consumption rates within the world. Like the EU, Turkey is also in need to define well established energy strategies in line with its initial purpose to be the energy hub in future. In this context, the Ministry Report indicates that "Turkey is

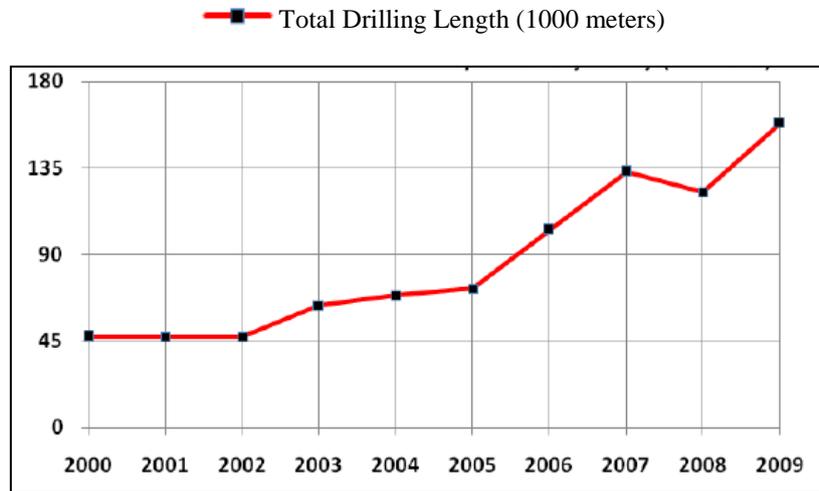
committed to provide energy policies aiming at diversification of supply, resource and technique” (2010, pg.14). All in all, Turkey’s way of developing energy policies is similar to that of EU, especially regarding planning and documentation (e.g. preparing strategy and/or activity plans).

Global economic crisis, which had started from the second half of the 2007 and were effective during the 2008, has been seen as one of the reasons of the recession in the energy consumption rates in the world. As stated in the IEA Background paper for the G8 Energy Ministers’ Meeting 2009; “The energy sector, like all other economic sectors, is being profoundly affected by the worsening business climate and the credit crunch” (pg.7). Accordingly, energy statistics for 2009 include the reflections of the global crisis for energy market in Turkey. Likewise, according to the Turkey Energy Report conducted by the World Energy Council Turkish National Committee, it is estimated that primary energy demand is decreased to 99 Million Mtoe for 2009 (pg. 13). In consideration of the last quarter of 2009, Turkey produced 133, 1 millions of tone crude oil and 11, 3 billions of tone natural gas, while the rest of producible crude oil and natural gas are 39, 4 millions of tone and 6, 1 billions of tone respectively (World Energy Council Turkish National Committee, 2009, pg.14).

In addition, there has been acceleration in the investment of infrastructure in pursuit of oil and natural gas both in Turkey and outside of Turkey. According to the “Strategic Plan 2010-2014” compiled by Ministry of Energy and Natural Resources, Turkey’s strategy is to widen its oil and gas resources by developing new exploratory drillings, especially in the sea floors, to find hydrocarbon both in Turkey and outside of the country (2010, pg. 14). Along with this strategy important drilling studies have been conducted, between 2000 and 2009. Table 7 and Table 8 show that, since 2006 there has been an acceleration regarding the total amounts of gas and oil drillings and total

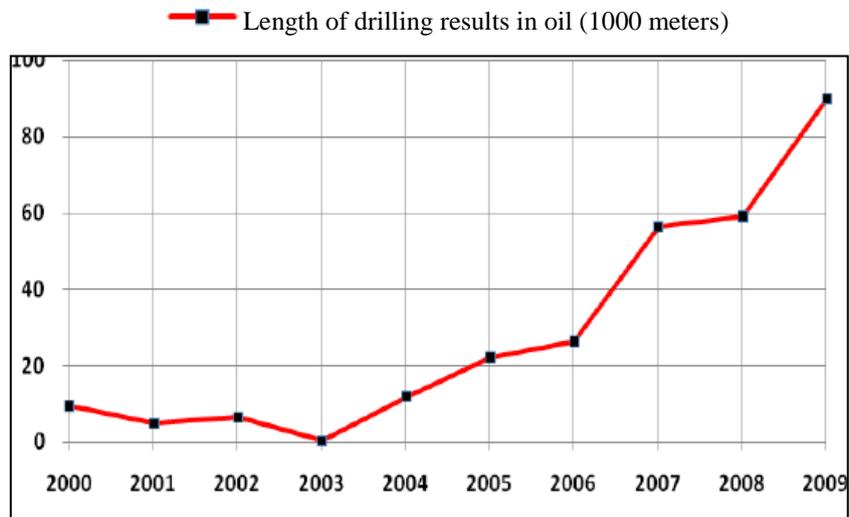
amounts of oil drilling projects.

Table 7 (total) amounts of gas and oil drilling (2000-2009)



Source: Ministry of Energy and Natural Resources, Strategic Plan for 2010-2014

Table 8 Amounts of oil drilling (2000-2009)



Source: Ministry of Energy and Natural Resources, Strategic Plan for 2010-2014

Drilling activities particularly in the domestic sea floors have been in the agenda of Turkish energy policy-makers since forty years. On the other hand, the main steps have been taken place since 1999. The major reasons for that explained by World Energy Council Turkish National Commission's recent work 'Turkey Energy Report 2009' as 'a result of high oil prices and technical developments' (2009, pg.16). Indeed, between the years 1999 and 2000 Turkish Petroleum Corporation initiated 32 oil well projects (World Energy Council Turkish National Commission, 2009, pg.16). In addition, with respect to the of General Directorate of Petroleum Affairs' Final Report 2009, in 2009 companies who have the oil rights in Turkey conducted 143 drillings (242.375 m) in total, including 51 searching (88.907 m), 50 fixing (80.607 m) and 42 production drillings (72.843 m), (2010, pg.32). Out of these 143 oil wells, 53 of them were oil-bearing while 30 of them were containing gas and 33 of them were empty; studies in 27 other drillings are still in progress for 2010 (Final Report 2009, pg.33).

An analysis of the recent studies in the sea floor would be beneficial to further understand Turkey's situation within its energy production-consumption capacity. As mentioned before, Turkey has focused on spreading explanatory drilling activities both in land and sea floor since 1999. Along with one of its energy priorities Turkey is in progress regarding resource diversification via searching domestic resources. The results of those research drillings can be characterized as either empty well, or containing gas/oil. Research activities in pursuit of gas and oil within Limanköy Project-1 (1999), Limanköy Project-2 (1999) and İskenderun Gulf Project (2001) resulted in empty wells while in Ayazlı Project (2004), 14 out of 16 drillings wells, and Hopa Project-1 (2005) were containing gas (World Energy Council Turkish National Commission, 2009, pg.17).

Although in strategy papers and activity plans Turkish policy makers concentrating on the importance of domestic oil/gas production, still the statistics do not nourish hopes. In Oğuz Türkyılmaz's summary on "Turkish Energy Perspective" compare to domestic oil consumption in 2007, which was '32.417' millions of tone, the proportion of domestic production within total amounts of production was only 6.6% (2009, pg.10).

All in all, Turkey's energy overview with respect to consumption and production situation can be drawn with regards to: 1) its geopolitical position as located at the centre of energy resources and import market. 2) Its production capacity and the potential to meet the domestic need and 3) energy strategies to guarantee affordable, secure and uninterrupted flow of hydrocarbon resources (Ministry of Foreign Affairs, 2006, pg.2).

As Demirbaş argues: "Turkey is at the crossroads of several volatile, strategically and economically important regions, including the awkward triangle of the Middle East, Central Asia and the Caucasus" (2001, pg.1877). On the one hand, Turkey is at the centre of countries or a region possessing some 71.8 percent of the world's proven gas reserves and some 72.7 percent of the world's proven oil reserves (Roberts, 2004, pg.18) and on the other hand it stands as one of the important market for energy suppliers. Evidently Turkey has improved its economic situation in recent years, and this has caused more energy needs, which means more consumption and more imports (Kılıç and Kaya, 2005, pg.1313). However, because of inadequate domestic energy resources and common use in the production processes, Turkey's import dependency for natural gas and oil has increased in recent years.

Observing Turkey's production capacity regarding the potential to meet the domestic need once again underlines the fact that Turkey is an import dependent country. Statistics show that Turkey can not compensate domestic need with internal production. For instance, in 2007 Turkey's domestic consumption was 107,6 Million Mtoe and among the indigenous production, the share of hydraulic and other types of renewables are %17 of the total energy production, while this rate represents %4.3 of total energy demand (Türkyılmaz, 2009, pg.5).

Last but not least, due to its geopolitical status and production-consumption capacity Turkey is developing both its energy strategies and priority areas carefully. For this purpose several strategy papers and activity reports have been prepared by energy officials and ministries. As an import dependent country, Turkey represents a cautious planning in order to maintain secure and stable energy policies. Accordingly, it is of vital importance to highlight one of Turkey's priorities in the energy policy; that is, Turkey's commitment to the diversification of supply, resource and technique. The drilling projects have been increased and supported. However, Turkey is well aware of the fact that developing new opportunities in production of "renewable energy" is extremely important too. Indeed, according to the 'Strategic Plan for 2010-2014' conducted by Ministry of Energy and Natural Resources, increasing the proportion of renewable energy resources within the energy supplies, is the second objective (2010, pg.17). On the other hand, as Oğuz Türkyılmaz mentions, "Energy Efficiency<sup>8</sup>", is not only important but also should not be ignored. He argues that "spreading policies on the Energy Efficiency will have positive effects on energy security, climate change and economy, especially

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<sup>8</sup> Using less energy to accomplish the same task, such as heating or lighting a building. Using less energy lowers costs and reduces emissions. See: [www.smith.edu/physplant/greenteam/glossary.php](http://www.smith.edu/physplant/greenteam/glossary.php)

regarding the labour market (Türkyılmaz, 2009, pg.11).

As a result, Turkey's energy production and consumption overview has been undertaken in accordance with Turkey's geopolitical structure as located at the centre of energy resources and import markets, its production capacity and the potential to meet the domestic need and lastly with its emerging policy strategies.

### **3.2 Turkish energy policy within its neighbourhood**

Turkey's energy policies should not be considered without its relationship with the neighbouring countries. It is important to remember that one of Turkey's energy policy aims is to become energy hub within the "Eurasia". Turkey's import dependency is a determinant in Turkey's energy policies with the neighbouring countries. This relation may have regenerate Turkey's energy policies with the neighbouring countries. Stern claims that: "Turkey's growing energy needs have given Turkey a strong interest in developing closer ties energy producing states of the Caspian region and the Middle East" (2004, pg.4). Today, Turkey seems to have partially achieved its initial interest and aims at becoming an important player, as an energy hub, within the Eurasia energy axis. As Üstün points out: "Turkey has been active in energy relations with its neighbours in recent years to diversify its energy resources as much as possible" (2010, pg. 290). Due to important pipeline projects and good relations with the Caspian and Middle East regions, Turkey seems to be developing its major objective.

Breakup of the former Soviet Union and the end of the Cold War has led important movements in the political background. As the most important results were emergences of new 'independent' states and as Amineh states: "change of the control of the Caspian Sea basin from two littoral states: the Soviet Union and Iran, to five countries, which now also include Azerbaijan,

Kazakhstan and Turkmenistan” (2003, pg.2). This was a significant opening out in the policy scene, mainly due to the natural gas and oil reserves in the region. According to Congressional Research Service (CRS) Report for congress: “the Caspian Sea region historically has produced oil and natural gas, but the region is considered to have large resources of oil and gas capable of much greater production” (2006, pg.1). The situation attracted several countries that see the region as a new investment platform.

With the collapse of the Soviet Union Turkey has become more active in the Central Asia and the Caucasus. As a matter of fact, Levack claims, “with the opportunity to develop a genuinely autonomous foreign policy, Turkey aimed to be an independent regional power” (2010, pg.16). Turkey’s attitude towards the region, at least in the first place, was different than the investment oriented countries (e.g US), and international oil and gas companies. Turkey’s initiatives were mainly motivated by the kinship and brotherhood policies. However, in the course of time; energy, Russia and latterly stability become Turkey’s strategic imperatives (Levack, 2010, pg.16). The main reason for this situation explained by Amineh as: “Russia remains the most prominent regional power in CEA (Central Eurasia). Russia’s main goal is to preserve economic, political, cultural and military influence in the region and to control Caspian oil and gas resources and transport” (2003, pg.4). Why this region is important for the future energy strategies and what is Turkey’s role within this framework can be analysed in two parts: region’s reserve rates and Turkey as the distributor for the West.

Evaluation of Caspian energy resources reveals significant facts: the region is rich of natural gas and oil and the region can be one of the leading alternatives in near future. According to International Energy Agency’s report on Central Asia and Transcaucasia, it is assumed that: “proven oil reserves in Central Asia and Transcaucasia vary between 15 and 40 billion barrels, with about 70 to 150

billion barrels of additional reserves considered possible” (1998, pg.32). According to BP Statistical Energy Review, current numbers proven natural gas reserves are: “12.91 trillion cubic metres in total<sup>9</sup>, the share of preeminent countries within this division is as the following: Azerbaijan (1.31), Kazakhstan (1.82), Turkmenistan (8.10), and Uzbekistan (1.68)” (2010, pg. 22). Considering the numbers proven oil reserves are: “48 thousand million barrels in total<sup>10</sup> and the share of preeminent countries within this division is as the following: Azerbaijan (7.0), Kazakhstan (39.8), Turkmenistan (0.6), and Uzbekistan (0.6)” (2010, pg. 22). Numbers indicate that these regions are of special importance for the diversification of energy supply.

Turkey aspires to be an energy hub between the exporter and the importer countries, by using its geographical location. In other words, “In an era when countries are increasingly looking to diversify their energy sources, Turkey hopes to establish itself as a kind of energy supermarket, betting that controlling oil routes will turn out to be as strategically valuable as producing the stuff” (Biresselioglu, 2007). For this sake it has developed a number of pipeline projects with different regions. Before mentioning these established pipelines, it is important to touch upon Turkey-Middle East relation regarding the energy framework.

Turkey’s relations with the Middle East have been changing during the last decade. The major reasons for this change are: the transformation process (‘zero problems with the neighbours’ principal) of the Turkish foreign policy and the Europeanization of the foreign policy making. As Altunışık claims: “domestic developments and global factors clearly have had an impact on

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<sup>9</sup> Only total of Azerbaijan, Kazakhstan, Turkmenistan, and Uzbekistan. The general total of Europe and the Eurasia is 63.09 trillion cubic metres

<sup>10</sup> Only total of Azerbaijan, Kazakhstan, Turkmenistan, and Uzbekistan. The general total of Europe and the Eurasia is 136.9 thousand million barrels

Turkey's Middle East policy since Turkey got the candidate status" (2009, pg.143). To what extent Turkey's policy approach has been changed is a remarkable question to be answered. Importantly, Turkey's changing role as a 'key promoter' and 'mediator' in the regions is the first supportive premise. In addition, Turkey and Middle East has loomed large in the areas of trade, economy and energy oriented issues.

In the energy trade, apart from the Caspian region, Middle East is still one of the most important exporter regions. Stern further explains the situation as: "it (Iran) already has a well-developed oil and gas transportation infrastructure, including portions of pipeline that could be used for various routes to the West" (2004, pg.3).

In accordance with the BP's 2009 numbers, proven oil reserves in the Middle East are: "754.2 thousand million barrels in total and the share of preeminent countries within this division is as the following: Saudi Arabia (264.6), Iran (137.6), Iraq (115.0) and Kuwait (101.5)" (2010, pg. 22). While, the proven natural gas reserves are: "78.6 trillion cubic metres in total and the share of preeminent countries are: Saudi Arabia (7.92), Iran (29.61), Iraq (3.17) and Qatar (25.37)" (2010, pg. 22). The overall results prove that Middle East is, in total, very rich of energy resources.

Turkey should be seen in the middle of a complex pipeline system. This pipeline system can be defined in two ways, "first are those on the east-west corridor, carrying Caspian or Persian Gulf oil and gas. Second, are those on the north-south corridor, carrying Russian oil and gas" (Fink, 2006, pg.1). For the first one, Baku-Tblisi- Ceyhan Oil Pipeline (BTC), Kirkuk-Ceyhan Oil Pipeline, South Caucasus Gas Pipeline (Baku-Erzurum-Ceyhan Pipeline), Turkey-Greece-Italy Gas Pipeline, Nabucco Gas Pipeline, and Trans-Caspian Gas Pipeline can be counted. Turkish Ministry of Foreign Affairs states in one

of their reports that: “the east-west corridor essentially aims at transporting Caucasian and Central Asian oil as well as natural gas to western markets through safe alternatives routes” (2006, pg. 3). Also, for the North-South Corridor, Blue Stream Pipeline, Samsun-Ceyhan (By-pass) Oil Pipeline, Burgas-Alexandroupolis Oil Pipeline, Samsun-Ceyhan Gas pipeline and Turkey-Israel Oil/Gas Pipeline can be counted. For the important **North-South Corridor**, following can be defined:

- ***Blue Stream Pipeline:***

Blue Stream project is one of the most important gas pipelines. As Fink depicts: “Blue Stream, the world’s deepest twin gas pipeline, began to pump Russian gas to the Turkish port of Samsun in 2003” (2006, pg.5). This line is an important component of the North-South corridor. Turkey plays key role with all these pipelines, as Babalı states: “in 2007, Turkey imported 9.3 billion cubic meters of Russian gas through Blue Stream; the Table for 2008 is likely to be 25 percent higher” (2009, pg.4).

- ***Samsun-Ceyhan (Bypass) Oil Pipeline:***

This was initiated by the concern of environmental risks (because because of a huge tanker traffic in the Turkish straits). For this aim Babalı stressed, “Samsun-Ceyhan project broke ground at Ceyhan in 2007, in a joint venture between Turkey’ Çalık Energy, Italy’s ENI and the Indian Oil Cooperation (IOC)” (2009, pg.4).

It is important to have a look at the **East-West corridor:**

- ***BTC Pipeline:***

This pipeline is one of the most important projects that Turkey initiated. With the length of 1774 km, BTC can carry 50 million tonnes of oil per year from Azerbaijan to the Western markets (BTC official website,

<http://www.btc.com.tr>). This pipeline project stiffens Turkey's role as a transit country. Also, as mentioned in the Ministry's report: "recent developments have made the BTC pipeline more effective with the signing of the Host Agreement between Azerbaijan and Kazakhstan to extend the pipeline to Kazakhstan on 16 June 2006" (2006, pg.4).

- ***Kirkuk-Ceyhan Oil Pipeline:***

The Kirkuk-Ceyhan oil pipeline, has 1,000 km length, built in the late 1970s, consists of two trunks, with a combined design capacity of 1.6 million barrels per day (World Bulletin, "*Turkey Iraq sign preliminary deal on Kirkuk-Ceyhan oil pipeline*", 2010). Although during the Iraq war the use of pipeline was faltered still as mentioned in the newsletters: "Turkey and Iraq signed a preliminary agreement extending to 15 years the period of the accord on transport of Iraqi oil from Kirkuk-Ceyhan oil pipeline" (KerkukNet, "*Turkey Iraq sign preliminary deal on Kirkuk-Ceyhan oil pipeline*", 2010).

- ***South Caucasus Gas Pipeline (Baku-Erzurum-Ceyhan Pipeline):***

This pipeline carries gas from Shah Deniz passes through Baku and Tbilisi. Ipek states: "it runs parallel to the BTC oil pipeline for most of its route before connecting to Turkey's national gas grid at Erzurum" (2006, pg.4). Also, the South Caucasus Pipeline exports rates for the year 2009 were amounted to 6.252 bn cubic meters and 1.651m tons of condensate (NewsAz, "*Gas export by South Caucasus pipeline decreases*", 2010).

- ***Turkey-Greece-Italy Gas Pipeline:***

Considered as one of the most important projects for Europe, ITGI is expected to operate in the following years. This pipeline will have 804 km of length and will go into service in 2015. It begins in Azerbaijan and ends in Italy. Once completed, the pipeline will carry around 10 billion cubic meters of natural gas

to Greece and Italy per year (World Bulletin, “*Turkey, Greece, Italy sign deal on natural gas pipeline*” 2010). Fink accentuates that: “Russia, which views the interconnector pipeline as a way of providing Western Europe with gas supplies that bypass Ukraine, has lent its support to the project” (2006,pg3).

- ***Trans-Caspian Gas Pipeline:***

Another important alternative project is the Trans-Caspian Pipeline. With this project, Kazakh and Turkmen gas will be carried through Turkey. This project, states İpek; “aims at merging upcoming increased production from the offshore Kashagan fields of Kazakhstan to the BTC pipeline for export to Western markets starting in 2008” (2006, pg.4). However, due to the uncertainty and political problems this project is yet to be seen.

- ***Nabucco Gas Pipeline:***

Nabucco Gas Pipeline is one of the most important projects carrying resources from the Caspian region, Middle East and Egypt to the Western markets. The project is interesting because its mission is to be an alternative to the Russian monopoly and reduce Europe’s dependence on the Russian gas. To illustrate the details, Table 9 shows facts and Table of the Nabucco Gas Pipeline.

Table 9 Facts and Tables

Total length [depending on the Feed line concept	3,300 km to 4,000km
Capacity	31bcm/ year
Pressure	100bar
Total Investment	EUR 7.9 billion

Source: Nabucco Pipeline Project Official Website <http://www.nabucco-pipeline.com>

According to the table, the total length of the pipeline is 3,300 km to 4,000km. There will be six stakeholders -*OMV (Austria), MOL (Hungary), Transgaz (Romania), Bulgarian Energy Holding (Bulgaria), Botas (Turkey), RWE (Germany)*- and five transit countries including; Turkey (2, 730 km), Bulgaria (412 km), Romania (469 km), Hungary (384 km) and Austria (47km). Turkey is the key player at this project as a transit country.

It is assumed that Nabucco construction will start in 2011 and the first gas flow will be around 2014. It is expected that: “When operating at full capacity, Nabucco will transport 1,550 bcm to Europe over the next 50 years” (Nabucco Official Website).

Debates on the Nabucco Pipeline project have been varied; there are those who totally support the project, while others stay calm and distant. It is true that the importance of this project has been realised during the Russia-Ukraine crises. Indeed, Fink argues, “European support for Nabucco increased in the months following the Russia-Ukraine gas dispute” (2006, pg.3). As mentioned in the previous sections, energy security and diversification of resources have been in the agenda of the EU. These crises, then, had repercussions on the European poly-makers. Yinanç claims that: “from that time on, the European Union became increasingly focused on the Nabucco project, as planned natural gas pipeline connecting the Caspian region and Middle East via Turkey, Bulgaria, Romania, Hungary, with Austria” (2008, pg.48). For Göktuğ Kara, “Nabucco project would be beneficial and an alternative only if it connects to the Middle Eastern resources, because of the US dominance in the very region, then it is difficult to defend ‘Nabucco’ as a unique project” (Interview, 2010). Though, despite the discussions and different approaches Nabucco project is projected to start transporting gas in 2014.

On the other hand, various debates have been hauled towards ‘South Stream’ project, which seen as a rival project against the Nabucco. In the Nabucco project the route was bypassing Russia, an explicit challenge against the Russian monopoly. South Stream project, expected to run from Russia to Bulgaria by south-western pipeline and reach to Greece and south Italy while with the north-western pipeline it supposed to run to Serbia, Hungary and end at Austria. For some South Stream is too much expensive, also for Gökтуğ Kara “Russia should have paid more attention on infrastructure investments and restoring relations with the transit countries rather than spending extreme amounts of money to the South Stream” (Interview, 2010). While others argue that this project can be seen as a response and challenge to the Nabucco, coordinated by Russia.

In the South Stream project presentation the major aims are listed as: “meeting growing demand for natural gas in Europe, ensuring supply flexibility and security, ensuring revenues for participating companies, stimulating economic progress and creating new jobs in participating countries, and availability of natural gas energy resource” (2009, South Stream Official Website). There are concerns about this project on the one hand; resource availability is a question mark. As Socar mentions: “Medvedev failed to identify a source of gas in Russia or elsewhere to supply South Stream, or a source of funding for the \$25 billion to \$30 billion cost of this project” (Eurasia Daily Monitor, “*EU Supports Nabucco Against South Stream*”, 2010). On the other, both Nabucco and the South Stream will use the same supply sources, which lead to inconvenience. Mammadov states: “Both pipelines are expected to be mainly supplied from the major gas fields of Azerbaijan (Shah Deniz) and Turkmenistan (South Yoloten)” (Hürriyet Daily News, “*Navigating between Nabucco and South Stream*”2010). According to some scholars Nabucco has more advantageous than the South Stream, because “Nabucco has the main advantage that it is cheaper than South Stream, it is also recognised by the EU and the US as a priority project” (Hürriyet Daily News, “*Navigating between*

*Nabucco and South Stream*”2010).

All in all, Nabucco is an important pipeline project highlighting Turkey as the key player in the transit routes. Although Turkish and Russian prime ministers found the South Stream as a chance to ameliorate the cooperation opportunities, as Putin says: “Such strategic projects as South Stream... and the construction of Turkey's first nuclear power plant can play a key role in promoting co-operation in this sphere” (BBC News, “*Putin seals new Turkey gas deal*”, 2010). Still it seems to be a bottleneck for the future of the Nabucco.

To conclude, Turkey’s energy policies have important priorities including; reduce important dependence, supply security and being an energy hub within the “Eurasia”.

As mentioned, Turkey has developed its relations with the neighbouring countries including the energy exporter ones. For last two decades Turkey has been trying to become one of the major key players in the Caspian and Middle East regions. In fact the breakup of the former Soviet Union and the end of the Cold War provided Turkey with opportunities to take important initiatives in the related regions. Also, “zero-problem” with the neighbours has been influential over developing better relations with the Middle East countries in the topics of trade, political engagement, and energy projects. Despite several debates, with numerous transit routes and increasing strategic relations with the energy rich countries, Turkey works towards its initial aim of being an energy hub.

## CHAPTER 4

### RELATION OF TURKISH ENERGY POLICY AND EU ENERGY POLICY

#### 4.1 Europeanization as a concept

Energy in general and energy policies in particular, have always had repercussions in the agenda of policy makers; although there are different approaches regarding its relation to the foreign policy. Integrating energy policies within the foreign policy framework requires the observation and articulation of; the nature and the ways to reach energy resources, total amounts of energy consumption and production rates in relation with not only neighbouring countries, but also with the rest of the world.

Energy policies are directly related to the economy and society. The very reason for this can be traced by a quotation from Göktuğ Kara: “Energy provides catalyst for action and production. In addition, energy affects the society due to its mutual role within the economy and production processes” (Interview notes, 2010). To be more precise, energy resources are directly related to the means of production and, at the end, they are indirectly linked to the society in itself. If it is accepted that energy is an economical and political tool/engine, then it becomes one of the most important potential to change the society. In point of fact, the transition from the agrarian community to the industrial community is nothing but an impact of energy on both economy and social policy. This relationship cannot be considered as nation-based, because energy policies are interactive in nature and cannot be shaped apart from the rest of the world.

In this context, following sections will discuss; energy issues within the relation of Europeanization, foreign policy and Europeanization, repercussions of Europeanization over Turkish Energy Strategies.

## **4.2 Europeanization of Turkish foreign policy**

Europeanization is a popular term widely used by many scholars in many different ways. As Simon Bulmer puts it: “over the last decade or so, Europeanization has been a growth area in European Union studies” (2010, pg.46). This study is concerned with conceptualizing Europeanization as a transforming process of policy norms and relative projections in the Turkish Foreign Policy.

Due to its differential structure as a process ‘whereby national policies adjust to seek competitive advantage within a broad EU policy context’ (Bulmer and Radaelli, 2004, pg.2), Europeanization has been in the research agendas of several academics and policy makers. Research on Europeanization includes different conceptualisations and definitions. One definition for ‘Europeanization’ has been made by Kerry Howell. He portrayed the term as: “process of downloading EU regulations and institutional structure to the domestic level, which mainly signifies a downloading process but is coupled with a bottom-up process of uploading national policies and preferences to the EU level” (2002, pg.2). In this characterisation, Europeanization has been denoted with process of institutional transformation and political change at the European level.

Indeed, Tanja Börzel and Thomas Risse defined the very ‘top-down’ and ‘bottom-up’ dimensions as two different reactions in response to Europeanization. ‘Top-down’ dimension is referred to the “downloading the

European Union (EU) directives, regulations and institutional structures to the domestic level” (Howell, 2002, pg.2). In this formulation, member states absorb European policy rules and institutional changes during their adaptation process. According to some scholars, there are reverse relationship between member states and the Europeanization process. This process is called as ‘uploading’ process, in which national domestic policies of the member states are impacting on the general European policies.

Uploading process can be explained as; “National policy models or rules are inserted into EU-level negotiations, with the most likely outcome being a synthesis, although very occasionally one state may be especially influential” (Bulmer and Radaelli, 2004, pg.5). Bulmer and Radaelli explain the ‘uploading’ process as a part of the ‘governance negotiations’ because they state that: “in each case where the EU takes a decision-whether legally binding or a mere declaration it is the culmination of a process of negotiations” (2004, pg.4). On the other hand Mesut Özcan defines this process as “a concept emphasizes the evolution of European Institutions as a set of norms, rules and practices” (2008, pg.22). Therefore, according to some scholars Europeanization is a two-way process including ‘downloading’ and ‘uploading’ policy norms and key structures.

Peter Mair accentuates to the two faces of the Europeanization. For him, Europeanization includes both the changes in the supranational European level and European impacts on the domestic level (2004, pg.341). Europeanization in the public policy sphere is also important for Radaelli, according to his definition:

Europeanization consists of processes of a) construction, b) diffusion and c) institutionalisation of formal and informal rules, procedures, policy paradigms, styles, ‘ways of doing things’ and shared beliefs and norms which are first defined and consolidated in the EU policy

processes and then incorporated in the logic of domestic (national and sub national) discourse, political structures and public policies (2004, pg.4).

Radaelli particularly pays attention to conceptualisation of Europeanization of Public Policy. In Radaelli's framework of Europeanization, 'bottom-up' perspective is prior. In other words, Radaelli defines the term as: "Europeanization is all about the domestic impact of the EU" (2007, pg.37). According to this definition, there are two types of mechanisms, vertical and horizontal. Radaelli further explains these mechanisms as: "Vertical mechanisms seem to demarcate clearly the EU level and the domestic level, where policy has to be metabolized. By contrast, horizontal mechanisms look at Europeanization as a process where there is no pressure to conform to EU policy models" (2003, pg.41). Horizontal mechanism include the change within its internal dynamics; in other words; it includes "market and the choice of the consumer" (Radaelli, 2003, pg.41).

Therefore, Radaelli's definition of Europeanization is of particular importance, because he tries to address the domestic impact of public policy of the EU. Other scholars also focus on the relationship between Europeanization and domestic policies. However, different from Radaelli's 'bottom-up' approach, those scholars follow the changes in relation with 'top-down' adaptations.

In this context, according to Börzel and Risse: "the adaptation between the European and the domestic level determines the degree of pressure for adaptation generated by Europeanization on the member states" (2000, pg.5). At this point two important terms come to the fore: 'misfit' and 'goodness of fit'. According to the terms, if there is a certain misfit between the domestic and European level policies, then it is possible to talk about a 'domestic change'. Börzel and Risse add that: "The 'goodness of fit' between the European and the domestic level determines the degree of pressure for

adaptation generated by Europeanization on the member states” (2003, pg.61). However, these concepts may not be so beneficial in each and every adaptation case. Hence, there are many arguments concerning the relation between the domestic policy change and Europeanization. Some argues that ‘top-down’ adaptations should be focused, while some argues that ‘bottom-up’ adaptations are also the case. These discussions are also important in evaluating the Europeanization of the foreign policies (adaptation of policies).

Debates over the Europeanization of the foreign policies are preeminent among scholars. For example, for Özlem Terzi: “the relation between Europeanization and the foreign policy is an indicators of a process whereby new habits become practices, which shape the participants and may lead to a re-orientation of their beliefs and behaviour” (2006, pg.7). As it was mentioned through Radaelli’s definition, Europeanization entails a process of construction of domestic (foreign) policy making via diffusion and institutionalization of EU norms and procedures. Therefore, the domestic effect of Europeanization can be conceptualized as a process of change at the domestic level in which member states adapt their processes, policies and institutions to new practices, norms, rules, and procedures that emanate from the emerging European system of governance (Terzi, 2006, pg.4).

The very effects of Europeanization over national foreign policies of the member states and others have been on the agendas of several scholars. For instance, in their Foreign Policy Analysis (FPA) Manners and Whitman asked four questions so as to understand the foreign policies of the of the EU member states:

What is the current European condition; what are the impacts of the European political, economic, societal environment on the foreign policies of member states; to what degree foreign policy formulation is being Europeanised as part of more recent developments in the EU; and

whether there are similar forces at work in the variety of member states under analysis which have common impact upon their foreign policies (2000, pg.1-2).

The questions include both time and causality within themselves; they are designed to Table out the general political atmosphere of the EU and the changes occur in the Europeanized domestic foreign policies. In this context, Terzi argues that: “The case studies done on the impact of EU membership on member countries’ foreign policy practitioners have revealed that some countries have acquired new areas of interest in their foreign policies” (2006, pg.7). An example for Europeanization of the foreign policy can be the Spanish case. According to Torreblanca, “Europeanization of Spanish foreign policy took place in two ways: policy convergence and policy transfer” (2001, pg.1). With respect to this argument, Spanish foreign policy was adapted to the European policy context and was re-defined the priority areas. In the meantime Spain affected the Union regarding foreign policy context (an example of uploading process). Torreblanca argues:

Spain has ‘exported’ parts of its own foreign policy agenda and subsequently managed to have the EU adopt policies on areas, such as Latin America or the Mediterranean, in which the EU had minor or marginal interests of its own (2001, pg.12).

Thus, the influence of the Europeanization over foreign policies is as significant as the changes occur during this change. Spanish case show that domestic priorities and policy agendas may mingle with the European level policies during the Europeanization process.

Europeanization of the foreign policy and adaptations of policy structures and junctures are not always related to the member states. Apart from the domestic changes within the member states level, it is also worth touching the changes/impacts of non-member and candidate states. In this sense it is of vital

importance to remember that this interpenetration of EU norms and principals should not only be considered in the member states level but also be examined with respect to non-member states level changes. According to Mesut Özcan, “The Europeanization process is confined not only to the EU member states and the several dimensions of the term explain changes in different actors” (2008, pg.22). In this context, it is important to evaluate Featherstone and Kazamias’ arguments on dimensions of the Europeanization including:

The increase and expansion of institutionalization at the EU level, 2) The adjustment evident in the institutional setting at the level of member states, consequent on EU obligations, 3) The adjustment evident in states that are not EU members, but which are closely linked to it (2001, pg.6).

These dimensions imply that the process of Europeanization can be traced both in the member states and the candidate states<sup>11</sup>. While in the member states, concrete changes occur in the institutional level, candidate countries reflect signs of the policy adjustments. Especially third dimension bolsters the fact that Europeanization is influential over the candidate countries, in a more coercive way. Indeed, Özcan argues: “the Europeanization process is related not only to the issue of foreign policy, but also to candidature and the membership of the EU greatly affect the domestic politics of the countries” (2008, pg.22). Therefore, the process of Europeanization should be seen as a transforming process not only for the member states but also for the candidate states because “the EU exerts similar pressures on the applicant countries” (Grabbe, 2002, pg.3).

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<sup>11</sup> For more information see: Cowles, G.M, Caporaso, and T.Risse, eds. 2001. *Trasnforming Europe: Europeanization and domestic change*. Ithaca,NY/London: Cornell University Press; Knill, C. 2001. *Transformation of national administration in Europe patterns of change and persistence*. Cambridge: Cambridge University Press; Schimmelfenning, F. 2007. *Europeanization beyond Europe. Living Reviews in European Governance 2, no.1.* <http://www.livingreviews.org/lreg-2007-1>

Although Europeanization has generally been defined as an exclusive term for EU member states (Terzi, 2006, pg. 8), Heather Grabbe argues that: “the Europeanization literature is relevant to the CEE (Central and Eastern Europe) applicants because these countries are already subject to substantially the same pressures of adaptation to EU policies as current member states (2002, pg3). As stated previously, Europeanization can be striking for the candidate countries, because it requires a number of adaptations in a number of areas. Gwiazda argues that: “It is expected that in the case of candidate countries adaptational pressures of coercive character will be dominant” (2002, pg.11).

Grabbe further identifies those pressures and states that “the creation of formal accession conditions has given the EU much wider leverage to get these applicants to comply with its demands than previous one” (2002, pg3). Apparently, for EU candidate countries, convergence becomes more and more challenging due to the versatile nature of accession criteria. For instance, according to the Copenhagen criteria EU prospective member, have to take on the ‘obligations of membership’- i.e. adoption of the *acquis communautaire*<sup>12</sup> – plus have to have ‘functioning market economy’ and ‘stability of institutions guaranteeing democracy, the rule of law, human rights, and respect for and protection of minorities’ (Grabbe, 2002, pg.5). Concerning the former Europeanization debates, the cases with the candidate states draw a more ‘top-down’ adaptations. Also, the situation becomes more stressful considering the important deadlines and strict rules. Gwiazda describes three ‘Europeanization literature models’<sup>13</sup> in order to explain the mechanisms of the Europeanization. For him Europeanization of the candidate states can be defined as ‘coercive

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<sup>12</sup> The total of laws and regulations, case law and other agreements applicable in the EU.  
See: [http://www.minfin.nl/english/Subjects/International/Europe/List\\_of\\_terms](http://www.minfin.nl/english/Subjects/International/Europe/List_of_terms)

<sup>13</sup> For more information see: Gwiazda, A; “*Europeanization in Candidate Countries from Central and Eastern Europe*” EPIC workshop in Florence, EUI, 19-22 September (2002) pp.9-10

and constraining' (Model1). Gwiazda explains that: "given the status of the candidate countries, there is no doubt that the obligations of meeting the accession criteria constrain national governments and coercive pressures result, to a great extent, in policy convergence" (2002, pg.11). As Üstün puts, "while the member states get the opportunity to affect the decisions during the process, candidates are informed at the end of the process about the policies to which they need to adapt" (2010, pg. 227). The *acquis* is the reference point of the adaptations. As stated in the EU Commission: "In all areas of the *acquis*, the candidate countries must bring their institutions, management capacity and administrative and judicial systems up to EU standards, both at national and regional level" (EU Commission, 2010). Therefore, it is possible to see the pressure of the EU accession conditionality over the candidate countries.

Also Eryilmaz argues: "during the formal accession process each candidate state has to adopt 'acquis politique'<sup>14</sup> of the CFSP (2007, pg. 10). This is also another argument supporting the coercive nature of Europeanization over the foreign policy making of the candidate countries. What is more, in this relationship the candidate countries are observed to be sober and patient towards these changes. Terzi mentions in her article that: "Among the candidates the signs of Europeanization of domestic policies are more viable compare to the member states; because the candidate countries are highly motivated towards admission" (2008, pg.16).

Although one still needs to acknowledge that "these common institutional norms and rules apply even less to the candidate countries and that there is a difference between the member states and the candidate countries with respect to Europeanization of foreign policy" (Müftüler Baç, 2009, pg.3), it is obvious

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<sup>14</sup> Phrase describing all the decisions and resolutions adopted by the Member States of the European Union in the field of foreign policy. See: <http://www.bookrags.com/tandf/acquis-politique-tf/>

that, there is an important relation between the process of the Europeanization and (foreign) policy making structure of the non-member/candidate states. Also, this relation between the candidate states and Europeanization process is a coercive one pushing them to adopt a series of rules in a limited time frame, with the condition of membership.

#### **4.2.1 The Turkey Case**

Energy policies have been influenced by the changing elements of the foreign policy. In other words, changes in the foreign policy domain have repercussions on the energy policy priorities. In this context it is important to understand the fact that Europeanization of the Turkish foreign policy affects Turkish energy policies. Following will give a brief summary of Turkish foreign policy in order to describe energy policies regarding this interdependence.

Europeanization of foreign policy in Turkey can be seen as an important issue as scholars have been conducting researches to identify the way and style of this transformation for years. In this context, “the question to be answered is whether the Turkish accession process also constituted an important step in Turkish foreign policy making” (Müftüler Baç, 2009, pg.1). In relation to the Europeanization process, Turkey has adapted several European level policy norms and rules in foreign policy making. Throughout the long EU adventure, Turkey has experienced a series of changes in many policy fields; foreign policy tradition is one of them.

Since the AKP government has come to the power in 2002, the change in the Turkish foreign policy tradition has become more visible. Current debates over Turkish foreign policy and the ‘drift’ arguments are important indicators of the change occurred especially for last years. In effect, considering the changing

global priorities, it becomes easier to observe the changes in the Turkish foreign policy.

To start with, the cold war (as an external dynamic) and existing Turkish domestic turbulences were significant backgrounds to better understand the transformation of the Turkish foreign policy. For example, in the internal scene, 1980's were significant mainly due to the military coup and the liberalisation process started with the Özal government. Until Özal government came to the power Turkey pursued a strict security oriented foreign policy. As Brusse and Griffiths mention: "In 1983, under the ever watchful eye of the army, Turkey adopted a new constitution that formally prepared the way for the restoration of democracy but that placed serious restrictions on the political and civil rights" (2004, pg.22). Within this new constitution and the general policy atmosphere it was hard to find a room to the EU relations. What is more, until Özal's rapprochement policy towards the EU, the relations were stagnated. For some scholars, the new constitution had negative effects on the relations between the EU because: "the document not only defines several key concepts in Turkish society and limits freedom of expression, but it also institutionalises the role of the military in the policy making process" (Levack, 2010, pg.11). From the Union's side Turkey was seen as a politically unstable and militarist country, also as Brusse and Griffiths define: "the developments in Turkey therefore immediately provoked the suspension of financial aid the indefinite postponement of all further talks with Turkey within the parliamentary EC-Turkey Association Council, that was, in the event, to last until 1986" (2002.pg.22).

Özal strongly believed that Turkey was ready to be in the Community, for this reason he pioneered to apply for full membership in 1987. For some scholar the submission was of special importance because "with this step it was seen that Turkey's further development as an economy and as a democracy would be

realized” (Alessandri, 2010, pg.4). On the other hand, as Eralp argues:

Although the ANAP was apprehensive regarding European definitions of democracy and human rights, it still applied for full membership, primarily because it saw the EC as a stable market for Turkish export as well as a source of funds and technology. It took more than two and a half years for the Commission to prepare its report on Turkey. This development suggests that there was a problem in the timing of the Turkish application and a negative climate in the interaction between Turkey and the EC (2009, pg.156).

Turkey- EU relations needed more time in order to fully stabilize the relationship. Nevertheless, 1980’s address an important period of time both in terms of changes in the Turkish foreign policy development and relation with the EU.

As an external dynamic, cold war was also influential over Turkish foreign policy making. During the cold war period Turkish foreign policy was described: “with the bipolarity, Turkey adopted a more assertive and multi-directional foreign policy, while at the same time Ankara’s ready resort to the threat or the use of the military force became more pronounced” (Sandrin, 2009, pg.1). When the cold war was over, Turkey moved to the Black Sea region and tried to play a role in stabilizing and recovering process of the region. Importantly Turkey organised and initiated the Black Sea Economic Cooperation (BSEC) in the year 1992 (Baran, 2008, pg.88). The efforts can be seen as the will to take a lead in the region. In fact, during this period internal policies were still affecting the external relations and Turkey’s foreign policy was mainly characterised by militarist approach and dominance of security concerns. Indeed as Aydın also accentuates: “In this period coercion oriented foreign policy was dominant” (2010, pg.9). In point of fact, after the collapse of the Soviet Union Turkey found itself in the middle of a number of conflicts coming from the South (Iraq) and North (ex-Soviet countries). Alessandri describes Turkey’s foreign policy attitude in the face of these challenges as:

“confrontation” (2010, pg.5).

In addition, with the collapse of the Soviet Union, one of the biggest external threats for the EU was destroyed and new states were established. This process was also important since the EU had started to question their military structure. Aydın mentions that: “the EU benefited from the softening of the political atmosphere and started to question the necessity of the military and security expenses within the Union” (2010, pg.9). Turkey on the one hand was concerned with its status within the NATO and on the other hand had to deal with its neighbours more than ever. Some scholar will later argue that this security oriented foreign policy was a misfortune for Turkey-EU relations “when Europe seemed to be moving towards the establishment of security culture in which issues were desecuritized and handled with peaceful and political means” (Sandrin, 2009, pg.1). Importantly, Turkish foreign policy has been constantly adapting to the contemporary economic and political demands and changing actors.

The most important steps for the Turkish foreign policy transformation have taken with EU’s acceptance Turkey as candidate country at Helsinki. In effect Levack claims, “The gradual reform process began in earnest 1999” (2010, pg.11). However, the major acceleration has been more visible with the AKP government since 2002. What was unique for AKP and what was the engine of the acceleration can be traced in Alessandri’s expression: “what the new party did was to give full course to processes which had started in the previous years, while emphasizing even more the need for Turkey to shift its foreign policy orientation from confrontation to engagement” (2010, pg.6). The new image of Turkey refers to a resolution oriented and supportive policy actor particularly in the neighbouring countries. Düzgüt and Tocci claim about this focus change that: “the major goal is to transform Turkey into a strong regional, even global actor through the exercise of soft power” (2010, pg. 1). This particular example

will be accentuated again in the framework of Europeanization of Turkish foreign policy.

Since AKP has come to the power, it has conducted a systematic foreign policy program including enhancement of Turkey-EU relations. Apparently, Turkey has been seen more aspirant towards EU membership, as Alessandri argues: “in recognition of Turkey’s effort, the EU agreed on opening negotiations for accession in 2005” (2010, pg. 7). Since then a number of reform movements and signs of the change have come to the fore. Negotiation process has been accelerated during this period and thirteen chapters have opened and, only one chapter, “Science and Research”, was provisionally closed.

Importantly, with the EU-led reforms and transforming the foreign policy agendas, European level effects have been observed over the Turkish foreign policy rhetoric. Even, for some scholars the transfer of hard power to the soft is evidence for Europeanized elements of the Turkish foreign policy. As Öniş and Yılmaz also mention: “the Europeanization process whose roots can be traced to the mid-1990s is pursued with a far greater degree of consistency and vigor especially in the so-called golden years of the AKP, the period from November 2002 to the opening of accession negotiations” (2009, pg.2). During the AKP government, huge changes have been witnessed in the Turkish foreign policy trends. Müftüler Baç lists these trends as, “the increased emphasis on diplomatic measures, changes in the foreign policy decision-making mechanism with a lesser role for the military and participation in common foreign policy objectives” (2009, pg.17). All in all, reducing hard power oriented foreign policy approach and engaging more with the neighbouring countries appear to be two preeminent changes in Turkish foreign policy tradition.

The most significant change was experienced in the civil-military balance. As Sandrin puts: “the influence of military, the main actor responsible for the militarized foreign policy and realpolitik security culture, was thus curbed with EU-related reforms” (2010, pg.2). This change can be seen as one of the Europeanized foreign policy elements in Turkey.

In effect, the transformation process can also be linked to Minister of Foreign Affairs, Ahmet Davutoğlu’s foreign policy framework. The major characteristic of this framework is described by Aras as the follows: “Davutoğlu’s foreign policy vision has Turkey’s domestic transformation in the background, specifically the consolidation of political and economic stability in the country” (2009, pg.128). This framework is worth mentioning not only due to its emphasis on the internal stability, but also due to the emphasis on the importance of good neighbouring relations. Aras argues that: “one essential part of Davutoğlu’s vision is to make negative images and prejudices, particularly those pertaining to the Middle East, a matter of past” (2009, pg.128). Strategically thinking, Middle East is an important region regarding the energy policies and stabilizing existing policies with the region have more than one reason. Davutoğlu claims that, “the vital situation of oil with respect to the international political economies, has led the emergence of strategy-planning based on natural resources” (2010, pg.333). Therefore, changing policy framework and good neighbouring relations are significant signs of a strategy plan including the stabilization of internal-external policies as well as controlling the geopolitical structure.

Today Turkey is trying to act as a key promoter both in the neighbouring countries and in the international policies. Important steps have been taken to ameliorate relations with some particular regions, like the Middle East. According to Altunışık, “EU foreign policy norms, such as multilateral diplomacy, soft power, functionalism, conflict management and resolution

roles have been increasingly used by Turkey in its Middle East policy (2009, pg.149). What is more, Davutoğlu claims that: “Turkey can use its unique understanding of the Middle East, and its diplomatic assets, to operate effectively on the ground” (2010, pg2). Although there are several concerns regarding Turkey’s current foreign policy orientation and its closer relations with the Middle East, the focus should be on the fact that: “Turkey sought to normalise its relations with its neighbours but it has also looked to develop economic and political ties with the Middle East as well as play a regional role that actively seeks solution to existing problems” (Levack, 2010, pg.18). Hence, it may be argued that Turkey’s foreign policy tradition is going through a major transformation.

Keeping this in mind, there is also the question of Turkey’s EU membership and its possible relation between Turkey’s foreign policy transformations. For some scholars, Turkey can use this new line of policy making in its EU relations, however some argues that “still more to do”. Düzgit and Tocci argue that: “this foreign policy line might be considered an asset in Turkey’s prospects of EU membership. The current EU discourse of constructing Europe as a ‘global actor’ necessitates a strong EU presence in the wider neighbourhood” (2010, pg.1). For these scholars Turkey, by using its soft power, can take the lead and be effective player within the Union. In fact, for Düzgit and Tocci this is dependent on three situations: political consistency, commitment to the universal values and ethnic/religious affinities and parallelism in the transformation of Turkey’s foreign policy with the ongoing democratization process” (2010, pg.2). Apart from these lacking elements, Turkey seems to maintain the general image that Turkey and the EU are interconnected reciprocally. As Davutoğlu points: " It is no longer possible to think of the EU and Turkey independent of one another when considering Turkey's foreign policy. EU integration is undoubtedly a process that is favourable to Turkey. But this process brings great benefits to the EU itself, both regionally and globally” (2010, pg.3). One basic reason is Turkey’s

geopolitical position as a country locating in the middle of natural resources.

On the other hand, some argues that despite Turkey's achievements in the foreign policy transformation and the processes of Europeanization, still there are concerns about the membership. The main idea is the fact that, Turkey's foreign policy transformation is questionable. According to Levack: "how the European Union and its member states will benefit from Turkey's new regional power is also a subject for debate" (2010, pg.20). The very reasons for this statement can be found in Turkey's changing strategies towards the Middle East.

Apparently there are criticisms of Turkey's foreign policy transformation, and these criticisms turn into an ambiguity when it comes to the issue of the membership. These concerns come to the fore especially during last few years, when the relations with Turkey had entered a kind of stagnation due to the prolonged negotiations. However, as Alessandri puts: "For better or worse, Turkey's membership has become for the EU an issue regarding its future rather than its past. The EU would certainly become a larger and more diverse entity" (2010, pg.17). Hence, it is important to discuss 'how successful Turkey as a regional power' rather than, 'how convergent the Turkish foreign policy to the EU'.

As the scope of this study is to Table out possible implications of Europeanization within Energy strategies as an element within the foreign policy paradigm, next section will elaborate on the Europeanization of Turkish energy strategies and its effects on relations between Turkey and European Union.

### **4.3 Turkish energy strategies in relation to the EU**

It has been argued that, there is a profound relationship between foreign policy issues and the energy policies. As a matter of fact the very relation stems from energy's nature as a multidimensional and international policy tool. From this point, derivation can be done regarding the Europeanization of Turkish (foreign) policy and energy strategies. In fact, following will include articulation of this argument with respects to: similarities between Turkey and EU regarding the energy policies and energy as a trump for Turkey's full membership to the EU.

#### **4.3.1 Similarities between Turkey and the EU regarding the energy policies**

The need to implement energy strategies has been a 'hard core' issue for all over the world. Many reasons can be listed account for this 'energy policy movement', but the most valid one is the fact that the need for the energy resources is infinite while on the other hand energy resources are finite. In recent years this situation has been realised and important steps have been taken to confront possible crises. From this reference point, Turkey and European Union have to be analysed carefully. One reason is the similar concerns for the energy policies, and the other is the process of Europeanization (which is also influential over energy policies in Turkey).

Beginning from the 1999 Helsinki Summit, Turkey's involvement to the EU process has become more viable and progressive. In fact, Europeanization of Turkish energy strategies can be related to this process regarding both Radaelli's and Börzel and Risse's approaches. With respect to the interrelation of the energy policies, uploading and downloading processes must be observed at the same time. However, because Turkey has not started negotiations on the energy chapter yet, it may be argued that there is no uploading at the moment

and downloading is the main process. In the following parts the signs of this process will be exemplified in details.

It is widely known that today EU is one of the most significant energy importers in the world because a huge portion of its total energy need is provided from other countries. The European Union is in constant relation with the other countries to meet its internal energy need, in other words, if the *type* of the most commonly used energy resource is not changed, EU will be import addict in future. The very concern is not a new one, in the introduction of Commission's Green Paper dated 2001 the situation was mentioned as: "The European Union is consuming more and more energy and importing more and more energy products. Community production is insufficient for the Union's energy requirements. As a result, external dependence for energy is constantly increasing (pg.2).

Likewise, Turkey has been experiencing substantial demand growth in all segments of the energy sector (Ministry of Foreign Affairs, 2006, pg.10). In other words, like the European Union, Turkey is also a net importer especially in the sectors of gas and oil. As mentioned in the report conducted by the Ministry of Foreign Affairs, "the limited production capacity of domestic energy sources as compared to the growing energy demand have resulted in dependency on energy imports, primarily oil and gas" (2006, pg.10). This gap between the production and the consumption rates is an important factor to further develop new energy policies. In point of fact, according to the 'Strategic Plan 2010-2014' conducted by the Ministry of Energy and Natural Resources, import dependence for the primary energy resources is one of the most important threat in front of Turkey (2010, pg.9). Hence, this asymmetric relation between production and consumption is a good reason to adopt new policies to lessen import dependence in the near future. The same concern is binding for the Union, as stated in the Commission's Green Paper: "Our import dependency is rising. Unless we can make domestic energy more competitive,

in the next 20 to 30 years around 70 % of the Union's energy requirements, compared to 50% today, will be met by imported products – some from regions threatened by insecurity” (2006, pg.3), decreasing the import dependence is an important target for the Union.

What is more, Turkey's primary energy production and the demand rates reveal that Turkey's energy production for 2007 is approximately 27.5 Mtoe and the great majority of this production consists of coal<sup>15</sup>. Indeed Turkey aims at full utilization of the indigenous hard coal and lignite reserves, hydro and other renewable resources such as wind and solar energy to meet the demand growth in a sustainable manner (Ministry of Foreign Affairs, 2006, pg.11). However, integration of renewable resources and indigenous reserves into the Turkish energy mix is far to be realized, because, still the shares of petroleum (% 33.310) and natural gas (%33.953) within the primary energy demand are 67263 in total<sup>16</sup>. Still, an accord to diversify the energy mix (*'Diversification of the energy mix'* which is also one of the priorities of EU energy strategies) is of vital importance so as to confront the future risks including intense import dependence and environmental problems. Here it is significant to note that Turkey takes the initiative to set a convergence of goals and strategies with the EU.

In some of its strategy papers and action plans Turkey reflects its readiness to solve this issue. In the Strategy Report of Ministry of Energy and Natural Resources, providing resource diversification via improving indigenous resources is at the top of the strategy list. Accordingly, officers from the ministry have set the year 2023 (centenary of Turkish Republic) as the deadline for effectuating a number of strategies. For example, in the year 2023 it is aimed to use domestic resources as a whole and the utmost amount of the

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<sup>15</sup> See page22 Table 4

<sup>16</sup> See page22 Table 4

renewables; it is also aimed to increase diversification of energy supply, lastly until the year 2020, it is expected to integrate the nuclear energy into the electrical energy production processes (2010, pg.12). Also, utilization of renewable energy sources in order to reduce the energy import dependency and to foster greenhouse gas abatement is another priority strategy for Turkey (Ministry of Foreign Affairs, 2006, pg.11).

In fact, Turkey has developed several steps with regard to its strategies on the renewable energy which are also in harmony with EU strategies. In this context, *Renewable Energy Law*, enacted in 2005, is important to note down. In fact Öztürk and Ergün argue that “The Law has also been enacted as a result of Turkey’s efforts to harmonize its legislation with European Union (“EU”) law” (2005, pg.1). Furthermore, in 2009, the Commission’s Progress Report emphasized that; “good progress can be reported on renewable energy, implementing regulations were adopted on wind energy and on use of geothermal resources (2009, pg.59). What is more, according to the Turkey Energy Report 2009 conducted by the World Energy Council Turkish National Commission, “In 2008, within Turkey’s total primary energy demand, 9.319 Mtoe (% 9) were provided by renewable energy sources” (2009, pg.30). All in all, attempts to spread the use of renewables within the domestic demand are not only some sort of cure for the import dependence and a step forward for the diversification of the energy mix, but also outstanding similarities between Turkey- EU energy policies.

Furthermore, Turkish energy strategies include the restructuring and liberalizing the energy market. Accordingly harmonization of the legal and regulatory framework with that of the EU is one of the priorities (Ministry of Foreign Affairs, 2006, pg.11). Indeed, in order to realize the very aim, Electricity, Natural Gas and Petroleum Market Laws were enacted (Ministry of Foreign Affairs, 2006, pg.11) and the Energy Market Regulatory Authority

(EMRA) was established (2001) as the independent authority to regulate and supervise the private sector (Yorkan, 2009, pg.35). Particular attention was paid to the electricity sector within the EU Progress Report. Accordingly, “Turkey has successfully engaged in a comprehensive reform of its electricity market and in gradually opening it to competition” (2009, pg.59). However, according to Yorkan although a number of paper-based studies were conducted, neither in the gas, nor in the electricity sectors liberalization has been fully realized (2009, pg.35).

As mentioned in the previous paragraphs, there are concrete examples of Turkey’s effort to harmonize the Energy policies with respect to the European norms. Because Turkey and the EU share similar concerns about the future of energy policies, Europeanized/harmonized parts of energy policies can be understood easily. For example, like the union Turkey is also struggling with import dependence, because there is a gap between the production and the consumption rates. This situation has been accentuated in many of the official documents and strategy papers (e.g ‘Strategic Plan 2010-2014’ conducted by the Ministry of Energy and Natural Resources). In addition, Turkey’s attempts to initiate alternative projects on renewable energy are worth mentioning. Also, efforts to establish liberalised energy market may be the most concrete example of the Europeanized way of doing policies. Barysch argues that: “Aware of the need for change, the Turkish government passed ambitious plans for energy market liberalisation and privatisation in 2001” (2007, pg.2). However, Turkey has failed to fulfil the requirements and has progressed a little. Still the efforts were important.

Despite the debates and concerns about Turkey’s foreign policy transformation and the stagnated relation with the Union, it can be assumed that Turkey has contributed much to its Europeanization process regarding the energy policies. Turkish energy policy making, reveal distinctive characteristics of

Europeanization. However, the question ‘whether Europeanization of Turkish energy policies would affect the membership or not’ seems to be problematic.

#### **4.3.2 Energy as a trump in the way of full membership**

There are different approaches regarding Turkey’s membership debates. For some, energy is/should be the key element regarding the integration of the EU and Turkey. However, there are still concerns about the eventuality of Turkey’s membership. For those, Turkey should not include its energy card in relation to the accession negotiations.

Turkey stands at the middle of the energy exporter countries and importer countries. As Sedat Laçiner, president of the Turkish think-tank USAK claims: “Turkey is like an island surrounded by energy- rich regions. With Arab countries in the south, Iran in the east and Russia in the north, Turkey has a very strategic location, which makes it more important than those nations that have oil sources” (Hürriyet Daily News, “Energy Plays key role in Turkey’s integration with Europe”, 2010). This geopolitical advantage is an important trump while setting up energy policies and strategies. As Dr. Heiko Schuss, University of Erlangen, claims: “energy targets of the EU and Turkey were overlapping, adding that Turkey’s involvement in the Nabucco project proves once again what a large potential it offers” (Hürriyet Daily News, “Energy Plays key role in Turkey’s integration with Europe”, 2010). This argument supports the idea that Turkey is an important ally for the EU in the energy regions and the Turkey-EU energy relations should be improved. Furthermore, there are also other arguments bolstering Turkey’s integration with the EU. To illustrate, the report by the Independent Commission on Turkey addressed that: “Due to its geo-strategic position, Turkey would add new dimensions to the Union’s foreign policy efforts in such vitally important regions as the Middle East, the Mediterranean, Central Asia and South Caucasus” (2004, pg.17). All in all, majorly due to its geopolitical advantage (including important pipeline

projects) and ‘Europeanized’ characteristics of energy policy making Turkey offers important prospects to contribute to the EU, especially in energy field.

As Barisch claims:

Turkey’s accession to the EU will only make progress if both sides keep reminding themselves of the benefits that deeper integration and closer co-operation would bring for both sides. Energy is an area where early gains are available. The fact that Turkey is negotiating for membership should help, not hinder, progress in this area (2007, pg.7).

Within this framework Turkey’s importance, as a key power in the region has come to the fore. Obviously, Turkey’s geo-political situation, changing foreign policy tactics and active role in the Energy Charter Treaty process are important values of its ability to lead the international energy policies.

However, there are some counter arguments about Turkey’s energy policies and its relations to membership process. Barisch perfectly summarises the situation as: “Some EU officials say that energy is too pressing an issue to wait for the accession talks to make progress. They add another argument for decoupling energy from the enlargement process, namely that Turkey should not be allowed to use its strategic location to get concessions from the EU” (2007, pg.7). Also, in his speech at the conference “Turkey and the EU” Andris Piebalgs, Energy Commissioner, expresses his ideas about Turkey-EU relations in the energy framework and states that:

This is a process that of course has nothing to do with the EU accession – the one does not prejudge the other or vice versa - but I would like to make a reflexion on that point. As I see it these two processes have a common ground in the fact that they both stem from the understanding that further cooperation is needed between EU and Turkey in a number of fields (2007).

Similar attitude has been taken by Gökтуğ Kara, claiming that: “I cannot see Turkey as an indispensable asset in becoming the energy hub. I believe that Turkey’s geopolitical situation can be a trump for the full membership only if Cyprus issue is solved” (Interview, 2010).

Another important example is the 15) Energy Chapter which was frozen in 2009. Since the accession negotiations have started, thirteen chapters have been opened and only one chapter has been provisionally closed (25. Science and Research). In May 2006 the screening for the 15) Energy Chapter was started and it was ended in June 2006. The screening report<sup>17</sup> prepared by the Commission addresses to the important points including the assessments of the following titles: “*Security of Supply, Internal Energy Market, State Aids, Renewable Energy, Energy Efficiency, Nuclear Energy, and Nuclear Safety, safeguards and radiation protection*” (2007, pg.11). According to the screening report Turkey draw a satisfactory picture for energy chapter. As mentioned in *the report*:

Overall, Turkey has attained a satisfactory level of alignment in this chapter, and should be able to pursue further alignment in a timely manner provided the necessary determination is brought to bear. Particular attention needs to be given to the adoption and entry into force of the outstanding energy efficiency framework law and further alignment with the energy efficiency acquis (2007, pg.11)

After the screening process, Secretariat general for EU Affairs prepared the *National Programme of Turkey for the Adoption of the EU Acquis*<sup>18</sup> in 2008. In order to continue alignment with and implementation of the acquis, the

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<sup>17</sup> See Screening Report Turkey Chapter-15 Energy 22 March 2007 <http://www.tobb.org.tr/abm/taramaraporlari/Chapter%2015%20-%20Energy.pdf>

<sup>18</sup> See: National Programme of Turkey for the Adoption of the EU Acquis (2008) pp.1-15 <http://www.abgs.gov.tr/index.php?p=42260&l=2>

programme streamlined three priorities including:

***Priority 15.1** Continuing alignments with and implementation of, the acquis on the internal gas and electricity market and on cross border exchanges in electricity, also with a view to possible membership of the Energy Community Treaty.*

***Priority 15.2** Strengthening administrative capacity and continuing alignment in the energy efficiency field, promotion of high-efficiency cogeneration, and development of renewable energy in transport, electricity and heating/cooling, including the setting of appropriate and ambitious targets and incentives*

***Priority 15.3** Acceding to the Joint Convention on the Safety of Spent Fuel Management and on the Safety of Radioactive Waste Management. Adoption of a nuclear law which ensures a high level of nuclear safety in line with EU standards*

However, energy chapter was frozen (due to Cyprus' block) in 2009 and the draft screening report is to be approved at the Council of the EU.

In fact, about energy chapter European officials seem to be divided among themselves, too. As Sarıışık claims: "whether or not to immediately open the energy chapter in Turkey's European Union accession negotiations as part of the common energy strategy has left the bloc divided" (Hürriyet Daily News, "EU Divided on opening energy chapter with Turkey", 2010).

It is known that Cyprus is strictly blocking the opening of the energy chapter for some political reasons. As Markos Kyprianou, Greek Cypriot foreign minister, says "The energy chapter cannot open while Turkey is attempting to block the Republic of Cyprus, an EU member state, from utilising its own

energy sources in accordance with international law” (Cyprus Mail, “Cyprus to keep blocking ‘bully’ Turkey on EU Energy chapter”, 2009). Importantly, this opposition have had repercussions in Turkey. For example, Taner Yıldız says that: “I think we do not deserve such treatment. They tell us that we need time. We do not approve of this. Given our contributions to the projects, how can one say that we need time? Turkey does not deserve this. I believe that we perform better in energy than most nations” (Today’s Zaman, “Energy Minister Yıldız: We are ready to open the energy chapter, but the EU is not”, 2010). Debates have different consequences, while Turkey insists on opening energy chapter.

Despite Turkey’s readiness and efforts, energy chapter remains as a problem and appears to remain for some more time. Cyprus as an important and difficult political issue and disagreements on the energy policies seem to make it hard to develop progress in the near future. As a result, to answer whether it is possible to argue Europeanization of Turkish energy policies would affect the membership or not, stands as an equivocal question mark. Even among scholars there is a discrepancy of ideas, for some Turkey would enhance the EU with its strong economy and geopolitical situation, while others propose that Turkey should not use the energy card as a trump, in Turkey-EU relations.

In this section there has been an overview of the EU energy strategies, Turkish energy strategies and possible traces signalling the traces of the Europeanization. Also, the section has been deepened with the current debates on two important questions: 1) to what extent Turkish energy policies are Europeanized? 2) Is it possible to argue that Europeanization of Turkish energy policies would affect the membership? For the first question the arguments are streamlined regarding the similarities between Turkey and EU from the energy policies perspective. For the second question an articulation is based on energy as a trump for Turkey’s full membership to the EU.

## **CHAPTER 5**

### **CONCLUSION**

Energy (gas and oil), as one of the most important policy elements and, has been dealt in a descriptive manner. The main focus point of this study was to trace the ‘Impacts of Europeanization of Turkish Energy Policies on Turkey-EU relations’ in three chapters. Energy policies have important (even evolutionary) repercussions in the global level and making new research studies is as important as the energy policies. The argumentation of the study includes: definition of the EU energy policy, Turkish energy policy and relation of Turkish energy policy and EU energy policy.

First chapter of the study was delineated such a way to understand EU energy strategies in a wider perspective. Accordingly, the chapter underlined; an overview to the EU energy production and consumption situation within the energy distribution of the World, history of the initiatives to establish a common EU energy policy and EU energy policies and specific dynamics/external threats.

The overview of the EU energy production and consumption situation has revealed the facts that European Union is of the leading importer countries for its internal oil and natural gas need. Also, Russia is the leading country within the EU’s major energy suppliers. In a political framework, EU’s status as a net importer entertains two risks: import dependency and security of supply. The Union has been trying to face these two potential challenges by developing long term energy strategies.

In point of fact, the tradition of developing political strategies has been effective in the EU policy making. Elaborating the status of the energy policies

with respect to this policy tradition is of vital importance. For this reason second part of the first chapter has been dedicated to highlight the initiatives to establish common energy strategies throughout the EU history. This part has been streamlined in a chronological way starting from the establishments of the ECSC and EURATOM in 1950's. 1970's were also underlined with special interest on oil crises. During 80's and 90's the Union was highly motivated to realise the single market and market liberalisation. The main steps were taken with the beginning of the 21<sup>st</sup> century and especially after 2005. EU has eventually defined its key priorities in the energy strategies as: maintaining sustainable, secure, affordable energy as well as developing the renewable and diversification of the resources and energy type. What is important the fact that EU is actively planning the process of the policies; however fails to implement them. In other words, the basic idea of this part is to show that the idea of 'common energy policy' within the Union is in progress and yet to be seen.

Last part of the EU Energy policy chapter has been composed of the articulation of EU energy policies and specific dynamics/external threats. In this section, it was explained how energy strategies were shaped regarding the domestic need, supply security, environmental factors, sustainability, and importantly with import-export situation. Import-export situation is the determinant factor for the energy strategies; hence special importance has been attached to the reality of 'import dependency' and its possible effects on the foreign policies. One of the main outcomes of this threat was: developing strategies to diversify the supplier countries. Russia-EU relations (in a very limited scope) were accentuated within EU's fear of being import dependent. As a matter of fact, Russia's role may not be reduced but at least it is possible to reduce the level of dependency on the hydrocarbon resources.

Second chapter of the study focused on two major subtopics: An overview to the Turkish energy production and consumption situation Turkish energy policy within its neighbourhood. In this section Turkey has been depicted with

regards to its geopolitical location and energy policies. In this part of the study the concentration was on the fact that although Turkey is in the middle of the important resource suppliers, still it is one of the preeminent importers in the world. Due to its rapid growth in the economy, Turkey is expected to increase its energy need in the near future. In order to meet the internal energy need Turkey is trying to establish working energy strategies and plans. Also drilling activities are the concrete initiatives to balance the internal demand with internal resources.

Turkey's initial aim is to become an energy hub, in order to evaluate this situation it is important to know Turkey's energy relations with the adjacent countries. For this aim, in the second part of the chapter Turkish energy policies within its neighbourhood was elaborated. In this section breakup of the Soviet Union and its repercussions were discussed. As a significant point, Turkey's active role within the Caspian region has been delineated carefully. Turkey's aspiration to become an energy hub, and its changing foreign policy principals and pipeline projects can be seen as evidences for this ultimate aim.

Pipeline projects have been explained in two categories; North-South Corridor (including Blue Stream and the Samsun-Ceyhan Oil Pipelines) and the East-West Corridor (including BTC, Kirkuk-Ceyhan, South Caucasus Gas, Turkey-Greece-Italy, Trans-Caspian and Nabucco Pipelines). Of all the pipeline projects it is particularly focused on Nabucco and the South Stream Pipelines (widely accepted as rival projects). The beneficial side of the pipeline projects is their supportive effect on Turkey's energy relation both regionally and globally. On the other hand, there are debates over sustainability of the Nabucco project, which is also important from the Turkish side. The major concern is the fact that Nabucco and the South Stream which are expected to use the same resources, Azerbaijan (Shah Deniz) and Turkmenistan (South Yoloten). Nevertheless, in the study it has been argued that Turkey will keep up with its initial aim and go on developing strategies for being an energy hub.

Last chapter was composed of three subtitles including: Europeanization as a concept, Europeanization of Turkish foreign policies and Turkish energy strategies in relation to the EU. This chapter was prepared in order to streamline the term Europeanization, Europeanization and foreign policies and Europeanization of Turkish energy policies.

In this part Europeanization has been defined by different approaches, but the main concentration was on Radaelli's definition. Radaelli defines Europeanization as a "bottom-up" process in which domestic impacts are also influential on the EU. The reverse process, top-down, has also been discussed. In this process member states are transforming their institutional norms with regards to the EU norms. Changes in the member states' foreign policies are also the evidences of the transformation of norms due to the EU. In point of fact, these constructive changes are also observable in the candidate states, because of the hard accession negotiations. In fact, adjusting to the Copenhagen Criteria entails a number of changes and sanctions in itself.

In the Turkish case of the Europeanization of foreign policy, Turkey has been elaborated within last twenty years' projection. From the 80's to today important external and internal dynamics and their relationship with the Turkey's foreign policy transformation were defined. The traces of the Europeanization of Turkish foreign policy were ensued and some results were derived. Compare to post cold war period, Turkey has developed its foreign policy norms differently. The best example is the transformation of the security oriented foreign policies into resolution oriented ones, and the increased emphasis on dialogue-based attitudes and measure.

The most important part of this section was the one which includes: Turkish energy strategies in relation to the EU. To make the analysis easier I aimed to divide this title into two parts: similarities between Turkey and EU regarding the energy policies and energy as a trump for Turkey's full membership to the EU. As an importer but geopolitically strong country, Turkey shares similar concerns with the EU regarding the energy policies. Both are insufficient to meet their internal need and eager to maintain sustainable energy policies.

The Europeanization process and the importance of the energy policies, may have led Turkey to develop several strategies reflecting the essence of Europeanization. Proactive attempts to develop studies on the renewable energy, restructuring and liberalizing the energy market, developing the documentation process of energy policies and setting similar strategies for the near future, can be counted as the most preeminent evidences for the Europeanization of the Turkish energy policies. At this point, it is important to assess in what respect was Turkish energy policies were Europeanized. Turkey is not a member country, as already mentioned; though it is possible to discuss the Europeanization of the policies and norms. Turkish case is a good example of the top-down process of the Europeanization. Because it is not a member, Turkey cannot affect the EU level policies like the definition of Radaelli. Previously listed attempts are the outcomes of the Europeanization and the downloading of the European policy norms and the values.

To conclude, throughout this thesis study Turkey and the EU have been depicted with regards to their energy policies/priorities. Some basic assumptions have been made and several results have been discussed. One last question is remained to be answered, "Is it possible to argue that Europeanization of Turkish energy policies would affect the membership?" The answer divides the scholars in two groups, some supports the idea that Turkey, as a future energy hub, can be a strong member of the EU, on the other

hand, others have doubts about Turkey's aspiration and its possibility of being an EU member state (especially due to the Cyprus issue). I think 'energy' is not a commensurable issue with other political titles; it is more vital and influential. Therefore, Turkey's potential contributions to the global energy policies and its political will should not be underestimated in the cause of some diplomatic reasons.

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