

# IPC-MERCATOR POLICY BRIEF



## IS TURKEY'S ENERGY LEADERSHIP OVER BEFORE IT BEGAN?

**Jörn Richert**

### Executive Summary

A strategy is a tool for successful policy-making. It systematically connects means to political ends. A strategic vision integrates individual ends under an overarching ambition. The strategic vision of Turkey's energy policy, as declared in the Turkish Ministry of Energy and Natural Resources' Strategic Plan for 2010–2014, is to make Turkey “the leader in its region in energy” affairs.<sup>1</sup>

Although regional energy leadership is at the heart of Turkey's energy strategy, the concept lacks both a clear definition as well as empirical analysis. This analytical gap should be closed for three reasons. First, only if regional energy leadership is clearly defined can Turkey's energy strategy be fully understood. Second, because of the centrality of energy leadership, analyzing its empirical reality is an integral part in evaluating Turkey's energy political performance. A third reason concerns the means by which energy leadership shall be realized. The Strategic Plan puts major emphasis on one concrete means: transforming Turkey into an energy hub.<sup>2</sup> The energy hub–energy leadership link postulated in the Strategic Plan, however, has not been scrutinized so far. It is therefore not clear, if being an energy hub would actually result in regional energy leadership. If the energy hub–energy leadership link does not hold, this would render Turkey's energy strategy ineffective.

In this policy brief, I address these three aspects consecutively: I define regional energy leadership, evaluate Turkey's leadership performance in the Southern Corridor, and discuss future options for Turkey's energy strategy. In the context of the third aspect, I test the viability of the energy hub–energy leadership link. The analysis presents important challenges to Turkey's energy strategy, as so far Turkey has not managed to become an energy leader. Moreover, the virtually certain construction of the Trans-Anatolian Pipeline (TANAP) and the Trans-Adriatic Pipeline (TAP) will result in a significant change in regional energy interdependence, leaving little room for Turkish leadership in the future. If Turkey wants to become an energy leader, so I conclude, it needs to fundamentally re-think its energy strategy.

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## Regional Energy Leadership – What is a Leader? What is a Region?

In the debate on Turkish energy policy, key concepts such as energy hub, energy bridge, and regional energy leadership are frequently used but rarely defined in a clear and consistent manner. Without such definitions, empirical argumentation and analysis remain imprecise. A first step in analyzing regional energy leadership is therefore to define it. To do so, I start by asking what a region is. From there on, I elaborate on other concepts such as interdependence and power. These will finally lead to an understanding of leadership.

Already the definition of the quite straightforward term region is a challenging task. Turkish energy officials and experts rarely present the country as situated within a region. Instead, they highlight Turkey's quality as a bridge between Europe and the Middle East/Central Asia. From this perspective, claims for regional energy leadership – this is leadership within a region – appear self-defeating from the very start.

Therefore, to make sense of the Turkish energy vision, a definition of region is needed that goes beyond common sense understandings of entities such as the Middle East or Europe. Such a definition is found in the new regionalism literature in the discipline of International Relations. Particularly, the work of Barry Buzan and Ole Wæver on regional security complexes is helpful in this regard.

Buzan and Wæver define these complexes as “durable patterns of amity and enmity taking the form of subglobal, geographically coherent patterns of security interdependence.”<sup>3</sup> Beside a geographical component, this definition highlights interdependence and relations between actors (amity and enmity). These aspects can help to develop an understanding of regions that goes beyond historically formed geographical areas.

Since the focus of this policy brief is on energy and not on security per se, this definition must be adapted. Taking the focus on energy into account, I understand a region as a regional energy governance complex, defined by durable, subglobal, and geographically coherent energy interdependencies and the political patterns that form around them. Substituting security for energy governance is not to say that energy cannot be a security issue – it might always be securitized.<sup>4</sup> In such a case, the patterns of amity and enmity that are highlighted by Buzan and Wæver might dominate politics as actors perceive each other in terms of friends and foes. However, the focus on energy governance acknowledges that energy might also be governed differently.

In a regional energy governance complex, actors are connected by interdependence. This means that their choices are systematically interlinked.<sup>5</sup> Taken by itself, interdependence is non-political and involves no relations of power.<sup>6</sup> However, actors might interpret this interdependence as relative dependence and therefore in terms of power relations.<sup>7</sup> Power is thus an important feature of energy regions. Joseph Nye defines power as “the ability to affect the behavior of others to get the outcomes you want.”<sup>8</sup> He highlights three main ways in which power can work: by threats or coercion, by payments, or by attraction.<sup>9</sup> Coercion and payment constitute forms of hard power, while attraction is understood as soft power. Soft power, as Nye argues, derives from an actor's “culture (when it is pleasing to others), its values (when they are attractive and consistently practiced), and its policies (when they are seen as inclusive and legitimate).”<sup>10</sup> Combinations of hard and soft power are called smart power.<sup>11</sup>

Finally, this understanding of power also helps to clarify what regional leadership means. Leadership, so Nye argues, is a relation of power. However, being a leader does not simply mean being a great power.

According to Nye, there are two concrete leadership conditions that need to be fulfilled. First, leadership cannot be built on hard power alone.<sup>12</sup> It implies at least some degree of soft power. Second, a leader needs followers. For Nye, a leader is “someone who helps a group create and achieve shared goals.”<sup>13</sup> A great power might exist regardless of patterns of enmity and amity. It might even reinforce them. Leadership, in contrast, demands to transcend such patterns and to make a group of actors work towards a common goal. With this conceptual discussion in mind, I turn next to the second task of this policy brief, the evaluation of Turkish energy leadership performance.

### **The Southern Corridor – Leadership in an Emerging Region**

The definitions provided in the preceding section allow us to pose a set of guiding questions that must be answered in order to properly analyze Turkish energy leadership: What kinds of interdependence exist within the energy governance complex? What kind of power emerges? Which actors are engaged? Do actors share a common objective that transcends patterns of enmity and amity? What power position does Turkey find itself in? What are its objectives and how do they relate to overarching objectives? Does Turkey contribute to achieving the latter?

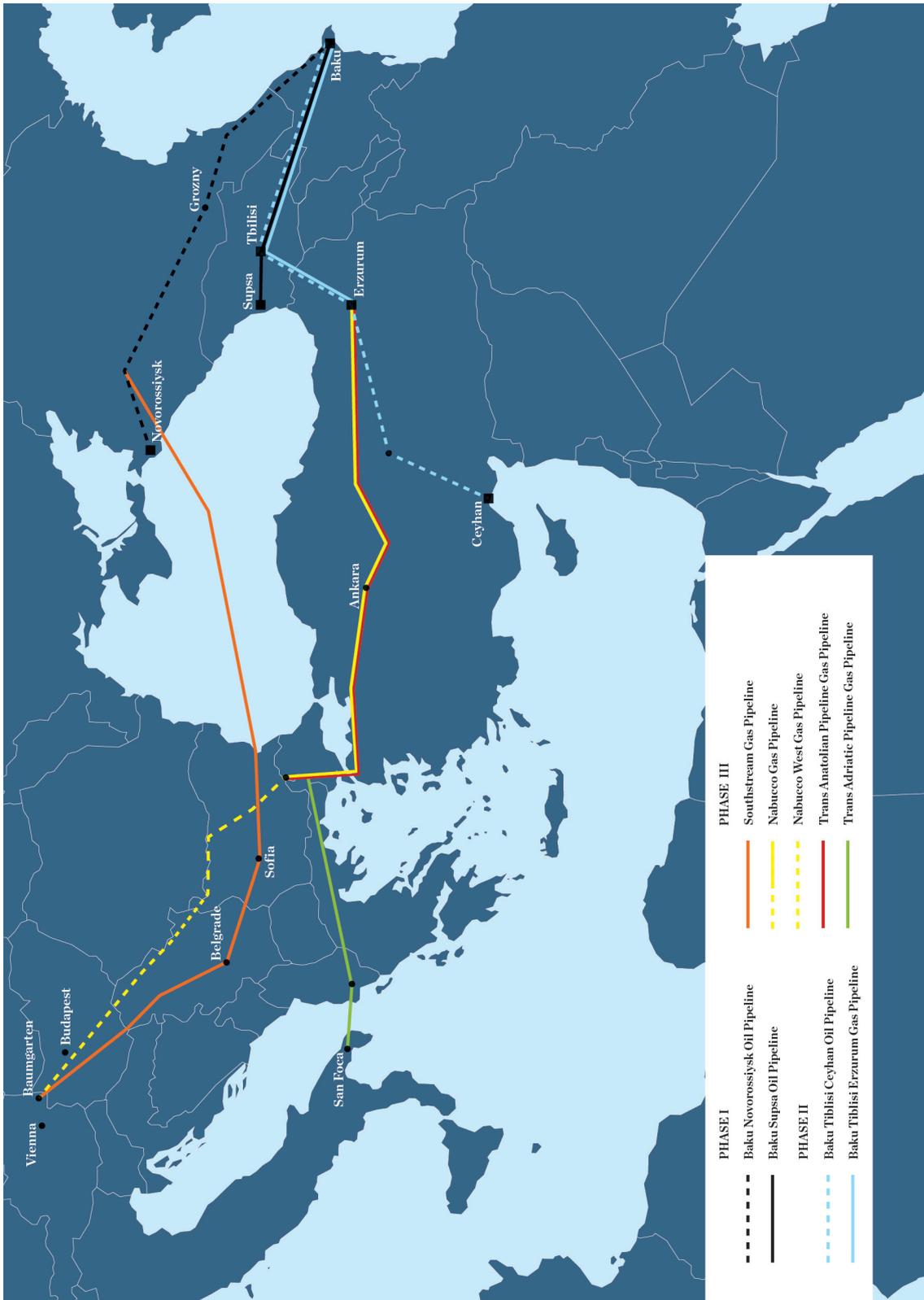
In this section, I analyze energy leadership in the Southern Corridor along the line of these questions. I first discuss the characteristics of the Southern Corridor in terms of interdependence, power, and how this region can be understood as the region

most relevant to Turkish energy political ambitions. In this context, I introduce four distinct historical phases of the becoming corridor until today. Thereafter, I analyze these phases to find out about leadership and the performance of Turkish energy policy.

#### ***The Region and the Turkish Power Position***

The region that is most relevant to Turkey's energy policy is the so-called Southern Corridor.<sup>14</sup> It connects European energy consumers with resources in Central Asia and potentially the Middle East while bypassing Russian territory. The corridor's origins lie in the late days of the Soviet Union. At the time, international oil companies (IOCs) such as BP and Chevron were looking for new resources in Central Asia.<sup>15</sup> Their efforts resulted in a series of oil contracts, including the so-called 1994 Contract of the Century with Azerbaijan. The Southern Corridor emerged when these new resources had to be transported to consuming markets.

The history of the Southern Corridor can be divided into three phases. The first phase is associated with the so-called Early Oil that originated from updated Soviet production facilities. Two pipelines were built in the late 1990s to transport this oil – one from Baku to the Russian port of Novorossiysk and the other to the Georgian port of Supsa (Figure 1).<sup>16</sup> In the second phase, growing oil production necessitated additional transport capacities. These were finally provided by the Baku-Tbilisi-Ceyhan (BTC) pipeline that became operational in 2005. A third phase began in the early 2000s when political attention shifted from oil to gas. The BTC pipeline had been built with an associated gas pipeline, the Baku-Tbilisi-Erzurum (BTE) pipeline, which began transporting gas in 2007.<sup>17</sup> In this third phase, actors aimed to expand the gas infrastructure towards



**Figure 1:** Three phases of pipelines and pipeline plans in an emerging Southern Corridor. Pipelines of phases I and II have been constructed. Of those pipelines shown for phase III, none has been constructed yet.

Europe, ultimately resulting in several agreements concerning the abovementioned TANAP/TAP duo. The duo is scheduled to bring 6 billion cubic meters of gas (bcm) per year from the second phase of the Azerbaijani Sah Deniz field to Turkey and 10 bcm/year to Europe by 2018 and 2019 respectively.<sup>18</sup>

As this overview shows, the Southern Corridor has long been an energy governance complex in the making. Throughout the corridor's history, interdependence was not constituted by actual energy flows. Instead, the region was held together by common interests in prospective flows of oil and gas. From this interdependence, a specific kind of power emerged. Politics were conducted by resorting to a mix of prospective payments, geographical potential, and the demonstration of expertise. Also, attraction, political commitments, and, to a lesser degree, coercive strategies played a role.

Turkey's power position was characterized by the fact that it was "sitting on the only transit route substantially free of Russia."<sup>19</sup> However, as Temel argues, soft power was also important. Turkey was an attractive partner thanks to the country's "stability, her solid links to Europe and [the] United States, [and] her ever deepening relations with the countries in the region."<sup>20</sup>

### *Early Oil, a New Objective, and U.S. Leadership*

From the beginning, the objective that was shared by most actors in the Southern Corridor was to transport energy resources to consuming markets. When the challenge to transport these resources came up for the first time in the context of Early Oil, two main options were discussed: a pipeline over Russian territory and an alternative route to the Georgian Black Sea coast. The IOCs favored the former option as it was expected to be substantially cheaper.<sup>21</sup> Azerbaijan was leaning towards the Russian option

as well because it was wary about confronting the demands of its northern neighbor.<sup>22</sup>

After the IOCs had signed the Contract of the Century, however, the U.S. Department of State became increasingly interested in the region's energy politics and the fate of the newly founded post-Soviet states.<sup>23</sup> It took over leadership and changed the objective of regional energy governance by highlighting that transport should not be entirely dependent on Russia. The United States exerted leadership by means of smart power. The Department of State altered the position of the companies by refusing hard assistance in the case of potential future problems with Russia.<sup>24</sup> The Azerbaijani President Heydar Aliyev, on the other hand, was ultimately persuaded by the attraction of being personally addressed by then-U.S. President Bill Clinton.<sup>25</sup>

While the United States exerted leadership, Turkey's attempts to direct regional energy governance into a favorable direction remained, as Bilgin puts it, rather awkward.<sup>26</sup> Turkey had supported a pipeline to Georgia.<sup>27</sup> However, in early 1996, the project partners rejected a Turkish proposal to build a pipeline to the Georgian port of Batumi.<sup>28</sup> Turkey had offered to finance the project under favorable conditions, but in return it demanded a 51% majority share and a commitment to building a main pipeline from Baku to the Turkish port of Ceyhan. The project partners refused.<sup>29</sup> Further, in the spring of 1998, Turkey failed to gain approval for a significant capacity expansion of the pipeline to Georgia. While this would have increased Turkey's chances of transporting supplies in the second phase of oil production, other actors refused to pay the additional cost.<sup>30</sup>

### *The Main Oil Pipeline and Turkey's Growing Role in Regional Energy Governance*

Ongoing oil exploration in Azerbaijan quickly called for a grander pipeline. Already in early 1993, Azerbaijan had revealed its plan of building a main export pipeline from Baku to Ceyhan. It had quickly found common ground with Turkey.<sup>31</sup> In the face of the more pressing challenge of transporting Early Oil, however, the debate about the main export pipeline lost momentum. Only after the Turkish plans to establish a Baku-Batumi pipeline had failed, the Baku-Ceyhan project became the country's major focus.<sup>32</sup> In early 1995, the United States endorsed the Turkish plan,<sup>33</sup> and the two countries became its most active promoters.<sup>34</sup>

In the subsequent political struggle, the objective to bypass Russia was unanimously accepted by all relevant actors. Differences emerged nevertheless. The oil companies favored what they saw as the cheapest option – constructing a pipeline to the Persian Gulf via Iran. Only when they realized that the United States would block any Iranian involvement<sup>35</sup> did they start to back an expansion of the Baku-Supsa pipeline. A pipeline towards Ceyhan, on the other hand, was perceived as a political project and too expensive.<sup>36</sup>

The IOCs found support from Georgia. However, then-Turkish President Suleyman Demirel convinced his Georgian counterpart Eduard Shevardnadze to equally support both a Baku-Supsa expansion and a Baku-Ceyhan pipeline leading through Georgia.<sup>37</sup> Turkey pushed for a Baku-Ceyhan solution on another front as well, when it introduced additional safety and environmental regulations for the passage of the Turkish Straits.<sup>38</sup> In the meantime, the United States tried to convince regional governments of the BTC plan. As a consequence of U.S. and Turkish activism, the heads of state of Azerbaijan, Georgia, Kazakhstan, Turkey, and

Uzbekistan signed – in the presence of then-U.S. Energy Secretary Bill Richardson – the so-called Ankara Declaration in October 1998 regarding the establishment of the BTC oil pipeline.<sup>39</sup>

The companies remained reluctant. They were only convinced when the governments agreed to support the financing of the pipeline. Turkey guaranteed a \$300-million payment in case of cost overrun.<sup>40</sup> The United States secured the participation of institutions such as the World Bank, convincing commercial banks of the viability of the project. Finally, a crucial factor in the realization of BTC was the relation between the United States and BP.<sup>41</sup> The British oil company had bought two U.S. competitors – Amoco for \$55 billion in 1998 and Arco for \$39 billion only a year later.<sup>42</sup> These mergers not only made BP the principal operator in the Baku oil endeavor, it also put the company on a collision course with U.S. antitrust laws. Anxious not to jeopardize its U.S. mergers, BP agreed to the BTC plans and managed to convince the other companies to follow suit.

While Turkey played a much more active role in this phase, it remained “subordinate to [that of] the USA.”<sup>43</sup> To a certain degree, its role was itself the result of conscious U.S. policy to make Turkey more active in regional energy politics.<sup>44</sup> Again, Washington exercised smart power in achieving the objective of circumventing Russia (and Iran). In addition to declining the companies' demands to interact with Iran, the United States used its attraction vis-à-vis local rulers, including those of Turkey, and its influence on the World Bank to steer regional energy governance.

### *From Oil to Gas and towards Volatile Leadership*

In the 2000s, the regional energy political focus increasingly moved from oil to natural gas. As with oil, interdependence and power resources were not a matter of material transactions but primarily political. Struggles revolved around prospective instead of actual flows of gas, and the planning of new pipelines was more important than existing ones. A new actor began to assert leadership: the European Union (EU).<sup>45</sup> The EU managed to make the realization of the Nabucco pipeline project, which was designed to bring Central Asian gas to Baumgarten, Austria, the main objective of regional energy governance.<sup>46</sup> It supported Nabucco because the pipeline allowed for, among other things, third party access and thus actual competition among suppliers.<sup>47</sup> In 2003, the European Commission contributed to a feasibility study of the project. Support was reinforced after the first Russian-Ukrainian “gas war” of 2006.<sup>48</sup> In 2008, the Commission made the Southern Gas Corridor one of its energy security priorities,<sup>49</sup> and then-Energy Commissioner Andris Piebalgs called Nabucco “the flag project of the diversification efforts of the EU.”<sup>50</sup> In March 2009, the EU deepened its commitment by allocating € 200 million of seed capital to Nabucco.<sup>51</sup>

Other actors initially followed the European lead. The United States, Azerbaijan, Georgia, and Turkey all supported Nabucco.<sup>52</sup> However, after “a decade without real progress,”<sup>53</sup> several developments between 2011 and 2013 slowly brought about the end of Nabucco. While the developing Euro-crisis made financing increasingly problematic, Nabucco cost updates were missing, and pressure from the Shah Deniz production consortium in Azerbaijan grew.<sup>54</sup> In early 2012, the Nabucco consortium downgraded its plans to a Nabucco-West pipeline, designed to bring gas from the Turkish-Bulgarian

border to Baumgarten. In 2013, the project was shelved altogether.<sup>55</sup>

These events signalled a shift of leadership from the EU to Azerbaijan. While Azerbaijan had in principle supported Nabucco, the prospect of increasing domestic gas production demanded a timely solution. In October and December 2011 respectively, BP and SOCAR suggested alternative pipeline projects.<sup>56</sup> It was TANAP, the Azerbaijani option, which finally replaced Nabucco as the project that would transport natural gas to Europe. Azerbaijan had quickly managed to engage Turkey, and both countries signed a series of agreements that paved the way for the new pipeline in late 2011.<sup>57</sup>

In the end, it was the EU's inability to combine the attraction of a European solution with the hard dimensions of financing and gas supplies that signaled the end of EU leadership.<sup>58</sup> Azerbaijan, on the other hand, was capable of overcoming the monetary hurdle by using revenues generated from its oil production.<sup>59</sup> Azerbaijani leadership was also reflected in the agreements that were reached with Turkey. Azerbaijan initially took an 80% share in the TANAP project, while Turkey's energy companies would hold only 20%.<sup>60</sup> This ownership structure, finally, also transformed the objective of energy governance. While the overarching aim of transporting Azerbaijani gas to Europe remained the same, the EU's ambition to allow for third party access vanished from the scene.

The Turkish position in this phase oscillated between following and active foot dragging. While in principle Turkey supported the cause of bringing Azerbaijani and potentially other gas to Europe, Turkish officials repeatedly tried to exploit their country's strategic position in energy politics for other political objectives.<sup>61</sup> In 2007, Turkey vetoed the entry of Gaz de France into the Nabucco

consortium as a retaliation of political decisions made by the French National Assembly that were unrelated to energy issues. In the run up to the signature of the Intergovernmental Agreements on Nabucco in 2009, then-Turkish Prime Minister Erdoğan linked Turkey's support for Nabucco to the EU country's accession process. At the same time, Turkey demanded Azerbaijan to accept overly demanding terms for energy transit, including a right to resell 15% of gas going to Europe, higher taxes, and extraordinarily high transit fees.<sup>62</sup> Turkish action, in the end, resulted in a two-year delay of Nabucco and thereby contributed to the project's failure.<sup>63</sup> Turkey only moved back from foot dragging to following when Azerbaijan took over leadership.

### ***Summary: Leadership in the Southern Corridor and Turkey's Questionable Performance***

As the analysis has shown, leadership in the Southern Corridor has moved repeatedly from one actor to another. It has also become clear that it was U.S. leadership that forged the common objective of bypassing Russia (as well as Iran). When the focus moved from oil to gas, the EU took over the leadership role. Its objective to allow for a gas pipeline from Azerbaijan to Europe governed by EU energy law, however, was not realized. The EU was lacking hard power components – particularly financing. These were only provided when Azerbaijan took over leadership by initiating TANAP.

The empirical evaluation of leadership in the Southern Corridor has furthermore clarified the varying role that Turkey has played. When the Early Oil pipeline to Georgia was discussed, Turkey's proposals were declined. While being more successful in the case of the BTC pipeline, Turkey

mainly followed the United States. Particularly in the case of Nabucco, Turkey's demanding stance contributed to failure rather than to the success of a common objective. In the case of TANAP, Turkey finally moved back from foot dragger to follower, this time by following Azerbaijan. Turkey, in short, has not managed to assert a leadership role in the Southern Corridor. As I will show in the following section, regional energy leadership will most likely also be out of reach for Turkey in the future.

### **The Future of Turkey's Energy Leadership**

The construction of TANAP/TAP will fulfill the major objective of two decades of regional energy governance – it allows Azerbaijani resources to reach Western markets while bypassing Russia. Although the construction of TANAP/TAP appears to be good news for Turkey, it has unpleasant consequences for the country's leadership ambitions. As I will illustrate in this section, the construction of TANAP/TAP will result in a situation in which Turkey will most likely not become a regional energy leader. Instead, there are two potential paths ahead – either to securitize energy and become an energy power or to economize energy and become an energy hub. While each of these strategies calls for further in-depth analysis, I limit myself to discussing their respective relation to Turkish energy leadership.

### ***New Interdependencies and Turkey's New Power Resource***

With TANAP/TAP in place, regional interdependence will increasingly be generated by physical infrastructure and resource flows. Importantly, the shift from prospective to actual pipelines and resource flows is likely to go hand-in-hand with a

shift in perceptions of Turkey. What once appeared attractive – Turkey's stability, solid links to Europe and the United States, and deep relations with countries in the region – will increasingly be perceived as the normal state of affairs. At the same time, the construction of TANAP/TAP adds a harder power source to Turkey's portfolio. At least in principle, it seems to give Turkey the power to “decide how much gas reaches EU markets and when it is delivered” and thus to “using its natural geographic leverage against the EU”<sup>64</sup> and other actors.<sup>65</sup> Producers, consumers, as well as companies will closely follow how Turkey will use this new “transit power.” The way in which Turkey uses this new power will result either in the securitization or the economization of regional energy governance. Neither of these scenarios entail energy leadership.

#### *Securitization – Turkey as a “not-so-important” Energy Power*

Turkey might strive to actively employ the “ability to manipulate gas flows and tailor it to its political and economic” agenda.<sup>66</sup> As seen above, the incumbent AKP government has already tried to exploit its position in energy politics for other political purposes. In the future, this strategy might make Turkey a more or less important regional power in energy affairs;<sup>67</sup> however, it will not result in energy leadership. Energy leadership necessitates followers. Applying “transit power”, however, means driving away such followers. It means exercising influence over producers by not letting their resources pass or over consumers by hindering the resources to reach their destination.

Wielding transit power, in other words, means securitizing regional energy governance and reinvigorating patterns of enmity and amity. As a consequence, leadership becomes impossible.

Instead of followers, Turkey will encounter increasing mistrust. When aspiring to use its “transit power,” Turkey might find that Europe as well as energy producers increasingly perceive it as a problem much more than as a solution. In the medium- and long-term, moreover, this strategy is likely to be self-defeating, since it erodes the comparative advantage Turkey has over Russia. Only if Turkey is seen as a more attractive partner than Russia will the extension of transit routes via Turkey seem sensible politically. Such greater attractiveness might appear self-evident in the context of the ongoing Ukrainian crisis. However, given the substantial interdependence of Russia and Europe, their relation is likely to normalize throughout the medium and long run. At the same time, confrontational behavior by Turkey would substantially decrease Turkey's attractiveness as a partner for Europe.

#### *Economization – Profit but no Leadership*

Another possible future strategy for Turkey is to remove power from its approach to energy interdependence in the Southern Corridor. This would entail transforming energy interdependencies into an exclusively economic matter. For pursuing this strategy, Turkey would have to foster integration into European markets towards “a single transit regime.”<sup>68</sup> It would also have to push for the liberalization of the emerging transit regime with Azerbaijan (e.g. third party access).

By pursuing an economization strategy, Turkey could possibly become an energy hub. Economization also appears to be a viable strategy since it implies substantial economic benefits for Turkey.<sup>69</sup> In contrast to securitization, moreover, this strategy is not self-defeating but self-enforcing. If Turkey manages to prove its reliability and stability

in the energy sector – most fundamentally by abstaining from political interference – and at the same time expands infrastructure and expertise in energy trade, this would make it an increasingly attractive energy partner. However, despite all these advantages, economization and becoming an energy hub leave no room for leadership. By taking energy out of the realm of politics and power, leadership – as a relationship of power – becomes impossible.

### **Policy Implications – Reconsidering Turkey’s Energy Vision**

As this policy brief has shown, Turkey’s regional energy leadership is likely over before it began. The Ministry of Energy’s strategic vision of becoming an energy leader has so far not been realized. Moreover, the transformation of interdependencies in the regional energy governance complex will substantially complicate future attempts to become an energy leader. On the contrary, recent energy policy seems to actively counteract such leadership by creating doubt about Turkey’s reliability as an energy partner.

Instead of leadership, two other aims appear to be within Turkey’s reach: securitization and economization. A continuing securitization of regional energy governance would mean losing potential followers and creating new patterns of amity and enmity. Economizing regional energy governance, on the other hand, removes power and thus leadership from the picture for the sake of maximizing economic benefits. This second strategy could potentially make Turkey an energy hub; however, becoming an energy hub does not result in becoming an energy leader. Nevertheless, economization appears to be a more promising strategy given the self-defeating character of securitization.

If Turkey wants to go beyond these two strategies and become a real energy leader, two things need to be done. First, Turkey should explicitly and credibly forsake the securitization strategy since it actively works against leadership. Second, becoming an energy leader requires the development of a new energy vision. It implies finding a new compelling common energy political objective, mustering new followers, and potentially reconsidering the geographic scope of Turkish energy political ambitions. If Turkey wants to become an energy leader, these challenges must be taken seriously in future strategic planning in Turkey.

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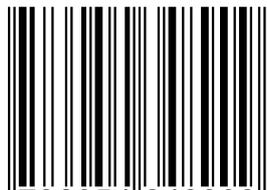
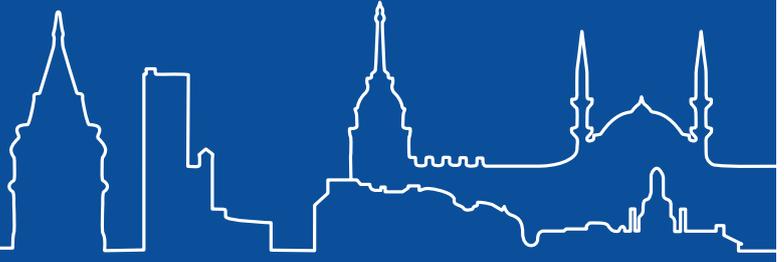
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67 | Although this issue cannot be discussed in detail here, contractual agreements and the ownership structure of joint ventures with Azerbaijan (Okumuş 2013), the general uncertainty regarding additional energy sources to fill the southern corridor (Tagliapietra 2014), Turkey's own growing gas demand (Rzayeva 2014), the potentially game-changing character of unconventional gas production (Richert 2014), the growing role of energy efficiency and renewable energies in Europe, as well as the relative unimportance of traded volumes in comparison with the overall European market make it unlikely that Turkey might emerge as a *great* energy power.

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69 | For respective numbers regarding the BTC pipeline see Baran (2001).

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