

T.C.
ISTANBUL KÜLTÜR UNIVERSITY
INSTITUTE OF GRADUATE STUDIES

THE TURKSTREAM PIPELINE
AND
ITS IMPACT ON TÜRKİYE-RUSSIA ENERGY RELATIONS

MA Thesis by

Gamze Ünsal

1403020038

Department: International Relations

Programme: International Relations

Supervisor: Assoc. Prof. Dr. Çağla Gül YESEVİ

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ÖZET

Modern dünyada enerji ihtiyacı her geçen gün artıyor. Bu gereksinim arttıkça ülkelerin enerjiye olan bağımlılığı da artmakta ve bu da bu ülkeler için enerji ithalatının maliyetini artırmaktadır. Bu tez, Türk Akım Boru Hattı ve enerjiye bağlı siyasi ve ekonomik göstergeler ışığında, Türkiye ile Rusya arasındaki ilişkinin değerlendirilmesini amaçlar.

Bu çalışmada, yakın dönemdeki Türkiye-Rusya enerji ilişkileri karşılıklı bağımlılık perspektifinden incelenmektedir. Türkiye-Rusya siyasi ilişkilerinde enerjinin rolü ve Türkakım projesinin önemi tartışılacaktır. Özellikle enerji sektöründe ve genel olarak ekonomide Türkiye-Rusya ilişkileri gelişim kaydetmektedir. Türkiye-Rusya ilişkisinin Karşılıklı Bağımlılık teorisine dayanarak sürdürülebilirliği ise bir tartışma konusudur. Yaşanan sorunların iki ülke ilişkilerini nasıl etkilediği incelenecektir. Bu tez, Türkakımı projesinin Türkiye – Rusya ilişkilerini nasıl etkilendiğini ve liberal perspektiften ilişkilerinin geleceğini, Karşılıklı Bağımlılık teorisine dayanarak sürdürüp sürdüremeyeceğini analiz etmektedir.

ANAHTAR KELİMELEER: Türk Akımı, Enerji, Güvenlik, Türkiye-Rusya, Karşılıklı Bağımlılık Teorisi

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ABSTRACT

The need for energy is growing every day in the modern world. As this requirement grows, so does the countries' dependence on energy, which increases the cost of energy importation for those countries. This thesis is based on the relations between Türkiye and Russia in light of the political and economic indicators centered on the TurkStream and its energy dependence.

In this study, recent Türkiye-Russia energy relations are examined from the perspective of interdependence. The role of energy in Türkiye-Russia political relations and the importance of the TurkStream project will be discussed. The relations between Türkiye-Russia are improving, especially in the energy sector and the general economy. In this regard, the interdependence approach has been used to examine Türkiye's geographical importance, rising energy needs, and mutual economic interest/benefit variables between the two countries. In addition, this thesis will also examine how political problems affect the relations between Türkiye and Russia. Energy cooperation between Türkiye and Russia has improved despite political problems from time to time. This thesis will analyze how Türkiye-Russia relations are affected by the TurkStream project and whether these relations can continue in the future from

a liberal_perspective based on the theory of interdependence. This thesis will be a scenario for Türkiye-Russia relations in the future.

KEYWORDS: TurkStream, Energy, Security, Türkiye-Russia, Interdependence theory



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LIST OF ABBREVIATIONS

NATO	The North Atlantic Treaty Organization
IEA	International Energy Agency
OECD	Organization for Economic Co-operation and Development
OPEC	The Organization of the Petroleum Exporting Countries
BTC	Baku–Tbilisi–Ceyhan
TANAP	The Trans Anatolian Natural Gas Pipeline
LNG	Liquefied Natural Gas
IMF	The International Monetary Fund
SOCAR	State Oil Company of Azerbaijan Republic
PETKIM	Petrokimya Holding Anonim Sirketi
TSP	TurkStream Pipeline

INTRODUCTION

As it is a crucial component for the survival of global markets, energy has played a considerable role in international relations since the 1970s. These days, governments are more concerned about having cheap, sustainable, and productive energy resources than ever before. Energy-producing nations may utilize it as a negotiating chip or political weapon. In a world with interconnected multinational and transnational entities and channels, energy supply and demand may be able to provide some light on international relations. When it comes to tying together international players and creating interdependence between nations, energy is one of the most important challenges. It will be crucial for the advancement of their energy security if they can recognize their dependency and are prepared to cooperate to meet their shared difficulties (Flores-Quiroga, 2012). Because of this, concerns pertaining to energy resources and supply are important in shaping state policy. As a result, concerns like energy, energy regulations, energy transmission lines, and the security of the supply of energy resources have evolved into issues crucial for governments to preserve their existence.

Energy is a crucial component of Turkish-Russian relations that helps to cement their connections and shared interests. The future foreign policy of these two nations will place an ever-increasing emphasis on the expansion and diversification of cooperation in the energy sector based on shared interests (Girgin, 2014). The dependency between Türkiye and Russia, which has grown in terms of energy, is anticipated to continue growing. Energy-related cooperation between Türkiye and Russia has also impacted their political and economic ties.

After the mid-1990s, Russia focused on economic, social, and political reconciliation with Türkiye, using energy as a strategy. Russia and Türkiye have expressed a desire to strengthen their energy trading links and economic relations between the two countries have

improved in other sectors (Özsağlam, 2013). During the cold war period, the relations viewed with a "win-lose" perspective were replaced by a "win-win" balance. The relations between the two countries are concrete and come to life with policy practices that protect the interests of both sides (Yılmaz S. , 2019). As a result, Türkiye and Russia have enjoyed a relationship of interdependence in the economic field, revealing a multi-dimensional partnership between the two countries. Frustrations with other countries have led to joint projects in the Black Sea in energy and bilateral relations in general. However, Türkiye's continued military and political collaboration with NATO and Western countries have resulted in a conflict of interests between Russia and Türkiye in the South Caucasus, the Black Sea, and the Middle East, as well as the maintenance of their unstable political ties (Koçak, 2017).

The geographical position of the two countries, which links these regions to the rest of the world, has played a significant role in the fragility of ties and conflict of interests between them. However, it should not be forgotten that Russia is Türkiye's primary source of natural gas imports. Türkiye has also been a candidate country for Russia to become a transition country for energy resource delivery to the European energy market. In this sense, the construction of the new Turkish Natural Gas Pipeline (TurkStream) from Russia to Türkiye and through Türkiye to the EU has begun (Birol, 2021).

As a project that will allow Russian natural gas to be delivered first to Türkiye and subsequently to European nations over the Black Sea, the TurkStream natural gas pipeline further solidifies Türkiye's status as an energy center. As a bridge between Russia and Europe for natural gas, the TurkStream project increases Türkiye's dominant position in the regional energy markets and allows Türkiye to influence global energy policies (İlter & Kınık, 2017). This thesis analyzes how Türkiye-Russia relations have been affected by the TurkStream project and whether their relations can continue their future through the theory of interdependence.

Increased American participation in regional policies that delimit or directly deal with the aforementioned nations has led both governments to re-examine their traditionally conflicting

relationships, which have been shattered on occasion. Although Türkiye's relations with Russia have been volatile throughout history, with economic advantages, crises, and external connections with third parties defined by various international conjunctures, one observes a fascinating combination of cooperation and competition. The statements made after the Moscow summit show many aspects of the dispute between Russia and Türkiye, yet both sides still reveal the commitment to work together (Kardaş, 2011). In addition, according to the statement made by the CEO of Bulgartransgaz, Russian natural gas is being shipped to Greece and North Macedonia, as well as Bulgaria, through the TurkStream project (Malinov, 2020). This situation shows that the positive impact of this bilateral relationship on other countries will be felt. However, considering the problems experienced, it is discussed how long this interdependence theory will be maintained.

The energy policy development of the two countries in Türkiye-Russia political relations and the impact and analysis of the TurkStream project on their relations will be discussed. Is the energy relationship between Türkiye and Russia sustainable despite political problems based on the interdependence theory? This study aims to answer questions about how Türkiye will maintain the balance of energy dependence and energy security. Reviews in economic relations are handled from a liberal perspective. As a result, the argument in favor of this is the interdependence of the goals driving the aforementioned Türkiye-Russia relationship on an energy basis, as shown throughout the thesis.

LITERATURE REVIEW

The main aim of this thesis is to review the Türkiye-Russia energy relations and their impact on the TurkStream pipeline. The basic assumption of this discussion is that their relationship with the interdependence theory will continue under the influence of economic factors. Turkish-Russian relations are mainly discussed within the framework of political

factors. Its relations with interdependence, energy security and balance of power have been examined in this thesis.

In literature, there are books, articles and reports of research organizations written on Turkish-Russian relations and the resources used are supported by qualitative data. This thesis evaluates and analyses Turkish-Russian relations, mainly regarding political issues. There is not enough data about the TurkStream project, as it is a current development.

According to Baris Doster, who looks at it from the perspective of dependence in his work "the effects of external dependence on energy on Türkiye-Russia relations"; Türkiye's dependence on Russia in energy is negatively reflected in Turkish foreign policy. He supports the need for Türkiye to create alternative energy resources.

Ziya Öniş and Şuhnaz Yılmaz, in their study titled "Türkiye and Russia in a Shifting Global Order: Cooperation, Conflict and Asymmetric Interdependence in a Turbulent Region", evaluated the relations between Türkiye and Russia in a complex interdependence perspective, especially since the 2000s. This study also pointed out that despite the political issues involving Syria and Ukraine, Türkiye and Russia continue to cooperate economically in their bilateral relations.

According to the theory of asymmetric interdependence, Tolga Demiryol stresses that Türkiye-Russia relations have pursued a policy of compartmentalization, which facilitates the two countries to maintain a certain level of political cooperation despite geopolitical conflicts of interest. The idea of securitization addresses whether or not the parties, particularly Türkiye, in a dependent position, regard the unbalanced relationship as a danger.

Although this thesis will analyze Türkiye's energy relationship through the interdependence theory, it will also compare and evaluate it through different theories. By including the assumptions of the interdependence approach of the thesis, the reasons for treating Turkish-Russian relations from the perspective of interdependence will be revealed. The main hypothesis of the thesis is that the TurkStream project adds a moderate approach to bilateral relations and improves cooperation between Türkiye and Russia's mutual economic interests.

First, the energy strategies of Türkiye and Russia will be examined, and the development and sustainability of the two countries' relations within the context of the theory of interdependence will be discussed. Information about the rate at which the TurkStream natural gas pipeline meets Türkiye's energy needs, the increasing energy needs due to Türkiye's growing population, and the search for alternative energy resources are given.

On the other hand, the economic size of the TurkStream project and its importance from the point of view of Türkiye - Russia will be mentioned. In summary, the interdependence theory has been supported by the abovementioned topics. Despite the competition between Türkiye and Russia in many areas, it could be considered that this situation is supported by many researchers, which is not an obstacle to cooperation.

METHODOLOGY

This thesis investigates Turkish-Russian energy relations considering global politics and the TurkStream Natural Gas Project. To what degree do Türkiye's energy needs influence Turkish-Russian relations? For the future of the relations between Türkiye and Russia, it is critical to find answers to whether the TurkStream project serves both sides' interests. We can better define our theoretical justification with the help of the interdependence theory. In addition to the energy relations between the two countries, political and economic relations were

examined. The purpose of this is to show that they distinguish between cooperation and disagreements based on the theory of interdependence and to prove that it is not reflected in the energy relationship. To further comprehend the importance of energy concerns in Turkish and Russian interdependence, we will conduct trend analyses for Turkish and Russian bilateral trade while focusing on energy issues such as the natural gas trade.

Turkish-Russian economic relations will be discussed using quantitative data based on reports and statistics, governmental data, and organizational investigations. Recent Turkish-Russian political relations will be presented using library sources, academic studies, and newspapers. To this end, the reports published by the Ministry of Energy and Natural Resources, Ministry of Foreign Affairs, IEA, OECD, and various research institutions will be used. The current status of Türkiye-Russia relations has been examined regarding the effects of mutual economic interests and political relations on the relations between the two countries. The fact that the TurkStream natural gas pipeline is a new development and that there are not enough studies on this subject is important in contributing to the literature. The contribution of the thesis study to the literature is to analyze the mutual relations between the two countries and the effects of energy on the economic and political relations through the TurkStream natural gas pipeline within the scope of the theory of interdependence.

1. THEORETICAL FRAMEWORK

1.1 The Interdependence Theory

Since the 1970s, the international system has changed and transformed, resulting in a growth in the issues and events that influence nations' foreign policy. In addition to military and security challenges, numerous new topics have entered the realm of international relations. The neo-liberalism paradigm sprang to prominence at the close of the 20th century as a result of the effects of globalization on international relations, which evolved as a result of advances in the

social, economic, political, and cultural domains. The neoliberal movement also gave rise to the interdependence idea. "Interdependence" refers to the reciprocal influence of governments or actors. According to the Theory of Interdependence, societies and nation-states connect through various routes (Baş, 2014). According to the interdependence argument, the state will employ force less frequently (Gürkaynak & Yalçın, 2009). The notion of interdependence, which suggests a framework that increases the circumstances for cooperation between nation-states, is widely acknowledged to have a role in advancing and fostering world peace.

Interdependence entered the international relations literature after the work of Robert O. Keohane and Joseph S. Nye Jr., *Power and Interdependence*, published in 1977. The interdependence theory has undergone revisions throughout time, much like other theories of international relations, and new underlying presumptions have been added. The international system took on a new dimension due to the fall of the Berlin Wall and the collapse of the Soviet Union. In terms of international relations, interdependence refers to the circumstances created by the mutual interaction of actors in various nations and between nations (Keohane & Nye, 1977). The degree to which an occurrence negatively affects the parties varies according to the interdependence approach since there isn't total equality on the parties' side.

Keohane and Nye argue that interdependence should not be viewed as a relationship in which absolute interests are mutually balanced because nations might aspire for total and relative benefit in their relationships. This approach, which affects the foreign policy strategies of states, is especially encountered in the economic field. In the interdependence theory, there is a cost for both parties (Magued, 2012). According to Keohane and Nye, the bargaining power of one party over the other depends on the sensitivity and degree of influence of the other party to this interdependence relationship. One may argue that the political ties between the two states are sometimes guided by the economic interdependence between the two nations. However, political and sociocultural support is required to ensure that the effects of economic processes continue. The inclination for nations to use force to achieve their goals, no matter the cost, is no longer valid in circumstances where doing so harms their interests. Interdependence has led

states to respect each other's security and cooperate in economic matters. Instead of behaving rashly, nations should forge friendships and alliances on both a bilateral and international level to ensure their sovereignty, economic progress, security, and stability (Demiryol, 2018).

On the other hand, interdependence also has negative effects, and small nations are more affected by this negative situation. If the interdependence between the parties is asymmetrical, the smaller parties may be unilaterally dependent on the other and become more open to political influence (Ari, 2002). Due to their interdependence, almost all nation-states are susceptible to outside influences. When the interdependence theory is considered in the context of the center-periphery, the periphery seems to be disadvantageous because the resources are at the initiative of the central state.

Keohane and Nye stress that interdependence does not necessarily result in cooperation or the abolition of power relations. Neoliberals contend that as the interdependence between nations has expanded, particularly in economic affairs, and as the economic dimension of power has grown in significance for states, efforts at cooperation in economic matters have become more prominent (Alagöz, 2016). When we examine the Türkiye-Russia connection, we can find examples of how economic reliance will result in a power relationship.

1.2 Energy Security

The International Energy Agency defines energy security as the availability of uninterrupted affordable energy resources (IEA, Energy security, 2019). However, energy security is a multidimensional phenomenon with different meanings for each country. There are two alternative approaches to energy security over energy and security ideas. The terms "availability, accessibility, and acceptability of energy supplies" are included in the energy-based definition of "energy security." Regarding energy security in terms of security, it is the physical defense against assaults of all sorts of facilities in energy exploration, development, generation, transmission, conversion, distribution, marketing, and consumption (Sevim, 2009).

Energy-producing and resource-owning nations look for various consumer markets to secure economic growth. On the other hand, energy-importing states aim at supply diversity. The National Energy Strategy in the USA states that protecting energy resources, particularly pipelines and transit routes, is necessary for energy security. Additionally, they contend that the balance of dependence should be maintained and that energy supplies should be varied based on the country (Uğurlu, 2009). While the European Union defines energy security, it "emphasizes the availability of a steady and plentiful supply of energy for EU people and the economy," highlighting the risk of energy reliance (European Commission, 2014).

By prioritizing energy demand security, nations like Russia seek to sell their energy resources at high prices to various consumers. On the other hand, nations like Germany strive to deliver resources constantly and at reasonable costs, independent of any one nation, within the context of a secure energy supply (Çelikpala, 2014). There are transit nations and importing and exporting nations, like Türkiye. On the other side, transit nations seek to host pipeline construction projects that are expected to flow through their nation. As a result of their interconnectedness, these three players are working to advance their national interests to the greatest extent possible (Yılmaz R. , 2011). For example, the gas supplied by Türkiye via the Western Line was cut off due to the disagreement between Ukraine and Russia over natural gas pricing, transit costs, and obligations (Erdil, 2009). So, it can be observed that all three actors have an impact on one another. The concept of energy security has expanded its sphere of influence with the effect of globalization. Energy security can now influence interstate relations.

2. HISTORICAL BACKGROUND OF TÜRKİYE-RUSSIA ENERGY RELATIONS

Looking at the history of relations between Türkiye and Russia, periods of tension, conflict, and cooperation can be seen. The relationship between Türkiye and Russia can be divided into roughly three periods; the competition in the Post-Cold War period and the period

between 2000-2008, when the competition was not beneficial to both sides, and there was a period when economic relations peaked. But this process has been continuing, and further research has been needed. The Post-2008 period, which we call a third period, can be called the years of cooperation. The two countries are rivals in almost every field in the first period. Although they could not improve their relations during the Cold War due to global political influences, in the first half of the 1990s, Ankara and Moscow pursued a relationship based on geopolitical competition. Türkiye has become an increasingly important country in regional energy projects in the 1990s (Güneş & Arslan, 2018).

The disintegration of the USSR and the independence of Kazakhstan, Turkmenistan and Azerbaijan in the Caspian Region and the desire of these countries to deliver their oil and natural gas resources to the world energy markets increased the strategic importance of Türkiye as a transit country (Erkan, 2015). This emerging role of Türkiye has led to competition between Türkiye and Russia and Iran, which are candidates to become transition countries in the region. After the 1998 economic crisis, the decrease in Russia's aggressive foreign policy resulted in the softening of delivering Ankara's threat perception towards Russia (Sarıaslan, 2019). The government changes experienced in both states in the 2000s positively affected the relations and a serious revival in their relations. The two countries have discovered the potential, especially in trade, tourism and energy, and have developed relations that benefit both sides by activating the necessary mechanisms. The first impressions of the interdependence strategy were taken by taking the first steps and benefiting from their relationships. During this period, they aimed to develop their economic and political relations (Çelikpala, 2015).

In Turkish-Russian relations, energy is an important factor that ensures cooperation considering mutual interests, and we will see that its importance will increase gradually in the coming periods. Especially after the energy protocols were signed in 2009, cooperation was achieved in important projects (Dünya, 2009).

In general, there is an asymmetrical interdependence in the Türkiye-Russia relations. Although Türkiye is dependent on Russia in terms of energy, Russia has become dependent on Türkiye in strategic areas such as textiles and food. On the other hand, there are conflicts and cooperation in bilateral relations. While there were problems such as the annexation of Crimea, the aircraft crisis and Syria in the political field, cooperation was achieved in projects such as the TurkStream Natural Gas Pipeline and the Akkuyu Nuclear Project. The fact that political disagreements do not harm economic relations is based on the interdependence theory. Türkiye and Russia will be able to manage their relations through interdependence by effectively using the channels of dialogue and focusing on regional cooperation (Cankara, 2017).

2.1 Russia's Energy Strategy

After the economic crisis in 1998, Russia concentrated on the field of energy to gain economic strength. Since 2000, it has been achieving economic development with the Putin government in the field of energy (Sariaslan, 2019). It has been an important energy actor in Europe and the Eurasian region. Developing in the field of energy, Russia gained power in economic and political terms and found the key to being a hegemonic power with the help of energy. It uses its energy resources and pipelines as a weapon in its foreign policy, aiming to re-establish hegemony in the Caspian Basin, Central Asia and the Caucasus (Güneş & Arslan, 2018).

Although Russia is not a member of OPEC, it has the world's largest natural gas reserves, the world's second-largest coal reserves and the eighth-largest oil reserves with its rich energy resources. In addition, Russia is the world's largest natural gas exporter, second-largest oil exporter and third-largest energy consumer (Country Analysis Brief: Russia, 2017). According to EIA (2018), Russia's total energy production ranks third globally. Its natural gas production was second in the world, with 25,325 quadrillion cubic meters in 2018. In the transportation of natural gas, Russia, a significant player, utilized it as a transit nation with Finland, Moldova, Ukraine, and Poland. It aspires to neutralize or merge its competitors (Turkmenistan, Kazakhstan, and Uzbekistan). This is demonstrated by the natural gas agreement signed with Turkmenistan in 2007. Russia has taken important steps towards becoming a hegemon power

by using it to become an important actor in the field of natural gas to address economic problems and recover its “backyard” (Akgül, 2007).

The energy strategies aimed by Russia are as follows:

- Maintaining its monopoly position on energy supply in Central Asia
- Blocking alternative pipelines in Central Asia that are not under their control
- Transporting energy to importing countries in Europe with new pipelines without the need for transit countries
- Purchasing of distribution systems in Europe by Gazprom, blocking alternative projects to Russian projects
- Gazprom maintaining a monopoly position in Russia
- Developing policies to prevent foreign natural gas producers (Qatar, Iran) from entering the European market
- Affecting the natural gas sales policies of the producers by purchasing the shares of foreign natural gas producers (IEA, 2010)

Russian society is directly impacted by the energy industry, according to the 2030 Energy Strategy Document. The attrition rates of the fixed assets in the energy industry and the low investments made in this sector are the key issues with energy security (Tiftikçigil & Yesevi, 2014). The most important reason for Russia's demand to export natural gas to Europe without being a transit country is the political crisis it has experienced. As a result of the problems with Ukraine in 2006 and 2009, Moldova in 2006, and Belarus in 2007, a plan to remove transit nations was made. Due to its hostile ties with the United States and Europe, the Russian energy industry has developed strategic plans in the Asian energy market. Asia had a 27 percent influence on Russia's oil exports in 2015. Its share in Russian exports will increase to 40% by 2025 (IEA, 2022). This situation reduces Russia's need for the European market and causes

increasing economic relations with Asian countries. Russia has taken over the energy control of Asian countries and has also connected Europe to itself through various pipelines (Bayraç H. N., 2009).

Despite these improvements, Russia's economy diversified away from oil and natural gas in 2019 due to a stagnating economy, inefficient energy industry, and increased international isolation. Russia's technical sanctions and inadequacy demonstrate that the country's development and competitiveness will be forced in the following years.

2.2 Türkiye's Energy Strategy

Türkiye is located in a region where 71.8% of the world's proven gas reserves and 72.7% of proven oil reserves are located, especially in the Middle East and Caspian Basin (Türkiye'nin Enerji Stratejisi, 2008). Türkiye is an externally dependent country given its existing energy resources and has to meet its growing energy needs. This situation has made Türkiye dependent on foreign countries, especially in oil and natural gas fields. Although it meets 30% of its energy needs, it imports the rest. Türkiye's geopolitical location and renewable energy resources provide advantages in energy strategies. Considering Türkiye's position with important suppliers such as the Middle East, Caucasus-Caspian and Russia, its role in the energy sector has increased with its projects. The table below shows that Türkiye relies heavily on natural gas imports and Russia is the primary source of imports. According to the Türkiye 2021 reports, 75.97% of its imports are pipeline gas (Epdk, 2021).

Tablo 1 Natural Gas Import Quantities for the Years 2011-2021 (Million Sm³)

Country	Russia		Iran		Azerbaijan		Algeria		Nigeria		Others**		Total	Percentage Change Compared to the Previous Year
Years	Quantity	Share (%)	Quantity	Share (%)	Quantity	Share (%)	Quantity	Share (%)	Quantity	Share (%)	Quantity	Share (%)	Quantity	
2011	25.406	57,91	8.190	18,67	3.806	8,67	4.156	9,47	1.248	2,84	1.069	2,44	43.874	15,35
2012	26.491	57,69	8.215	17,89	3.354	7,3	4.076	8,88	1.322	2,88	2.464	5,37	45.922	4,67

2013	26.212	57,9	8.730	19,28	4.245	9,38	3.917	8,65	1.274	2,81	892	1,97	45.26 9	-1,42
2014	26.975	54,7 6	8.932	18,13	6.074	12,33	4.179	8,48	1.414	2,87	1.689	3,43	49.26 2	8,82
2015	26.783	55,3 1	7.826	16,16	6.169	12,74	3.916	8,09	1.240	2,56	2.493	5,15	48.42 7	-1,7
2016	24.540	52,9 4	7.705	16,62	6.480	13,98	4.284	9,24	1.220	2,63	2.124	4,58	46.35 2	-4,28
2017	28.690	51,9 3	9.251	16,74	6.544	11,85	4.617	8,36	1.344	2,43	4.804	8,7	55.25 0	19,2
2018	23.642	47,0 2	7.863	15,64	7.527	14,97	4.521	8,99	1.668	3,32	5.061	10,21	50.28 2	-8,99
2019	15.196	33,6 1	7.736	17,11	9.585	21,2	5.678	12,56	1.756	3,88	5.260	11,63	45.21 1	-10,08
2020	16.166	33,5 9	5.321	11,06	11.548	24,00	5.573	11,58	1.358	2,82	8.159	16,95	48.12 6	6,45
2021	26.343	44,8 7	9.434	16,07	7.986	13,60	5.987	10,20	1.249	2,13	7.706	13,13	58.70 4	21,98

(Epdk, 2021)

Türkiye is heavily reliant on imported natural gas, as shown in Table 1, and Russia is the primary source of imports. It follows a policy based on the strategy of interdependence arising from a win-win relationship based on energy security. Türkiye aims to provide energy security by diversifying its energy and resources given its transit country location. Türkiye's main objectives are to provide uninterrupted, reliable, timely and clean energy, but we see that this political understanding is not enough with the chaos and excessive energy cost. It has been trying to ensure energy security with natural gas pipeline projects, which it has concentrated on recently. These projects are as follows:

- Kirkuk-Ceyhan Oil Pipeline
- Baku-Tbilisi-Ceyhan Oil Pipeline
- Trans-Anatolian Natural Gas Pipeline (TANAP)
- TurkStream Natural Gas Pipeline
- Russia-Türkiye natural gas pipeline project (West line)
- Blue Stream Natural Gas Pipeline
- Eastern Anatolia natural gas pipeline (Iran-Türkiye)

- Baku-Tbilisi-Erzurum natural gas pipeline
- Türkiye - Greece natural gas interconnection (T.C. Enerji ve Tabii Kaynaklar Bakanlığı, 2022)

Based on the above-mentioned pipelines, Türkiye's energy resource diversity has increased. With these projects, Russia's share of natural gas imports decreased by 34% in 2019. With these investments, it has had the chance to supply natural gas cheaply and reliably. In addition, 5.8 billion cubic meters of natural gas were transported from Russia to Europe with the newly opened TurkStream natural gas pipeline (Morrow, 2021). With the decrease in Türkiye's natural gas consumption in 2018-2019, there was a decrease in the amount of gas purchased from Russia and Iran. In addition, with the newly discovered natural gas reserves, natural gas production in 2019 was at 474 bcm (Epdk, 2019). A natural gas reserve of 320 bcm was obtained by the Fatih drilling ship in the Black Sea, and in 2020, this level increased to 405 bcm with the natural gas reserves discovered in the Tuna-1 Region. These recent developments have negatively affected relations with Russia (Bal, 2020).

When the 2023 targets of Türkiye are examined, positive developments are observed. Within the framework of these purposes, the Ministry of Energy and Natural Resources (MENR) determines Türkiye's energy strategy; "The country's energy needs are met in a timely, adequate, reliable manner, in a way that will realize the intended economic growth, support and guide social development moves, and taking into account the economic conditions and environmental impact." In goals that attach importance to national energy policies, oil-natural gas exploration activities and pipeline projects are proof of positive developments. Until 2023, Türkiye will continue its natural gas and oil exploration by conducting 26 offshore drillings (Kavaz, 2019). In terms of energy efficiency, it aims to save 30 billion dollars in 2033 by investing over 10 billion dollars until 2023 (Yılankıran & Doğan, 2020).

In conclusion, the primary goal of Türkiye's plan is to lessen dependence on any provider by importing gas from various sources. It may be concluded that Türkiye has a steady and consistent approach toward becoming a hub for energy. Regarding energy security, instability in the region's countries makes Türkiye stand out as a strong strategic partner. TurkStream will also assist Türkiye in achieving its objective of developing into a significant East-West gas "bridge." As a crucial regional energy hub, Türkiye will be able to supply gas to the rest of south-eastern Europe.

2.3 The Role of Energy in Türkiye-Russia Relations

Energy has been the most important actor in Türkiye and Russia's commercial and economic relations. Türkiye's rapidly increasing energy needs and Russia's rich energy resources have played a leading role in developing bilateral relations. Energy relations between the two countries started in the 1980s, and the first natural gas agreement was signed on September 18, 1984. The liberation and internationalization efforts of the Turkish economy have been effective. The first natural gas flow took place in 1987 via the Transbalkan pipeline through Ukraine, Moldova, Romania and Bulgaria. After the collapse of the Soviet Union in 1991, their bilateral relations started to develop. A closer relationship between Russia and Turkey has also been facilitated by the US and EU's hostility against Russia and their opposition to the South Stream natural gas pipeline project (Balta & Özkan, 2016).

With this project, based on the obligation of "Buy or Pay", the condition for Türkiye was to purchase gas at the determined rate for 25 years, and Russia has provided a partner with high potential (Moiseyenko, 2009). The European Commission blocked the South Stream project on the grounds that it did not adhere to EU ownership or third-party pipeline access regulations. The South Stream's construction in Bulgaria was put on hold by a demand from the EU (Yesevi, 2018). On the other hand, a competitive environment prevailed from time to time in the turbulent relations between Türkiye and Russia. The project, supported by the USA and the EU, which proposed the Baku-Tbilisi-Erzurum pipeline project, created a competitive environment with Russia. Against Russia, which wanted to maintain its dominance over the old pipelines, Türkiye has participated in the BTC project, which aims to have a say in the region with the support of

the USA and to bypass Moscow. This project aims to deliver Azerbaijani oil to Türkiye via Georgia. Russia was also concerned about the long-term connection of Kazakhstan oil and Turkmenistan natural gas to BTC through the pipeline to be passed under the Caspian Sea and the dependence of these two countries on themselves in terms of delivering energy resources to international markets. For these reasons, blocking the BTC Oil Pipeline has been vital for Moscow, and the Kremlin has followed a decisive policy (Moiseyenko, 2009). In 2006, the BTE project was completed, and Türkiye became a port exporting Caspian oil to the world market.

On the other hand, Russia has developed the Blue Stream project to protect its energy policies and national interests. The Blue Stream project, signed in 1997, has gained importance since 2005. The Blue Stream project has made Türkiye an important transport country reaching the west. It is a natural gas pipeline between Türkiye and Russia without a transit country. The Blue Stream project has been linked to the approval of Russia to prevent Türkiye from selling natural gas to EU countries. Thus, Türkiye's commitment to Russia increased and prevented it from diversifying its energy routes (Aslan & Işılak, 2020). Other competitive projects are the Nabucco Project, supported by the USA and the EU, and the South stream project, developed by Russia as an alternative to this project. However, it did not happen because the EU blocked the project, which was costly for Russia (Telli, 2017).

Another of Türkiye's efforts to search for alternative gas supply countries and reduce its dependence on Russia is the Baku-Tbilisi-Erzurum pipeline project, carried out in 2007. With this project, Türkiye became the third country in natural gas supply to Azerbaijan, after Russia and Iran. With the Türkiye-Greece pipeline developed in this period, Azerbaijani gas began to be supplied to Greece. The Trans Anatolian Natural Gas Pipeline (TANAP) project, which will ensure the supply of Azerbaijani natural gas to EU countries, was put into service in 2018. With this project, the influence of Russia in the Caspian region will be eliminated, and Türkiye's role as a transit country will increase (Çelikipala, 2015). Despite all these developments, the relationship between Türkiye and Russia continues positively. The TurkStream project was developed as an alternative to the Sunfire project, showing that Russia also needs Türkiye. Russia has tried to find alternative solutions to the US and EU embargoes. It aims to meet the

energy needs of Türkiye and EU countries through the TurkStream. It is an important step towards becoming an energy center. This project, which will disable Ukraine, has prevented Türkiye's natural gas from being interrupted. Although the TurkStream project was interrupted by the aircraft crisis with Russia in 2015, the continuation of the projects after the normalization process proves that the relations are based on mutual dependency (Kazdal, 2018).

i. The Russia-Türkiye Natural Gas Pipeline (West Line)

The West Line Project is an important beginning for energy exchange between Türkiye and Russia. An Intergovernmental Agreement concerning the distribution of natural gas was signed between the governments of the Republic of Türkiye and the former Soviet Union on September 18, 1984, as a consequence of the study of alternative energy resources. In this regard, BOTAŞ and SoyuzGazExport signed a 25-year Natural Gas Purchase-Sale Agreement on February 14, 1986, in Ankara. The west line route is a way to reach Türkiye passing through Russia, Ukraine, Romania and Bulgaria (Enerji ve Tabii Kaynaklar Bakanlığı, T.C., 2019).

The imports of natural gas began in 1987 progressively and reached a maximum of 6 billion m³/year in 1993. The 845 km long Russia-Türkiye pipeline enters Türkiye in Malkoçlar on the Bulgarian border, then takes a different route through Hamitabat, Ambarlı, Istanbul, Izmir, Bursa, and Eskişehir before arriving in Ankara. A capacity of 14 billion m³ per year has been attained by this project (Koutroumpis, 2019).

To guarantee supply continuity for the West Line Project, Ukraine creates various drawbacks as a transit nation. Political problems between Ukraine and Russia caused interruptions in the Marmara region. This situation threatens Türkiye's energy security. The imbalance of Türkiye's and Russia's interdependencies has been harmed by the Western Line Project (Sarıkaya, 2019). Russia stopped exporting gas to Türkiye through the Western Line when the TurkStream natural gas pipeline project was implemented (Abay, 2017).

ii. The Blue Stream Natural Gas Pipeline

Within the scope of the 25-year Natural Gas Purchase and Sale Agreement signed between BOTAŞ and Gazexport on December 15, 1997, natural gas reaches Türkiye from the Russian

Federation via a line through the Black Sea. According to the agreement, 16 billion m³ of natural gas is supplied to Türkiye annually (Blue Stream). The purpose of this pipeline is Russia's desire to increase its gas lines and prevent Türkiye from making energy agreements with third countries. The Blue Stream project started gas distribution after the protocol was signed in 2002 (Aslan & Işılak, 2020).

The implementation of the project strengthened the economic and political relations between Türkiye and Russia, and Türkiye became one of Russia's most important energy partners. With the Blue Stream project, Russia has once again had the chance to have a say in Eurasian geography. On the other hand, the USA, aiming to reduce its energy dependence on Russia, saw the project as a threat. Although Türkiye welcomed this project, it caused political restrictions. The most obvious reason for this situation is that Türkiye cannot sell natural gas to third countries without the permission of Russia. For this reason, Türkiye has decided to reconsider its relations. In 2006, Russia proposed the Blue Stream-2 project to continue this project, but since no progress was made, the South Stream project emerged (Özsağlam, 2013).

iii. The South Stream Project

The South Stream project, which was developed as a rival to Nabucco, forced Blue Stream-2 into the background. Considering that South Stream was a substitute for Blue Stream-2 as well as Nabucco (Kemaloğlu, 2009). This project aims to supply natural gas to Central and Southern Europe via Bulgaria. The pipeline, starting from the Beregovaya Terminal, the starting point of the Blue Stream, would be 2000 meters deep in the Black Sea, approximately 900 km long and reach Bulgaria. Here it would be divided into two; the northern line would reach Europe via Romania and Hungary, and the southern line would reach Italy via Greece (Yesevi & Tiftikçigil, 2015). The South Stream was a component of a plan to isolate and put political pressure on Ukraine using gas supply and pricing, which is one reason for that choice from a geopolitical perspective. President Putin claimed that the only viable choice was to break this transit reliance since it would never be feasible to forge political and economic ties with Kyiv that would permit secure gas delivery to Europe through Ukraine (Boersma, 2014). This project aims to increase its influence, especially in southeastern Europe, and to play an active role in the Balkans. The annual carrying capacity of the project would be 63 billion cubic meters.

Although Türkiye approved the project in 2011, Putin announced the cancellation of the project in 2014. The economic crises and political problems experienced by Russia were effective in the project's cancellation. Crises with Ukraine caused relations with the EU to deteriorate and prevented the realization of the project (Sarıkaya, 2019).

Nye and Keohane use commerce, personal contact, and communication to illustrate the idea of intersocietal interaction. The building of the South Stream pipeline has not been supported by the partnership between the EU, an international entity, and the Russian Federation. The pipeline development has received backing from EU member states, although the EU has voiced opposition to it (Yesevi, 2018). Except for nations that stood to gain from their transit roles, such as Bulgaria, Serbia, and Hungary, the European perception of the South Stream had generally been negative. This was either due to the perception that the project would undermine supply diversification and strengthen Gazprom's market dominance or to a general political hostility towards Russia and Gazprom (Hassanzadeh & Dickel, 2014). Following the cancellation of South the Stream, Russia declared that it would be replaced by pipelines with an equivalent capacity to transport gas straight to Türkiye across the Black Sea. In addition to ending the South Stream, the Ukraine crisis has strengthened TurkStream and made Türkiye a viable option as an energy transit country. TurkStream can recognize that Russia plans to supply Europe's 25 to 30 percent gas requirements by 2030 alone (IEA, 2021). This would make TurkStream a lucrative alternative to South Stream for Russia. The European Commission stopped it because it violated the Third Energy Package, and the intergovernmental agreements signed between Russia and various European Union member countries did not comply with the laws of the European Union. The main reason for this situation was the annexation of Crimea by Russia and the sanctions imposed by the EU. In 2014, Russia announced that it would supply natural gas through Türkiye (Sıvış, 2019).

iv. The TurkStream Natural Gas Pipeline

One of Russia and Türkiye's most significant collaborations is the TurkStream Natural Gas Pipeline. Russia chose to divert the pipeline to Türkiye under the new project known as the "TurkStream" after the South Stream project was scrapped. The EU and US put a trade embargo on Russia after the conflict in Ukraine in 2013, which compelled the Russians to make this choice. The TurkStream project was first brought to the agenda during Putin's visit to Türkiye in 2014, and an agreement was signed in 2016. The project was built starting from Russia, passing under the Black Sea and reaching the land in the Thrace region. With the TurkStream, Russia aimed to bypass Ukraine and realize gas supply to Europe through Türkiye. The biggest effects of the emergence of the project are the sanctions imposed by the EU and the cancellation of the South Stream project. Replacing the high-cost South Stream project, the TurkStream project will reduce the cost of Russia. President Putin and President Recep Tayyip Erdoğan officially opened the pipeline on January 8, 2020 (Sabah, 2020). The TurkStream has an annual transport capacity of 31.5 billion cubic meters and two offshore lines (TurkStream). It is planned to supply gas to Türkiye with the first line and consumers in South and Southeast Europe with the second line. Türkiye is expected to receive 15.75 trillion cubic meters of natural gas annually from this project, with the remaining 15.75 trillion cubic meters of gas being shipped to Europe (TBMM, Sıra Sayı 441, 2016). The Thrace will become an energy hub with TANAP and TurkStream pipelines. With this pipeline, it has been decided that Türkiye will use 14 billion cubic meters of natural gas to be transported. With the TurkStream pipeline, Russian natural gas will be transported not only to the south of Europe but also to the east. In this context, it plays an important role in ensuring the security of supply for Türkiye, Russia, and the EU. It has effectively met Türkiye's increasing energy need and played an effective role in foreign policy. The amount of natural gas consumed by Türkiye in 2019 was 44,9 billion cubic meters (Kaya, 2020). Considering the consumption amount, it is clear that Türkiye will greatly contribute to the natural gas demand. It is also important that the supply of energy is safe and affordable (Sivış, 2019).

In addition to its goal of becoming an energy hub, it is also an important step towards becoming a commercial hub. Türkiye also aims to be a safe harbor with this pipeline. However,

after the crisis between Russia and Ukraine, Europe does not look positively towards the energy resources of which Russia is at the center. The tensions experienced after Türkiye shot down the Russian warplane justified Europe's concerns. However, the economic and political relations interrupted by the plane crisis were revived with the meeting of the presidents a year later, and it was announced that the first line of TurkStream would be built in 2019. The Turkish Ministry of Energy announced that there had been natural gas cuts from the western line to Türkiye due to the recent disagreements between Russia and Ukraine. Third parties will cause no natural gas interruptions with the TurkStream pipeline. It will enable Türkiye to benefit from competitive prices according to its geostrategic position. Türkiye will be the side that will benefit from the tensions between the West and Russia (Güneş & Arslan, 2018).

According to Russia, its natural gas strategy is essential to preserving its hegemony in the global energy market and the area. The Russian economy has seen significant losses due to embargoes put in place by the EU and the U.S. in the wake of the 2013 Ukraine crisis. The EU's initiatives to satisfy its energy demands from various sources and ways have bothered Russia, even though the EU sourced the majority of its energy requirements from Russia. The TurkStream natural gas pipeline has become a new energy route for Russia (Kanapiyanova, 2018).

When the current Turkish agreement is examined, some articles prevent Türkiye from becoming an energy center. The building of the whole pipeline project is being handled by three companies: the onshore section 1 company, the onshore section 2 company, and the offshore section company. Designing, building, operating, and owning the onshore section 1 are the legal responsibilities of the Turkish participant of the onshore section 1 corporation (BOTAŞ-Petroleum Pipeline Company and its affiliate). BOTAŞ holds a 100% share in the charter's whole capital. The participants possess fifty percent (50%) of the charter capital of the onshore section 2 corporation (Turkish and Russian) (Kesikli, 2020). However, for gas transmission over the TurkStream II route, Gazprom is exempt from requiring permission, approval, or a license

from Türkiye (TBMM, 2016). Türkiye will continue to be a transit nation due to this arrangement (Kesikli, 2020).

While Türkiye is the main proponent of the TurkStream pipeline, it is important to highlight the nations that the project would directly or indirectly affect. Greece, Macedonia, Serbia, Bulgaria, and Italy are the destinations for the proposed transportation of natural gas. Greece will assume a significant role in energy transfer and see an increase in its strategic importance due to this natural gas pipeline (Gören & Çelik, 2019). Greece's approach to Russia in 2015, when the EU enforced sanctions, drew harsh criticism from the west. After the devastating consequences of the 2008 financial crisis, Greece's participation in the TurkStream project represented a fantastic opportunity (Erdeğer, 2019). However, it is unknown what political impact this initiative, which Russia is leading, would eventually have on Greece. Balkan nations will discover a significant alternative to the rising energy demands included in this initiative, and the non-EU countries' accession processes will quicken (Gotev, 2015).

Türkiye is an important transit country with the TurkStream pipeline. By displacing the Western Line (Ukraine, Romania, and Bulgaria) utilized in natural gas transmission between Türkiye and Russia at the outset of this position, it will be possible to deliver direct gas supply from Russia without encountering the transit country security concern. A gas transit location extending to Romania, Hungary and Austria, especially Greece and Bulgaria, will be obtained (Yılmaz A. , 2019). The TurkStream Pipeline, constructed using modern technology, will serve as a crucial distribution network for Türkiye and Europe. All parties involved with the TurkStream Project view it as crucial as these actors depend on one another (Gören & Çelik, 2019).

3. TÜRKİYE- RUSSIA ECONOMIC AND POLITICAL RELATIONS

Politics and economy are important factors affecting each other in the relations between the two countries. Political instability affects the country's economy and cooperation. When we look at the Türkiye-Russia relationship, although there are political disagreements, they have separated their economic and political relations from each other. Political disagreements did not hinder cooperation on economic, cultural and security issues. Both nations' economic and political stances must be examined to comprehend the levels of dependency, collaboration, and conflict between the Russian Federation and Türkiye regarding the energy markets as an economic problem.

3.1. Economic Relations between Türkiye and Russia

According to Robert Keohane and Joseph Nye, the cost component needs to be considered for international relations to be managed within the context of interdependence. When examined from the perspective of interdependence, the economy plays an important role in Türkiye-Russia relations (Keohane & Nye, 2001). It has been noted that Türkiye and Russia have established a relationship built on a multifaceted economic collaboration spanning commerce, energy, and the defense sector.

The economic relations between Türkiye and Russia started for the first time in 1984, and a serious revival has taken place since 2000. According to the natural gas agreement signed in 1984, Türkiye was committed to importing a certain volume of natural gas at a free exchange rate every year, and the Russian side was undertaking to import goods from Türkiye. Additionally, Türkiye began receiving 6 billion cubic meters of natural gas annually due to this arrangement, with the pipeline running through Ukraine, Romania, and Bulgaria (Tokgöz, 2011). In 1991, a contract for economic and commercial cooperation was signed with the Russian Federation, and a trading system was developed that lasted until the 2000s. Türkiye

imports natural resources, raw materials, intermediate goods, and energy from Russia. It also exports consumer goods to Russia (Aksel, 2019).

By displaying an image of shared affection and confidence, Vladimir Putin's official inauguration as President of Russia in 2000 positively affected commercial relations between Russia and Türkiye. The volume of bilateral commerce has significantly expanded under Putin. The major drivers of the volume growth of bilateral commerce between Türkiye and Russia were Türkiye's growing reliance on Russian gas and oil, the expansion of its tourist industry and increased investment (Özbay, 2011).

The political ties that improved in the 2000s were also mirrored in the economy, and the amount of commerce from 2001 to 2008 reached 38 billion dollars. It has been noted that since 2001, commerce between Türkiye and Russia has risen five times. At the same time, from 2001 to 2008, Russia's part in Türkiye's overall foreign trade volume increased to 11.33 percent (Özkurt, 2019). It was intended to reach a total trade volume of \$100 billion between Türkiye and Russia. However, the Five-Day War in Georgia in 2008 and the global economic crisis prevented these plans from materializing (Özbay, Kolobov, & Kornilov, Çağdaş Türk Rus İlişkileri / Sorunlar ve İşbirliği Alanları 1992-2005, 2006). Türkiye's export to Russia declined by more than 50% in 2009 to a total of \$3 billion, while Türkiye's imports from Russia fell significantly to \$19.5 billion. Even yet, both nations recognized the other's significance to the region's economy, and as their bilateral commerce had been centered on strategic products like energy, weapons, food, and agriculture, they were eager to resume cooperation despite political differences (Yanık, 2007).

The pipeline of the Blue Stream Agreement, which passes through the Black Sea, was put into practice in 2005. The "Blue Stream Agreement" is crucial for advancing a cooperative strategy rather than a competitive one between the two nations on the energy-related "Baku-Tbilisi-Ceyhan" oil pipeline. After this agreement, a new era was started in economic, technical and financial relations. Mutual economic links grew after this pact, effectively making the two nations "dependent" on one another. Studies in industries like commerce, tourism, finance, transportation, contracts, and direct investment have become more intense (Aksel, 2019).

According to TUIK 2015 data, economic relations with Russia have increased since 2005. Russia took the lead in Türkiye's import items with a figure of 25 billion dollars in 2014. Establishing the High-Level Cooperation Council (HLCC) in 2010 was the most significant turning point in the economic ties between Türkiye and Russia. The Intergovernmental Commission for Trade and Economic Cooperation between Türkiye and Russia continues its operations under this council. When the years 2004 to 2015 are considered, there has been a rise in economic cooperation between the two administrations. In 2015, Türkiye produced 0.38 billion cubic meters of natural gas while importing 26.78 billion cubic meters from Russia. In the same year, Türkiye imported 48.43 bcm of natural gas overall (Winrow, 2017). However, Türkiye's rising domestic energy demand has increased the country's need for Russian gas. However, the aircraft incident in 2015 seriously harmed Türkiye-Russian economic connections, particularly in the tourist sector, and it was then that the vulnerability of such partnerships in the face of political divergences was exposed (Yeşilot & Özdemir, 2016).

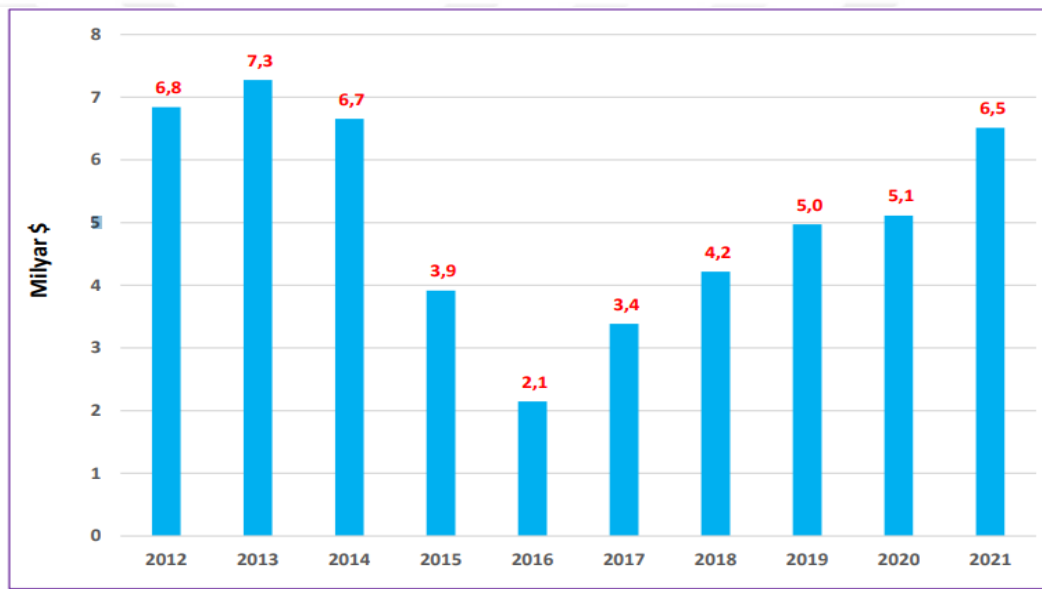
According to TUIK's February 2021 data, Russia ranks second in Türkiye's imports with 3 billion 534 million dollars (TUIK, 2021). Russia realized 2.2 percent of Türkiye's total exports in 2019. In total exports, the trade of the two countries accounts for 7 percent of Türkiye's total trade volume. The two countries want to reach a trading volume of 100 billion dollars. Considering their geographical location, realizing the trade volume target of 100 billion dollars seems possible. The closest approach to this target was 33.3 billion dollars in 2012. But in line with this goal, the balance will favor Russia (T.C. Ticaret Bakanlığı, 2019).

Despite the asymmetrical partnership, Russia considers Türkiye important with its interests in energy lines and as an investment center. When we look at it from the perspective of Türkiye, Erdoğan expressed the importance of Russia in the Turkish economy: "We have a nuclear energy issue, and the numbers are very serious there (Özdemir, 2020).

While the trade volume of Russia was 26.5 billion dollars in 2019, it decreased to 20.8 billion dollars in 2020 with the effect of the Coronavirus pandemic. During this period, Russia's share of energy exports in total exports fell below the 50 percent mark for the first time in 20

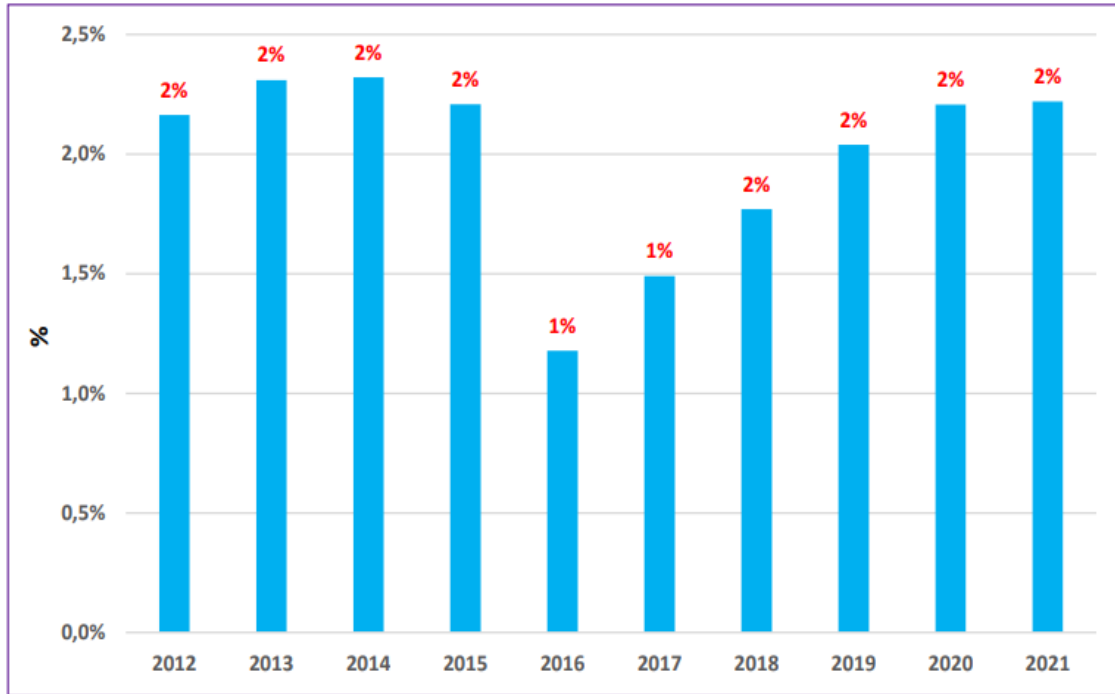
years. As a result of the slowdown in industry and trade due to the pandemic, oil demand around the world hit bottom. According to official data, it was learned that the trade volume between the two countries decreased by 20 percent in 2020. In total foreign trade, Russia's exports to Türkiye were announced as 15.7 billion dollars and imports from Türkiye as 5.1 billion dollars (TürkRus, 2022).

Table 2 Russia's imports from Türkiye (TİM, 2022)



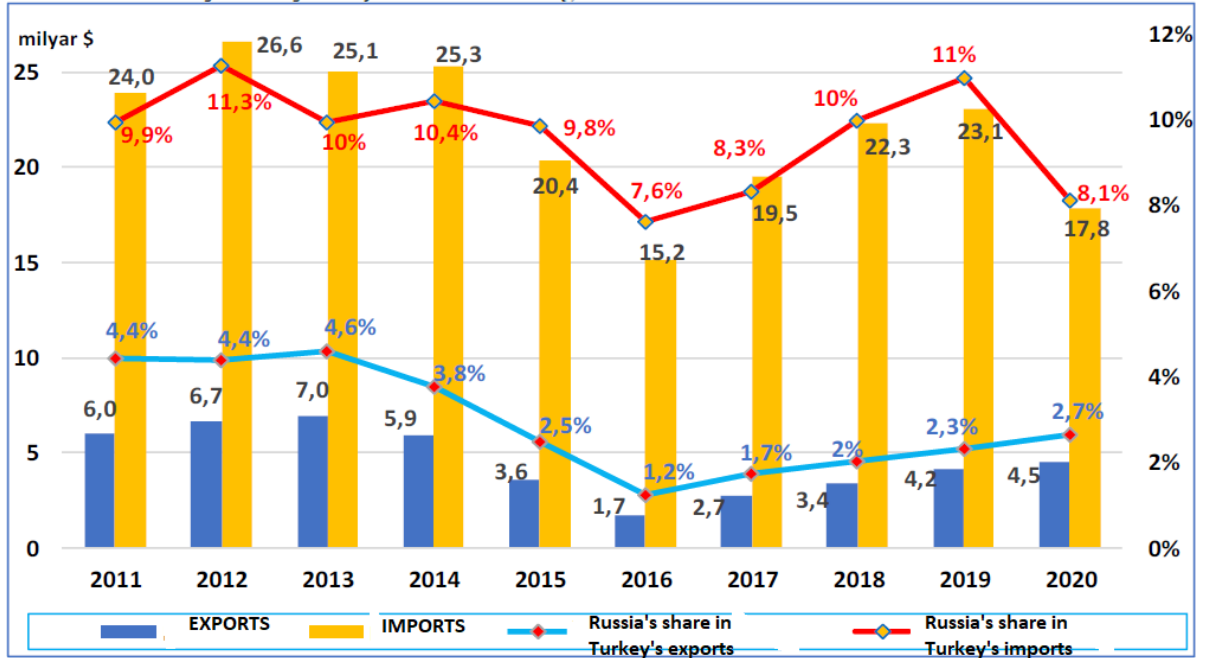
As can be seen in Table 2, Türkiye's exports to Russia have been following an increasing trend recently. Türkiye's international trade with the Russian Federation fell by 47.2% between 2013 and 2016, totaling almost \$15 billion. Türkiye's imports fell by 40% during the same period, despite a 75% decline in exports. There has been a 15.4% decline between 2013 and 2016 (Sakal, 2021).

Table 3 Türkiye's Share in Russia Imports (TİM, 2022)



According to Table 4, Türkiye's exports to Russia were over \$7 billion in 2013, placing it in the fourth position. It went down to \$4.2 billion in 2019, placing it tenth and increased to \$4.5 billion in 2020, with a rise of 8.9%. Türkiye's biggest exports to Russia include fresh produce, such as citrus fruits, fresh grapes, and tomatoes, as well as machinery, parts for land vehicles, clothes, and accessories (T.C. Ticaret Bakanlığı, 2021). The primary items that Türkiye imports from Russia include oil and its byproducts, natural gas, hard coal, iron and steel goods, raw aluminum, and various cereal goods. Turkish Statistical Institute figures show that the Russian Federation held the largest import share in Türkiye between January and June (TUIK, 2022).

Table 4 Türkiye-Russia Foreign Trade Indicators (TÜİK, 2022)



Natural gas is the most important factor in the economic relationship between Türkiye and Russia. Türkiye's domestic energy resources are limited, and most of its natural gas imports come from Russia. The agreement made in the energy field in 1984 is important in its economic relations. One of the projects realized after this agreement, the Blue Stream natural gas pipeline, caused an increase in the volume of natural gas purchased from Russia. With the TurkStream agreement, another important natural gas pipeline, Türkiye not only imports natural gas from Russia but also became a transit country on the transition to Europe. In this context, Türkiye is an important step towards its goal of becoming an energy center. Long-term programming of economic cooperation policies in the context of geo-economic conditions is important because interdependence is likely to turn against Türkiye (Kakışım, Türkiye'nin Bölgesel Doğal Gaz Merkezine Dönüşebilme Potansiyeli, 2020).

According to the Energy Market Regulatory Authority's "Natural Gas Market Sector Report" for January 2021, pipelines carried roughly 4 billion 508 million cubic meters of gas, while LNG facilities carried 1 billion 585 million cubic meters. Russia's largest natural gas import was 2 billion 675 million cubic meters. Türkiye's natural gas usage fell by 2.8 percent over this time, to 6 billion 335 million cubic meters (Sputnik Türkiye, 2021)

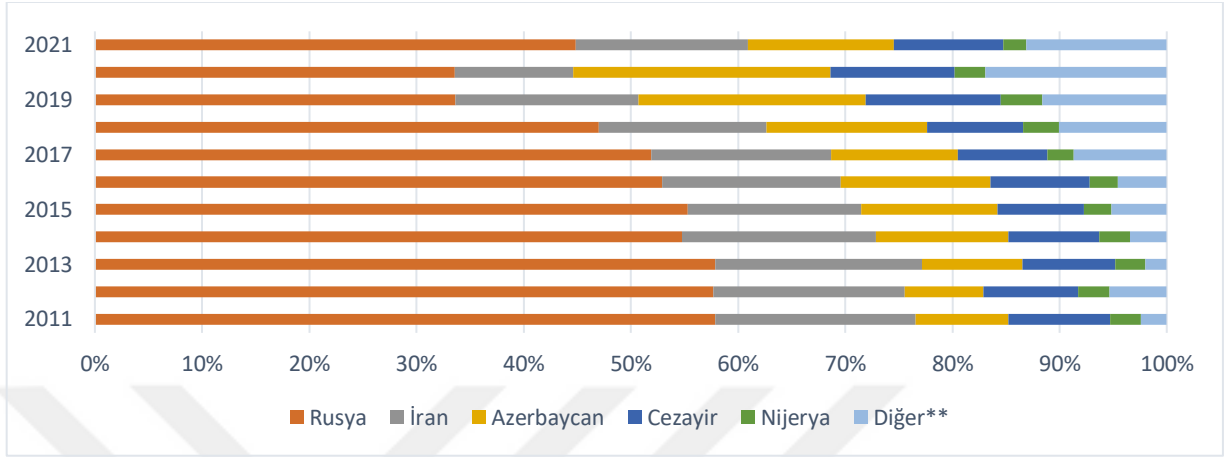


Table 5 Change in Shares of Import Resources for the Years 2011-2021 (%)

Import amounts of companies that imported natural gas between 2013-2021 are shown in Table 1, according to the type of natural gas. The amount of pipeline gas imported in 2021 increased compared to that of pipeline gas imported in 2020, while the ratio of LNG imports to total imports decreased. With a share of 44.87 percent, the points of entry for natural gas supplied from the Russian Federation are in the lead but have risen since 2020 (Epdk, 2021). With 5 billion 92 million dollars in imports, the Russian Federation reached the top position in 2022 (Milliyet, 2022).

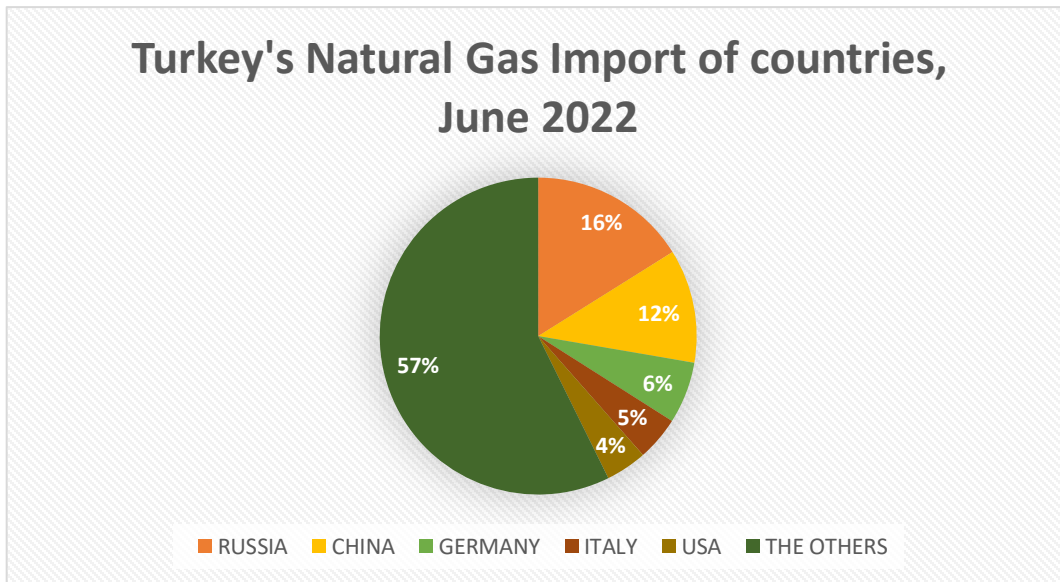


Table 6 Imports of Countries, June 2022 (TUIK, Dış Ticaret İstatistikleri, 2022)

Table 7 Türkiye Import Quantities of Natural Gas Imported by Companies (Million Sm3) and Shares (%) Between 2013-2021 (TÜİK, 2022)

GAS TYPE	GAS PIPELINE		LNG		TOTAL
Years	Amount	Share (%)	Amount	Share (%)	Amount
2013	39.419,44	87,08	5.849,54	12,92	45.268,98
2014	41.981,41	85,22	7.280,87	14,78	49.262,28
2015	40.778,11	84,21	7.648,96	15,79	48.427,08
2016	38.724,48	83,54	7.627,68	16,46	46.352,17
2017	44.484,67	80,52	10.765,28	19,48	55.249,95
2018	39.032,13	77,63	11.249,92	22,37	50.282,05
2019	32.517,40	71,92	12.694,07	28,08	45.211,47
2020	33.047,16	68,67	15.078,35	31,33	48.125,51
2021	44.596,57	75,97	14.107,36	24,03	58.703,93

According to the kind of natural gas, quantities of businesses that imported natural gas between 2013 and 2021 are displayed in Table 7. While the proportion of LNG imports to overall imports declined, the amount of pipe gas imported in 2021 grew compared to the amount imported in 2020 (TUIK, 2022).

In conclusion, it is possible to say that economic relations are an important driving force in Türkiye-Russia relations. Although they have developed their commercial relations in many areas, it is a great step for the two countries, which have made an important partnership in the field of energy, to develop their relations with the Akkuyu Nuclear Power Plant and TurkStream projects.

3.2. Political Relations between Türkiye and Russia

Although the relations between Türkiye and Russia have developed in many economic, political and cultural areas, conflict and competition have prevailed. The developments in political relations have not been as rapid as in the economic field. The atmosphere of insecurity in the 1990s was disrupted by the "Agreement on the Principles of Relations between the Republic of Türkiye and the Russian Federation," signed for the first time in 1992, and an

environment of mutual trust and cooperation was aimed. However, the fact that Russia does not want to give Türkiye a say in the near abroad policy, the continuation of the Chechnya issue in Russia and the PKK issue in Türkiye, and the fact that they blame each other for these issues have prevented the development of political relations (Özbay, 2011). On the other hand, although the competitive environment prevails in the political sense, it has been observed that their interests overlap in many areas. Türkiye and Russia are important energy partners, and their dependence on each other in terms of energy has affected their attitudes toward their political policies. Especially by the 2000s, President Putin and President Erdoğan brought relations to a peak. President Putin's policy of establishing relations with all states in the state's interests has brought Türkiye and Russia closer. The two countries, which have improved their relations in the field of economy and energy, have reached a level of interdependence today (Taşçı, 2019).

Looking at the history of the relationship between the two countries, it is seen that they have not always implemented solution-oriented and harmonious policies. Although there was no full-fledged conflict between Türkiye and Russia, geopolitically motivated competition caused the two countries to overlook possible collaboration. The Nagorno-Karabakh conflict between Armenia and Azerbaijan sparked a storm in Russian-Turkish ties in the South Caucasus, and tensions surrounding the conflict persisted long after the 1994 ceasefire (Balta & Çelikkpala, Turkey and Russia: Historical Patterns and Contemporary Trends in Bilateral Relations, 2020). With the Islamic radicalization of the Chechen opposition to Moscow in the late 1990s, Turkish officials began to crack down on Chechen sympathizers in Türkiye, compelling the Kremlin to scale back its backing for Kurdish militants fighting Ankara (Örmeci, 2019). Internal conflicts and problems with domestic security were two of the most important issues between the two countries. All other topics progressed only after the two countries struck a latent agreement on the PKK/Chechen conflict (Taşçı, 2019).

Foreign policy tendencies in both countries began to shift around the end of the 1990s and the beginning of the 2000s, with a new combination of multilateralism and bilateralism defining relations.

Russia presented its new Foreign Policy Concept on June 28, 2000, prioritizing Russian interests in post-Soviet territories. Foreign Minister İsmail Cem (1997-2002) in Türkiye, on the other hand, advocated for strengthening Türkiye's ties with its neighbors, shifting to a more trade-oriented and conflict-free foreign policy, and transforming Türkiye's traditional Western-oriented foreign policy into a more multi-dimensional approach (Tuğtan, 2016). During this period, Türkiye aimed to seek pragmatic ways to resolve disputes and cooperate with its neighbors with the "zero problems with neighbors" policy. Türkiye became a trading state due to the program, which resulted in a remarkable expansion of commercial ties, particularly with neighboring Russia and other Middle Eastern countries (Kirişçi, 2009).

The political ties between Türkiye and Russia have significantly improved since Vladimir Putin was elected president of the Russian Federation in January 2000 and the Justice and Development Party (AK Party) took office in Türkiye at the end of 2002. Türkiye pursued a multifaceted foreign policy course because of the "zero issues with neighbors policy" that was adopted. Early in the 2000s, there was a lot of diplomatic activity regarding the two nations' political relations. Official high-level visits are now commonplace, but new definitions of collaboration have been developed on the other hand. Vladimir Putin's 2004 trip to Türkiye as the President of Russia is remembered as the first official presidential trip since the fall of the USSR (Çulha, 2016). Russia and Türkiye have progressed in building their bilateral relationship, but they have divergent views on regional concerns. As a result, ties between Türkiye and Russia have a rivalry and conflict component while retaining a cooperative element (Çelikpala, Rekabet ve İşbirliği İkileminde Yönünü Arayan Türk-Rus İlişkileri, 2015). Relations between Türkiye and Russia have grown because the two nations resolved to give up the idea of rivalry in their ties and emphasize collaboration after signing the Cooperation and Action Plan in Eurasia in 2001, sharing economic advantages on philosophical and political unions.

The maximum level of ties during the new phase of bilateral relations was attained in 2005. The progress of the six accords made by Putin in 2004, mostly about economic matters, was discussed during R. Tayyip Erdoğan's 2005 visit to Moscow. Additionally, during this discussion, the demand for a decrease in the cost of natural gas coming from the Blue Stream

natural gas line and going to Türkiye was again raised (Akyol, 2005). Erdoğan's visit positively impacted Putin's decision to help Türkiye in its dispute with Cyprus. This conference covered in-depth foreign policy discussions and other topics assessed in 2005 interviews using the idea of interdependence. These gatherings established the groundwork for advancements in international policy and the economics, energy, and tourist sectors. With Prime Minister Erdoğan and the Presidents of Russia and Italy, the Blue Stream Pipeline Project, which transports natural gas from Russia to Türkiye via the pipeline, was inaugurated in Samsun (Hürriyet, 2005). Indicators of the evolution of ties during this period include Russia's support for Türkiye's EU membership and Türkiye's efforts to include Russia as a partner in cooperation platforms. The two nations' adoption of an economic win-win strategy over a focus on foreign policy is the most crucial element in developing ties (Aksel, 2019).

Türkiye benefited from the 2006 Ukraine-Russia conflict. When Russia stopped exporting gas to Ukraine, the issues caused by its inability to pay its debts to that country were resolved. Russia's suspension of supplies to Ukraine has raised the significance of the Blue Stream pipeline (Kirby, 2014). It is a period in which the two countries depend on each other economically and strategically.

Türkiye-Russia relations focus on national interests as well as competition. When combined with domestic reasons, these perspectives attempt to explain the growing cooperation between the two countries as an 'alliance of the excluded' or 'unrepresented' (Hill & Taşpınar, 2006). As a result, when individuals are more isolated in the international context, they prefer to cooperate more. When both nations have conflicting attitudes toward the transatlantic bloc, the chance of relations between Russia and Türkiye progressing toward strategic partnership increases (Balta, 2019). Political or ideational variables alone cannot explain patterns of conflict and cooperation between the two countries. Indeed, the dynamics of bilateral ties can partly be explained by expanding economic cooperation and foreign trade patterns (Çelikpala, 2015).

Similarly, Öniş and Yılmaz say that one of Türkiye's and Russia's primary strategies has been to categorize economic concerns and geopolitical disputes to avoid detrimental spillover from either. This tendency is particularly evident in energy cooperation, which flourished during

the tumultuous period following Türkiye's downing of a Russian jet in 2015 (Öniş & Yılmaz, 2016). Also, increasing trade is unquestionably a powerful motivator for both countries to work out their differences and develop more compatible regional policies.

In 2008, when Russia invaded Georgia, there was the first conflict between the two nations. Russia eventually turned South Ossetia and Abkhaz into two pro-Russian satellite nations (Çomak & Şeker, 2017). On the other side, starting in 2008, Türkiye has backed Georgia's independence and territorial integrity. When NATO and US ships attempted to enter the Black Sea during this conflict, pretexting that they wanted to transport help to Georgia, Türkiye gained Russian praise for keeping neutral and undertaking peace efforts. Türkiye has erected a barrier in front of foreign dynamics to resolve regional conflicts by forbidding US ships from entering the Black Sea. Although Türkiye did not publicly express displeasure with Russia's activities in Georgia, it impacted the two nations' relations (Öncel, 2018).

Following 2011, as Arab revolts erupted across the Middle East, these pull and push dynamics that influenced bilateral ties grew increasingly pronounced. It was then exacerbated by the civil war in Syria, which put the Turkish-Russian strategic alliance to the test, given that Türkiye and Russia backed opposite parties, and their assistance was tipping the power balance on the ground. Russia's active participation in Syria and the annexation of Crimea in March 2014 demonstrated the new foreign policy's assertiveness (Balta, 2019). The latter increased Russian-Western tensions while dramatically strengthening Russia's military presence in the Black Sea. Even before the aircraft incident, there were several issues between Türkiye and Russia due to profound disagreements over Syria. The second international conference process, conducted in Geneva at the start of 2014 and sought to bring the warring parties in Syria together, could not reconcile Türkiye and Russia's divergent positions on the Syrian problem (Karakuş, 2014). Assad's condition has not simply brought Syria-related tensions between Türkiye and Russia. The struggle against ISIS in the region has divided Ankara and Moscow significantly in their viewpoints (İzzetgil & Murshudlu, 2021). It is clear that Türkiye and Russia still take care to continue their political contact despite their divergent views on Syria. Türkiye and Russia are working hard to advance their close bilateral relationship in commerce, energy, and tourism without regard to the Syrian conflict. Another topic of conversation between

Türkiye and Russia at this time is the state of the Terrorism issue in Syria. In this regard, the PKK's resumption of hostilities with Turkish security forces following the ISIS bombing of Suruç in July 2015, which claimed 34 lives, marks a turning point (Aljazeeraturk, 2015). Even the shooting of a Russian plane that violated Turkish airspace in 2015 resulted from the Syrian situation. As a result, the Syrian conflict might be regarded as the biggest crisis to affect Turkish-Russian ties during the AK Party era (Telli, 2017).

However, the Russian decision to act directly in Syria in late September 2015 posed the greatest threat to Turkish interests, resulting in an escalation of hostilities with Russia. The downing of a Russian military airplane by the Turkish military on November 24, 2015, reached a pinnacle, virtually severing ties between the two nations. Türkiye not only lost billions of euros due to Russian economic sanctions but also lost influence over Syria due to Russia's deployment of its S-400 air missile defense system, which essentially closed Syrian airspace to Turkish jets (Gencer, 2017). The Turkish-Russian rapprochement accelerated following the failed coup on July 15, 2016, when Putin affirmed Russia's support for Erdoğan. After the downing of the Russian plane, a bilateral agreement on visa-free travel between the two nations was partially restored, as were limitations on Turkish enterprises operating in Russia, a prohibition on employing Turkish employees in the country, and an embargo on a variety of Turkish products. On the other hand, Türkiye has agreed to purchase the S-400 surface-to-air missile defense systems from Russia. This decision is another indicator of Türkiye's growing security rapprochement with Russia, which would jeopardize the Turkish-Western alliance and Türkiye's NATO membership (Gürçan, 2017).

Regarding potential effects on Türkiye and Russia's future in the Black Sea area, the Crimean crisis is one of the most significant challenges. One of the recent events that most significantly altered the balance of power in the Black Sea Region was Russia's annexation of Crimea. Ukraine lost its most significant ports in the Black Sea and its military sites, which were strategically located in the Black Sea, came into Russian hands with the transfer of sovereignty of Crimea. Widespread protests in Ukraine, spearheaded by the pro-EU opposition, broke out when the Viktor Yanukovych government refused to sign the association agreement with the EU, forcing the Yanukovych administration to quit (Kazdal, 2018). Crimea joined Russia

following the local referendum. Crimea's choice to join Russia and the referendum's results were not recognized by Türkiye, which upheld the territorial integrity of Ukraine. Foreign Minister Davutoglu referred to the Crimean referendum as a *fait accompli* and emphasized that the referendum's findings and execution were undesirable. He emphasized that the referendum was invalid (Ministry of Foreign Affairs, 2014). For Türkiye, the Crimean Tatars' situation on the island has a different significance. This resulted in the Crimean Tatars' banishment once more. Also, Foreign Minister Davutoğlu emphasized that the Ukrainian issue will severely impact the security and stability of Ukraine and Crimea and the entire area, particularly the Black Sea basin (Ministry of Foreign Affairs, 2014). Other factors that impacted Türkiye in this crisis included the security of the Black Sea and the future of energy lines. Despite being a NATO member, Türkiye opted not to participate in the growing hostility between the West and Russia due to the Ukraine conflict. Western European nations began imposing sanctions on Russia due to these events in Ukraine. In July 2014, US President Obama declared that his nation and the EU would enact extensive new sanctions against Russian banking and military sector businesses (Sitdikov, 2015). Türkiye did not participate in the sanctions placed on Russia, even though it strongly disagreed with this nation. Türkiye avoided demonstrating abrasive attitudes while favoring divergent views and strategies with Russia, as in the Syrian conflict. However, the two nations' commercial relations were impacted by the Russian economy's downturn and the ruble's weakening. During this time, Russia grew due to Russia's isolation from the West due to the Ukraine crisis, its exposure to economic sanctions, and the energy crisis that resulted from this tension in the triangle between Russia, the West, and Ukraine closer to Türkiye (Çelikpala, Rekabet ve İşbirliği İkileminde Yönünü Arayan Türk-Rus İlişkileri, 2015). Despite Türkiye and Russia's best efforts to uphold the balancing policy, their differences gave rise to a tense climate in their interactions. The High-Level Cooperation Council's fifth meeting, held in 2014, was a crucial step towards easing the tension. Agreements were reached at this conference on topics including "Memorandum of Understanding between BOTAS and GAZPROM" and "Memorandum of Understanding between the General Directorate of Renewable Energy and the Russian Energy Agency on the Use of Energy Efficiency and Renewable Energy Resources" (T.C. Dışişleri Bakanlığı, 2014). As a result, the Turkish Stream project took center stage in place of the South Stream (Koçak, 2017). Türkiye's differing stance from NATO members

towards the Ukraine issue is mostly due to Türkiye and Russia's growing dependency on one another in recent years (Taşçı, 2019).

The aircraft crisis in 2015 brought the two nations into a state of tension unlike any other, even if it has just recently subsided. Relations between Türkiye and Russia deteriorated when Russian jets twice breached Turkish airspace on October 3 and 5, 2015. The tension culminated on November 24 when Turkish F-16s shot down a Russian SU-24 that had violated Turkish airspace. Russia decided to impose sanctions on Türkiye in numerous sectors following the aircraft issue (Kazdal, 2018). The entry of Turkish goods into Russia has been largely blocked in this context, the visa-free travel privilege granted to Turkish citizens to enter Russia has been abolished, and the visas of Turkish citizens who were conducting business, studying or visiting Russia have been revoked for a variety of reasons (Koçak, 2017). The sanctions imposed by Russia, however, do not simply have a negative impact on Türkiye. Due to the sanctions, Russia suffers because the two nations are significant trading partners in several sectors. The Russian sanctions are costly for both parties from the standpoint of dependency. Due to the aircraft problem, Russia lost Türkiye, a significant commercial partner. As a result of the crisis, significant energy projects, including the Turkish Stream natural gas pipeline and the Akkuyu nuclear power plant, were suspended. This prompted Moscow to consider mending its relations with Ankara (Erşen, 2016).

Recep Tayyip Erdoğan, the President of Türkiye, traveled to Russia following the failed coup attempt on July 15, 2016. After the meeting, they decided to take significant actions to normalize ties between the two nations on September 9, 2016. The two nations appeared to have emphasized enhancing their economic ties at the Putin-Erdoğan meeting held in St. Petersburg (Cumhuriyet, 2016). The Turkish government's announcement that it would award the Akkuyu nuclear power plant strategic investment status, the implementation of the TurkStream project, and the reiteration of the 100-billion-dollar trade volume goal between the two nations are particularly significant in this regard (Erşen, 2016). In 2016, Andrey Karlov, the Russian ambassador to Ankara, was shot and killed while attending an exhibition in Ankara, just as ties between the two countries began to mend. However, the leaders of both nations believed that the event was an assassination and that this sabotage was done to harm the improving bilateral

ties between Türkiye and Russia (Yeltin, Neoklasik Realizm Bağlamında Türkiye-Rusya İlişkileri ve Ara Değişkenlerin Rolü: Andrey Karlov Suikati, 2021).

The atmosphere of collaboration has been reformed as of 2017. The Astana negotiations, which are crucial for ending the Syrian conflict, have begun between Russia and Türkiye in response to ISIS targets in Syria. In this meeting held in Sochi, an agreement was signed to create a safe zone between Türkiye, Russia and Iran. This development can be considered a turning point for solving the Syrian crisis. The S-400 missile systems are a significant breakthrough that happened in 2017. Türkiye is the first NATO member to work with the Russian military (Yeltin, 2021). On the other hand, NATO appears to find integrating these technologies into the Russian air defense system unacceptable since it would seriously compromise the system's security. Given these conditions, Western experts regarded Türkiye's selection for Russia in the missile defense system as Russia's most significant strategic victory over NATO, which fuelled worries and allegations that Türkiye was turning away from the West (Öniş & Yılmaz, 2016).

The ground-breaking ceremony for the Akkuyu Nuclear Power Plant was held online before the seventh High-Level Cooperation Council Meeting following Putin's fourth administration (Sputnik Türkiye, 2018). Following the meeting, it was revealed in a press release that cooperation in Syria would continue, the TurkStream pipeline project's undersea portion would soon be finished, planning would start for the project's land portion, and the S-400 air defense system would be delivered to Türkiye sooner than expected (Taşçı, Türkiye-Rusya İlişkileri ve Üst Düzey İşbirliği Konseyi(ÜDİK), 2019). The Syrian crisis is on the table in addition to the advances in the military sector and commerce between Russia and Türkiye. Tensions in Idlib have risen due to Russia's growing influence in the area. Türkiye and Russia had to negotiate a meeting at a table due to the rising tension in Idlib. In Sochi, Russia, the presidents of the two nations met. Idlib was the major topic of discussion during the summit between Erdoğan, Putin, and Rouhani on September 7th, 2018, in Tehran. It was determined to work jointly on Idlib, which is crucial for Türkiye and Russia's coordinated operation on Syria. The outcomes of this conference are crucial because they show that Türkiye and Russia have good diplomatic ties and represent a significant development in the Syrian situation (Özer,

2018). However, Assad's onslaught rendered the Sochi accord ineffective. After the martyrdom of 34 Turkish soldiers in Idlib, Türkiye had to respond to the regime. Later, a truce was proclaimed following the conclusion of the second memorandum of understanding in Sochi (İzzetgil & Murshudlu, 2021).

Despite many conflicts, Türkiye and Russia have always worked to find a solution to preserve their relationship. Despite all the differences, a global issue like the Syrian crisis hasn't entirely strained relations between Türkiye and Russia since the two nations still rely on one another in some sectors. Regarding their national interests, both states have a flexible or strong agreement-oriented approach that will highlight their strength in foreign policy and security.

4. TÜRKİYE'S OTHER ENERGY RELATIONS



Figure 1 Pipelines passing through Türkiye (İlkha, 2022)

Türkiye is an energy-dependent nation that imports the bulk of its energy requirements due to its rising energy consumption. In terms of collecting and distributing energy, nations may

increasingly rely on one another. Therefore, the security of the energy supply has gained importance. To eliminate this dependency, consumer countries may seek new energy suppliers or apply energy diversity for different energy resources (Yıldırım, 2019). Türkiye's primary supply of natural gas is Russia, which also serves as a significant market and energy corridor for Russia to transfer its resources to Türkiye. To secure the security of its energy supply and the variety of its resource base, Türkiye has started a new initiative-development process. Türkiye has begun to look for alternative supply nations to prepare for a potential energy crisis or disruption. Türkiye acts as a bridge for moving energy resources from the Middle East and Caspian Basin to global energy markets, particularly in Europe, because of its geographic location. As a result, there is a good chance that the EU will work with Türkiye to ensure energy security (Yılmaz D. , 2021).

Türkiye serves as a natural link between source nations and consumer markets, and it is a crucial player in maintaining energy security by diversifying sources and routes. Türkiye, which is developing gradually in every field, has become one of the rapidly growing energy markets in the world. According to various energy market analyses, the world's energy demand will increase by approximately 60% by 2030, oil and natural gas will maintain their share in energy resource distribution, and an investment of approximately 16 trillion dollars will be required to meet the ever-increasing energy demand. In this regard, it should be noted that in recent years, Türkiye has experienced rapidly expanding demand in all areas of the energy industry (Pamir, 2005).

Türkiye, which now imports more than half of its energy, is highly influenced by changes in the global energy industry structure and the regulations that govern it. Furthermore, it has grown foreign-dependent, particularly in oil and natural gas, due to limited supplies in the face of rising energy demand. In addition to its significant reliance on foreign energy, Türkiye, the second-largest natural gas consumer after China in recent years, imports nearly all of its natural gas. “Of 51 billion cubic meters (bcm) of natural gas imported by Türkiye in 2015, 58% comes from Russia, 15% comes from Iran, 12% comes from Azerbaijan, and 7.7% comes from Algeria (LNG) and 2.4% from Nigeria (LNG)” (T.C. Enerji Piyasası Düzenleme Kurumu, 2018).

Türkiye's energy policy has been developed around four main goals. The goals of Türkiye's energy policies, in general, are to diversify the countries where energy is supplied and ensure the security of the routes, to increase the share of renewable energy sources in the supply of energy needs, to improve energy efficiency, and to ensure participation in European energy security. The need for oil and natural gas transportation from the Caucasus and Central Asia to Europe via Türkiye, which Europe proposed as an alternative to Russian energy to provide energy variety, is a transit site for Türkiye to transfer Central Asian and Caucasian energy resources to Europe (Kardaş, 2011). Türkiye is attempting to improve its position as an energy bridge in particular. Türkiye is a strategic transit country for almost all land and sea routes connecting the Middle East and the Caspian Region to the Mediterranean and Europe. To maintain continuity in oil and natural gas imports, supply security, and resource variety in the face of ever-increasing demand, Türkiye, which aspires to be an energy market, must establish comprehensive energy transfer projects (Bayraç H. , 2009). Türkiye may be able to obtain more favorable contracts from the producers, allowing it to balance its domestic consumption and, perhaps more importantly, opening up the possibility of re-exporting the available gas if it can increase resource and resource diversification to ensure its energy security (Ülgen & Çelikpala, 2017).

4.1 Türkiye-Azerbaijan Energy Relations

Türkiye-Azerbaijan relations have made great progress since the independence of Azerbaijan. Türkiye-Russia ties include a thorough examination of Eurasian energy strategies. Since the South Caucasus is in a suitable location for the transit of energy and energy lines, Azerbaijan and Georgia's pro-Western stance in the Caucasus requires Russia to accomplish its energy policy aims in the region. The most significant component in Azerbaijan's economic growth is its natural gas and oil exports. According to IMF figures, oil and natural gas account for more than 90% of overall exports (Özel & Uçar, 2019).

Azerbaijan is the major export gate of the Caspian Basin's western opening. The strong reliance on energy for economic growth renders the Azerbaijani economy vulnerable to unforeseen events. Unexpected impacts in the energy industry in 2011 resulted in a reduction in overall production until mid-2013. Türkiye's participation in deals struck with major oil firms worldwide to produce oil and natural gas from resources in the Azerbaijani regions of the Caspian has aided the development of relations between the two nations. The South Caucasus Natural Gas Pipeline, developed in tandem with BTC and following the Baku-Tbilisi-Erzurum route, has brought Azerbaijan natural gas identified in the Shah Sea Field to the Turkish domestic market (Yesevi, 2013). This circumstance will aid Türkiye in breaking Russia's natural gas monopoly, ensuring resource diversification and supply security, and bolstering our economic and political independence. As a result, Türkiye's chances of suffering a situation comparable to Ukraine's have been lowered. Furthermore, it will be able to take advantage of pricing and negotiation advantages in the supply of natural gas, as well as the opportunity to get natural gas at a lower cost. The fact that the Baku-Tbilisi-Erzurum line, which will transport the gas in question, will run parallel to the Baku-Tbilisi-Ceyhan Crude Oil Pipeline will help to reduce the investment costs of the two lines on the one hand and will also save money in terms of operating costs and security on the other (IEA, 2021).

Energy agreements between Türkiye and Azerbaijan that proceeded with the signing of the Baku-Tiflis-Ceyhan Oil Pipeline and Baku-Tiflis-Erzurum Natural Gas Pipeline Projects became more extensive when SOCAR purchased PETKM in 2008. The Trans-Anatolia Pipeline (TANAP) memorandum of understanding was signed on December 26, 2011, and the intergovernmental agreement was signed on June 26, 2012 (Erdoğan, 2017). Through Türkiye, this pipeline would transmit natural gas from Azerbaijan to Europe. The Turkish border is the beginning point. The Greek and Bulgarian borders will be Türkgöz and exit points to Europe, while Eskişehir and the Thrace area will be Turkish departure points. At the Eskişehir Compressor and Measurement Station, commercial gas purchases from the Trans Anatolian Natural Gas Pipeline began on June 30, 2018 (Botaş, 2018). Approximately 9.1 billion cubic meters of gas have flowed from TANAP so far, including 4.9 billion cubic meters in 2020

(Temizer, 2021). Its yearly capacity is expected to increase from 16 billion cubic meters in 2020 to 23 billion cubic meters in 2023 and 31 billion cubic meters in 2026 (Yılmaz R. , 2010).

The TANAP project is critical for Türkiye's and Europe's energy security. The project will also be important in transporting Azeri natural gas to new markets. A line with this capacity is critical for Türkiye's natural gas independence from Russia and Iran. TANAP has significantly impacted ties between Iran and Türkiye, as Türkiye is the only way for Iran to access the European market. Russia has made efforts to prevent TANAP from being implemented, with the goal of delivering Central Asian energy resources to the world market by maintaining its dominance, particularly in the Middle East and Central Asia regions, which have their resources and a large portion of the world's energy resources (Yesevi, 2013). TANAP is a significant step forward in the international energy economy, assuring the security of Türkiye's and Azerbaijan's energy transmission channels, reducing reliance on a single country, and providing the diversity of resources necessary for energy supply continuity (Yesevi & Tiftikçigil, Türkiye'nin Enerji İlişkileri, 2015). While Türkiye obtains a strategic edge over Russia in implementing global energy policy, Azerbaijan will expand its range of action in developing projects and operations without relying on Russia. TANAP is a critical project for consolidating Türkiye's position as a transit nation and addressing Europe's need to diversify its natural gas resources in the most efficient manner (İlter & Kınık, 2017).

4.2 Türkiye-Iran Energy Relations

Iran controls a huge portion of the world's natural gas reserves due to its geostrategic location commanding the Gulf area and the Strait of Hormuz. Türkiye, which follows a foreign-dependent energy strategy, gets a considerable portion of its growing energy demands from Iran, following Russia. The 1996 deal for Türkiye to acquire 10 billion m³ of natural gas annually from Iran for 25 years is particularly crucial for Türkiye. It aimed to export Iranian natural gas to European markets through Türkiye and in cooperation with Türkiye (Pusat, 2018). As a result, Türkiye will serve as an essential security corridor for the West regarding energy supply

security. According to EMRA's 2021 report, Iran accounts for 16.07% of Turkey's natural gas imports (Epdk, 2021). The launch of natural gas imports from Iran has been interpreted as heralding a new era of political and economic reliance between the two nations. However, since the beginning of natural gas imports in December 2001, there have been occasional problems between the two nations about quantity and price. Still, despite these difficulties, Türkiye has continued to buy natural gas from Iran (Berk & Schulte, 2017).

Representatives from the two nations agreed on three new initiatives in 2007 to boost business collaboration between the two countries. The following projects are involved in the agreement:

- The transportation of Iranian and Turkmen natural gas to Europe will be carried out through Türkiye.
- Three natural gas fields in the South Pars area, where Iran has 14 trillion cubic meters of reserves, will be transferred to the Republic of Türkiye without a tender, with TPAO investing and developing them.
- Iran will get Iran's portion of the 20 billion cubic meters of natural gas estimated to be generated in these areas. Türkiye will consume what it needs from the remainder, and the surplus will be delivered to Europe via the Türkiye-European Union natural gas line (Sariaslan, 2013).

Even though work on this subject began years ago and the first memorandum of agreement was signed in July 2007, the final signature is yet to be completed (Üzümcü, 2015). Natural gas imports from Iran are one of the most important things in Türkiye's trade volume. Another element of Iran that is as significant to Türkiye as mutual commerce is that it facilitates trade with Central Asian nations (Sert, 2012).

Iran is Türkiye's second largest gas supplier. On the other hand, Türkiye is Iran's biggest customer. Due to international sanctions and pressures, Türkiye imports 90% of Iran's gas exports. Türkiye's energy imports rely on Iran, one of its closest allies (Sariaslan, 2000'li

Yıllarda Türkiye-İran Ekonomik İlişkileri, 2013). Due to international pressures and embargoes, Iran, on the other hand, severely needs and is reliant on Türkiye. Regarding the problem from the perspective of supplier countries, Iran is the second largest energy provider in Türkiye and the largest energy supplier in the Middle East, behind Russia. Even though relations with Iran were not always easy and interruptions in energy delivery occurred from time to time, the commitments and guarantees made since 2006 have prevented the stated cutbacks in energy supplies from occurring again (Ünver, 2015). The most pressing problem in the future of the two nations' energy ties is what Iranian natural gas will imply for Türkiye if the sanctions against Iran are repealed. For the transportation of Iran's natural gas to the West, relations between Türkiye and Iran are critical. However, some analysts believe that transporting Iranian natural gas to Europe via Türkiye is a poor option for the following three reasons: Türkiye-Iran bilateral relations, regional energy supply-demand equality and geo-economic issues (Gürkaş, 2011). It is possible to believe that taking significant actions to sustain and deepen economic cooperation, especially in difficult political circumstances, would positively resolve political issues.

4.3 The Role Of The EU In The Türkiye-Russia Energy Relations

Despite the rise in renewable energy consumption in Europe, natural gas remains one of several EU nations' most widely used energy resources. Large economies, such as Germany, France, Italy, and Spain, as well as Türkiye, continue to utilize natural gas, albeit the fact that they increasingly rely on renewable energy sources. The percentage of natural gas that the EU imported in 2021 was 83% (Eurostat, 2022). The European Union Statistics Office (Eurostat) reports that in 2020, 58 percent of the energy utilized by EU nations was imported. Turkey's foreign dependency on energy is 71 percent. EU countries met 38% of their natural gas needs from Russia (Euronews, 2022). Among supplier nations, Russia is the country from which the EU and Türkiye import the most natural gas. In 2017, European nations, including Türkiye, bought around 190 billion cubic meters of natural gas from Russia, according to British Petroleum figures. Germany imported 51% of its natural gas from Russia, whereas Türkiye imported 52% of its natural gas from Russia. In 2017, Russia supplied 38.5 percent of the EU's total natural gas imports (Türkiye Petrolleri, 2018). Among supplier nations, Russia is the

country from which the EU and Türkiye import the most natural gas. In 2017, European nations, including Türkiye, bought around 190 billion cubic meters of natural gas from Russia, according to British Petroleum figures. In some EU countries, import dependency on Russia is well above these rates. The Baltic and South East European countries are almost completely dependent on Russian natural gas. One of the main reasons for this high reliance is that these countries have extremely little access to other suppliers outside Russia. In this respect, compared to the EU countries, Turkey has pipelines to Russia, Iran and Azerbaijan and other continents.. It is more advantageous because it can supply natural gas by sea from supplier countries. Türkiye's geographical proximity to energy-rich supply nations is the most crucial element contributing to this advantage. Another factor that makes European energy security reliant on the region in which Türkiye is located is the increasing depletion of European energy resources. Until recently, EU countries met their energy needs from three main sources: Russia, the Middle East (North Africa) and European countries (Norway and England). However, in recent years, Norway and England have been experiencing very serious production declines in oil and natural gas fields. As a result, the EU's reliance on Russia and the Middle East for energy imports is fast expanding. However, both of these marketplaces have severe security issues (Güneş & Arslan, 2018).

The Ukraine conflict shows that Russia exploits energy as a political instrument. The EU is considering alternative approaches to balance Russia. Likewise, unstable producers stand out when the Middle East market is examined. There is no doubt that there are serious problems not only in the producing countries but also in the transportation routes. From this perspective, Türkiye is the most viable option. Türkiye's increasing prominence in EU energy corridors is related to its geographical location. Türkiye's economy has developed significantly in recent years due to factors such as energy and energy transportation experience, sufficient workforce, and significantly more stable political, economic, and social structure compared to others in the region and all of these increase Turkey's importance. Furthermore, no physical gas and commerce hubs in Europe, other than Türkiye, are supplying the same quantity of gas from several nations as Türkiye, owing to Europe's pipeline system. A trade center in Türkiye will

provide the country with significant macroeconomic benefits, guaranteed pricing and long-term resource potential for Europe (Kanapiyanova, 2018).

After the TurkStream pipeline was completed, the previous pipeline became idle since Russia planned to eliminate Ukraine as a corridor nation. TurkStream is a new pipeline with an annual capacity of 31.5 billion m³ for two lines, each of which is 15.75 billion m³ per year. The pipeline has two purposes: one is to transport natural gas from Russia to Türkiye, and the other is to transport Russian gas to Europe via Türkiye (Kurban, 2020). This method will protect the gas flow from any nation to Türkiye without utilizing the transmission system against third-party interruptions. Türkiye must follow more active policies regarding the transit route of energy lines in the future, and in this context, it should not be just a bridge country. Türkiye is strengthening its position as a regional player by engaging in international energy projects to minimize natural gas consumption in power generation (Elmas, 2019).

Following Russia's invasion of Ukraine, the West imposed several sanctions on Russia, and Europe started to explore alternatives. At the same time, the Russian natural gas corporation Gazprom decreased shipments for various reasons. The Nord Stream natural gas pipeline, which plays a significant role in Russia's European exports, was shut down (Haberturk, 2022). Along with the shutdown for maintenance on Nord Stream 1, Russia has also completely cut off supplies to Bulgaria, Denmark, Finland, the Netherlands and Poland (CnnTürk, 2022). The Nord Stream twin pipeline system crosses the Baltic Sea from Lubmin, in Greifswald, Germany, to Vyborg, Russia. The Nord Stream route passes across the territorial waterways of Germany, Denmark, Finland, Sweden, and Russia, as well as their respective Exclusive Economic Zones (NordStream, 2022). While European authorities contend that Russia is using energy resources as a weapon, Russian officials maintain that the issues with natural gas supply to Europe result from sanctions (Haberturk, 2022). If Europe had not reduced its supply, it could be assumed that these developments would have positively impacted the TurkStream pipeline.

These events have reduced Türkiye's reliance on Russia, whereas the TurkStream project has increased Russia's reliance on Türkiye. Given the growth of the EU-Russia energy cooperation, which is seen as heading towards growing dependency despite periodic ups and downs, the energy links between Ankara and Moscow are projected to impact the future of EU-Türkiye relations significantly. Türkiye's future role as a European gas center or transit nation will be limited and heavily reliant on internal and foreign circumstances. The most crucial elements are European demand and Russia's capacity to exercise market pressure. Strong ties with Russia will complement the European Union project rather than serve as a substitute. Türkiye will be able to support and enhance its economic and political position concerning the West because of the close relationships it will have with several of its neighbors, particularly Russia (Özcan, 2020).

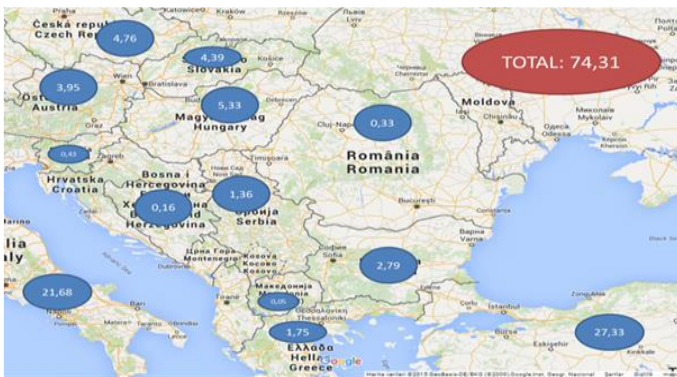
5. THE FUTURE OF THE TURKSTREAM AND ITS EFFECT ON TÜRKİYE-RUSSIA RELATIONS

This thesis contends that the political and security components have a greater impact on the likelihood of natural gas (pipeline) projects being realized. When it comes to the EU's gas supply, the EU has made it plain that security takes precedence over the economy. The TurkStream Pipeline project is the outcome of shifting Russian gas export policies, which have been influenced by TEP's and Bulgaria's attitudes. The TSP pipeline will emerge at Kırıkköy on the European side of Türkiye, with a gas distribution point in Lüleburgaz for Turkish consumers and a border crossing between Türkiye and Greece in Ipsala serving as a delivery point for European clients, as planned (Kanapiyanova, 2018). The offshore pipeline will run 660 kilometers along the old South Stream path and 250 kilometers over a new corridor leading to the European region of Türkiye. The pipeline's 910-kilometer offshore section will reach the Black Sea seafloor at a maximum depth of 2,200 meters. The gas pipeline's onshore leg will run 180 kilometers from Türkiye's Black Sea coast to the Greece-Türkiye border, including each of

the four strings of the offshore gas pipeline with a capacity of 15.75 billion cubic meters. The first string of gas is destined solely for the Turkish market (Turkstream, 2022).

The TurkStream Natural Gas Pipeline transported 18.7 billion cubic meters of gas to Turkey and 16.8 billion cubic meters to Europe between January 1 and December 31, 2021 (Kılıç, 2022). TSP is also interested in nations that rely on Russian gas for more than 60% of their energy. "The EU's natural gas imports significantly diversify," according to the BP Energy Outlook 2035 research, "with LNG net imports nearly tripling by 2035 and accounting for 30% of consumption in 2035, up from 9% now. However, pipeline imports from Russia remain a significant supply source, increasing by 15% and maintaining a market share of about" (Özcan, 2020)

The overall value of Russian gas imports in 2014 in Italy and Türkiye, potential markets for gas carried via TSP, was 74,31 bcm. In addition, according to the BP Energy Outlook 2035 study, "Russia is the world's top net energy exporter, with net exports supplying 4% of global energy demand in 2035, while Europe remains the world's largest gas importer". These techniques reveal that TSP and the pipeline's technical life are now unaffected regarding Russia's supply volume of gas resources (IEA, 2021).



The potential benefit to Russia is clear. Indeed, Putin hopes to achieve three key aims with TurkStream: increasing the EU's reliance on Russian gas by building a new supply route, rendering Ukraine irrelevant in gas transit, and expanding Russia's influence over the Turkish market. Russia's grand plan is inextricably tied to its energy policy. Russia and Gazprom will leave it to the Europeans to create the required infrastructure to connect the European market to the new TurkStream, having realized that the EU would not alter its Third Energy Package requirements. As a coalition that supports European countries such as Hungary, Greece, Serbia and Macedonia, it is on the side of Russia. Russia is proposing price cuts on oil and gas delivery, as well as financial assistance in the case of Greece, to improve its ties with these nations (Sakal, 2021). To avoid being left out, Bulgaria is now actively lobbying in favor of the TurkStream alternative, namely the Trans Anatolian Pipeline (TANAP) and its potential European extensions, which include the currently stalled Nabucco West pipeline and the 5 billion cubic meters Greek-Bulgarian interconnector. All of these prospective transit nations stand to earn from significant transit fees while also increasing their geopolitical prominence. With TurkStream, Russia can tighten its grip on the rapidly expanding Turkish market. Indeed, it will connect its resources to new hubs in Türkiye and add a new route to the previously existing ones (Blue Stream, Tans-Balkan Pipeline) (Güneş & Arslan, 2018).

Supporting the TurkStream project, on the other hand, may be detrimental in terms of diversity and may increase Europe's present reliance on Russia. Furthermore, Russia would retain control over the volume of goods entering Europe. Also, the project may be in direct competition with the TANAP initiative. As a result, TurkStream might harm the TANAP project by fostering the sense of insecurity and volatility that surrounds these massive gas infrastructure expenditures. Furthermore, if TANAP and the Southern Gas Corridor project's broad structure are completed as planned, they might benefit Europe's diversification needs while undermining Russia's geopolitical and economic interests (Kakışım & Kodaman, 2019).

Türkiye supports its pragmatic stance, promising to accept all pipelines seeking to pass through its borders. Indeed, the country would like to grow as a regional energy hub, even though it may instead emerge as a regional transit country if the contracts are not properly negotiated. Türkiye is often seen as the clear winner in any situation due to all these factors. It gains leverage over the EU and Russia with TANAP and Turkish Stream. It might utilize its increased political power to restrain Russia's big regional agenda and gain leverage in its EU accession talks. TurkStream, on the other hand, may increase Türkiye's reliance on Russian gas. Indeed, the country currently imports more than half of its gas from Russia, so adding a new Russian route to the existing ones will almost certainly increase its reliance on Russia (Karagöl & Kızılkaya, 2015).

On the one hand, the new TurkStream project may erode Ukraine's strategic importance. Indeed, if it were to be bypassed, it would lose its transit income and its political importance as Russia's key energy route to the EU. By losing its transit function, the country may become less reliant on Russia and have a better chance of implementing critical political reforms with less outside intervention. LNG supplies reaching other markets via pipelines (such as China) and other pipeline projects via northern Europe to supply central and southern Europe will not deliver Russia's economy the same economic outcomes as TSP and SSP (Kolcu, 2019).

Providing high energy demands from a single source is a major concern for the EU and Türkiye regarding energy reliance, necessitating the search for alternative resources. Russia's widely stated "energy weapon" most likely backfired in this regard. As the region's major energy provider and a country whose economy relies heavily on oil revenues, Russia should not be a source of concern for purchasers (Özcan, 2020). Another example is the United States' decision, during the Ukraine crisis, to broaden sanctions on Russia to encompass energy infrastructure projects. The US decision will impede the completion of the new pipeline projects that Russia is attempting to build as long as Russia does not ease up on its pressure on Ukraine. It is concerned that the impending expansion of sanctions would impact projects like Nord Stream and Blue Stream, which are being actively developed in collaboration with European and

Russian enterprises, as well as the TurkStream projects already under development (Volero, 2017).

In this perspective, Russia's responsiveness and penchant for using hard power in recent years have pushed it away from the image of being a reliable energy exporter. Russia and Türkiye will gain credibility internationally if they cooperate in the energy sector. Türkiye hopes to contribute to the growth of cooperation and mutual trust in the area and ensure energy supply security by serving as an energy corridor between north and south and east and west. With the transit of Caspian resources to Europe, the fact that Russian natural gas will be connected to Europe via the Black Sea under the sovereignty of Türkiye is critical for the area. As the number of collaborating nations in the area grows, a significant step toward energy supply security will be taken as the number of energy source choices grows (Abbasigil, 2017).

5.1 Limits of Interdependence

The impression of dependency is the first aspect to examine when analyzing the impact of interdependence on political cooperation processes. The influence of asymmetrical reliance on politics is shaped by whether interdependent players, particularly those with limited choices, view dependence as a security concern and the policies it creates (or does not produce) in response. However, objective indices of reliance, such as how much of a country's natural gas consumption is fulfilled by imports, may not influence the dependent actor's threat assessment. For example, Norway and Russia account for around one-third of EU natural gas imports. However, whereas the EU's reliance on Norway for natural gas imports is not a danger, Russia's reliance is seen as a critical security issue, which distinguishes the EU's approaches to Norway and Russia (Demiryol, 2018).

The shift of the European Union's perspective of energy import reliance in the previous decade is an example of securitization in the energy sector. While European natural gas output fell from 234 billion cubic meters to 130 billion cubic meters between 2000 and 2014, annual demand climbed from 374 billion cubic meters to 464 billion cubic meters. As a result, reliance on imports expanded dramatically, with the dependency ratio rising from 48.9% in 2000 to 65.3% in 2014 (Kazakoğlu, 2015). The EU's reliance on Russian natural gas has only recently been a security concern. Following the 2006 Ukraine crisis, a shift in threat perception underlined the security threats posed by Russia-EU ties' unequal structure (Koçak, 2017).

The TurkStream pipeline has increased the Black Sea's significance in energy demand security. The Russian Federation prioritizes natural gas exports as part of its energy export plans. An energy-based economic order was established by shifting the production investments that the nation should have made to the energy sector. While it has an advantage, like making energy consumers reliant, this condition makes it more likely that the energy demand security issue will arise (Erkan, 2015). It should be highlighted that Russia needs these customers and energy markets just as much as its energy allies do. Russia aims to increase the dependency of neighboring countries on itself. Russia is constructing more energy transmission lines to boost exports to achieve this aim. TurkStream is a significant illustration of this (Kakışım, 2019).

When assessing Türkiye-Russia energy ties, Türkiye's senior decision-makers stressed the relevance of the reciprocity motif. Former Energy Minister Taner Yıldız, speaking on the same topic, stated that energy cooperation is of strategic importance for both nations and that "there is no unilateral dependency in this field, and mutual dependence would not pose any issues" (Demiryol, 2018). The focus on Russia's reliability as a supplier is the first component in Türkiye's dependency narrative. The view of Russia as a dependable partner in providing Türkiye's energy demands was seen as a factor that somewhat offsets the dangers associated with the unequal nature of the dependent relationship (Kakışım, 2019).

The second component of the interdependence rhetoric is that Russia needs Türkiye as much as Türkiye needs Russia. While Russia is important for the security of Türkiye's energy supply, Türkiye is equally important for Russia's energy demand and transit security. However, as the data in the preceding section shows, there are significant disparities in Russia's and Türkiye's vulnerabilities due to their interdependence. As a result, Russia has more options than Türkiye, so the cost of ending the interdependent connection is smaller (Abbasigil, 2017).

Russia's vulnerability is significantly reduced if trade links with Türkiye are disrupted. In other words, Russia pays less for ending its interdependent connection with Türkiye than Türkiye does. Russia's vulnerability is significantly reduced if trade links with Türkiye are disrupted. In addition to the European market, where natural gas consumption has expanded recently, Gazprom's demand diversification plan includes different Asian countries, especially China. Regarding the economic consequences of anticipated gas trade disruptions, Russia is likewise in a better position than Türkiye (Demiryol, 2018). In many respects, Türkiye's reliance on natural gas imports is a source of concern. Using natural gas for nearly half of power generation raises economic and societal costs in the short term in the event of a supply disruption. A long-term disruption in natural gas supplies will have a negative impact on many places, particularly home heating and industrial use. Dependence on Russian gas has a major macroeconomic cost. The impact of the energy bill on the current account deficit might be seen as evidence that Türkiye is in a far more precarious position than Russia (Telli, 2017).

Other aspects of Türkiye-Russia's asymmetrical connection include buy or pay conditions in the gas purchase and sale contracts and Russian capital partnerships in the Turkish energy industry. Take-or-pay arrangements govern Türkiye's gas purchases and sales with Russia. As a result, Türkiye is liable for paying the price of natural gas it is unable to import owing to insufficient local demand or other factors, despite having made a purchase promise. This is a component that raises the asymmetric dependence's economic cost. Another aspect is that Russian-owned enterprises invest in Türkiye's energy infrastructure, particularly in energy production and delivery. The participation of Russian firms in the Turkish energy industry is

primarily the outcome of the Turkish government's efforts to modernize the sector (Sarıkaya, 2019).

It has been found that when Türkiye-Russia ties were favorable, asymmetric dependency was not seen as a top security threat by Ankara, which made political collaboration feasible. Furthermore, they attempted to reduce the economic reflection of political problems by prioritizing shared economic interests in bilateral ties between Türkiye and Russia. Thus, despite their geopolitical conflicts of interest, the two countries may retain a certain level of political collaboration. Asymmetric dependency, on the other hand, suggests a hierarchical relationship between the two players in the long run, as stated in the preceding section (Demiryol, 2018). In this sense, the airplane crisis on November 24, 2015 crisis served as a litmus test for the unequal dependency between Türkiye and Russia's long-term viability. The Russian government issued a series of economic measures against Türkiye in response to the downing of a Russian aircraft near the Syrian-Turkish border. On the other hand, sanctions on Türkiye in the natural gas sector were not formally on the table. Even though the sanctions had no direct impact on natural gas flows, Türkiye's view of energy security, particularly its reliance on Russian gas, underwent a fast securitization process in the aftermath of the plane crash (Özkurt, 2019).

The current troubles in Türkiye-Russia relations have demonstrated that the unequal energy connection between the two nations has its limitations and that these borders are formed by the alignment of the two parties' geopolitical objectives. When the diversification of geopolitical interests impairs the compartmentalization mechanism and assures import reliance, asymmetry-based power relations and competitive dynamics emerge.

CONCLUSION

Energy has been seen to have a fairly broad impact area when contemporary energy policies are considered. Changes in energy policies significantly impact the political and economic spheres. The idea of energy security has also shaped the interactions between Türkiye and Russia. Natural gas has played a significant role in the two nations' supply and demand axis-driven energy commerce. The two states' interdependent relationships have grown due to the trade and energy project agreements that have been struck.

Türkiye needs to work with producers and consumers since it is a transit country in the energy trade. Türkiye is a substitute route for Russia that, in light of the issue with Ukraine, will guarantee the continuation of energy commerce with the EU. Additionally, it hopes to stop Türkiye from participating in initiatives with other nations in the area that would exclude itself owing to its established collaboration with Türkiye.

Türkiye and Russia's energy links, which date back to 1967, have increased mutual dependency by transitioning to nuclear energy today and fossil energy resources such as coal, oil, and natural gas. Although there have been times when there have been conflicts of interest and substantial issues in ties, the energy discussion has always progressed. Türkiye's participation in projects that would upset Russia's energy policy and weaken its hold on the European energy market has not stifled the growth of energy ties. However, the airplane issue in 2015 put ties to the test, and the interdependence between Russia and Türkiye allowed the problem to be resolved without a power outage. Despite this, the fact that Russia and Türkiye share similar geopolitical aims and ongoing conflicts in some areas related to the Syria issue might result in fresh crises for the two nations. In this regard, Türkiye must preserve the balance in its ties and not allow interdependence to deteriorate into imbalanced dependency in favor of Russia.

The TurkStream natural gas pipeline is changing bilateral and global relations by strengthening economic, political, and strategic collaboration between Russia and Türkiye. Türkiye's geographic security, both in the Black Sea and Europe, is aided by the TurkStream pipeline. TurkStream has the power to alter regional power dynamics and pave the way for new alliances, supply routes, and diplomatic strategies. The latest studies to implement the TurkStream Project may be viewed as a clear indicator that both nations' energy cooperation should be maintained in the long run. Türkiye's geographic importance, rising energy demand, and mutual energy-based economic interests of Türkiye and Russia all contribute favorably to the two nations' economic relations. Türkiye serves as a natural gas transportation link between Europe and Asia.

Türkiye's rising energy consumption necessitates the exploration of alternative energy resources. The reason for Türkiye to seek alternative energy resources is to provide energy security. This is demonstrated by the energy deals with Azerbaijan and Iran. TANAP has significantly impacted ties between Iran and Türkiye, as Türkiye is the only way for Iran to access the European market.

When the Turkish-Russian relationship is seen through mutual reliance, there are benefits and drawbacks. Although Türkiye is regarded to be in a disadvantageous position versus Russia since it is an energy-importing country, it will be effective in dealing with Russia by leveraging its geographic importance and the benefits of being a major energy client. Russia also does not want to lose a market like Türkiye, strategically located along the energy corridor and growing economically. The idea that both parties would lose in a bad development, but not equally, is reinforced by stressing reciprocal engagement in bilateral relations. Türkiye is sensitive and vulnerable as a result of this. On the other hand, it also impacts Russia, as Türkiye is the second-largest gas importer. The likelihood of finding a different route has dropped due to its issues with the neighboring states. From the perspective of interdependence, a circumstance like a disagreement or conflict will have a detrimental impact on both parties.

Energy is a factor that fosters mutual dependency in Turkish-Russian ties. Future foreign policy decisions by both nations will emphasize the energy cooperation that will be made in this framework. The relationship between Türkiye and Russia was clarified by Keohane and Nye's idea of interdependence. It has been underlined that cooperation in energy, economics, and the military, particularly the TurkStream natural gas pipeline, contributes to improving ties between the two nations. The energy ties between Türkiye and Russia are expected to affect the future of Türkiye-EU relations significantly.



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