

T. C.
ISTANBUL KULTUR UNIVERSITY
INSTITUTE OF GRADUATE STUDIES

**NATURAL GAS POLICIES OF TÜRKİYE: RELATIONS WITH THE EU AND
ISRAEL**

MA Thesis by

MOHAMMED M. M. ALGHARIB

2000000379

Department: International Relations

Programme: International Relations

Supervisor: Assoc. Prof. Dr. Çağla Gül Yesevi

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Members of Examining Committee:
Assoc. Prof. Dr. Bora Bayraktar
Assoc. Prof. Dr. Azime Telli

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ÖZET

Türkiye, uzun yıllardır petrol ve son dönemde doğal gaz açısından bir geçiş devleti olarak giderek artan önemde rol oynamaktadır. Avrasya, Rusya ve Orta Doğu'dan gelen büyük miktarda fosil yakıt, büyük boru hatları vasıtasıyla ve farklı yollarla Türkiye'den geçmekte ve bu durum, uluslararası enerji haritasını etkilemesi ve ondan etkilenmesi açısından Türkiye'yi önemli bir konuma yerleştirmektedir.

Türkiye'nin doğal gaz politikaları ile uluslararası enerji sahnesinin önde gelen oyuncular arasındaki bağlantıları anlamak, sonu gelmeyen bir süreç gibi görünmektedir. Bu süreç, birçok gündem tarafından etkilenen girdilerin ve -gerek Türkiye'nin yerel doğal gaz profilinin kendisi gerekse bölgesel zorluklar bakımından- çeşitli bileşenlerin karmaşıklığı sebebiyle, çetrefilli bir süreçtir.

Bu çalışma, devletlerin özellikle doğal gaz durumu ve doğal gaz güvenliği gibi stratejik çıkarlarına dayalı ekonomik ve politik kararlar verirken potansiyel zorluklarla karşılaştıkları gerçeğinden hareketle Türkiye'nin doğal gaz politikasına ışık tutmayı hedeflemektedir.

Bu çalışma, Türkiye'nin doğal gaz politikasının önceliklerindeki değişimin, bölgedeki zincirleme olaylara ve Türkiye'nin iç işlerine göre, AKP iktidarının başından bu yana nasıl yeniden tasarlandığını tartışarak, "Türkiye'nin doğal gaz politikalarının motivasyonu nedir?" ve "Türkiye'nin dış politikası ile Türkiye'nin doğal gaz politikaları birbirini nasıl etkiliyor ve tamamlıyor?" sorularını cevaplamayı amaçlamaktadır.

Bu çalışma, bu konuların teorik arka planını, neorealizm teorisini kullanarak analiz etmektedir. Çalışma ayrıca Türkiye'nin doğal gaz politikalarının, önemli bir geçiş ülkesi

olarak konumuna ve bir tüketim ülkesi olarak ihtiyaçlarına bağlı olduğunu ileri sürmektedir. Bu sebeple Türkiye'nin doğal gaz politikaları, dış politikasını tamamlamakta ve nispi kazanımlar elde etmek amacıyla İsrail ve AB ile daha etkin ilişkiler kurma olasılığını artırmak için dış politikalara ağırlık kazandırmaktadır.

Anahtar Sözcükler: Doğal Gaz Siyasetleri, Türkiye, İsrail, Avrupa Birliği, Neorealizm.



University : **Istanbul Kultur University**
Institute : **Institute of Graduate Studies**
Department : **International Relations**
Program : **International Relations**
Supervisor : **Assoc. Prof. Dr. Çağla Gül Yesevi**
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ABSTRACT

Türkiye had an increasingly important role for many years as a transit state for oil and, recently, for natural gas. Massive amounts of fossil fuels pass through Türkiye from Eurasia, Russia, and The Middle East through major pipelines and different ways, which put Türkiye in a significant position to affect and be affected by the international energy map.

Understanding the links between Turkish natural gas policies and the leading players in the international energy arena seems to be an endless process. This process appears to be challenging because of the complications of the inputs and the various components -either for the Turkish domestic natural gas profile itself or for the regional difficulties-which are influenced by many agendas.

This study aims to shed light on the natural gas politics of Türkiye based on the fact that states face potential challenges when making their economic and political decisions based on their strategic interests, especially its natural gas position and natural gas security.

This study aims to answer the questions: "What motivates Türkiye's natural gas policies?" and "How do Türkiye's foreign policy and Türkiye's natural gas policies affect and integrate each other?" by discussing how the change in priorities of Türkiye's natural gas politics redesigned based on the successive events in the region and Türkiye's internal affairs since the beginning of the JDP party's rule.

This study analyzes the theoretical backgrounds of these issues by using neorealism theory. Additionally, the study suggests that Türkiye's natural gas policies depend on its situation as an important transit state and its needs as a consumption state. Thus, Türkiye's natural

gas policies are integrated with its foreign policies and put weight on them to increase the possibility to adopt and establish more active relations with Israel and the EU to earn more relative gains.

Keywords: Natural Gas Politics, Türkiye, Israel, European Union, Neorealism.



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ABBREVIATIONS

AGC	Anatolian Natural Gas Centre
B/D	Barrel a day
BP	British Petroleum
BTC	The Baku-Tbilisi-Ceyhan Natural Gas Pipeline
BTE	The Baku-Tbilisi-Erzurum Natural Gas Pipeline
CEDIGAZ	Natural Gas Information Services
CERA	Cambridge Energy Associates
E&P	Exploration And Production Activities
EEZ	Exclusive Economic Zone
EIA	U.S. Energy Information Administration
EMGF	East Mediterranean Gas Forum
EMR	Energy Market Regulatory Authority
EU	European Union
FSRU	Floating Storage and Regasification Unit
GAZBIR	Natural Gas Distribution Companies Association of Turkey
IDF	The Israel Defense Forces
IEA	International Energy Agency
IMF	International Monetary Fund
ITG	The Türkiye-Greece Natural Gas Interconnection
LNG	Liquefied Natural Gas
MAPEG	The General Directorate Of Mining And Oil Works
MENR	Ministry of Energy and Natural Resources
OECD	The Organization For Economic Co-operation And Development
PA	Palestinian Authority
SCGPL	The South Caucasus Gas Pipeline
TANAP	The Trans-Anatolian Gas Pipeline

TAPO	Turkish Petroleum Corporation
TEİAŞ	Turkish Electricity Transmission General Directorate
TFC	Total Final Consumption
TFEC	Total Final Energy Consumption
TKİ	Turkish Coal Enterprises
TPAO	Turkish Petroleum Corporation
TPES	Total Primary Energy Supply
TSKB	Industrial Development Bank of Turkey
TSVTS	Turkish Straits Vessel Traffic Service
TTK	Turkish Hard Coal Authority
TWh	Terawatt Hours

CHAPTER 1

1.1. Introduction

With the advantages of its geo-strategically location, Türkiye had an increasingly important role for many years as a transit state for oil and, recently, for natural gas. Massive amounts of fossil fuels pass Türkiye to Europe and the other Atlantic markets from Eurasia, Russia, and the Middle East through major pipelines and different ways,¹ which put Türkiye in a significant position to affect and be affected by the international energy map. This creates the components of its energy policies, which were affected by the radical transformations of domestic, regional, and international factors which needed to be studied.

Since 2009, Türkiye adopted a new vision that was closely connected to its foreign policy aims to become a regional energy power; the Ministry of Energy and Natural Resources in its strategic plan 2010-2014 declared its ambition to become "the leader in the region in energy affairs."² This stand can be defined based on the International Relations functions which define states' aims to face potential challenges when making economic and political decisions based on their strategic interests. Especially their energy position and its security, specifically, the natural gas security, which became the regional energy political focus as a dynamic and strategic fuel "after decades of oil sovereignty."

While Türkiye offers one of the best options for an alternative energy corridor to link the main markets of Europe, "which increasingly depend on energy imports," with the wealthiest energy domains in the Middle East and the Caspian regions. This status creates a rich research environment for International Relations scholars to study the characteristics of Turkish energy policies, which could be one of the few components of the positive agenda for Türkiye and its relation with the EU and Israel.³

¹ "Türkiye." International Energy Agency IEA, <https://www.iea.org/countries/turkiye> [Accessed 08.07.2022].

² Ministry of Energy and Natural Resources. (2009). "Strategic Plan 2010–2014" http://www.enerji.gov.tr/yayinlar_raporlar_EN/ETKB_2010_2014_Stratejik_Planı_EN.pdf [Accessed 11.07.2022].

³ Simone Tagliapietra, "A new strategy for EU-Türkiye energy cooperation." *Turkish Policy Quarterly* 17, No. 3 (2018): 111.

In the recent two decades, the natural gas shares in the international energy mix kept increasing, and the LNG trade flourished.⁴ First, for its environmental benefits, natural gas burns cleaner than oil, coal, and other fossil fuel sources.⁵ Secondly, regarding economic viability; natural gas is considered an inexpensive energy source compared to other energy sources. For instance, the EU successfully applied reforms to its energy regulations and operating parameters to make natural gas more competitive and flexible.⁶ In Türkiye, the natural gas share tripled in the past two decades, from 15.1 bcm in 2000 to 45.1 bcm in 2019.⁷

In that regard, besides considering the developments in the geopolitics of the natural gas map; understanding the links between Türkiye's natural gas policies and its foreign policies toward the EU and Israel seems to be an endless process. This thesis aims to identify the various components of Türkiye natural gas policies -either for the Turkish domestic natural gas agenda itself or for the regional difficulties-.

By examining the interconnection of Türkiye's bilateral ties with every part. This thesis tries to answer two questions; "What motivates Türkiye's natural gas policies?" and "How do Türkiye's foreign policy and Türkiye's natural gas policies affect and integrate each other?". To answer these questions, this thesis relies on detailed explanations and analyses of Türkiye's natural gas policies with remarks on Turkish foreign policy, which is essential to give a clear understanding of what tools are used in Türkiye's natural gas policies and the possible gains for Türkiye.

These questions were built on understanding how could natural gas policies affect the state's interests to construct the arguments of the thesis on firm ground. In that regard, this thesis uses Neorealism theoretical explanations to support the research process with clear

⁴ "The Role of Gas in Today's Energy Transitions." International Energy Agency IEA <https://www.iea.org/reports/the-role-of-gas-in-todays-energy-transitions>. [Accessed 08.07.2022].

⁵ "Natural gas explained: Natural gas and the environment." U.S. Energy information Administration EIA <https://www.eia.gov/energyexplained/natural-gas/natural-gas-and-the-environment.php> [Accessed 08.07.2022].

⁶ Difiglio, Carmine, Bora Şekip Güray, and Ersin Merdan. *Türkiye Energy Outlook 2020*. (Istanbul: Sabancı University, 2020), 256.

⁷ Ibid, 254.

definitions of the actors in the system, relations between states, and motivation yielding these relations.

This thesis will not compare Türkiye's natural gas policies with each actor but will study every actor independently. It will focus on how these policies affect the relations between Türkiye and these players using the theory of "Neorealism" for its explanatory power to analyze the interests through which Türkiye increases its gains most. In that context, referring to the direct and indirect factors that affect Türkiye's natural gas profile will enable the research to have a fruitful analysis of natural gas relations between Türkiye, the EU, and Israel.

Notably, the direct and indirect inputs to the Turkish natural gas policy-shaping process are diverse. These inputs can be categorized into main groups related to the location, the domestic political position, the natural gas outlook and the consumption rates, the regional ambitions, and any unpredictable global crises, for instance, what happened in the Covid-19 pandemic and the Russian-Ukrainian war in 2022.

By looking at Türkiye's natural gas policies from an outside view, the end of the cold war was considered a turning point in Türkiye's position as a western ally. Still, Türkiye's location has been viewed as a focal point for its importance compared to what it was during the cold war for energy-related issues.⁸

Even though the regional political elites are fed on negative historical memories in a region ruled by a sense of realistic nationalism. This view could not ignore that Türkiye occupies a strategic link between the leading and potential natural gas players and the main energy-hungry markets. Türkiye's geographical location's importance is a fact, and it's appeared to the surface occasionally, depending on the current regional ambitions. After the Ukrainian crisis in 2014, this fact was a focal point. The crisis was considered the last push to make the European decision to find alternatives for the Russian natural gas supplies by diversifying the suppliers.⁹

⁸ Kenan Aksu, "Türkiye-EU Relations: Beyond membership; army, religion, and energy." (PhD diss., University of London, 2015), 11.

⁹ Ibid, 33.

What makes Türkiye important to the EU is offering a semi-safe haven for the EU natural gas plans to achieve its goals through many projects depending on Türkiye's location. Even though many actors are afraid that Türkiye might strive to employ the ability to manipulate gas flows and tailor them to its political and economic position.¹⁰

In addition, Türkiye's location is essential not only for its closeness to the energy-hungry markets, which makes it a compulsory corridor but also for its proximity to the main domains of oil and natural gas. For instance, British Petroleum estimates that oil-proved reserves in the Middle East are about 48.3% of global reserves¹¹ and 40.3% of proven natural gas international reserves.¹² Furthermore, oil-proved reserves in Eurasia are approximately 10.35% of global reserves¹³ and 30.1% of proven natural gas international reserves¹⁴. In addition, the geographical and political historical connection of the Eurasia region with Türkiye highlights the importance of its geographic location as a safe transit gate.

Within the last decade, massive amounts of offshore natural gas were discovered in the East Mediterranean. These amounts, their closeness to the European markets, and the blurring of exclusive economic zones in this spot put this area of the world undergoing crucial changes. Starting in 2009 when Israel discovered the Tamar natural gas field and Leviathan in the next year.¹⁵ The discovery added a new aspect to potential conflict fed by an endless desire to supply the domestic markets and to reach the European markets, considering the political weight of being a natural gas exporter to the EU.

With the first discoveries in the Eastern Mediterranean, many states became rising international natural gas players, creating hope to change their political and economic realities. These hopes, carried by the discovered and the possible amounts, increased their ambition to change the game rules. The importance of these discoveries lies in their open

¹⁰ Ibid, 178.

¹¹ British Petroleum BP, *Statistical Review of World Energy 2021*, (2021), 16.

¹² Ibid, 34.

¹³ Ibid, 16.

¹⁴ Ibid, 34.

¹⁵ "The first discoveries started in 1999 when Israel has discovered the Noa and Mari-B fields, but the first commercially recoverable amounts was the new discoveries that started in 2009."

location at the intersection of Asia, Europe, and Africa and their connection to global trade routes through the Suez and Bosphorus.

The conflict of interest can also be a prelude to potential joint projects based on economic reasons after the need for cooperation has emerged rather than a potential long-term conflict that may lead to a further deterioration of relations. This cooperation could dispel any disagreement of political views on any other agenda and build a new concept of cooperation.

In 2014, Israel and Türkiye negotiated the construction of a subsea pipeline under the Mediterranean to transport the Israeli-discovered natural gas to EU markets via Türkiye.¹⁶ This negotiation came after years of tension in relationships because of the Israeli attack on the Mavi Marmara humanitarian aid ship in 2010, which led to significant uncertainty in the relations after the killing of 10 Turkish peace activists in the attack.¹⁷

These negotiations were one of the cornerstones to a détente after the incident, pushed by Türkiye's intention to increase diversifying the natural gas sources, besides Israel's intention to reach the second energy-hungry market in the world, "Europe." As a result of this, at the beginning of 2016, the prime minister of Türkiye, Recep Tayyip Erdogan, stated:

Israel needs a state like us, and we also admit that we need Israel.¹⁸

Regionally, Turkish natural gas policies appear to be a promising opportunity for developing better relations with many international actors due to its geographical location, as confirmed by the Turkish presidential spokesman, Ibrahim Kalin, in September 2020:

¹⁶ Nurieva, Guzel. "Natural Gas Factor in Israel-Türkiye-Russia: Energy Triangle." *Turkish Journal of Middle Eastern Studies*, no: 1 (2017): 104.

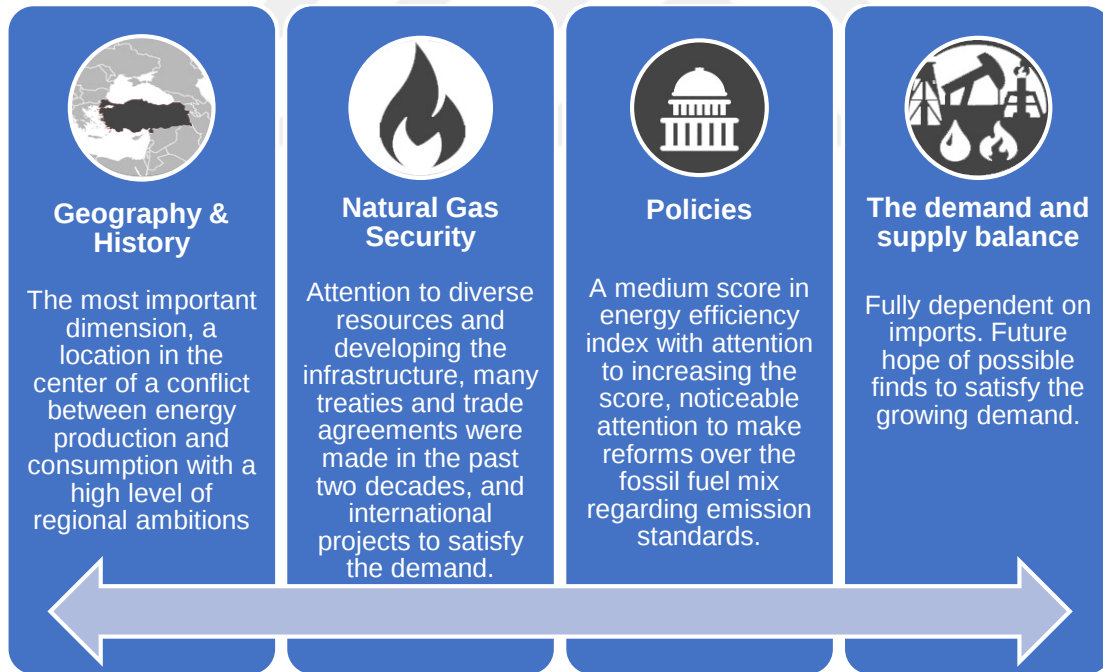
¹⁷ Robert Booth, "Israeli attack on Gaza flotilla sparks international outrage." *The Guardian*, May 31, 2010, <https://www.theguardian.com/world/2010/may/31/israeli-attacks-gaza-flotilla-activists> [Accessed 10.07.2022].

¹⁸ Barak Ravid, "Erdogan: We Must Admit That Türkiye Needs a Country Like Israel." *Haaretz*, January 10, 2018. <https://www.haaretz.com/israel-news/.premium-erdogan-türkiye-needs-israel-1.5384927> [Accessed 10.07.2022].

Türkiye is ready to cooperate with Israel despite the divergent viewpoints. Yes, we have political disagreements. Still, it should not be an obstacle because we are all part of this geography, and since we cannot change it, we must act according to this fact.¹⁹

Israel's importance to Türkiye at the present moment is due to an additional factor other than the seeking to improve Türkiye's diplomatic situation in the Eastern Mediterranean. But instead, Israel has appeared as a significant player in the natural gas arena after the enormous discoveries.

Based on all facts mentioned before, this thesis summarizes the external factors that affect Türkiye's natural gas policies' and the most essential dimensions in the following diagram to clarify what this study is trying to prove:



Source: Data collected from EMR, MENR, and IEA, 2022.

¹⁹ "Presidential Spokesman Ibrahim Kalin signals cooperation with Egypt, Israel." *Türkiyegazette*, September 22, 2020. <https://Türkiyegazette.com/presidential-spokesman-ibrahim-kalin-signals-cooperation-with-egypt-israel/> [Accessed 11.07.2022].

By going inside to discover the domestic factors that affect natural gas policies in Türkiye, the domestic political position related to natural gas policies seems to be ambitious. Türkiye's natural gas policies are one of the priorities not just for the Ministry of Energy and Natural Resources but also for other government institutions. This importance was clear in the Eleventh Development Plan (2019-2023) by the Presidency of Türkiye,²⁰ which focused on goals for the natural gas sector.

The plan aimed to reach the diversification of the natural gas supplies and the routes as a priority to meet the increasing local demand with the consideration of enhancing the supply security of the LNG by targeting a new level of active involvement in regional projects and by improving Türkiye's role in natural gas balances in the region. However, the diversification of the supplies to increase the level of natural gas security cannot be achieved only by applying internal efforts related to the market reforms through liberalization of the natural gas market, developing the distribution network "residential and non-residential," and increasing the storage reserve capacity.²¹

In that regard, what distinguishes the internal Turkish natural gas agenda is the high consumption rates with a noticeable incremental increase and dependence on imports. This heightened reliance on imports to meet the demand puts supply security and source diversification as the primary policy priority for the natural gas sector.²²

Türkiye currently receives 99% of its natural gas needs from imports which makes its security very sensitive to any changes in international prices or any decrease of the supplies from the sources based on political disputes or climatic reasons.²³

So far, regarding domestic production until the recent natural gas discoveries in the Black Sea, Türkiye has produced about 1% of annual domestic demand over the past decade.²⁴

²⁰ Presidency of the Republic of Türkiye. (2021). "The Eleventh Development Plan (2019-2023)". Retrieved August 19, 2022, 125.

²¹ Mert Bilgin, "Energy policy in Türkiye: security, markets, supplies, and pipelines." *Turkish Studies* vol. 12, no. 3, (September 2011): 402.

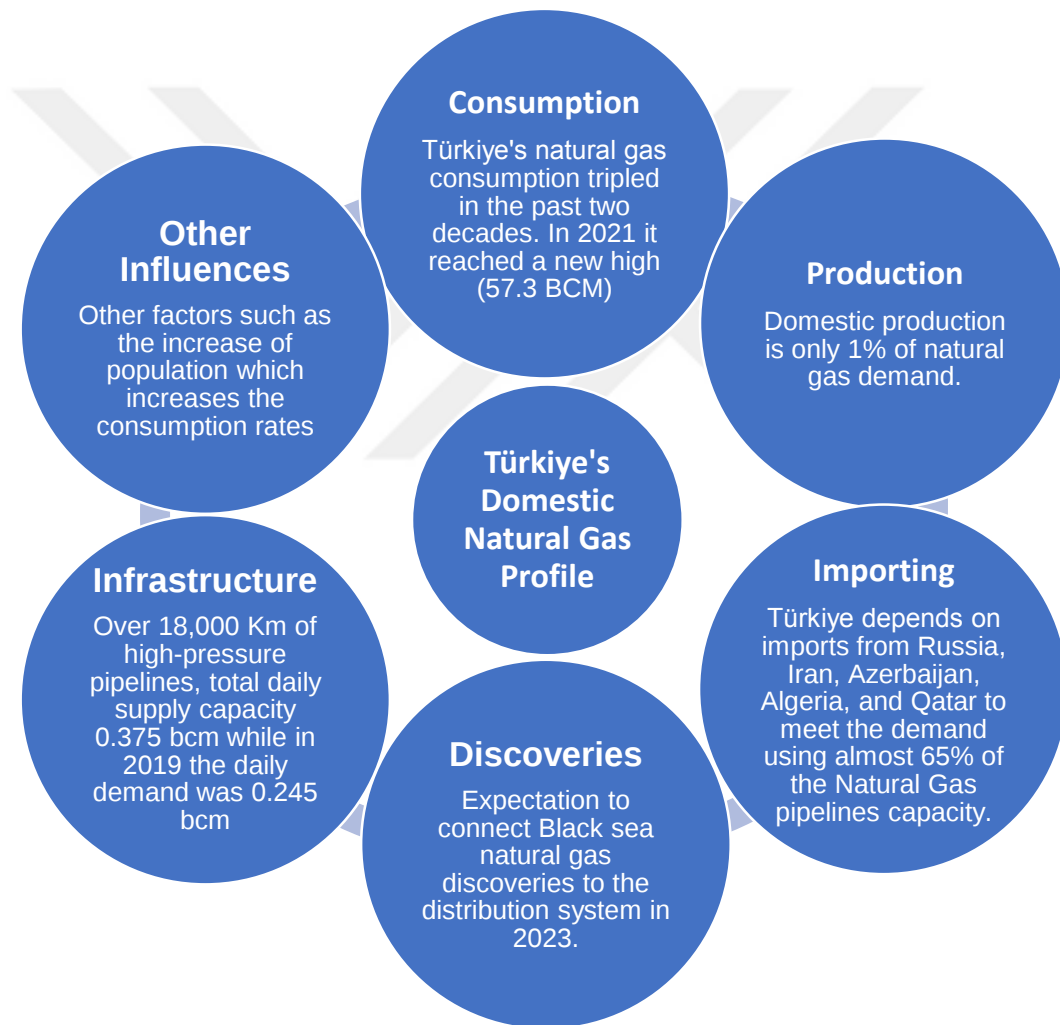
²² Difiglio and others, 'Türkiye energy outlook 2020', 254.

²³ Yunus Furuncu, "ANALYSIS - COVID-19's blow to energy markets." Anadolu Agency, April 24, 2020. <https://www.aa.com.tr/en/analysis/analysis-covid-19s-blow-to-energy-markets/181710> [Accessed 09.07.2022].

²⁴ Difiglio and others, 'Türkiye Energy Outlook 2020', 275.

The discoveries (with 710 bcm)²⁵ will change this situation and significantly increase the outlook for domestic gas production while reducing Türkiye's anticipated natural gas imports.

As mentioned, Türkiye's domestic natural gas policies are characterized as a circuit of influences. The shape of these policies can be illustrated in the following diagram to clarify the most significant impacts but not to contain all the effects:



Source: Data collected from MENR, EMR, IEA, and BOTAŞ, 2022.

²⁵ "Turkish president announces more gas reserves found in Black Sea." Anadolu Agency, December 27, 2022. <https://www.aa.com.tr/en/energy/natural-gas/turkish-president-announces-more-gas-reserves-found-in-black-sea/37200> [Accessed 03.04.2023].

This brief explanation of Türkiye's natural gas policies argues that Türkiye has an increasing natural gas demand and great attention regarding natural gas security, which will be discussed in a details in the following chapters to yield a solid ground for a better analysis.

1.2. The Importance of the Study

Based on the brief facts above, the main aim of this study is to examine Türkiye's natural gas policies with the EU and Israel. Mainly since 2003, when the JDP's rule started, with consideration that no study has been conducted so far on these states together specifically.

This thesis is dedicated to explaining the influence of each state as a critical issue that leads to the reason for the problem. A part of the choice of this topic is that most prior studies focus on each state without considering the other state's influence. The majority of studies concentrate on the relations consistently to identify the problem itself while offering no real solution or a new shape of natural gas relations. In contrast, this thesis strongly believes that each state is closely linked to the others.

Since the hydrocarbon conflict in the Eastern Mediterranean got its momentum in the media, a new generation of international relations researchers in the region was inspired by the passion for knowledge to analyze the focal cases in the area and its links with the major global players in the perspective of the energy policies.

As an international relations researcher, I was attracted by the capability of energy policies to explain the significant events in the last two decades and their influences on shaping the global system, especially the EU and Israel and their relations with Türkiye. This study will analyze these relations to find opportunities and possibilities by clearly understanding Türkiye's natural gas policies.

1.3. The Hypothesis of the Study

As one of the biggest natural gas consumers, Türkiye's economy is growing and integrated with the global economy. This puts more pressure on becoming more politically active in the natural gas sector to bring regional security and stability. Adding more interaction to Türkiye's natural gas policies nowadays is a priority.

This thesis seeks to find what motivates Türkiye's natural gas policies and how could the internal and external effects of its policies led its foreign policy-making to become more active in the natural gas sector.

Giannakopoulos, in his study, considered that Türkiye, since 2003, faces three choices; the first is “the leadership strategy” This strategy would strive for Türkiye to find and work with followers toward a common goal of transporting natural gas via Türkiye. The second is "economization," based on the role of treating natural gas issues as exclusively economic issues by removing any political barriers. The third choice is "securitization" by treating the natural gas issues as a security issue. He believed that Türkiye's foreign policy behavior was closer to this strategy.²⁶

In that context, Türkiye's foreign policies expressed interaction with natural gas policies through its projects, talks, and agreements to host pipeline networks and distribution systems to transport natural gas from east to west and south to north. The former prime minister of Türkiye, Ahmet Davutoğlu, considered that pipeline projects must be constructive attempts to bring regional security and stability.²⁷

This study developed two arguments as follows:

Türkiye's natural gas policies depend on its situation as an important transit state and its needs as a consumption state. Thus, Türkiye's natural gas policies are integrated with its

²⁶ Angelos Giannakopoulos, *Energy Cooperation and Security in the Eastern Mediterranean: A Seismic Shift towards Peace or Conflict?* (Tel Aviv: S. Daniel Abraham Center for International and Regional Studies, 2016), 47.

²⁷ Ahmet Davutoğlu, “Türkiye’s foreign policy vision: an assessment of 2007.” *Insight Türkiye*, vol. 10, no. 1, (2008): 77-96.

foreign policies and motivate it to increase the possibility of adopting and establishing more active relations with Israel and the EU to earn more relative gains.

The more the EU depends on meeting its natural gas needs on imports, the more the relations between Türkiye and the EU develop into other agendas. Thus, Türkiye could increase its relative gains in the system.

1.4. The Literature Review

It is not hard to find written literature related to Türkiye's natural gas policies, the geography of natural gas, and its relation to Türkiye's foreign policies. Still, due to the immensity of available information, this thesis conducts a critical evaluation to classify the available literature to find the answer to the hypotheses and the research question and to reach a logical conclusion.

Many engagements were written related to the thesis' problem, either from researchers who are outsiders to the heart of these policies (non-Turkish) or insiders (Turkish), which put many perspectives into consideration. Therefore, this study uses various resources from all sides to create a sense of balance in its analysis from English and Turkish sources. This study consults many books, internet resources, academic journals, Ph.D. dissertations, newspapers, and media tools during the literature search process to explore reality objectively.

One of the primary thoughts that study Türkiye-EU natural gas policies is that the open opposition among EU countries such as Germany and France to Turkish EU membership could change based on energy cooperation. Tagliapietra, in his article "A new strategy for EU-Türkiye energy cooperation," claims that natural gas represents the cornerstone of EU-Türkiye energy relations.²⁸

²⁸ Simone Tagliapietra, "A new strategy for EU-Türkiye energy cooperation." *Turkish Policy Quarterly* 17, no. 3 (2018): 125.

However, the political importance in that regard "by calculating the current and also the possible in the future limited amounts of the regional gas transit" seems to be overrated.²⁹ Still, Tagliapietra argues that both sides, Türkiye and the EU, can benefit from this collaboration in the internal energy profile by renewed relationship focusing on natural gas.

Tagliapietra elaborated that this hopeful collaboration could be achieved through two main solutions. The first is by increasing the capacity of the Turk Stream gas pipeline to supply the European markets with more significant amounts. However, this solution could not be possible only if Türkiye and the EU worked together to overcome the geopolitical and commercial obstacles and invest more in the infrastructure. He concluded this solution as a potential achievement to reach a much-awaited positive agenda between both parties.

The second solution is to increase collaboration in other energy sectors, such as renewable energy, energy efficiency, and nuclear energy. Still, this solution will not accelerate the possible collaboration as much as the first.³⁰

Another view in the same area is that Türkiye's location is at the center of Türkiye's and the EU's natural gas policies. Besides its historical ties with energy-exporting states in the Caspian Sea. This opportunity increases Turkish ambitions to become a regional energy hub by establishing a competitive market so that it that can supply a steady flow of reliable and cost-effective energy, as Aykin, Tache, and Karaman argued:

Accession talks with Türkiye should be resumed, and its membership in the EU should be assessed based on potential contributions to the regional energy market. It should be noted that the integration of energy markets in Eurasia and the Middle East will not only increase the security of the energy supply but also provide business opportunities for all parties, therefore contributing to peace, stability, and wealth in the region.³¹

²⁹ Ibid.

³⁰ Ibid

³¹ Sibel Aykin, Ileana Tache, and Ahmet Başar Akaraman. "Energy policy of the EU and the Role of Türkiye in Energy Supply Security.", *Bulletin of the Transilvania University of Brasov*, vol. 10, no. 2, (2018): 301.

Coşkun and Carlson state that the importance of Türkiye's location for the EU is not just for the urgent European need for diverse natural gas suppliers but for the changes in the energy-oriented policies and multipolar international system:

China and India have grown into one of the biggest consumers of Eurasian energy resources. Hence, the intense competition in the global energy market has caused a decrease in the share of the US and the EU.³²

Coşkun and Carlson argued that this competition gave energy-rich states and potential transit states strategic leverage to be superpowers, especially those with the possibility to carry natural gas to the EU. For instance, the rise of Russia's natural gas supplies role as an energy-rich state and Türkiye as a possible natural gas corridor could give Türkiye a space to maneuver by investing in the balance of demand and supply; in that regard, Türkiye seeks to enjoy the offtake rights as a transit state.

Even with the opposing views in the political environment in which the project Nabucco was conceptualized. Tagliapietra saw elements of political rapprochement between Türkiye and the EU over the last two decades. He suggests that both parties need to find a rapprochement in an urgent need now because of the progressive changes in the energy environment, either on the supply side or the demand side.³³

For the supply side, significant discoveries of proven natural gas reserves in offshore Israel's EEZ and the Kurdistan Region of Iraq were discovered. For the demand side, a definite political confrontation between the European Union and Russia will reinvigorate the EU to seek to diversify its natural gas supply. Those two factors will be a solid ground to reshape the relationship between Türkiye and the EU. However, those factors won't be considered a definite fact for both parties to collaborate; the EU may prefer to use a bilateral basis with natural gas-producing states. Still, those factors are grounds to invest in.

³² Bezen Balamir Coşkun, Richard Carlson. "New energy geopolitics: why does Türkiye matter?" *Insight Türkiye*, vol. 12, no. 3, (2010): 218.

³³ Simone Tagliapietra, "The EU-Türkiye energy relations after the 2014 Ukraine Crisis: Enhancing the Partnership in a Rapidly Changing Environment." *Fondazione Eni Enrico Mattei*, No. 75 (2014): 14.

Another view in that regard is to invest in Türkiye's location as a transit state, But in a different shape, by leaving the concept of "Energy hub" to the idea of "Anatolian Natural Gas Centre" (AGC). Arinc claims that the absence of an only energy supplier body to the EU Commission does not ensure reassurance for the suppliers or the importer states.³⁴

In that context, Arinc claims that there is a fear of one state could threaten the sustainability of the EU energy mix by affecting the prices of energy. For that reason, Arinc suggests making Türkiye an open energy market for suppliers from Eurasia and the Middle East. This mechanism could help Türkiye to liberalize its natural gas market from Russian control, even if the amounts from the Middle East "for technical reasons" are small and not compared to the Russian corridor to supply Europe directly and non-directly through Türkiye. These small amounts could make a significant change and could be a cornerstone for expanding projects in the future, as Arinc argued.

Another core belief within this context is to highlight the cooperation between Türkiye and the EU based on a "Frenemy" concept. Ksenia, in her article, analyzed that the shape of the energy relations contains two leading players; the first in Russia and the other in the EU and Türkiye. Türkiye and the EU are on the same side not for their solid ties but for the convergence of goals; both parties in the same interest conflict circle with the first player.³⁵

On the other side, Türkiye and Russia see each other as competitors for regional energy leadership. In different words, Türkiye and the EU adopt a multidimensional foreign policy approach to reach the stability of their energy mix, this convergence of goals could push them to favor cooperation over some historical political discrepancies. For instance, Türkiye did not refuse to cooperate with Greece on energy issues such as the Interconnector Türkiye–Greece. These goals, side by side with Türkiye's pipeline decisions, would not only convert Türkiye into an energy transit corridor but also provide Türkiye with significant leverage in the accession negotiations with the EU.

³⁴ Ibrahim Said Arinc, "The Natural Gas Geopolitics of Türkiye." (PhD diss., Durham University, 2014), 219.

³⁵ Krauer-Pacheco Ksenia, "Türkiye as a Transit Country and Energy Hub: the link to its foreign policy aims." *Forschungsstelle Osteuropa*, no. 118, (2011): 54.

However, there are a few studies that focus on the historical lack of agreement between Türkiye and the EU for reasons related to the tension between Türkiye and Greece. Likewise, the European Union's unwillingness to resort to Türkiye in the energy file as a transit gateway is based on the fact that Türkiye will invest in this matter to pressure towards granting it full membership.

Kumaş argued that the EU is not borne the fact that Türkiye is the only state which would supply the energy demand for its market. Even though Türkiye's geopolitical location stresses its importance, this advantage is not enough to characterize the scene for Türkiye's future relations with the European Union. The fundamental idea is that the geographic location of Türkiye is not everything.

Kumaş concluded this fact based on the decision of the EU regarding Turkish accession, which was described as an "uncertain and ambivalence decision" this uncertainty might push Türkiye toward choosing to minimize the level of cooperation in energy cooperation and save its energy card to use later in other agendas.³⁶

In that regard, one of the essential core beliefs is the effect of the Turkish–Cypriot relationship on the shape of Türkiye's foreign policies with the EU. Stergiou argued that there is a sense of ongoing international Islamicization of Turkish policies regarding the Cyprus question; this is stronger than any economic incentive.³⁷ Stergiou concluded energy itself would not be a strong incentive for peace, especially in a deep conflict like the problem of Cyprus, which indeed affect Türkiye's relationship with the EU.

Although the apparent convergence of the EU and Turkish interests, the energy relation reflects an important fact related to trust despite this convergence. Demiryol analyzed the reason for this trust issue due to the problem of credible commitment between both parties. They both fully and credibly do not yet commit to enough regional energy cooperation. The other reason, as Demiryol argued, is the interest conflict Intra-EU which feeds on three

³⁶ Gizem Kumaş, "Energy Policies of Türkiye in triangle of the USA, the EU and Russia." (MSc thesis, Bilkent University, 2010) 131.

³⁷ Andreas Stergiou, "Türkiye–Cyprus–Israel Relations and the Cyprus Conflict.", *Journal of Balkan and Near Eastern Studies*, vol. 18, no. 4, (2016): 388.

factors: interests of major energy companies, variations in the import dependency between the members, and the effect of the market size on the bargaining levels.³⁸

For Türkiye, Demiryol claims that the Turkish government prioritized its short-term energy interests over any prospects for long-term cooperation. Demiryol saw the reason for this issue is the Turkish side's perception that any cooperative efforts in the energy arena with the EU would yield tangible political benefits related to the accession of Türkiye into the EU.

Another important view in that context is Roberts' article; Roberts discussed what exactly is the energy hub state and its features. By elaborating on this information, Roberts analyzed Türkiye as a suitable energy hub; the main thematic issue was, being a hub state is almost the same as being a transit state. In addition, the hub state should adopt two essential features: to be a hub for the pipelines and to liberalize its energy markets. Robert saw that Türkiye had failed to achieve these objectives for various reasons.³⁹

Regarding this point, Roberts highlighted that BOTAŞ controls directly and indirectly 80% to 90% share of the energy market in Türkiye. Szigetvári, in his article, agreed with Roberts' ideas and saw that Türkiye did not adopt a liberalization policy for its energy market. Yet, regardless of whether Türkiye joins the EU, it is doing what it sees as best for itself.⁴⁰

Luft and Korin mentioned another systematic issue in this context; they saw that Türkiye's energy policies have a limited integration, which pushes it to experience a kind of extensive strategic planning because of its strong dependence on Russian energy exports. This situation limits its ability to evolve an effective countermeasure to Russia as an energy

³⁸ Tolga Demiryol, "The Eastern Partnership and the EU-Türkiye Energy Relations." *Baltic Journal of European Studies*, no. 4, (2010): 131.

³⁹ John Roberts, "Türkiye as a regional energy hub." *Insight Türkiye*, vol. 12, no. 3, (2010): 30.

⁴⁰ Tamás Szigetvári, "EU-Türkiye Relations: Changing Approaches." *Romanian Journal of European affairs*, vol. 14, no. 1, (2014): 40.

provider to the EU. Türkiye probably seeks stronger bilateral relations with Russia to balance any costs of playing a pivotal role in the EU's energy diversification efforts.⁴¹

In another context, and by looking at the historical background of the Türkiye-Israel relationship and considering some economic and political parameters of the complexity of this relationship, this thesis suggests putting further academic efforts into studying the influence of overlapping issues in this relationship.

By exploring the possibilities of cooperation offered by the natural gas policies developments to help facilitate Türkiye-Israel foreign policies rapprochement based on the idea that the end of the cold war brought other challenges to the Türkiye and Israel relationship. It is clear that both parties faced an increasing need to change their status from "security consumers" to "security producers."

The early signs of energy collaboration between Türkiye and Israel started at the beginning of the twenty-first century by sharing the same views between Israel and Türkiye while constructing the Baku-Tbilisi-Ceyhan (BTC) oil pipeline. Gradually, this view was a cornerstone for political talks to discuss plans with Türkiye to extend the BTC pipeline to Israel. However, this possibility did not achieve, and although this study focuses on the natural gas policies, this initial convergence in the views of energy policies will later be reflected in the natural gas policies as seen in this study.

This study did not identify any literary works that studied natural gas policies in the recent period after the Mavi Marmara incident. Although this aspect was affected by the change in diplomatic relations between the two countries, most literary works focus on other agendas. These events coincided with significant changes in the Eastern Mediterranean, where a massive amount of fossil fuels was discovered, with expectations of more real discoveries in the coming years.

After the détente between Israel and Türkiye, this period was full of literary works that studied the natural gas policies and their integration with foreign policies. Most of the

⁴¹ Gal Luft, and Anne Korin. *Energy Security Challenges for the 21st Century: A Reference Handbook : A Reference Handbook. Contemporary Military, Strategic, and Security Issues*. Santa Barbara: Praeger 2009, 260.

studies in this period considered two main approaches; the first is the Turkish-Cyprus relations and their influence on the Turkish-Israeli natural gas policies, which we will explain in more detail in the following pages. The other approach is to study the direct natural gas policies between Israel and Türkiye.

By observing the situation and what Turkish-Israeli relations have experienced since 2014, Israeli and Turkish energy companies started negotiations to construct a pipeline under the sea. Nurieva, in her study, saw this period as a cautiously optimistic political convergence, pushed by the possible benefits; Türkiye seeks to strengthen its status as a potential "energy transit state" by acknowledging the joint need to negotiate with Israel on the collaborative subsea pipeline project.⁴² Nurieva concluded that this project, despite the possible political obstacles, could sharply redraw the current regional energy map. Still, until this point, the project will face a long-lasting implementation process that could be affected by any unpredicted event in the Eastern Mediterranean.

One of the most important thoughts in this context is Görgülü and Gündoğar's study, which focuses on discussions on exports, energy security, and various political maneuvers after discovering the Leviathan field. They saw that the potential pipeline from Israel offshore to Türkiye would be a significant project if it materialized.⁴³

Görgülü and Gündoğar saw this project might not be succeeded because of three obstacles. The first is related to internal Israeli discussions. The second obstacle is finance; no investor would undertake a risk to invest in this area at that time because of the potential dispute over the delimitation of the maritime borders between the coastal states in the eastern Mediterranean. Finally, the project's route has two possible ways. The first is more cost-effective through Lebanon and Syria, but this path could be described as "commercially successful and politically impossible." The other route is through the territorial waters of Cyprus, which could not be clear how much incentive natural gas can be a solution to the Cyprus question.

⁴² Guzel Nurieva, "Natural Gas Factor in Israel-Türkiye-Russia: Energy Triangle." *Turkish Journal of Middle Eastern Studies*, no: 1 (2017): 124.

⁴³ Aybars Görgülü, Sabiha Senyücel Gündoğar. "Energy Relations between Türkiye and Israel." *Middle East and North Africa Regional Architecture*, (2016): 5.

An opposite argument was found in Tagliapietra's article "The rise of Türkiye and the new Mediterranean: Challenges and opportunities for energy cooperation in a region in transition." Tagliapietra analyzed that the natural gas finds in the Eastern Mediterranean came in "the worst moment for Türkiye-Israeli relations," which put more complication to the geopolitical equilibrium as he clarifies:

Among several uncertainties, one thing is certain: the key role that Türkiye will play in resolving or worsening the situation.⁴⁴

In another context, some studies believe that any possible cooperation between Israel and Türkiye will be through Cyprus' EEZ, based on the impossibility of any potential route through the Lebanese and Syrian EEZ as a route for the subsea pipeline between Israel and Türkiye. In that context, the Cypriot path is the only way to reach a political solution with Cyprus; for that reason, these studies occupy the most significant space of overall literary works that study Türkiye-Israel foreign policies' effect on their natural gas policies

However, by exploring the possibilities of collaboration/dispute offered by hydrocarbon finds, these studies saw Türkiye, Israel, and Cyprus as an independent natural gas triangle, which affects the future relationship between all the players in the natural gas arena.

Gürel and Le Cornu suggest a model to reach an agreement between all parts of the natural gas triangle by constructing a Turkish-Israeli pipeline beside an LNG plant in Cyprus.⁴⁵ This model, as they argued, would be a potential solution for restoring the Turkish-Israeli ties and for a settlement in Cyprus. However, this model could not be achieved without the leaders' bold political vision and a solid external influence, for instance, the USA. Gürel and Le Cornu argued that Türkiye would choose this path based on the Israeli-Cypriot ambition to export the LNG as an independent option without Türkiye.

In a further study, Stergiou analyzed, according to the historical background of the Cyprus question and based on some political and economic parameters of the geopolitical

⁴⁴ Simone Tagliapietra, "The rise of Türkiye and the new Mediterranean: challenges and opportunities for energy cooperation in a region in transition." *Fondazione Eni Enrico Mattei*, No. 66 (2012): 10.

⁴⁵ Ayla Gürel, Laura Le Cornu. "Can Gas Catalyse Peace in the Eastern Mediterranean?," *The International Spectator*, vol. 49, No. 2, (2014): 31.

environment in the Eastern Mediterranean, that any optimism for the joint exploitation of natural gas resources would be described as "wishful thinking." The discoveries, as he saw, will add more complexity to the historical dispute, affecting the Turkish-Israeli natural gas policies as a strong ally for Cyprus.⁴⁶

The same argument was found in Aslim's study; he describes the Eastern Mediterranean area as an area of losing opportunities; the states see the natural gas finds as a source of national interest, which will increase the possibility for an interest conflict. Aslim concluded that this situation could put more pressure on Israel to cooperate with Türkiye and Cyprus "separately" the problem in this model is that this collaboration would not last; this tension may refrain international investors from investing in any possible project.⁴⁷

One of the focal views in this section is the formation of the network of Cyprus-Greece-Israel vis-à-vis Türkiye; as Stavris suggests, he saw this network and its connection with Türkiye as a "Rubik's Cube" with an endless array of scenarios.⁴⁸ Although Stavris concluded that the advent of this network, as a form, would invariably run into Türkiye's grand designs, Israel understands adequately enough that it will not benefit from acrimony with Türkiye, which put this network in a complex project management challenge. Cankara also agrees with Stavris's view; she suggests that:

Türkiye is actually the easiest partner for Israel to establish strong links. However, Israel preferred other delivery routes after the Mavi Marmara incident, that brought the ties to the lowest point regardless of the potential prolific results of some.⁴⁹

Agdemir clarified this dilemma's reasons for Greece seeking to strengthen its ties with Israel, which would limit any possible recovery in Israeli-Turkish relations. The second reason that the Israeli government adopted the idea is that any collaboration with Greece

⁴⁶ Stergiou, 'Türkiye-Cyprus-Israel Relations and the Cyprus Conflict', 377.

⁴⁷ İlksoy Aslim, "Energy sources in the Eastern Mediterranean: contributor to solve the problems in Cyprus, Türkiye, and Israel triangle?." *Athens Journal of Mediterranean Studies*, vol. 4, (2017): 44.

⁴⁸ George Stavris, "The New Energy Triangle of Cyprus-Greece-Israel: casting a new for Türkiye?." *Turkish Policy Quarterly*, vol. 11, No. 2, (2012): 100.

⁴⁹ Pinar Özden Cankara, Yavuz Cankara. "Türkiye's and Israel's Policies toward the Energy Struggle in the Eastern Mediterranean." *International Journal of Turcologia*, vol. 15, No. 30, (2020): 17.

in the natural gas agenda would have the ability to bring Tel Aviv closer to Europe to help alleviate any political isolation that Israel may face in the international community.⁵⁰

1.5. The Significance of the Study

As Ranke in the Epochs of Modern history noted: "the truth lies possibly in the middle" this study believes that no study has yet studied all three parts' foreign policies' effect on their natural gas policies together. This study will locate itself in a balanced view by looking at every aspect "independently" to pay attention equally to any analysis done by energy policy researchers in the EU, Türkiye, and Israel in different languages to avoid any prejudices.

Therefore, this study consulted a wide range of views that had to be covered during the research process to reach a logical, objective, unbiased scientific answer to the hypothesis and the research question.

1.6. The Research Methodology

Researching such a complicated topic involves carefully categorizing the required information and how it affects the discoveries. This dilemma made this thesis prioritize using a multi-discipline by employing numerous research methods; this study will rely mainly on two methods: "the Data Analysis," "and Framing Analysis."

For the Data Analysis, theoretically, I could classify this study as a macro-level outlook to answer the research question and the hypothesis. However, this study also provides integrated depth to the micro-level model to devise more in-depth answers. As many energy policy researchers consider the International Energy Agency (IEA) publications as the bible of energy policies, this study will consider it the primary source. In addition to

⁵⁰ A. Murat Agdemir, "A new partnership in the Eastern Mediterranean: The growing relations between Israel and Greece." *Mediterranean Quarterly*, Vol. 26, No. 4, (2015): 65.

the US Energy Information Administration (EIA), Statistical Reviews from British Petroleum (BP), and Natural Gas Information Services (CEDIGAZ).

All these sources will be dealt with "integrated" as primary sources for this study; for instance, the data from BP could be used to identify the natural gas reserves for each part. The data from IEA could be used to determine future predictions, and the data from CEDIGAZ could be used to identify general statistical and historical data.

Also, this study will review the data and the agreements from Turkey's Ministry of Energy and Natural Resources, the Energy Directorate of the European Union, and the official institutions from Israel, Cyprus, and Greece. This study will also collect data from the annual review of the pipeline project companies.

Using two chief quantitative research designs, the quantitative analysis will explain the measurement's characteristics. The first is the "Exploratory design," and the other is the "Experimental design." This study will rely on the Exploratory design to characterize the data that can then be used to design the inputs for exploratory design. In contrast, the experimental approach will be used to discover how political scientists' cause-and-effect research studies.

To identify the qualitative data, this study will rely on two types of qualitative methods, the first is "the Interpretative analysis", and the other is "the Performance analysis." In contrast, the interpretative analysis will be used to interpret the interconnection in the expression of the political behavior, precisely to analyze the foreign policy behavior of the states; the performance analysis will be used to evaluate the formal political speech for the triangle's states' official institutions.

For the Framing Analysis, the primary use is to identify; which ideas prevail and how the conceptual mechanisms construct material interests in the regionalization process over time. In social sciences, the frames are any idea that specifies the goals and the suggestions

for particular policy choices; as Carr said: "The past, the present, and the future are bound to each other with the infinite chain of history."⁵¹

This study will rely on the framing analysis to discover the political elites' way of thinking about natural gas policies and how they are framed in their minds and reflected in their decisions, speeches, attitudes, and choices. In other words, this study believes that the frames connect the "core beliefs" with "issue-specific ideas" by forming the elite's decisions; by using this method, this study aimed to identify which ideas matter in actors' policy discourses.

1.7. The Theoretical Framework

This thesis will utilize the neorealism perspective to analyze Türkiye's foreign policies' effect on its natural gas policies toward the EU and Israel. This section will define the theory's main concepts and outline its main strands.

A part of choosing this theory is its explanatory power to understand the study period, in which the three states' pursuit of ways to maximize their interests are observed. In addition, the ability of Neorealism to introduce a precise analysis of Türkiye's natural gas policies with the EU and Israel within the "relative gain" framework.

The Neorealism theory is one of the systemic theories of international relations that study the effects of the global system on states. Notably, Neorealism is a variant of Realism with great attention to studying the effect of human nature; it depends on building this view on the effect of the "Authority" of human nature.⁵²

According to Neorealism, any interaction in the global structure is determined by basic principles; chaos, the distribution of capabilities, and decentralization. In other words, each independent state is equal in this system; these states operate according to the logic of

⁵¹ Edward Hallett Carr, *What is history? In Reading Architectural History*, pp. 179. Routledge, 2003.

⁵² Stephen M. Walt, "International Relations: One World, Many Theories." *Foreign Policy*, no. 110, (1998): 31.

relative gains, which means that states are looking for their interest, and this interest will not be made subordinate to the interests of other states.⁵³

While Realism relies on the concept of the arrangement of units as a property of the system, Neorealism defines the system as anarchic; this system is ruled by the juxtaposition of the not identical units, in which each unit identifies its interest with the interest of the system.⁵⁴

The Realism theory assumes the rationality of the units in the system by being aware of external circumstances. Accordingly, the units decide the best way to survive and maintain their positions in the system as the primary goal of interest maximization by concentrating on the distribution of capabilities. In that context, the unstable systems would make the unit concerned about its part of the relative gains that the other units may gain.⁵⁵

On the other side, Neorealism defines three types of systems based on the distribution of capabilities; the unipolar system (only one state dominates), the bipolar system (two states dominate), and the multipolar system (more than two states dominate). By these types, Neorealism adopts a hypothesis that explains how units respond to the threat, which motivates the units to look for a balance against the threat based on the proximity and/or contiguity between units.⁵⁶

In the following chapters, the assumptions of Neorealism will be used to explain what motivates Türkiye's natural gas policies and how much they are integrated/unintegrated with its foreign policies with the EU and Israel.

These concepts will help the thesis explore the tools used to pursue natural gas policies by discovering the motivating factors for Türkiye's natural gas policies, for instance, the economic pressure, the geostrategic advantage, and the maximization of relative gains.

⁵³ John J. Mearsheimer, "The Inevitable Rivalry: America, China, and the Tragedy of Great-Power Politics." *Foreign Affairs*, vol. 100, no. 6, (2001): 50.

⁵⁴ Kenneth N. Waltz, *Theory of International Politics*. New York: Random House, 1979.

⁵⁵ John J. Mearsheimer, *The Inevitable Rivalry: America, China, and the Tragedy of Great-Power Politics*. (New York: Norton and Company, 2001) 52.

⁵⁶ *Ibid*, 381.

1.8. The Outline of the Thesis

This thesis has five chapters divided into substantive sections. Each section contains a freestanding discussion using one of the methods mentioned above.

The first chapter introduces an overview of the study to establish a context and background. The chapter includes the importance of the research, the research question, the research hypothesis, the literature review, and the theoretical framework,

The second chapter accounts for a general outlook on Türkiye's natural gas profile; this chapter will be used in the following chapters to analyze the formation of Türkiye's natural gas policies based on its natural gas position, which will be diagnosed in this chapter. The difficulty of this chapter lies not in the time to gather the necessary data to create a clear image of Türkiye's natural gas profile but in the high rate of changing the data and the increased level of consumption.

The third chapter represents the start of determining Türkiye's natural gas policies with the EU as a supranational actor and Türkiye as a state. By touching upon the possible gains for both sides and the collective policy assumption for the EU. The chapter ends with explaining how Türkiye is essential to the EU regarding the agenda of natural gas to justify the maximization of interests for both parties and the assumption of the rationality for the critical influence agendas.

The fourth chapter explains the Türkiye-Israel natural gas policies and tries to analyze the reflections of some regional political issues over natural gas policy relations to determine possible cooperation. The chapter ends with describing the form of possible invested nature gas relations.

The fifth chapter is the conclusion part of the study, the central part, and the aim of the study. This chapter will combine the previous chapters' points, merge the study's analytical parts, and end with an overall assessment of the answer to the research question and the hypothesis findings; this chapter also tries to give new ideas for further research.

CHAPTER 2 : TÜRKİYE’S NATURAL GAS PROFILE

Due to Türkiye's geographical location, rapid economy, and Europe's need for stable natural gas flow, Türkiye has found itself "after the cold war" at the center of the demand and supply route for natural gas. Its position is a significant potential energy hub. These circumstances are considered a chance for Türkiye; investing in this chance relies on three factors: avoiding reliance on imported natural gas -which is impossible to achieve nowadays- diversifying the sources, and supplying natural gas at reasonable and affordable prices to meet its demand.

Nowadays, Türkiye relies on meeting its natural gas demand through imports. The gap between supply and the continuously rising demand is essential in determining how Türkiye deals with the natural gas agenda. Increasing Türkiye’s natural gas use-efficiency is an absolute necessity, which made the efforts into diversifying and sustainable natural gas sources as a critical point for its natural gas security efforts. This move seems an ongoing process because of the rapidly growing economy, which puts more load on policymakers.

During the last two decades, the main aim for the policymakers in Türkiye was prioritizing the consumption of natural gas resources to meet the demand, avoiding dependence on imports by focusing on discoveries, and diversifying the supply mix. These efforts will be achieved in many ways, which we will discover in this chapter.

In 2021, Türkiye's economy expanded by 11%, the fastest growth among the G20 states. the World Bank in Türkiye foresaw that the growth would be lower in the following years because of Covid-19 economic pressures, the spillover of the Ukraine-Russia war, and the inflation of energy prices globally.⁵⁷

While these pressures are considered factors that fragile the natural gas security status, this thesis believes these pressures are also an opportunity. Türkiye could have an essential role

⁵⁷ “The World Bank in Türkiye: Turkey Overview.” The World Bank, Retrieved July 12, 2022. <https://www.worldbank.org/en/country/turkey>.

in any future peaceful solution for the Ukraine-Russia war as a mediator acceptable to all parties.

This chapter seeks to set out Türkiye's natural gas profile, referring to its overall energy profile with graphics. This chapter will explain the current natural gas situation, which Türkiye utilizes for its domestic natural gas needs. Then, the chapter briefly addresses natural gas routes passing through Türkiye, its natural gas discoveries efforts, and the production and consumption rates to give an overall idea of Türkiye's natural gas profile; then, this chapter will provide a conclusion about this profile.

2.1. Türkiye's Energy Mix

Türkiye's economic crisis in 2001 pushed the policymakers to implement wide-scale reforms driven by the World Bank and the International Monetary Fund (IMF) to reach a steady growth course reflected in the business environment after years of political instability. The GDP grew and formed new heights yearly despite the slow start in 2007 till 2009 and Covid-19 economic pressures in 2020.

In 2021 ,Türkiye's GDP reached 810 billion USD,⁵⁸ and the population reached 84.1 million; unlike much of Europe, this population is of working age, relatively 67.9%.⁵⁹ With this economic development, the demand for energy in Türkiye became high, while Türkiye depends on satisfying its energy needs through imports. It is worth mentioning that energy imports represent almost one-fifth of Türkiye's import bill, including fossil fuels, lubricants, and other materials. The share of energy in the total components of government spending is fifth place after health, transportation, agriculture, and education.

According to the International Energy Agency, Türkiye's total primary energy demand in 2020 was 147.11 million tonnes of oil equivalent (toe),⁶⁰ comprising: oil, natural gas, coal,

⁵⁸ Ibid.

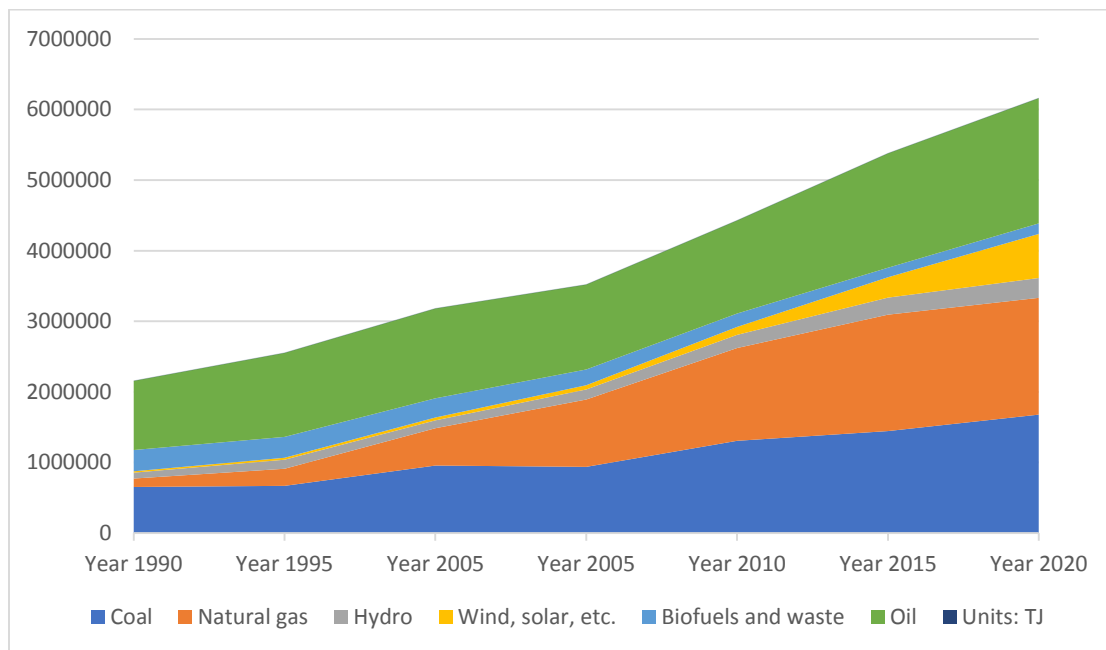
⁵⁹ "Proportion of Türkiye's youth population was higher than that of the EU member countries." *TurkSat*, 17 May, 2022. <https://data.tuik.gov.tr/Bulten/Index?p=Youth-in-Statistics-2021-45634>.

⁶⁰ "Türkiye." International Energy Agency IEA, Retrieved July 8, 2022. <https://www.iea.org/countries/turkiye>.

combustible renewable, and wastes. Still, fossil fuels drive Türkiye's economy, with a heavy dependency on imports, especially oil and gas (93% and 99%, respectively).⁶¹

Although Türkiye has prioritized expanding domestic exploration and production to help reduce its import dependency. Still, Türkiye has a long road to reach more ambitious growth in renewable, not just in electricity (residential and non-residential) but also in other sectors such as heating.

Chart 2.1 Total Türkiye's energy supply by source



Source: IEA, 2021.

As shown in the chart above, Türkiye's significant energy mix shares rely on oil, coal, and natural gas. This chapter will analyze Türkiye's oil, coal, and renewable energy profiles as the significant primary energy resources besides natural gas -the core of this thesis-. Also, Türkiye's electricity profile will be analyzed as the most critical energy consumption sector. Then, Türkiye's natural gas profile will be examined in more detail next.

⁶¹ International Energy Agency (IEA). (2021). *Turkey 2021 energy policy review*. p11, Retrieved August 14, 2022.

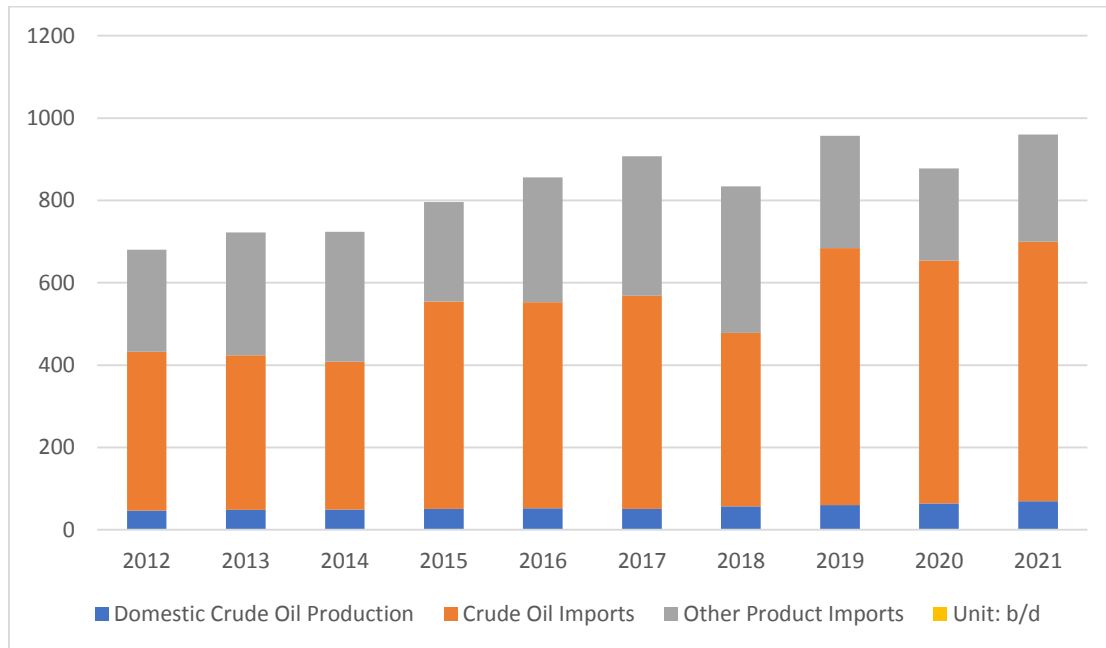
2.1.1. Oil

Although the drop in oil consumption in Türkiye because of Covid-19 restrictions in 2020 and 2021, oil remains the most significant energy source; the oil total final consumption was relatively increased since 2000 as a share of the total final consumption of all energy sources. Still, oil is considered to play a significant role in Türkiye's supply of energy products.

Although Türkiye depends on imports to meet its demand for oil and refined products, domestic production has increased in the past two decades, also the growth in the market has been higher. The country meets more than 96% of its oil and natural gas needs through imports. Therefore, Türkiye's oil and natural gas exploration activities projects have gained momentum in the past decade to decrease the gap in the foreign trade deficit.

Türkiye's oil consumption followed an upward trend from 2000 until 2017, the consumption decreased in 2018 and 2019, and the fall extended into 2020 because of Covid-19 travel restrictions; the aviation sector, as a significant consumer sector, was affected by the measures taken to wake the Covid-19 pandemic.

Chart 2.2 Türkiye's Oil Consumption and Domestic Production in 2012-2021

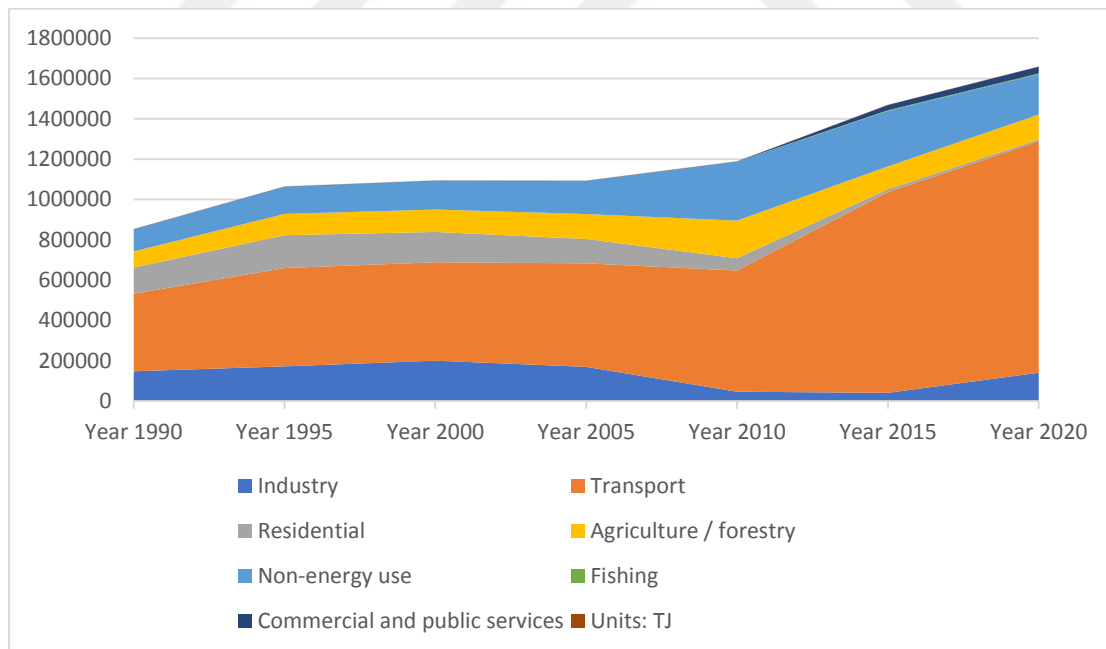


Source: MENR, 2021.

In 2021, Türkiye's dependence on oil imports was almost 93%, the daily average crude oil production was 69,000 b/d, while the average daily demand was 960,000 b/d, which means that Türkiye imported a daily average of 631,000 b/d of oil and 260,000 b/d of processed products to satisfy the gap between demand and supply.⁶²

According to IEA data, the particularly dominant industry is transportation, either for domestic transportation or international shipping and aviation. In 2020, the transportation sector consumed over 69% of Türkiye's total oil demand, which clarifies the massive gap between the demand in the previous years and the demand at the peak of the Covid-19 pandemic in 2020. The industry sector is the second-largest consumer, with almost 20% of total oil consumption. Half of this amount was used in construction and the chemical and petrochemical industries for "non-energy purposes." The remaining consumption amounts were in the services sectors, including forestry, agriculture, fishing, and public services.⁶³

Chart 2.3 Türkiye's oil consumption by sector



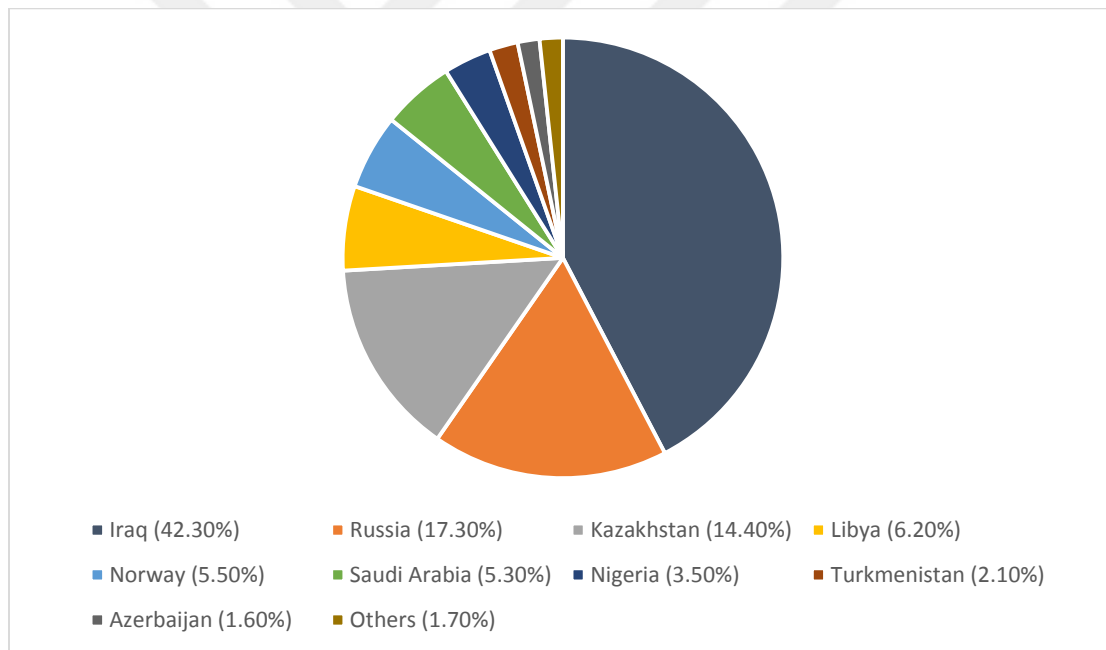
Source: IEA, 2020.

⁶² Turkish Petroleum Corporation TAPO. (2021). "2021 petrol ve dogal gaz sektor raporu [2021 oil and natural gas sector report]". p36. Retrieved August 10, 2022.

⁶³ IEA, 'Türkiye'.

In 2021, Türkiye's most oil imports to meet its demand came from Iraq (42.3%), Russia (17.3%), and Kazakhstan (14.4%), while the top three countries were the same as in 2020. Although Türkiye's oil imports from Iran were up to 34% in 2018, these imports decreased to almost 7% in 2019 due to the US sanctions on Iran. This gap was substituted by increased imports from Russia and Iraq (212,100 b/d and 191,900 b/d, respectively). In 2019, new oil sellers were added to diversify crude oil supply routes, including Norway, Turkmenistan, and Tunisia. In 2021, Türkiye imported Oil from Libya (6.2%), Norway (5.5%), Saudi Arabia (5.3%), Nigeria (3.5%), Turkmenistan (2.1%), and Azerbaijan (1%).⁶⁴

Chart 2.4 Türkiye's oil imports by country



Source: EMRA, 2021.

Another two critical factors that shape the Turkish oil policies -besides the consumption, production, and importation- are the upstream regulations and the oil supply infrastructure. For the upstream regulations, MENR's Strategic Energy Plan (2015-2019) promoted

⁶⁴ TPAO, '2021 oil and natural gas sector report', 37.

energy supply security by increasing energy production besides the Petroleum Law (Law No. 6491) of 2013 to organize oil upstream activities.

For the oil supply infrastructure, with its strategic geographic position, Türkiye has unique economic opportunities; almost 3% of the global oil supplies are shipped through Türkiye's straits. In 2018, around 86 000 ships passed through Türkiye's straits, operating as one of the busiest sea routes in the world.⁶⁵ Türkiye occupies over 8,000 kilometers of coastline, giving it access to the Mediterranean and the Black Sea imports. Many oil import ports played a significant role; for instance, Izmir, Kocaeli, and Mersin ports facilitate around 84% of total imported crude oil and refined products.⁶⁶

In addition, Türkiye has a significant pipeline network, domestically and regionally, to transport oil from the Caspian region and Iraq. The most critical pipeline is Baku-Tbilisi-Ceyhan (BTC), with a capacity of almost one mb/d through Azerbaijan and Georgia; BTC also transports Turkmen and Kazakh Oil. In addition, the second significant transit pipeline is the Iraq-Türkiye Pipeline (ITP), with a capacity of 1.4 mb/d.⁶⁷

For storage infrastructure, Türkiye has government and private sector oil storage facilities with a total oil storage capacity of 14.2 million cubic meters. BOTAŞ and TPAO run and operate the state-owned storage facilities connected to the importation pipelines network.⁶⁸

2.1.2. Coal

As the third-largest share in Türkiye's primary energy source, coal represents almost 28% of Türkiye's total primary energy source (TPES),⁶⁹ according to 2019 reports. The share of coal in Türkiye's TPES has been stable in recent decades; this share is mainly used for power and heat generation. However, Türkiye has an enormous domestic coal reserve,

⁶⁵ "Maritime traffic in the Turkish straits." The Turkish Straits Vessel Traffic Service (TSVTS), Retrieved July 10, 2022. https://afcan.org/dossiers_techniques/tsvts_gb.html.

⁶⁶ IEA, 'Türkiye 2021 energy policy review', 127.

⁶⁷ Ibid, 128.

⁶⁸ Ibid.

⁶⁹ "World energy balances." International Energy Agency IEA, Retrieved July 13, 2022. <https://www.iea.org/data-and-statistics/data-product/world-energy-balances>.

mainly Lignite (brown coal), and coal production occupies a large share of total domestic energy production.

Türkiye adopted policies to reduce CO₂ emissions as the share of coal in TPES is a considerable cause of greenhouse gas emissions. Although the approach to reducing coal consumption is focused on the power sector, coal-to-gas switching is more accessible than in other sectors, such as industry. In that context, in 2018, coal combustion accounted for 43% of energy-related CO₂ emissions.⁷⁰ Still, coal has a significant share of Türkiye's TPES.

However, coal imports have increased in the last decade to meet the continuously growing demand. In production terms, domestic coal production accounted for 71% of the total supply in 2019. While in energy-producing terms, Türkiye's domestic coal production wrapped almost 28% of its TPES, which clarifies Türkiye's policies to increase domestic production by providing backing for mining and coal power generation efforts.⁷¹

These incentives encouraged coal mining efforts and increased domestic coal share in power generation. They were led by the state-owned coal companies, the Turkish Hard Coal Authority (TTK) and the Turkish Coal Enterprises (TKİ). In addition, the government promoting more privatization of the coal-mining sector and incentivized increased domestic coal production by relicensing the non-producing areas of public companies via a tendering system to private companies.⁷²

According to the organization for Economic Co-operation and Development (OECD), Türkiye's domestic coal production covers 71% of the total coal; Türkiye's coal production is mainly Lignite (brown coal) with low calorific value compared to the imported steam coal.⁷³

⁷⁰ IEA, 'Türkiye 2021 energy policy review', 172.

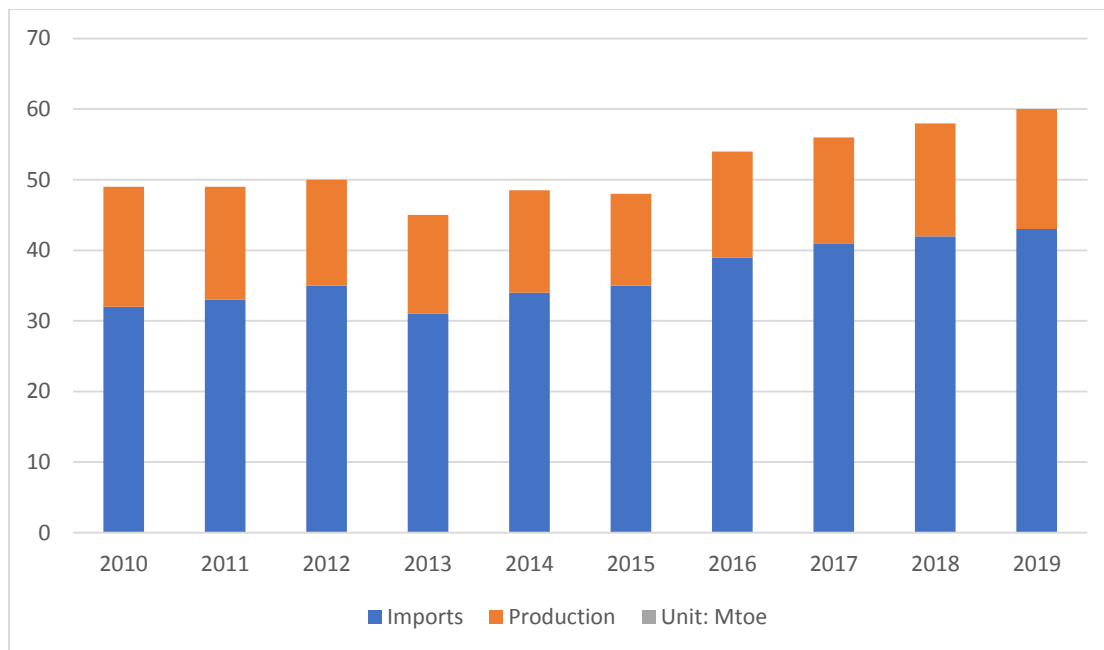
⁷¹ Ibid, 171.

⁷² Ibid, 175.

⁷³ "Fossil fuel support data and Country Notes." Organisation for Economic Co-Operation and Development OECD, Retrieved July 14, 2022. https://stats.oecd.org/Index.aspx?DataSetCode=FFS_TUR.

Türkiye's domestic coal production grew 38% in the last years after decreasing from 2009 to 2015 to reach 17.7 Mtoe in 2019, supported by government policies to incentivise mining and power generation efforts. However, domestic production has fluctuated in the last decade while imports have steadily increased.⁷⁴

Chart 2.5 Türkiye's coal supply by source



Source: IEA, 2019.

According to IEA, the coal consumption share of Türkiye's TEPS is almost stable. However, the consumption rates have steadily risen in the recent two decades due to rapid growth in coal power generation, which nearly doubled in the last decade. The total coal consumption in energy increased by 39% in the prior decade, from 29.4 million tonnes of oil equivalent "Mtoe" in 2008 to 40.8 Mtoe in 2018.⁷⁵

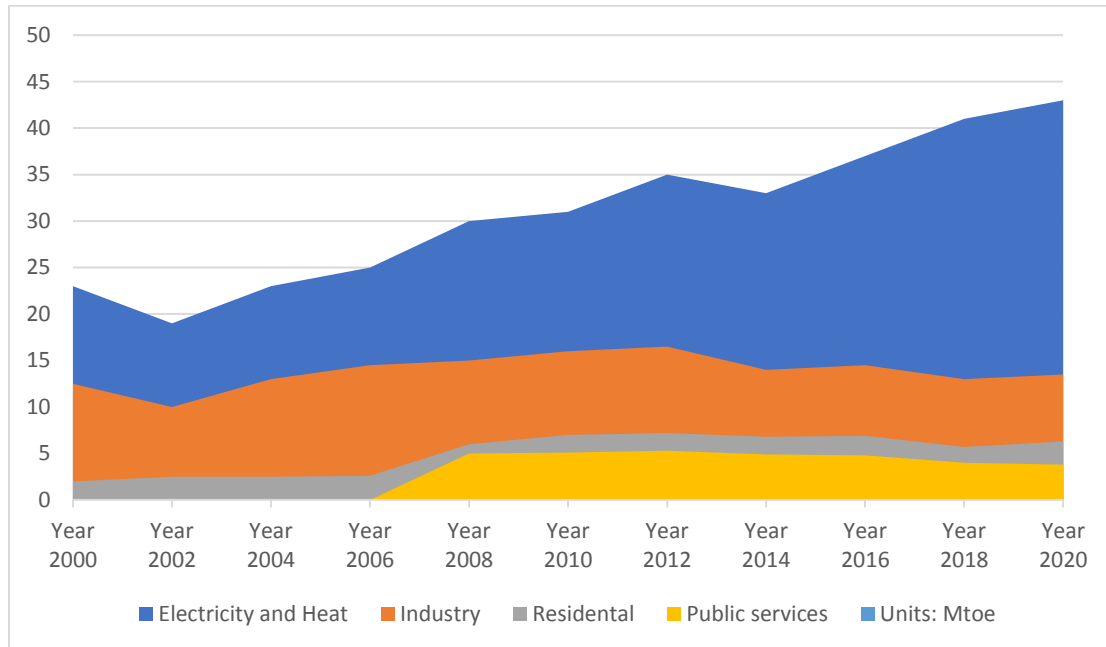
In 2020, a significant share of coal consumption went to electricity generation, which accounted for almost (37%) of total coal consumption, (28%) for heating generation, (and 26%) for industry purposes—followed by public services (5%) and residential (4%), with

⁷⁴ Ibid

⁷⁵ IEA, 'Türkiye 2021 energy policy review', 177.

a noticeable growth of coal demand in electricity and heat generation and decreasing in the public services sector.⁷⁶

Chart 2.6 Türkiye's coal consumption by sector



Source: IEA, 2020.

Türkiye has followed a plan to boost the domestic coal production and consumption of its proven coal reserves, Lignite (brown coal), in particular, despite no clean coal technology proving its economic viability yet to reduce the size of CO₂ emissions. This aim is one of Türkiye's plans to reduce the share of imported natural gas and coal in electricity generation. The main target behind this policy is to reduce dependency on imported energy sources and lower the import bill, to decrease the heavy weight on the nation's import bill.

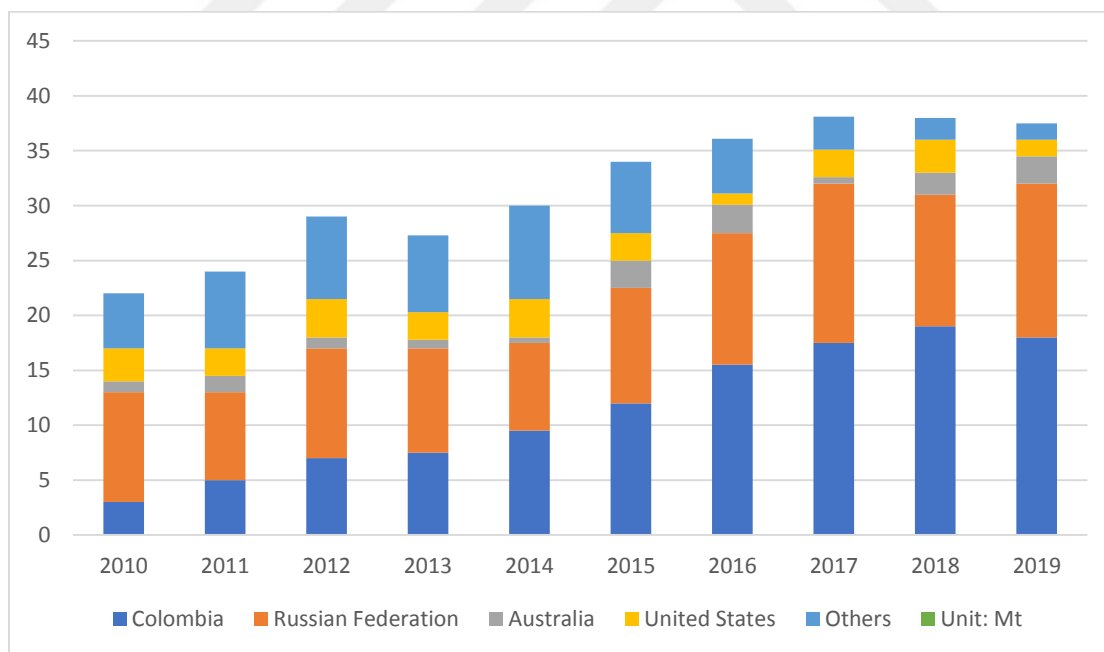
To achieve the coal policy goal of reducing import dependence, Türkiye has made efforts to find new coal fields besides improving the productivity of existing mines. Accordingly, proven lignite reserves are 19.14 billion tonnes and 1.6 billion tonnes of hard coal. In that context, the coal mining field receives financial support from the Turkish government to

⁷⁶ Ibid, 172.

enable the companies to pay miners' wages up to 100% higher than comparable jobs in other sectors.⁷⁷

As mentioned before, Türkiye's domestic coal production has fluctuated, which makes the imports more essential to meet the growing demand for power and heat generation. Türkiye's coal imports have nearly doubled in the past two decades, although imports have remained relatively flat in the five years during the rapid increase in domestic production. In 2019 Türkiye imported 48% of its total coal imports from Colombia, followed by Russia at 36%, Australia at 8%, and 3% from the United States. Most of these imports are steam coal for power generation and industry; the rest is coking coal, used mainly in steel production.⁷⁸

Chart 2.7 Türkiye's coal imports by country



Source: IEA, 2019.

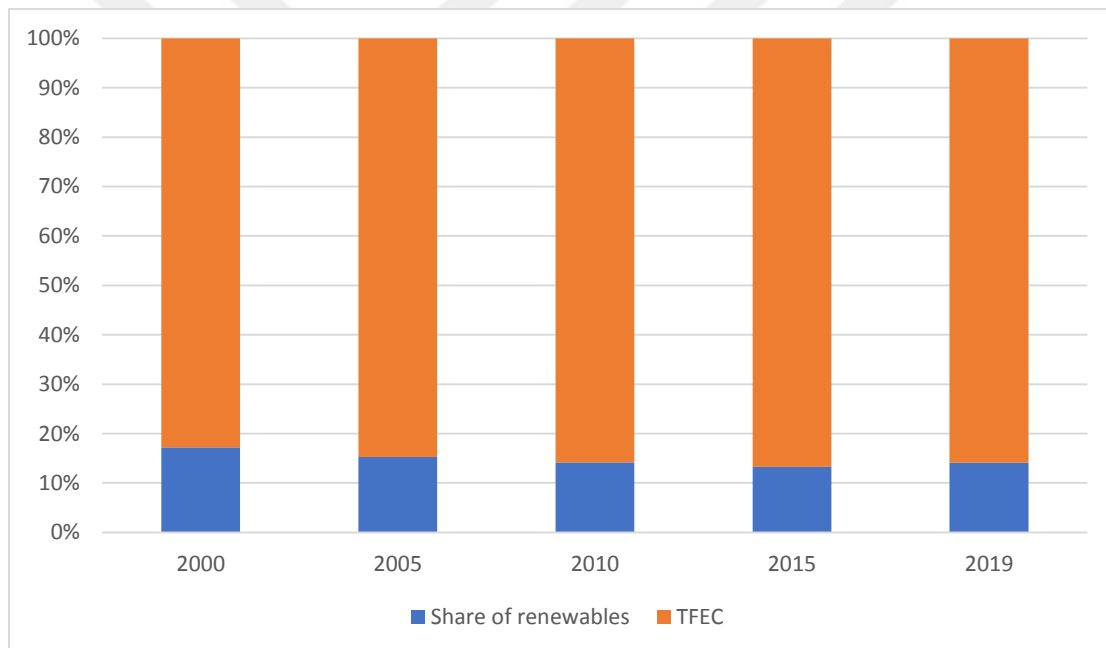
⁷⁷ Ibid, 174.

⁷⁸ Ibid, 174.

2.1.3. Renewable Energy

As Türkiye's fourth most significant share of the total primary energy supply, renewable energy supply has increased in the recent decade. Most growth is led by hydro, wind, and solar power. Renewable electricity in Türkiye nowadays reached a large share of total final energy consumption (TFEC). Solar and wind energy contribution was increased due to Türkiye's decisive steps to maintain momentum on renewable energy in its aims to reduce the dependence on energy imports and the significant leverage that renewable energy gives in the path of decarbonization as the cleanest energy source.

Chart 2.8 Türkiye's renewable energy share of total final energy consumption



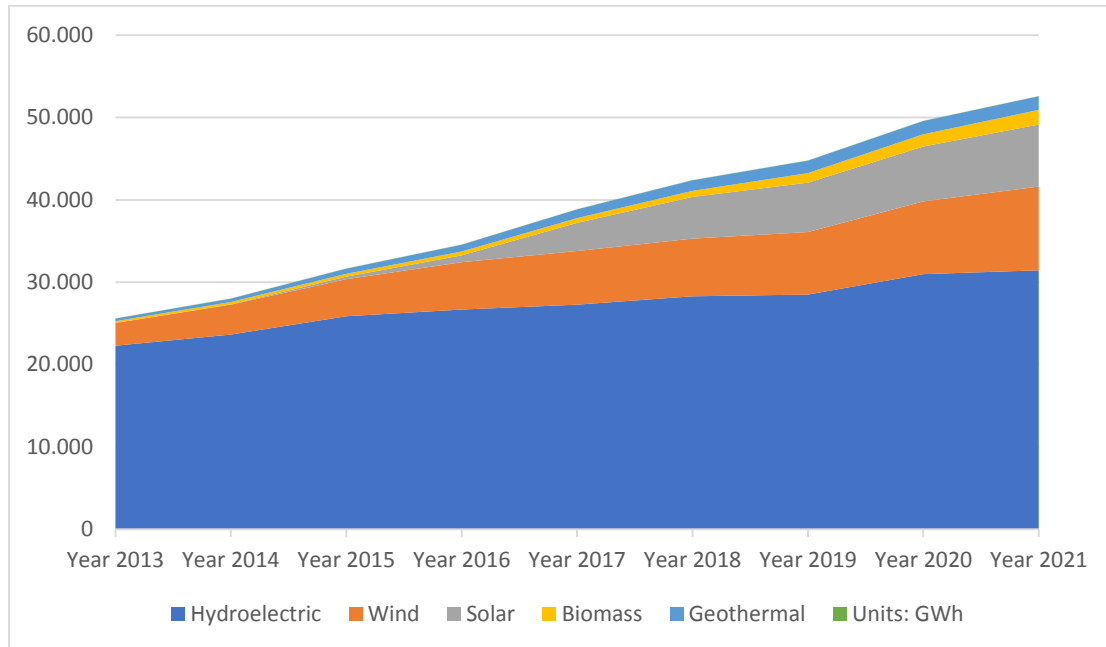
Source: IEA, 2019.

Türkiye's renewable electricity share has nearly tripled since 2008, as Türkiye has significant wind, geothermal, and solar power resources. Developing these resources is vital in combating climate change and reducing import dependency.

Both geothermal and solar energy used for heating and electricity more than doubled within a decade, as many households have switched from traditional methods to modern heating

and cooking for more efficiency. In addition, Bioenergy consumption increased in the last few years.⁷⁹

Chart 2.9 Türkiye's Growth of Installed Capacity for Renewable Energy



Source: TEİAŞ and TSKB, 2021.

The main barriers to Türkiye's aim to increase the renewable energy share of TPES are the required finance mechanisms and enterprising support programs. However, diversification of supply to generate an energy system more flexible by increasing the share of renewable energy is among Türkiye's central supply security policies due to meeting energy demand with greener options which had momentum in recent years internationally and domestically.

In this context, the Turkish government has presented various support instruments to promote the growth of renewable energy capacity, including rooftop solar compensation and competitive auctions. IEA expected that hydropower growth after 2020 could decrease due to the absence of development plans beyond commissioning large-scale projects currently under construction. But for the onshore wind, IEA expected that competitive

⁷⁹ Industrial Development Bank of Turkey TSKP. (2021). Energy outlook 2021. p30. Retrieved August 1\1, 2022, from https://en.tskb.com.tr/i/assets/document/pdf/energy_outlook_2021.pdf.

auctions would drive capacity expansions.⁸⁰ Still, affordable financing plans remain a crucial challenge, mainly due to global inflation and its impact on the depreciation of the Turkish lira and high nominal interest rates on loans.

2.1.4. Electricity

Until the 1900s, Türkiye's electricity service sector operated within a vertically integrated structure and was delivered by state-owned institutions. However, in the 2000s, the Turkish government launched new legal regulations to liberate this model and change it to a competitive and multi-player model. The current model helps the state to focus on supply security and puts this security at the heart of economic growth and national prosperity. Nowadays, many private sector actors are active in the current model, which sets new aspects of competitiveness, dynamism, and deepening structure.

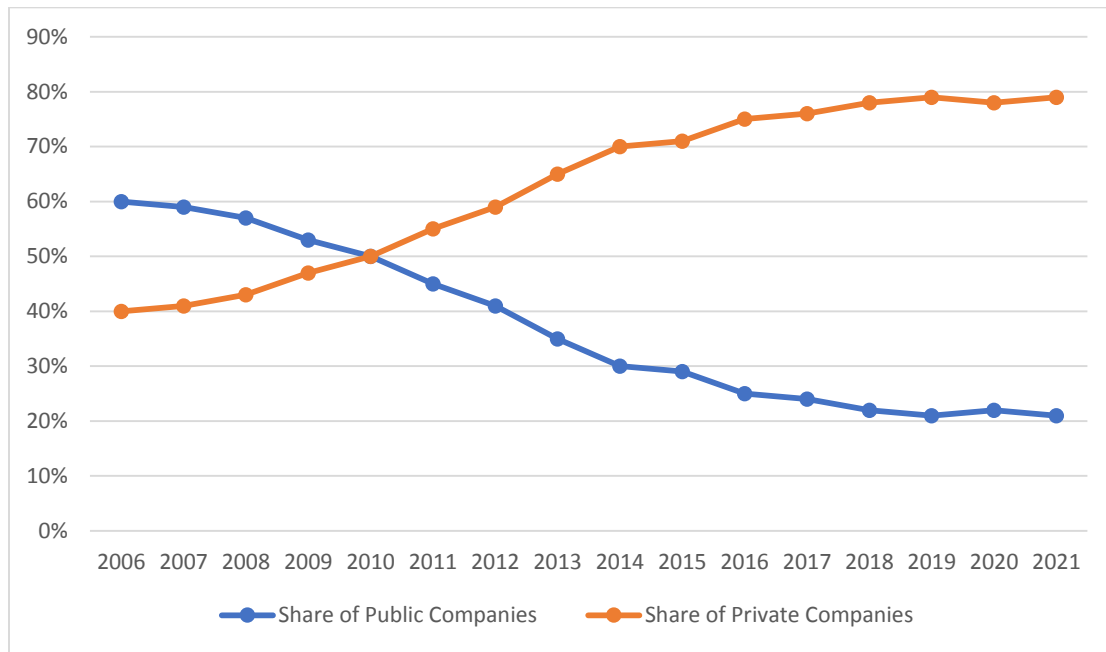
The new model allows the structure of the electricity sector to develop by overcoming capital and investment challenges and confusion in legislative issues. All these factors help the electricity sector in one way or another to diversify Türkiye's TFEC mix by considering alternative fuel using and hybrid generation options, and grid optimization. Still, Türkiye's electricity inputs mix uses traditional power sources. The share of natural gas and coal is still significant, making the electricity sector more sensitive to fluctuations in global energy prices.

When Electricity Market Law No. 4628 entered into force in 2001, the Energy Market Regulatory Authority (EMRA) was established to help to pave the way for more advanced liberalization steps in Türkiye's electricity sector, which built the current ownership status of the electricity industry. The share of Electricity Generation Corporation (EÜAŞ) has declined from 81.7% in 2001 to 21.6% in 2021 to private sector share.

Nowadays, all 21 distribution regions in Türkiye are managed and operated by private sector actors. The public companies still had a share of almost 20% in the electricity generation market because of the transfer of the build-operate-transfer power plants, which expired to EÜAŞ under the contracts.

⁸⁰ IEA, 'Türkiye 2021 energy policy review', 79.

Chart 2.10 Shares of generating institutions in Türkiye's electricity installed capacity



Source: Turkish Electricity Corporation, 2021.

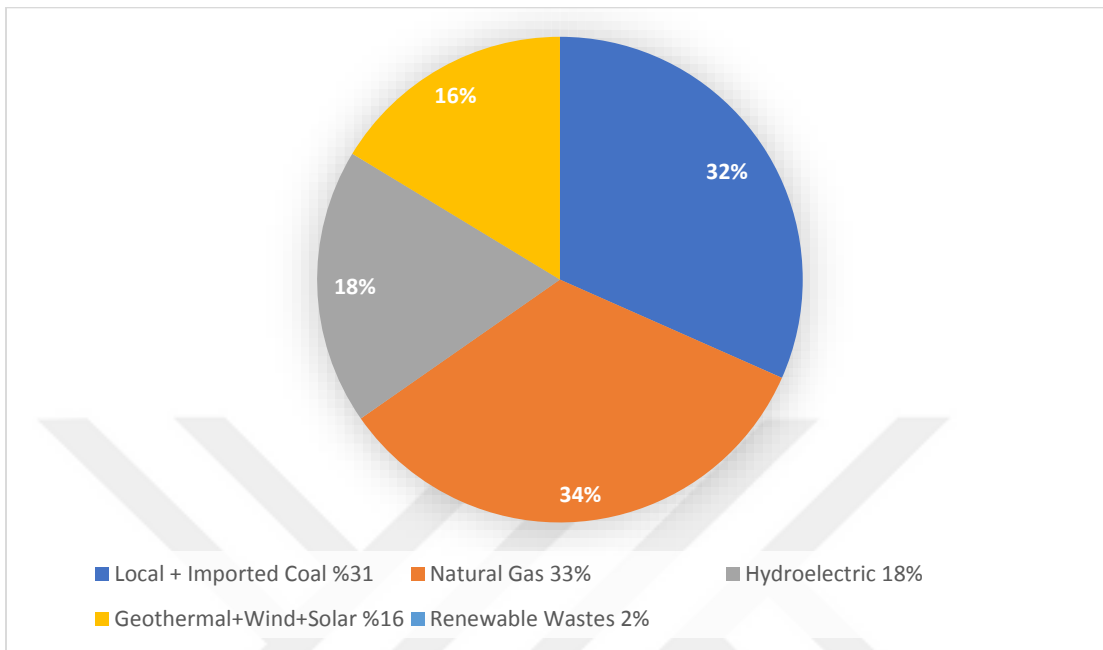
Türkiye has shallow import and export volumes in electricity, so total electricity generation follows a parallel course with demand. In that context, most of the investments since the liberalization of the electricity sector at the beginning of the 2000s were to meet the local market.

In addition, Türkiye's electricity demand has experienced a limited growth of 0.2% since 2019, after annual growth of 1.8% since the beginning of the 2000s. After the peak of the Covid-19 pandemic, the demand increased sharply compared with the previous year.

In 2021, imported natural gas was responsible for 33.1% of Türkiye's total gross electricity generation, while the share of imported and domestic coal products was 30.7%, a decrease of 3.6% from last year's gross electricity generation. Also, the hydroelectric power plants decreased by 10.3%. The decline in coal and hydroelectric power plants was met by natural gas because of the increased imported coal prices and the drought.⁸¹

⁸¹ Ibid, 185.

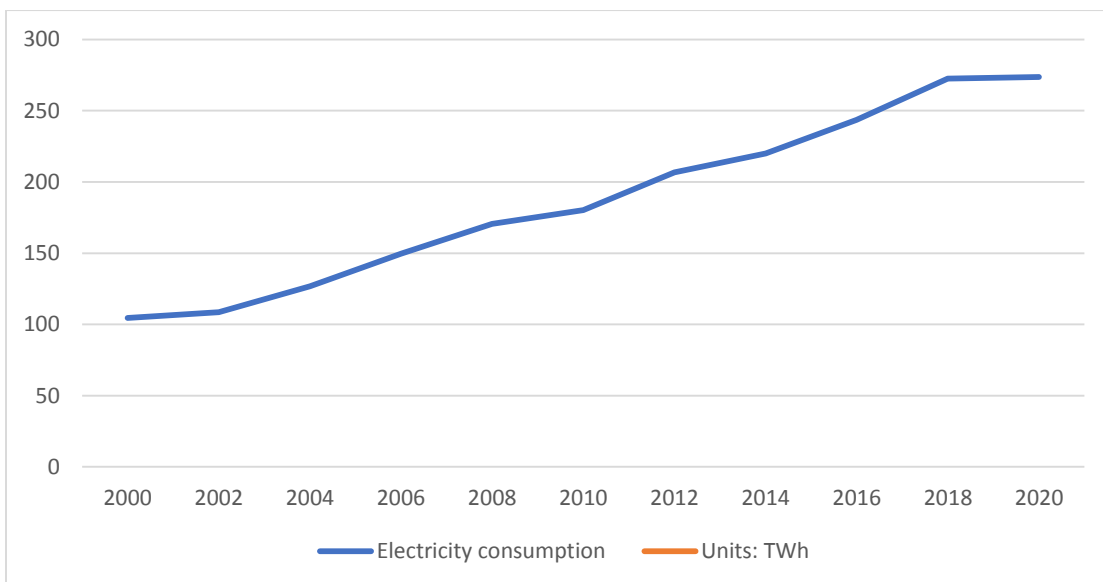
Chart 2.11 Türkiye's electricity generation by source in 2021.



Source: TEİAŞ, 2020.

In addition, Türkiye's total electricity consumption reached a near-record high of 273.6 terawatt hours (TWh) in 2020, almost 262% growth from the consumption of 2000.

Chart 2.12 Türkiye's electricity consumption.



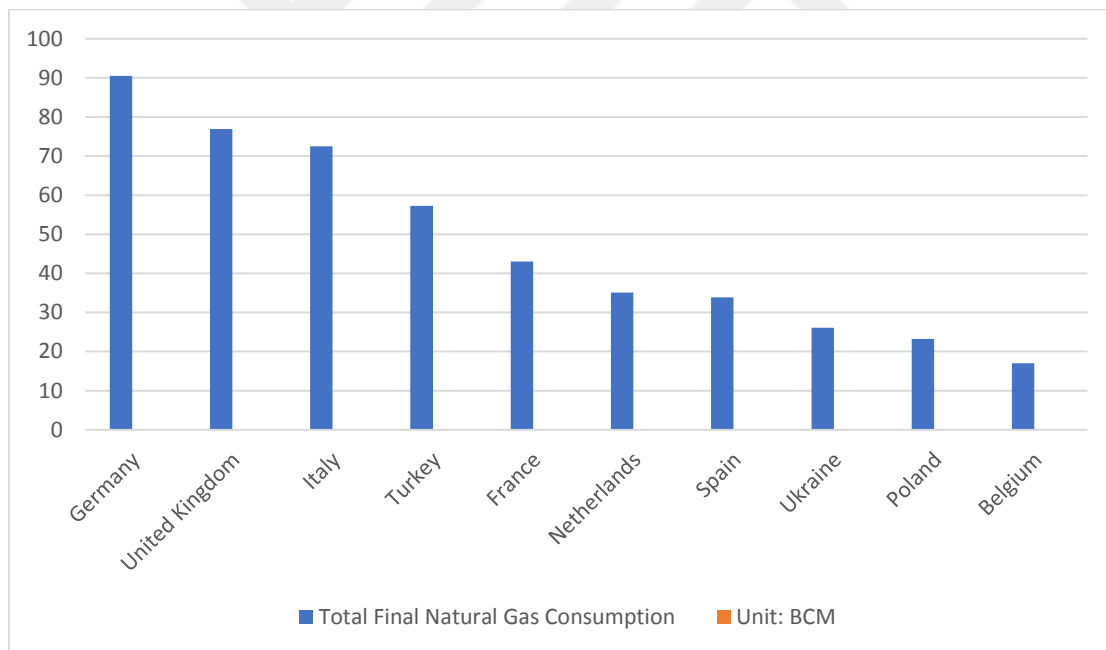
Source: IEA, 2020.

2.2. Türkiye's Natural Gas Outlook

As one of the fastest-growing economies in the G20, Türkiye's natural gas consumption has been in continuous growth for the past two decades. It is a fact that growth in natural gas demand is directly proportional to the increase in population, industrialization patterns, and urbanization. Thus, Türkiye's natural gas consumption experienced several years of double-digit growth in the first decade of the new millennium.

In 2021, Türkiye became Europe's fourth largest natural gas consumer after Germany, the United Kingdom, and Italy.⁸² In that context, in its 2021 annual report, the Turkish Natural Gas Distributors Association (GAZBİR) estimated Türkiye's final natural gas consumption as 58.8 bcm.⁸³

Chart 2.13 Natural Gas Consumption of First tenth European Countries.



Source: BP, 2021.

⁸² British Petroleum BP. (2021). Statistical Review of World Energy 2021. p.29, Retrieved August 10, 2022, from <https://www.bp.com/content/dam/bp/business-sites/en/global/corporate/pdfs/energy-economics/statistical-review/bp-stats-review-2021-full-report.pdf>.

⁸³ Natural Gas Distribution Companies Association of Turkey Gazbir. (2021). 2021 natural gas distribution sector report. p.16, Retrieved August 11, 2022, from https://www.gazbir.org.tr/uploads/page/2021_NATURAL_GAS_DISTRIBUTION_SECTOR_REPORT.pdf.

In that regard, Türkiye's natural gas production has been almost 1% of the consumption rate. Türkiye's dependency on natural gas imports is nearly 99% to meet its consumption,⁸⁴ with these imports playing an essential role in its foreign trade deficit.

This section will discuss Türkiye's natural gas profile by discovering Türkiye's natural gas consumption, supply, exploration efforts, infrastructure, the local market structure and regulations, and security of supply efforts.

2.2.1. Türkiye's Natural Gas Consumption

Natural gas ranks second after oil in Türkiye's TFEC. IEA expected that Türkiye's natural gas demand would increase in the short and medium term in line with the energy demand estimates made on a global scale; in that context, Türkiye's natural gas consumption has increased steadily over the past two decades. In 2017, it reached a historic high of 53.9 bcm, which is a 16% growth in one year compared with the year before because of the increasing electricity demand.⁸⁵

However, the data in the next few years show that Türkiye's natural gas consumption decreased in 2018 and 2019 by around 8%. In 2020, the data showed a new increase despite the Covid-19 pandemic. This increase expanded to 2021, which experienced a newly recorded high in consumption rates because of the decline of hydroelectric and coal share in the electricity generation sector because of the increased imported coal prices and the drought; this decline was met by natural gas share.⁸⁶

A year-on-year comparison of 2020 and 2021 showed that the upward trend regarding Türkiye's natural gas consumption is still prevalent; many variables, such as the weather conditions and the imported amount of natural gas, are influential for potential record-breaking gas consumption in 2023.

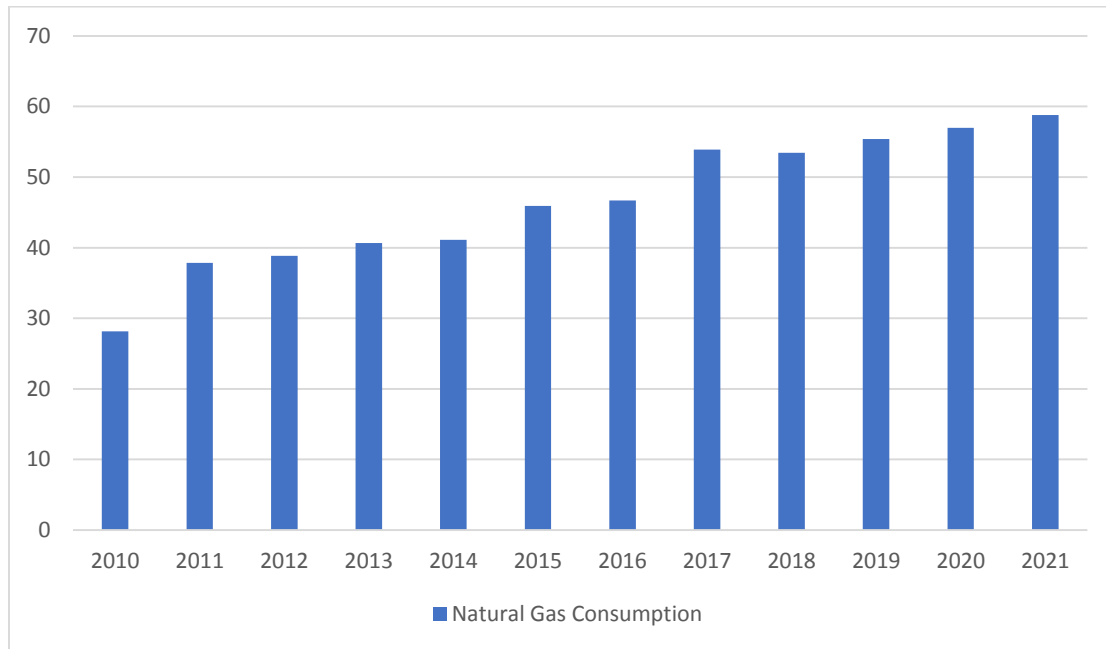
⁸⁴ IEA, 'Türkiye 2021 energy policy review', 138.

⁸⁵ TSKP, 'Energy outlook 2021', 19.

⁸⁶ Ibid, 24.

In addition, the rise in the production of power plants generating electricity from natural gas is also a sign of an upcoming increase in the natural gas consumption rate. Many institutions and organizations applied the hybrid working-form-home model as a new model -besides the traditional working model- after trying the effectivity of this model during the Covid-19 pandemic, which put a new weight on the electricity and heat generation plants.

Chart 2.14 Türkiye's natural gas consumption.



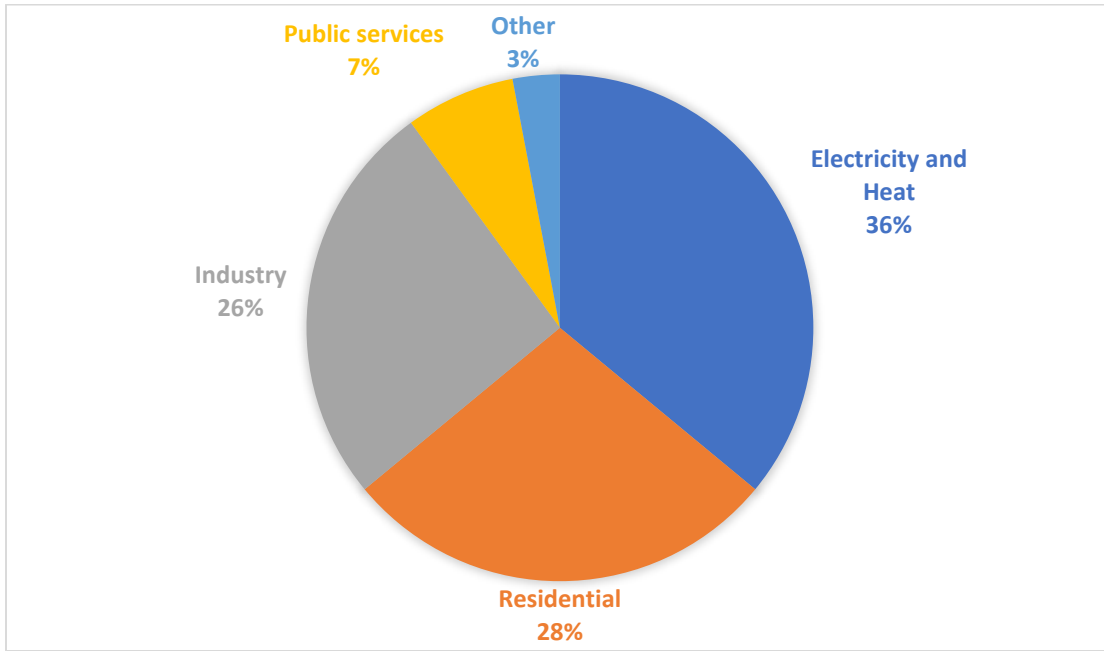
Source: EMRA, 2021.

According to GAZBIR, electricity and heat generation is Türkiye's largest natural gas consumer sector, accounting for 36% of total natural gas demand in 2021. Reflecting this, gas consumption in the power sector in 2021 was 21.168 bcm. The main reason for this large share is that natural gas power plants are typically flexible power sources, which makes them more accommodating to variations in supply—for instance, hydroelectric power, whose availability fluctuates with many conditions, such as drought.⁸⁷

⁸⁷ Gazbir, '2021 natural gas distribution sector report', 19.

As the second and third large consumer sectors, the Industrial and residential sectors have seen more stable growth in recent years. While natural gas covered 51% of total residential sector energy consumption in Türkiye, the share of natural gas consumption in the industrial sector has grown more the sixfold compared to 2000. The residential sector accounted for 28%, and the industrial sector accounted for 26% of Türkiye's total gas consumption in 2021.⁸⁸

Chart 2.15 Türkiye's natural gas consumption per sector.



Source: Gazbir, 2021.

2.2.2. Türkiye 's Natural Gas Imports

Türkiye started to import natural gas in 1988;⁸⁹ due to Türkiye's deficient domestic production, which covers almost 1% of its total natural gas demand. In 2021, Türkiye's total natural gas consumption was 58.8 bcm. To meet this demand, Türkiye imported nearly

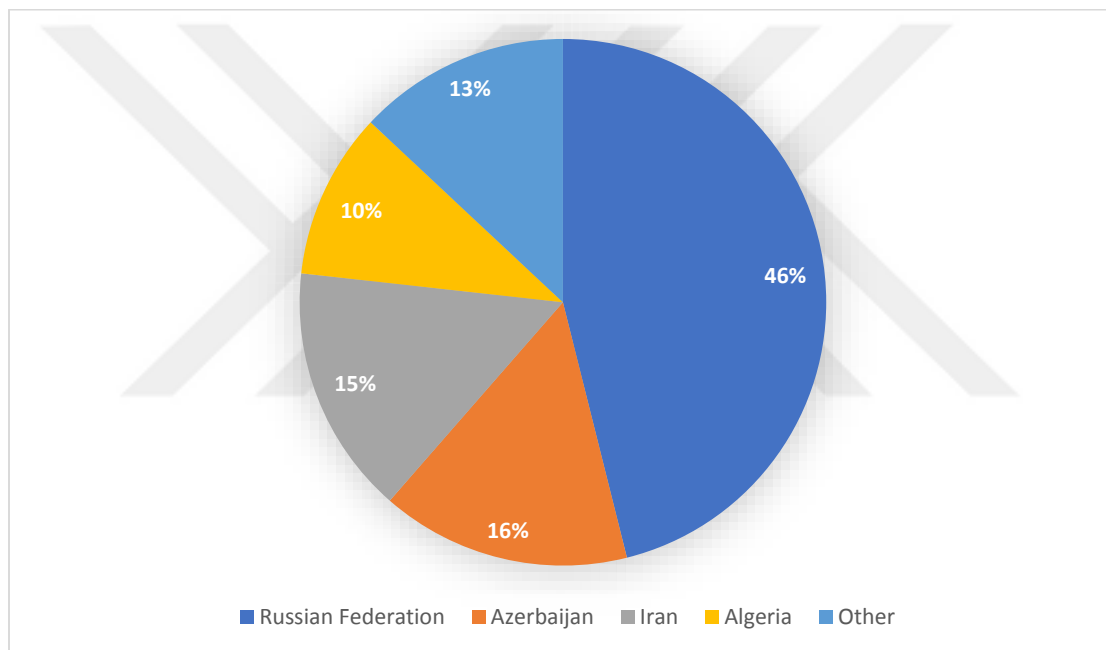
⁸⁸ Ibid.

⁸⁹ Özen, Erdiñç. *Türkiye Doğalgaz Piyasası: Beklentiler, Gelişmeler* [Turkish Natural Gas Market: Prospects, Progress] (Deloitte, 2012), 15.

46% of this amount from Russia in the context of two long-term contracts; the first expired at the end of 2021, and the other ended in 2025.⁹⁰

In addition, Türkiye imported in the same year 9 bcm from Azerbaijan, representing 15.3% of the total consumption rate. The exact amount was imported from Iran. In that regard, it's worth mentioning that US sanctions do not apply to pipeline imports of natural gas from Iran. Also, 6 Bcm of liquefied natural gas (LNG) was imported from Algeria.⁹¹

Chart 2.16 Türkiye's natural gas import per country, 2021.



Source: IEA, 2021.

In the early 2000s, Russian Federation dominated Türkiye's natural gas supply, which put its security in a critical position for any political tension. Türkiye started importing natural gas from Iran by the end of 2001, Azerbaijan in 2007, and Qatar in 2013 to diversify its natural gas supplies. The Turkish efforts to diversify the natural gas supply still determine the final shape of its natural gas policies to minimize the risk of a supply disruption.

⁹⁰ James Cockayne, "Turkey 2021 Gas Imports: Ukraine War Puts Russia Reliance in Focus." *MEES*, (2022): 1-1.

⁹¹ IEA, 'Türkiye 2021 energy policy review', 152.

In the first six months of 2022, Türkiye imported LPG from Russia in the context of Türkiye's contracts with Russian energy company Gazprom which expanded for a four-year deal till the end of 2025 for 5.75 bcm/year through TurkStream.⁹² Within this framework, the pricing system of this contract was based on 70% of the LNG spot market price plus the Brent Crude oil price, which is considered a high price compared with the Blue Stream gas.

Also, Türkiye signed a new contract in 2021 with Azerbaijan to import 11 bcm/year until the end of 2024.⁹³ Besides the 19% of TPAO's share in Shah Deniz 1, this contract is a safe space for Türkiye's natural gas security: fracking the shale gas might help its natural gas security.

2.2.3. Türkiye's Natural Gas Exploration Efforts

Türkiye's natural gas production in 2021 was less than 1 bcm, representing almost 1% of its total natural gas consumption. This fact is the backbone of Türkiye's natural gas policies; Türkiye puts heavy weight on its exploration efforts to avoid endangering its natural gas security in light of escalating international disputes, which could affect the supply flow.

Türkiye's natural gas exploration and production activities (E&P) are carried out under exploration and production licenses granted by the General Directorate of Mining and Oil Works (MAPEG) according to Turkish Petroleum Law No. 6491. Also, natural gas can be marketed by producers based on a relevant license from EMRA.

Recently, natural gas production has been on a declining trend in Türkiye. According to the current production data, Türkiye's natural gas production will cease entirely shortly if the new gas fields are not starting production in the Black Sea. However, Türkiye is pursuing exploration to increase the domestic potential of natural gas. Many Initial shale gas exploration attempts show that it has potential. Still, until these discoveries in the Black

⁹² "Russia's Gazprom Signs Four-Year Gas Deal with Turkey's Botas." Reuters, January 01, 2022. <https://www.reuters.com/business/energy/russias-gazprom-signs-four-year-gas-deal-with-turkeys-botas-2022-01-06/>.

⁹³ Archana, Rani. "Turkey Signs Deal to Import Natural Gas from Azerbaijan." Offshore Technology, October 18, 2021. <https://www.offshore-technology.com/news/turkey-deal-gas-azerbaijan/>.

Sea came with positive results to make more detailed assessments, these efforts were not contributing to the final natural gas production.

In 2020, Türkiye's E&P activities discovered offshore natural gas in the Black Sea. In August 2020, Türkiye's president Recep Tayyip Erdoğan announced the discovery of the Sakarya gas field by TPAO in the Tuna-1 Zone in the Black Sea, with an estimated reserve of 320 bcm of natural gas, this founds are the most significant Turkish natural gas discovery in its history.⁹⁴

In October 2020, Türkiye's E&P efforts discovered an additional natural gas reserve of 85 bcm in the same zone. And in June 2021, Türkiye also announced that another 135 bcm of natural gas was explored in the Amasra-1 gas field.⁹⁵ In December 2022, the Turkish president announced that the total discovered natural gas amounted to 710 bcm.⁹⁶

Map 2.1 Türkiye discovered natural gas in the black sea.



Source: TRT, 2021.

⁹⁴ IEA, 'Türkiye 2021 energy policy review', 146.

⁹⁵ Ibid.

⁹⁶ "Turkish president announces more gas reserves found in Black Sea." Anadolu Agency, December 27, 2022. <https://www.aa.com.tr/en/energy/natural-gas/turkish-president-announces-more-gas-reserves-found-in-black-sea/37200> [Accessed 03.04.2023].

By calculating the size and the production target date, these discovered natural gas would reduce Türkiye's import need to meet its increasing demand. Türkiye's dependency on natural gas imports could be reduced by 36%, and the nation's energy import bill could be reduced by 10% at least. As this thesis sees, the major success is improving Türkiye's position in any negotiating process with natural gas suppliers when the long-term natural gas import contracts are near to expire.

2.2.4. Türkiye's Natural Gas Infrastructure

Natural gas infrastructure is critical in ensuring supply security and diversity. Türkiye recently applied improvements to its infrastructure in the main context to ensure its natural gas security. Nowadays, Türkiye's gas transmission network length approaches 16,000 km, with 17 entry points. This network is operated by BOTAŞ and contains seven international pipeline import points, with five LNG entry points, and five domestic entry points, enabling Türkiye to deal with a total import capacity of 320 mcm/day. At the same time, Türkiye aims to reach a full import capacity of 463 mcm/day in 2023.⁹⁷

This sub-section will discuss Türkiye's natural gas storage, pipeline network, and LNG terminals in detail for their importance in Türkiye's natural gas security efforts.

2.2.4.1. Türkiye's Natural Gas Storage Capacity

Türkiye's storage capacity is an essential case for Türkiye's natural gas security. According to Türkiye's Eleventh Development Plan (2019-2023) and the MENR's Strategic Plan (2019-2023), Türkiye aims to expand its natural gas cumulative storage capacity to 10 bcm by the end of 2023.

BOTAŞ operates Silivri, Kuzey Marmara, Değirmenköy, and Tuz Gölü Natural Gas Storage Facility beside the floating storage and regasification units FSRUs. Silivri, Kuzey Marmara, and Değirmenköy acted as a single storage cluster and started operationally in 2007. This cluster has a total withdrawal capacity of 25 mcm/day and an entire working

⁹⁷ Ibid, 147.

capacity of 2.84 bcm; Kuzey Marmara has expansion plans to increase its full storage capacity to 4.6 bcm.⁹⁸

Tuz Gölü, natural gas underground storage facility, started operation in 2016; the facility aims to reach 80 mcm/day of withdrawal capacity and 5.4 bcm working capacity in 2023.⁹⁹

In addition, BOTAŞ Dörtüol FSRUs were commissioned in 2017, and the first Turkish FSRU ship Ertuğrul Gazi added to the fleet of BOTAŞ in 2021, equipped with a storage capacity of 170,000 m3 of LNG to ensure short-term and medium-term supply security.¹⁰⁰

2.2.4.2. Türkiye's Natural Gas Pipelines Network

Türkiye gets most of its natural gas imports through pipelines; even though the share of LNG imports has been increasing in recent years; still, pipeline infrastructure remains a critical part of Türkiye's energy security. According to MENR, Türkiye has 12 pipelines to import natural gas, either a working pipeline, a proposed project, or an unsuccessful project. The importance of the pipeline to its natural gas security made Türkiye plan to further develop its infrastructure by increasing existing pipelines' capacity and instructing new ones.¹⁰¹

⁹⁸ "Storage." BOTAŞ, Retrieved September 9, 2022. <https://www.botas.gov.tr/pages/storage/302>.

⁹⁹ Ibid

¹⁰⁰ "Floating Storage and Regasification Unit (FSRU)-Dörtüol." BOTAŞ, Retrieved September 9, 2022. <https://www.botas.gov.tr/pages/floating-storage-and-regasification-unit-fsru-dortuol/372>

¹⁰¹ "Natural Gas Pipelines". Republic of Turkey Ministry of Energy and Natural Resources, August 06, 2022, <https://enerji.gov.tr/bilgi-merkezi-dogal-gaz-boru-hatkari-en/>.

Map 2.2 Türkiye's natural gas pipelines.



Source: The Map of Türkiye's pipelines, IEA, 2021.

The Russia -Türkiye Natural Gas Pipeline was established to transport natural gas to Türkiye from the former Soviet Union in 1986, according to the signed agreement between both parties in 1984. The West Line pipeline entered Türkiye at the Malkoçlar entry point on the Bulgarian border and extended to reach Ankara in 1988. The capacity of the west line is 18.8 bcm/year; BOTAŞ transferred 4 bcm/year in its power to private importers. In 2013, four private Turkish companies (Akfel, Bosphorus, Bati Hatti, and Kibar Enerji) signed contracts with Gazprom to transport 6 bcm/year until 2043, now delivered through the TurkStream line since 2020.¹⁰²

The Blue Stream Pipeline, which entered into service in 2003 according to the 25-year natural gas purchase-sale agreement signed between BOTAŞ and Gazprom on December 15, 1997, transports natural gas from the Russian Federation through a transit line under the Black Sea to Türkiye. Blue stream has an import capacity of 16 bcm/year.¹⁰³

¹⁰² Ibid.

¹⁰³ Ibid.

The Eastern Anatolian Natural Gas Main Transmission Line (Iran-Türkiye), which started to transport natural gas from Iran in 2001, its maximum capacity is 10.4 bcm/year. It has a length of approximately 1491 km.¹⁰⁴

The Baku-Tbilisi-Erzurum Natural Gas Pipeline (BTE) started to transport natural gas from Azerbaijan in 2004, according to a contract between BOTAŞ and SOCAR. Its capacity is 6.6 bcm/year, and it transports natural gas from the first phase of the Shah Deniz field with an approximate length of 980 km. In 2015 the pipeline started to expand in parallel with the development of the Shah Deniz Phase 2. The expansion project will be fully completed in 2022, and the first flow to TANAP was started at the end of June 2018.¹⁰⁵

The Türkiye-Greece Natural Gas Interconnection (ITG), considered the first phase of the South European Gas Ring, interconnects the Turkish and Greek natural gas systems according to the signed agreement in 2003 between BOTAŞ and DEPA; the first flow through this pipeline was started in 2007.¹⁰⁶

The Trans-Anatolian Gas Pipeline (TANAP) started to transport natural gas from the Shah Deniz field of Azerbaijan in 2018, according to the signed agreement in 2011. TANAP is transporting 6 bcm/year to Türkiye and 10 bcm/year to Europe through Türkiye. With its construction of the 1841 km, TANAP is fully compliant with EU interoperability rules based on regulations by EMRA. TANAP is operated and owned by SOCAR (58%), BOTAŞ (30%), and BP (12%).¹⁰⁷

The Turkstream Natural Gas Pipeline, operated by Gazprom and BOTAŞ to transport natural gas from Russia to Kırıkköy in Türkiye, Turkstream is a replaced project for the South Stream pipeline, which was canceled due to the Ukrainian crisis and the high dissatisfaction created by the Syrian crisis.¹⁰⁸ The construction of Turkstream was started

¹⁰⁴ Ibid.

¹⁰⁵ Ibid.

¹⁰⁶ Ibid.

¹⁰⁷ Ibid.

¹⁰⁸ ÇAĞLA GÜL YESEVİ, "Considering Pipeline Politics in Eurasia: South Stream, Turk Stream and TANAP." *Bilge Strateji*, 10 (2018): 32.

in 2017; its maximum capacity is 31.5 bcm/year for two lines, Turkstream 1 and Turkstream 2, each having 15.75 bcm/year.¹⁰⁹

In addition, The Arab gas pipeline which supposed to transport natural gas from Egypt to Kilis in Türkiye through Jordan, Lebanon, and Syria, with another branch underwater and overland pipelines through Israel. The project was canceled in 2012 after the Arab spring and a perceived souring of ties between the two states.¹¹⁰

The Nabucco pipeline, also known as Türkiye–Austria natural gas pipeline. Its 3,893 km length and 31 bcm/year maximum capacity are supposed to transport natural gas from Türkiye to Austria through Bulgaria, Romania, and Hungary. The Nabucco project failed due to the lack of sufficient energy supply and financial reasons.¹¹¹

The Qatar–Türkiye pipeline was a project proposal to build a natural gas pipeline from the Iranian–Qatari South Pars/North Dome Gas-Condensate field towards Türkiye through Saudi Arabia, Jordan, and Syria. The project failed for many reasons, for instance, the security challenges,¹¹² but the main reason was the Syrian rejection of protecting its Russian ally's interests.¹¹³

2.2.4.3. Türkiye's LNG Terminals

Türkiye has five LNG terminals; four are currently in operation, and the last is under construction. The total daily regasification capacity for all of Türkiye's liquefied natural gas import terminals is 145 mcm/day, which is half of Türkiye's winter peak daily demand.¹¹⁴ Table 2.1. show the five LNG terminals in Türkiye:

¹⁰⁹ MENR, “Natural Gas Pipelines”.

¹¹⁰ Ibid.

¹¹¹ Burcu Yavuz Tiftikçigil & Çağla Gül Yesevi, “Energy Relations between Turkey and Russia: Conflict In Energy Projects.” *Journal of Economics and Sustainable Development*. Vol.5, No.12, 2014: 65.

¹¹² Ariscynatha Putra Ingpraja, “Political Implications of Turkey – Qatar Gas Pipeline Construction on European Union Energy Security.” *Journal of International Studies on Energy Affairs*, Vol 1, No. 1, (2020): 52.

¹¹³ Christian Lin, “Syrian Buffer Zone–Turkey-Qatar Pipeline.” *ISPSW Strategy Series*, no. 367, (2015): 4.

¹¹⁴ IEA, ‘Türkiye 2021 energy policy review’, 149.

Table 2.1 Türkiye 's LNG Terminals.

Türkiye 's LNG Terminals	Operated by	Year	The Capacity
Marmara Ereğlisi LNG Terminal	BOTAŞ	1994	37 mcm/day
The Izmir Aliğa LNG Terminal	EgeGaz	2006	40 mcm/day
Etki LNG Terminal	Etki	2016	28 mcm/day
Dörtyol LNG	BOTAŞ	2018	20 mcm/day
Saros FSRU	BOTAŞ	2021	20 mcm/day

Source: IEA, 2022.

2.2.5. Türkiye's Natural Gas Market Structure and Regulations

Türkiye's natural gas sector is regulated by the Energy Market Regulatory Authority (EMRA); the state-owned Petroleum Pipeline Company (BOTAŞ) is the sole operator of the natural gas transmission system. To establish a competitive natural gas market and liberalize the gas sector, Türkiye passed the Natural Gas Market Law in 2001, which concerns the liberalization of the natural gas market in Türkiye along with the establishment of an independent supervision and control mechanism over the market to ensure the supply of good-quality natural gas at competitive prices.

However, BOTAŞ is still the major player in the market due to the small size share of the private sector; in addition, the private sector needs to cultivate a standard transportation contract with BOTAŞ to export, import, and wholesale natural gas in Türkiye. One of the main targets of The Natural Gas Market Law is to restructure BOTAŞ as a horizontally integrated legal entity "still ongoing process." EMRA is responsible for any license to construct any new infrastructure connected to the natural gas network and for resolving all disputes related to third-parties access.

Türkiye's natural gas market design is organized by EMRA, which allows the players in the market to trade anonymously as a shape of the liberalized market to create a balanced market fully compliant with EU regulations.¹¹⁵

BOTAŞ imports natural gas through long-term import contracts, these contracts require an intergovernmental agreement, but the export process requires a separate understanding with BOTAŞ for its gas export capacity. Hence, only BOTAŞ is active among all companies licensed to export natural gas.¹¹⁶

2.2.6. Türkiye's Natural Gas Supply Security Efforts

In the past two decades, Türkiye has made progress in developing natural gas access for consumers; nowadays, all 81 cities in Türkiye have connected to the natural gas network. In general, the natural gas market liberalization process has played an essential role in boosting Türkiye's natural gas security.¹¹⁷

In diversifying the import process, although Türkiye imports the most significant amount of natural gas from Russia, Türkiye made notable progress by decreasing the share of Russian imports to other suppliers, such as Azerbaijan. As well as introducing new pipelines and increasing the capacity of existing pipelines. Also, boosting storage capacity is one of the cornerstones of Türkiye's gas security policies.

Domestically, BOTAŞ has undertaken additional investments in recent years by adding compressor stations to avoid bottlenecks in its transmission system to transport imported natural gas from eastern Türkiye to demand centers in the west.

Türkiye also made significant progress in increasing its import capacity to any seasonal risk and its demand peaks. Every year, a seasonal Risk Management Report is prepared by the Turkish Electricity Transmission Corporation and BOTAŞ to carry out network management and risk assessments. When peak demand exceeds supplies, BOTAŞ

¹¹⁵ Ibid, 155.

¹¹⁶ TCA, 'Natural Gas Sector Research'.

¹¹⁷ IEA, 'Türkiye 2021 energy policy review', 142.

prioritizes residential consumption by directing power generators to lower their consumption by up to half their levels temporarily.

2.3. Analysis and Evaluation

This chapter explored Türkiye's energy mix and natural gas profile to enable the following chapters to explain the natural gas policies of Türkiye with the EU and Israel in detail. This chapter's analyses put a solid ground to connect the hypotheses and Türkiye's natural gas motivates.

Broadly, Türkiye relies on natural gas imports to meet its increasing demand, which causes to orient its natural gas policies to be sharply supplied-oriented. These crucial facts are essential to understand the motivations of Türkiye's natural policies with the EU and Israel. For the EU, Türkiye's over-dependency on natural gas imports and its geographical location could put common targets into its foreign policies with the EU. Especially the fact that the EU's increasing demand for natural gas could push the EU's leaders to seek common or collective foreign policies with Türkiye to gain mutual benefits from collaboration regarding the natural gas agenda.

For Israel, the fact that Türkiye's natural gas security efforts to diversify its supplies, besides Türkiye's aim to become an energy hub, at the same time, the change of Israel's status from "natural gas consumer" to "natural gas supplier" could be a new start to find confluence elements in their joint foreign policies

In that regard, pipeline projects and pipelines would provide straightforward explanations for the arguments to discover how the foreign policies of Türkiye affected its natural gas policies with Israel and the EU. Furthermore, they explain how these pipelines and pipeline projects could increase each party's relative gains.

CHAPTER 3 : TÜRKİYE-EU NATURAL GAS POLICIES

After the end of the cold war, Türkiye found its geographical location as one of the most critical locations on the international energy map. Türkiye's dependency on Russian energy supplies and the endless European desire to escape the Russian energy role in its policies is significant to the EU, besides Türkiye's proximity location to important world energy exporter countries. Türkiye's location offers an excellent opportunity to supply the EU's hungry-energy market from Euroasia and the Middle East.

The Ukrainian crisis in 2014, besides the Russian-Ukrainian war in 2022, brought additional concerns to the energy security agenda of Europe. The EU's policymaking process faced a critical position of the Russians' ability to use energy flows to reduce the EU's political room for maneuver, especially after the Nord Stream natural gas flow shutdown for maintenance in August 2022.¹¹⁸

Historically, the relationship between Türkiye and the EU regarding the energy agenda has been defined based on the Turkish ambitions to use its location to introduce itself as an energy hub. On the other hand, Türkiye offers a reasonable solution to solve the EU's energy question since energy is considered one of the most critical issues for the EU.¹¹⁹

Before 2022, the main barrier to achieving a real breakthrough was the EU's fear that Türkiye could use the energy agenda to achieve political gains.¹²⁰ In that context, Türkiye applied European standards to its energy network, hoping this step would decrease the political gap and cooperate with Greece as a goodwill gesture with energy projects.

Although the role of natural gas cooperation between the EU and Türkiye in the last decade remains, especially, the collaboration in TANAP and Türkiye-Greece Interconnector, cooperation in these fields appear to be limited in practice on long-term cooperation. Many

¹¹⁸ Tagliapietra and Zachmann, 'Designing a new EU-Türkiye Strategic gas partnership', 2.

¹¹⁹ Kumaş, 'Energy Policies of Türkiye', 98.

¹²⁰ Aksu, 'Türkiye-EU Relations: Beyond membership; army, religion, and energy', 11.

voices in the EU called for suspending Türkiye's EU accession process because of the dispute over Cyprus.¹²¹

Even though all the issues are in dispute between Türkiye and the EU, both believe that vital mutual interests prevail despite the significant politically challenging times, especially after the critical energy position of Europe during the Russian-Ukrainian war in 2022, while Türkiye represented an opportunity for the EU to pass the bottleneck position.¹²²

However, Türkiye's natural gas policies with the EU are affected by many variables. For instance, the Cyprus question and the relationship with Greece. This creates many question marks for how the balance of power concept affects these natural gas policies. This chapter relies on Neorealism theory to emphasize the influence of foreign policies on their natural gas policies to discover what motivates these natural gas policies.

This chapter will elaborate on Türkiye-EU natural gas policies in light of political changes since the start of the JDP party rule in Türkiye; the chapter will touch upon the circumstances before the Russian-Ukrainian war in 2022 "As a focal point" and the changes in the period after the war started. This chapter will discover Türkiye's foreign policies' effect on its natural gas policies with the EU using the framing analysis method, the Russian role's effect, and the energy alternatives' impact on the EU-Türkiye natural gas policies.

3.1. Türkiye-EU Natural Gas Policies 2002-2021

Since the very moment of the rise of the JDP party to its role in Türkiye, the Turkish government has adopted many economic and political reforms.¹²³ Generally, the global economy and the EU had a large-scale impact on these reforms, especially regarding its energy policies. After the end of the cold war, Türkiye had good relations with many actors in the arena; the policy of "zero problems," which was adopted as the main shape of

¹²¹ Tagliapietra and Zachmann, 'Designing a new EU-Türkiye Strategic gas partnership', 2.

¹²² Arinc, 'The Natural Gas Geopolitics of Türkiye', 132.

¹²³ Soner Cagaptay. *The Rise of Turkey: The Twenty-First Century's First Muslim Power*. Lincoln: Potomac Books 2014, 128.

Türkiye's approach, helped Türkiye to become an investment link, especially in the energy sector.¹²⁴

The continuous JDP governments of president Erdogan since 2002 have used the EU membership standards and prospects as a tool in its economic development; the economy in Türkiye has flourished, and the state had good relations with all the actors in the international arena. Although the significant change in Türkiye's policies after 2011 and the strained political connections with many actors, the energy sector was one of the few positive agendas of Türkiye.¹²⁵

One of the main reasons that support Türkiye's aims to become an energy hub is being located between nearly 70% of the hydrocarbon resources globally and its close geographical location to the largest energy consumer markets in Europe.¹²⁶ Türkiye adopted a new strategy to introduce itself as an indispensable partner for the EU, especially after Europe's continuously increasing energy demand.¹²⁷ This gave Türkiye a great space to promote its geographical location as an energy bridge to regain the importance of its location again after the end of the cold war and the change of considerations for its location.

Türkiye-EU natural gas policies during 2003-2021 have experienced instability. In the first decade of the new millennium, the political and economic environment supported the elements of affinity between Türkiye and the EU; the Turkish ambitions to become an energy hub were very close to the EU's ambitions to diversify its supplies.¹²⁸

In this period, this thesis assumes that the political environment, represented by neorealist thoughts, played a most critical role than the economic environment in defining the shape of Türkiye-EU natural gas relations. This section analyzed a dataset of "157" political

¹²⁴ Gencer Ozcan, "Policy of Zero Problems with the Neighbours", *IEMed Mediterranean Yearbook Med*, 2012: 60.

¹²⁵ Tagliapietra, "A new strategy for EU-Türkiye energy cooperation." 125.

¹²⁶ British Petroleum BP. (2021). Statistical Review of World Energy 2021. p28. Retrieved August 10, 2022, from <https://www.bp.com/content/dam/bp/business-sites/en/global/corporate/pdfs/energy-economics/statistical-review/bp-stats-review-2021-full-report.pdf>.

¹²⁷ ¹²⁷ Arinc, 'The Natural Gas Geopolitics of Turkey', 155.

¹²⁸ Demiryol, 'The Eastern partnership and the EU-Turkey energy relations', 64.

statements from both sides, press releases, and events, using the framing analysis method to examine the pattern of Türkiye-EU natural gas policies and the preferences of both sides.

This section divided this period into four main patterns: cooperative economic, conflictual economic, cooperative policies, and conflictual policies. To analyze and understand the environment that triggered the foreign policies of Türkiye and the EU and how it affects their natural gas policies. Statements referring exclusively to the hydrocarbon resources, maritime jurisdiction areas, Türkiye's accession to the EU, pipelines, TRNC, and Turkey's integration to the EU standards were selected as a base of the analysis.

The cooperative economic pattern refers to the statements that enhance economic equality positively between Türkiye and the EU and serve both sides' interests economically. The conflictual economic pattern refers to the statements in which each party seeks to increase its relative economic gains in the system, regardless of the interests of the other party.

The cooperative policies pattern refers to the statements that enhance political equality positively between Türkiye and the EU and serve both sides' interests politically. Finally, the conflictual policies pattern refers to the statements in which each party seeks to increase its relative political gains in the system, regardless of the interests of the other party.

Table 3.1 The policy discourses numbers of Türkiye-EU natural gas policies patterns 2003-2021

	Cooperative policies		Conflictual policies		Cooperative economic		Conflictual economic		Total	
Year	TR	EU	TR	EU	TR	EU	TR	EU	TR	EU
2003	1	3	0	1	0	1	0	0	1	5
2004	0	0	2	2	0	0	0	0	2	2
2005	0	0	0	3	2	2	0	0	2	5
2006	0	2	0	2	0	1	0	0	0	5
2007	1	0	4	4	0	2	1	1	6	7
2008	0	1	0	0	0	0	0	0	0	1

2009	2	2	1	0	4	7	1	2	8	11
2010	0	1	1	2	2	0	0	0	3	3
2011	0	1	3	1	1	1	3	1	7	4
2012	1	0	1	0	2	1	1	0	5	1
2013	1	3	0	0	2	0	1	0	4	3
2014	1	1	1	0	4	2	1	0	7	3
2015	0	0	1	0	2	2	1	0	4	2
2016	0	0	0	0	1	3	0	0	1	3
2017	0	0	2	1	1	0	1	0	4	1
2018	0	0	7	1	1	0	2	1	10	2
2019	1	0	5	0	0	1	3	2	9	3
2020	2	2	7	2	0	0	2	0	11	4
2021	3	2	2	0	0	0	1	0	6	2
Total	13	18	37	19	22	23	18	7	90	67

Source: Data collected from Anadolu Agency (AA), Bloomberg, Daily Sabah, Deutsche Welle, Turkish Radio and Television Corporation (TRT), Turkish Ministry of Foreign Affairs official website, Republic of Türkiye Presidency Archives, and European Commission official website.¹²⁹

As the table shows, the prominent pattern of Türkiye-EU natural gas policies between 2002 and 2021 is "the conflictual policies," with 35.7% of the total 157 statements (23.6% by the Turkish side and 12.1% by the EU side). The second frequently used pattern is "the cooperative economic," with 28.7% (14% for the Turkish side and 14.7% for the EU side). The third pattern is "the cooperative policies," with 19.7% (8.2% for the Turkish side and

¹²⁹ Before 2009, some data in these resources may have been missed, this might be due to technical problems of saving the data on the websites' archives for a long time. This thesis used the copies of these websites on "The internet Archive" to collect the data from 2003 till 2009.

11.5% for the EU side). And the last frequently used pattern is "the conflictual economic," with 15.9% (11.5% for the Turkish side and 4.4% for the EU side)

However, this thesis observes a shift in the Turkish side from "the cooperative economic" started in 2010 to "the conflictual economic" pattern; this study excuses the reason for this shift for the collapse of the Nabucco project. Also, the table shows a significant trend for "the conflictual policies" pattern since 2018 for both Türkiye and the EU; this tension can be clarified for issues related to the Turkish exploration activities in the Eastern Mediterranean and the shadow of these activities on the Cyprus question.

3.1.1. The Cooperative Policies Pattern

Since the beginning of the JDP party rule in Türkiye in the early 2000s, this pattern has been the dominant pattern in describing Türkiye-EU natural gas policies. This study analyzed the importance of this pattern by the significance of the Nabucco project for Türkiye and the EU; Tagliapietra described these years as "the golden years" of Türkiye-EU relations.¹³⁰

At that time, Türkiye adopted liberal traditions and policy concepts; the policy of "zero problems" was the central foreign policy of Türkiye; it is a fact that this concept considers the political gains that the state expected to get by increasing the commercial links. These trends were focused on many factors centralized around the importance of Türkiye's geographic location to help the EU diversify its natural gas supply. The Turkish political elites focused on the political gains that Türkiye could get after the Nabucco project came true, especially the increasing Türkiye's position as a potential EU member.

One of the main reasons that pushed Türkiye to invest in this pattern is the Turkish internal affairs effect; the JDP party's government employed the advantages of being a potential

¹³⁰ Tagliapietra, 'A new strategy for EU-Türkiye energy cooperation', 4.

natural gas transit route for the EU to gain internal political momentum. This aspect was evident continuously in statements from the Turkish ministry of foreign affairs.¹³¹

On the other hand, this study observes a European trend focusing on Türkiye as a solution to diversifying its natural gas supplies. The President of the European Union, Jose Manuel Barroso, during the Nabucco signing ceremony, said:

The agreement was not a historic day for the European energy security only but also for the relations between the EU and other related countries like Türkiye.¹³²

Leigh clarifies the role of governmental and international energy firms in strengthening or weakening the path of natural gas agreements communication channels. Leigh analyzed this role as essential in curbing potential conflicts and bolstering interdependence. In early 2013, a new argument for this pattern was raised based on the states' concept and the non-state actors' role. She described this argument as "the peace pipeline hypothesis."¹³³

"The commitment to European energy security" event in New York City in September 2013 was focused on the participation of natural gas pipeline projects in the balance of powers in the international arena. This critical argument was frequently used to describe the new projects of TANAP and TAP. The foreign ministers of the participant states described this trend as follows:

Construction huge pipeline bringing natural gas through Türkiye to Europe is expected to bring economic benefits to the countries involved and "contribute to security."¹³⁴

¹³¹ "Turkey's international energy strategy." The Turkish ministry of foreign affairs, Retrieved September 10, 2022. <https://www.mfa.gov.tr/turkeys-energy-strategy.en.mfa>.

¹³² "Barosso calls Nabucco agreement historic day for European energy security." Anadolu Agency, July 13, 2009. <https://www.aa.com.tr/en/archive/barosso-calls-nabucco-agreement-historic-day-for-european-energy-security/427389>.

¹³³ Michael Leigh, "Energy - A Geopolitical Game Changer?," The International Spectator, vol. 49, no. 2, (2014): 1-10.

¹³⁴ "Pipeline of peace." Anadolu Agency, September 26, 2013. <https://www.aa.com.tr/en/archive/pipeline-of-peace/215774>.

This vision is integrated with the concepts of neorealism theory, as the units in the system are always looking for tools to take advantage of their perimeters to enhance the balance of power in their favour, as this thesis supposes.

The shift in Türkiye's foreign policies after 2014 significantly affected its natural gas policies. Türkiye's foreign policy shifted from liberal policies to neorealism. İseri and Bartan use this approach to explain Türkiye's regional natural gas policies; they argued that the new systemic challenges after the Arab Spring and the discoveries in the Eastern Mediterranean formed Türkiye's policymaking process based on relative gains calculations.¹³⁵ The EU adopted the same approach; German Foreign Minister Guido Westerwelle expressed this vision in December 2013; he said:

Someday, the EU may need Türkiye more than Türkiye does.¹³⁶

Another critical path for this pattern was to focus on the effect of the Cyprus question; Gürel and Le Cornu argued that hydrocarbon resources in the Eastern Mediterranean could potentially be a catalyst for both bringing about a Cyprus settlement and rapprochement. Türkiye invested in this path as a sign of its intent to bring peace.¹³⁷ Although this path was not a dominant trend, Türkiye still expressed the importance of its role as a potential route for Cyprus gas. The Turkish EU minister Mevlüt Çavuşoğlu mentioned:

Türkiye is the best route for exporting offshore natural gas from Cyprus to Europe.¹³⁸

However, İseri and Bartan clarify that this orientation is somehow compatible with the idea that Türkiye adopted neorealism concepts to use its geographical location as a tool to earn

¹³⁵ İseri, Emre, Ahmet Çağrı Bartan. "Turkey's geostrategic vision and energy concerns in the Eastern Mediterranean security architecture: a view from Ankara." *Dokuz Eylül University Journal of Social Sciences Institute*, vol. 21, no. 4, (2019): 111-124.

¹³⁶ "Someday EU may need Turkey more than Turkey do: German FM." Anadolu Agency, December 10, 2013. <https://www.aa.com.tr/en/turkey/someday-eu-may-need-turkey-more-than-turkey-do-german-fm/198534>.

¹³⁷ Gürel and Le Cornu, 'Can Gas Catalyse Peace in the Eastern Mediterranean?', 11-33.

¹³⁸ "Turkey best route for Cypriot gas to Europe, EU minister." *Hürriyet Daily News*, July 01, 2014. <https://www.hurriyetaidailynews.com/turkey-best-route-for-cypriot-gas-to-europe-eu-minister---68535>.

relative gains regarding Cyprus' question. Türkiye's decision can be explained by referring to neorealism, in which states tend to use any possible tools to increase their relative gains.

In 2019, this pattern appeared on the surface again; This study saw the risen momentum of this pattern for three reasons. The first factor carried by the ambitions to satisfy the EU natural gas continuously increased demand. The EU put significant initiatives to diversify its supplies from Euroasia; specifically, the South corridor, which carries natural gas from Azerbaijan through Türkiye to the EU, occupied increased importance.

The second factor is related to Türkiye's internal affairs; the new policy path made Türkiye quarrel with many regional actors, especially the risen natural gas players in the Eastern Mediterranean.

Finally, Türkiye's isolation from the Eastern Mediterranean Gas Forum (EMGF). İpek and Gür, in their study, argued that this situation created causal ideas for Türkiye to adopt “frenemy” approaches. According to İpek and Gür, causal ideas refer to ideas that came as a result of a behavioural pattern and event. İpek and Gür used causal analysis in their study to analyze Türkiye's isolation from the Eastern Mediterranean Gas Forum, which triggered the Turkish policy-making process to evolve into a more balanced path to fix its policy gradually.

3.1.2. The Conflictual Policies Pattern

This pattern occupies the most significant space in Türkiye-EU natural gas policies. Although this pattern gained momentum in 2018 for reasons related to Cyprus in the first place, since the early 2000s, this pattern has been at its minimum.

The first years of Nabucco had many amity and enmity concepts between Türkiye and the EU; while Türkiye considered the project a cornerstone to increasing its position as a potential EU member, the EU, on the opposite, saw this ambition as a threat. Aksu argued that since the 2000s, the EU feared that Türkiye could use the energy agenda to achieve

political gains on other agendas.¹³⁹ This clarifies the risen statements from European leaders during this period to feed this pattern.

In addition, the failure of the Nabucco project floated to the surface other political disputes that did not have the perfect momentum to be a real contention during the golden years of Nabucco. Since the beginning of the new decade, Tziarras argued that a new sense of regional power imbalance appeared again after years of political hope. He realized that Türkiye's preferences for dealing with the Eastern Mediterranean issues had adopted a neorealist theoretical framework.¹⁴⁰

This shift of views was clarified by Türkiye's discovery activities in the Eastern Mediterranean despite the results of these actions tense the regional atmosphere. On the other hand, Tziarras analyzed the position of the rising natural gas players in the regions to form a quasi-alliance for these states' fear of Türkiye's rising regional power and its ambitions to counterbalance the perceived threat in the area, which fed this pattern heavily since the beginning of 2018.

This study believes that one of the main factors that feed this pattern is the failure of regionalism in the liberalism sense that was adopted as the main shape of Türkiye's foreign policies since the beginning of JDP party rule. Especially in light of the Arab Spring and its effect on the region, the security concerns in Türkiye's preferences for regional cooperation use neorealist arguments.

This framing analysis led that the majority of inputs that fuel this pattern centralized around the Cyprus question. The momentum of this pattern started in 2018 when the interset conflict regarding the hydrocarbon resources' developments and maritime borders delimitation appeared to the surface as a significant key point.

Since 2019, Türkiye has repeatedly dispatched Turkish-flagged drill ships (Fatih and Yavuz) accompanied by navy vessels for drill operations around Cyprus to enforce Türkiye and the TRNC's rights in the disputed maritime borders. On the other hand, Türkiye saw

¹³⁹ Aksu, 'Türkiye-EU Relations: Beyond membership; army, religion, and energy', 11.

¹⁴⁰ Tziarras, 'The Eastern Mediterranean: between power struggles and regionalist aspirations, 17.

the EU's operation in the Mediterranean to monitor Libya's UN arms as a threat to restrict its interest in the Eastern Mediterranean.¹⁴¹

In that context, Türkiye has repeatedly used the concept of "Fairness" to justify its drilling operations rights in this spot. Türkiye's vice president Fuat Oktay, in an interview in 2020, used rhetorical frames to feed this pattern when he said:

Nobody should expect Türkiye to pull back in line with this fairness.¹⁴²

This framing analysis led to elaborate that the dominant conflictual policies pattern had been affected by the conditioned biases which continuously affect the policy form based on the core beliefs of the political leaders in Türkiye's relations with the EU.

3.1.3. The Cooperative Economic Pattern

This pattern occupies the second largest space in this framing analysis. Since the beginning of the JDP party's rule, Türkiye has invested heavily to introduce itself as a potential energy hub. During this period, Türkiye-EU natural gas policies were shaped based on the concept of interest collaboration, which was affected by cooperative schemes, including more direct foreign investment, reducing transportation costs, matching technology standards, and energy security by diversifying the supplies.

It's worth noting that the statements regarding the Nabucco project gained momentum in the first period of the JDP party's rule when Türkiye started to introduce its geographical location as an energy hub. This momentum gradually increased from 2002 until 2008 and decreased until 2012, when the TANAP and TAP projects received the majority of statements.

¹⁴¹ "Turkey says EU sanctions on Turkish firm over Libya embargo show bias." Reuters, Retrieved September 10, 2022. <https://www.thomsonreuters.com/en/policies/copyright.html>

¹⁴² "INTERVIEW - Turkey to EU: 'Be fair, Turkey will not pull back'." Anadolu Agency, Retrieved September 12, 2022. <https://www.aa.com.tr/en/europe/interview-turkey-to-eu-be-fair-turkey-will-not-pull-back/1957888>

As mentioned, this pattern was dominant until 2018, when the conflictual policies pattern started to gain the majority of statements. Konak argued that states surrounded by high costs and long-term operational of natural gas investments could look to change any conflictual policy form to reach more stability in cooperative economics. In other words, the geographical closeness to the proven natural gas-rich reserves and the closeness to the natural gas-hungry markets put a significant advantage on this geographical location.¹⁴³ They could decrease any potential economic conflict among these actors. In that context, Türkiye invested in linking its natural gas network with the rich domains in Eurasia to help its ambitions reach an advanced energy hub level.

Mastanduno mentioned that the interests of any actors could shift based on economic, technological, and political benefits, which may increase either the benefits of changing the regional order or altering the costs of rebalancing in the region.¹⁴⁴ This idea could offer a significant scale to understand Türkiye's steps to melt any political barriers in 2016 and 2017 with Greece regarding natural gas collaboration to earn more relative gains. In addition, TANAP and TAP projects were critical inputs for this pattern.

On the other side, the EU started to adopt a concept of a new natural gas policy shape with Türkiye. The EU leaders recorded many statements that consider Türkiye the only route to diversifying its natural gas supply, especially after the effects of the Ukrainian crisis of 2014 and the endless European desire to escape the Russian role in its natural gas security.

Notably, In 2018, this pattern started to lose momentum to the conflictual policies pattern. This thesis believes that this pattern could lose more momentum to the conflictual policies pattern based on the idea that Türkiye might invest in increasing its relative gains according to the new circumstances in the international arena, for instance, The Russian-Ukrainian war in 2022.

¹⁴³ Ali Konak, "Turkey's dependence on natural gas and the need for production of alternative energy sources" [Türkiye'nin doğal gaz bağımlılığı ve alternatif enerji kaynakları üretiminin gerekliliği], *International Journal of Afro-Eurasian Studies*, Vol 4, No. 7, (2019): 196-209.

¹⁴⁴ M. Mastanduno, "A Realist View: Three Images of the Coming International Order. Ed. Paul TV & Hall JA *International Order and the Future of World Politics*." (2001).

3.1.4. The Conflictual Economic Pattern

The less contributed pattern in this framing analysis inputs. However, this analysis discovered a noticeable momentum for this pattern, especially between 2013 and 2021. This study saw that this pattern might have been formed in this period based on dominant ideas affected by the peak of the conflictual policies pattern.

By tracing the process that led to this pattern, this study found that the basic stands of this pattern were built based on ideational mechanisms regarding Eastern Mediterranean hydrocarbon resources and the conflict of interest that rose in this period.

Acharya explains two significant factors that shape regional collaboration or regional conflict based on ideas and material interest. First is the "cognitive priors," which are the pre-existing ideas of individuals and societies which reflect how actors in any arena, "including the community and the political leaders," interpret any process beyond rational calculations of cost and benefit but based on the pre-existing ideas only.¹⁴⁵ The pre-existing beliefs of Türkiye could clarify this as a whole structure for historical issues related to Cyprus and its effect on the EU and this effect on the natural gas policies.

The second factor is the "exogenous ideas," which intersect with pre-existing beliefs to produce concepts on how the communities will react to the effect of international actors' ideas and how this process could affect national convictions.¹⁴⁶ For instance, the impact of the EU and the United States of America in solving national issues clarifies how political leaders use national beliefs to gain public opinion credit on matters related to the supreme national interest.

This thesis believes that these two factors helped to clarify the inputs of this pattern, especially in this period which witnessed the peak of the conflictual policies pattern and the effect of the internal political affairs in the light of the need to gain public opinion credit after the acute economic crisis of the Turkish Lira.

¹⁴⁵ Amitav Acharya, "How ideas spread: Whose norms matter? Norm localization and institutional change in Asian regionalism." *International organization*, vol 58, No.2 (2004): 239-275.

¹⁴⁶ Ibid

3.2. The Russian Role "Dependency or Independency?"

To have a better theoretical explanation for Türkiye-EU natural gas policies, the need to study the Russian role is critical, especially after the Russian-Ukrainian war in 2022. Türkiye-Russia natural gas relations have an essential role in defining Türkiye's and the EU's orientations, in which somehow these policies fit into complex interdependence concepts. Many actors are interacting with Türkiye-Russian natural gas policies. While the governments organize the central policies, it's evident that many channels interface deepened relations with companies, especially BOTAŞ and Gazprom.

While Europe was suffering to secure its natural gas supplies after the Russian-Ukrainian war in 2022, on the other side, Türkiye's need to increase its importance as a reliable transit country for the EU to satisfy the EU's demand was essential. However, the EU adopted the belief, since the direct interference of Russia in the Nabucco project, as a sign that Russia might try to expand its natural gas market to increase its dominance in states dependent on Russian natural gas sources through third parties.¹⁴⁷

It could be claimed that these fast-paced political events in the region after February 2022 will be a cornerstone to re-form the natural gas policies globally. Türkiye puts maximum effort into finding points of convergence in political views as an alternative for the Russian supplies to the EU by aiming to liaise with Caspian states and cooperate with them to deliver their rich sources to the EU.

For instance, this interest conflict is rooted in the paradox of the Nabucco and South Stream projects; the South Stream was introduced to diversify Russian natural gas transportation through Türkiye. While Nabucco, on the other side, was developed to decrease dependency on Russian energy sources through Türkiye from Eurasia. Both projects increased Türkiye's importance, but based on the EU's preferences, these put a different level on Türkiye's importance.

¹⁴⁷ Burcu Yavuz Tiftikçigil, Çağla Gül Yesevi, "Energy Relations between Turkey and Russia: Conflict In Energy Projects." *Journal of Economics and Sustainable Development*, Vol.5, No.12, (2014): 56-69.

In that context, this thesis agrees with Weihe's views that any unilateral dependency generates unbalanced power;¹⁴⁸ this could clarify any Russian interference in Eurasia shortly to abort any projects that liberate the Turkish and the EU from the dependence on Russian natural gas imports.

3.3. How Could The EU's Natural Gas Supply Alternatives Affect Its Policies With Türkiye?

A significant factor that makes the EU's natural gas profile a common characteristic with Türkiye's natural gas profile is the high dependency rate on natural gas imports. While Türkiye relies 99% on imports to meet the natural gas demand, the EU satisfies 58% of its natural gas demand depending on imports.¹⁴⁹

Russia occupies the largest natural gas exporting share of both parties. Both parties adopted the same political stand to diversify their supplies to avoid any critical political position in the future, especially after the Ukrainian crisis in 2014. While Türkiye invests relations with Eurasia, the EU did not adopt any realistic steps to reach this aim; the imported natural gas amounts from Russia increased in the past two decades from 50% total of its natural gas consumption in 2000 to 58% in 2021.¹⁵⁰ This section discovers how Türkiye could invest in the EU's urgent need to secure its natural gas demand based on the existing and possible alternatives in light of the Russian-Ukrainian war in 2022.

According to the International Monetary Fund (IMF), the EU imported 477 bcm of natural gas in 2021 from Russia 58%, Norway 23%, North Africa 16.5%, and Azerbaijan 2.5%. However, by analyzing the existing natural gas infrastructure in Türkiye and the EU,

¹⁴⁸ Weihe, Thomas (Ed.). *The Black Sea between the EU and Russia: Security, Energy, Democracy*. p35 Hamburg: Körper – Stiftung, 2007.

¹⁴⁹ "From Where Do We Import Energy." Eurostat, Retrieved September 10, 2022. <https://ec.europa.eu/eurostat/cache/infographs/energy/bloc-2c.html>.

¹⁵⁰ Ibid

Türkiye could help Bulgaria and Greece to meet their natural gas demand by increasing the gas imports from Azerbaijan through Türkiye and LNG imports.¹⁵¹

This thesis believes that Türkiye could employ the current circumstances to increase the natural gas imported share from Iran to supply Eastern Europe through its existing network. A part of the belief basis relies on the Eastern Anatolian Natural Gas Main Transmission Line, which started to transport natural gas from Iran in 2001. Its maximum capacity is 10.4 bcm/year.¹⁵²

However, the Eastern Anatolian Natural Gas Main Transmission Line's maximum rate was not used. Also, Türkiye could work to increase the natural gas imported share from Azerbaijan through BTE, which transports 6.6 bcm of natural gas annually. In comparison, its full capacity is 24 bcm, and TANAP transports 16 bcm of natural gas annually while its full capacity is 31 bcm.¹⁵³

While Türkiye suffered from isolation from the Eastern Mediterranean Gas Forum, it could be claimed that the current circumstances offer Türkiye an opportunity to benefit from the EU's need to diversify its natural gas mix. Türkiye could work with the EU to reshape the natural gas map in the region to make up for the natural gas imports deficiency by looking for alternatives supplies from the Eastern Mediterranean.

Besides the natural gas security collaboration, it could be claimed that Türkiye has a significant opportunity to increase the share of renewable energy in its mix since Türkiye occupies more than the average level of practical solar energy potential to produce electricity. This claim will help Türkiye increase its energy security. It could also help Türkiye eliminate the energy import burdens to use its geographical location as a transit state and decrease the energy import bill.

¹⁵¹ Gabriel Di Bella and others, "Natural gas in Europe: the potential impact of disruptions to supply." *IMF Working Papers*, no. 145, (2022): 1-45.

¹⁵² MENR, 'Natural Gas Pipelines'.

¹⁵³ Ibid.

CHAPTER 4 : TÜRKİYE-ISRAEL NATURAL GAS POLICIES

In the post cold war, Türkiye and Israel's interests met in many agendas, including the natural gas policies. Türkiye and Israel wanted to change their status from "consumers" to "producers"; this created a new form of relations based on non-military issues such as energy security.¹⁵⁴

Before 2003, Türkiye-Israel natural gas policies had limited space to affect the political relations between both actors profoundly. Gradually, after the beginning of the JDP party rule, the natural gas agenda started to affect the form of Türkiye's cooperative energy security. Türkiye defined the "Energy hub" as the primary definition for its aims.¹⁵⁵ At the same time, Israel aimed to export its natural gas finds in the Eastern Mediterranean to Europe, which could help Türkiye become an energy hub to transport natural gas from the East to the West and the South to the North.

In that context, Türkiye has undertaken in the early 2000s foreign policies that focus on economic and trade issues and put aside deep-rooted ideological differences with its neighbours. Natural gas security was one of the main fundamentals of these policies. However, the Eastern Mediterranean area was rapidly changing regarding natural gas explorations and geopolitics; this area started to be changed to become a potential world-class natural gas arena.¹⁵⁶

In 2010, İHH İnsani Yardım Vakfı Institution organized the Mavi Marmara humanitarian aid vessel to break the sea blockade on the Gaza Strip; the ship carried both Turkish and non-Turkish activists and held the Turkish flag.¹⁵⁷ The Israel Defence Forces (IDF) raided the ship, killing nine people of Turkish origin and one Turkish American citizen. Ankara's reaction to the incident was to downgrade relations with Israel to the minimum level; the

¹⁵⁴ "Azerbaijan-Turkey-Israel Relations: The Energy Factor." *MERIA Journal*, vol. 12, no. 3, (2008): 10.

¹⁵⁵ Krauer-Pacheco Ksenia, "Turkey as a Transit Country and Energy Hub: the link to its foreign policy aims." *Forschungsstelle Osteuropa*, no. 118, (2011): 27.

¹⁵⁶ Tagliapietra, 'The rise of Türkiye and the new Mediterranean', 10.

¹⁵⁷ Moustafa Bayoumi, "Midnight on the Mavi Marmara: The Attack on the Gaza Freedom Flotilla and How It Changed the Course of the Israel/Palestine Conflict." *JOURNAL OF PALESTINE STUDIES*, vol. 40, no. 3, (2011): 3.

official links collapsed after Türkiye recalled its ambassador from Israel and expelled the Israeli ambassador from Türkiye.¹⁵⁸

The reconciliation agreement between Türkiye and Israel was discussed for almost six years after the incident, and reaching a final agreement was difficult. During these years, the regional landscape has changed dramatically; the Arab Spring shadowed the region, the war in Syria was a real threat for both, the political scene in Egypt was altered, and the nuclear deal between Iran and the West was a serious development. One significant regional development was the new natural gas finds in the Eastern Mediterranean. No development in the region during this period can be fully understood without considering natural gas-related factors.

After the détente in 2016, Türkiye-Israel natural gas policies started to reach their final form; with the help of international mediation, both parties gradually brought political and economic convergence into the scene based on mutual benefits. The energy ministers of Türkiye and Israel met in 2016 for the first time to discuss the possibilities of transporting the natural gas flow from the Leviathan natural gas field of Israel to Türkiye via a submarine pipeline.¹⁵⁹

Although the submarine natural gas pipeline project failed for many reasons, these talks were the pillar to starting a new natural gas policies era between Türkiye and Israel. Eitan Na'eh, the new Israeli ambassador to Türkiye, stated:

We must work together to benefit both states. Energy is one issue that will not be solved merely by words; this collaboration will mutually open up the entire business community. Energy collaboration would be the catalyst for the booming of the relations.¹⁶⁰

¹⁵⁸ Oğuzhan Akyener, "Future of Israel gas export up to 2050 & Turkey." *Energy Policy Turkey*, vol. 51, no. 2, (2016): 38.

¹⁵⁹ Can Sezer, "Israel, Turkey deepen energy ties as relations resume after 6-yr rupture." Reuters, October 13, 2016. <https://www.reuters.com/article/us-turkey-israel-energy/israel-turkey-deepen-energy-ties-as-relations-resume-after-6-yr-rupture-idUSKCN12D126>. [Accessed 10.09.2022]

¹⁶⁰ K. Valansi, "Türkiye-İsrail doğal gaz anlaşmasının eli kulağında [Natural gas deal lose between Turkey and Israel]", 2017.

The momentum of the convergence of political and economic views continued gradually based on the mutual benefits to reach a peak in 2022 when the Israeli president visited Ankara in February 2022 to discuss many agendas.¹⁶¹ The most significant agenda for this visit was the natural gas collaboration which put the basics for coming high-level talks. Türkiye-Israel natural gas politics is important because of the high leverage of sensitivity of this agenda on the foreign affairs for each state in light of the rapid regional developments.

This chapter aims to shed light on Türkiye-Israel natural gas policies by elaborating on Türkiye's natural gas diplomacy toward Israel and the effect of the most significant regional issues, such as the Palestinian cause and the Israel-Cyprus relationship. This chapter will rely on "Qualitative data analysis" to discover what motivates each foreign policy and how they affect their natural gas policies. Then the chapter will find the role alternatives of Israel to transport natural gas to Europe in Türkiye-Israel natural gas policies.

4.1. Türkiye's Natural Gas Diplomacy Toward Israel

The natural gas policies between Türkiye and Israel are among the most potent cores of bilateral relations. During the past two decades, these policies have had many ups and downs; it is a fact that energy politics is not independent of strategic and regional issues, and cooperation regarding energy is a sign of the level of relations dimensions between states.

Although the first signs of natural gas collaboration between Türkiye and Israel appeared in the early 1990s, the first actual process was between 2005 and 2008 when Israel conducted for the first time direct negotiations with Türkiye on participation in the Baku-Erzurum-Ceyhan gas pipeline—also known as South Caucasus Gas Pipeline (SCGPL).¹⁶² In another context, Israel started at the same time consultations with Gazprom to link the

¹⁶¹ "Israel's Herzog visits Turkey, meets Erdoğan to 'restart' ties." Daily Sabah, March 09, 2022. <https://www.dailysabah.com/politics/diplomacy/israels-herzog-visits-turkey-meets-erdogan-to-restart-ties> [Accessed 29.08.2022].

¹⁶² Nurieva, 'Natural gas factor in Israel-Turkey-Russia', 117.

Israeli gas system with the Blue Stream project by constructing a subsea natural gas pipeline via Türkiye.¹⁶³

At that time, Türkiye and Israel relied on natural gas imports to meet their demand. While the scene was changing in Israel after 2009, carried by the new offshore discoveries, Türkiye was open to any strategic partnership that could increase its relative gains by investing in its geographical location.¹⁶⁴

It is noteworthy that Türkiye's and Israel's views were met at that time; the Israeli authorities demonstrated enough intention to collaborate in any of these projects, and the main idea for both projects was similar, which is linking the Turkish and Israeli natural gas networks with each other by constructing a pipeline under the Mediterranean Sea.¹⁶⁵

Map 4.1 Israel-Türkiye Subsea Gas Pipeline's proposed route.



Source: TRT, 2021.

At that time, Türkiye-Israel natural gas policies were an example of high interdependence between the effect of geostrategic issues, the foreign policies' role, and natural gas policies.

¹⁶³ Ibid.

¹⁶⁴ Aslim, 'Energy Sources in the Eastern Mediterranean', 41.

¹⁶⁵ Robert O. Freedman, "The Russian Invasion of Georgia: its impact on Israel and the Middle East." *Caucasian review of international affairs*, vol. 2, no. 4, (2008): 6.

After the Mavi Marmara incident on May 2010, diplomatic relations between Türkiye and Israel were broken until Israeli Prime Minister Benjamin Netanyahu officially apologized to Türkiye's Prime Minister Recep Tayyip Erdogan in March 2013.¹⁶⁶ During this period, the natural gas policies between these actors were at the minimum level until 2016 before the re-convergence.

During the years of détente, the natural gas map in the region was under changes. Israel discovered vast reserves of natural gas, laying the basis for its new natural gas policies. These finds were crucial for Türkiye for its geographical nearness and the possibility of ensuring diversity to reduce the state's dependence on a single natural gas supplier. In that context, Türkiye's president Recep Tayyip Erdogan stated at the beginning of 2016:

Israel needs a state like us in the region, and we also need Israel.¹⁶⁷

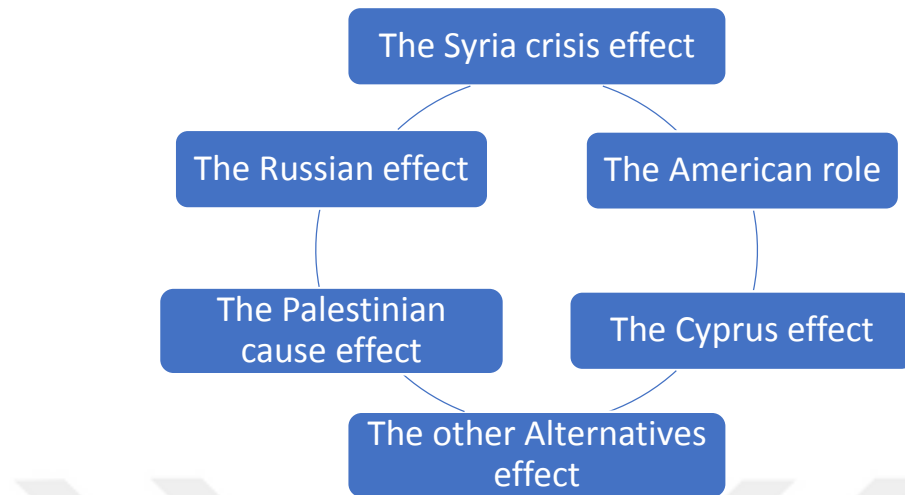
After these changes, it appears that each state seeks to benefit from the geopolitical advantages by strengthening its relations with the other to improve its position in the regional balance of power. In that context, these benefits would be reflected in the size of the relative gains that can be obtained in the unstable regional system. On the other hand, Türkiye-Israeli natural gas policies are affected by the relative gain aims and its motivations more than the foreign policies' role. While the political relations collapsed after the Mavi Marmara incident, the size of trading between Türkiye and Israel increased; according to the Turkish Ministry of Foreign Affairs, the volume of trading increased in 2013 by 25% and in 2014 by 5.8%.¹⁶⁸

It could be summarized the factors that could motivate both actors and deeply affect their natural gas policies in the following diagram to clarify what this thesis is trying to prove:

¹⁶⁶ Bryza, Matthew J. "Eastern Mediterranean natural gas: potential for historic breakthroughs among Israel, Turkey, and Cyprus." *Turkish Policy Quarterly*, vol. 12, no. 3, (2013): 41.

¹⁶⁷ Görgülü, Aybars, Sabiha Senyücel Gündoğar. "Energy Relations between Turkey and Israel." *Middle East and North Africa Regional Architecture*, (2016): 2.

¹⁶⁸ "Economic and Commercial Relations with Israel." *The Turkish ministry of foreign affairs*, Retrieved September 10, 2022. <https://www.mfa.gov.tr/economic-and-commercial-relations-with-israel.en.mfa>.



4.1.1. The Syrian Crisis Effect

One of the most critical factors that directly affected Türkiye-Israel natural gas policies is the Syria crisis which started in 2011 and concerned the region. There are two possible routes for any direct collaboration between Türkiye and Israel for linking the internal natural gas networks, either to supply Türkiye's market or to export to Europe. The first is a subsea pipeline from the Leviathan field to Türkiye through Lebanon and Syria's Executive Economic Zones (EEZ). The other is by crossing the Cypriot continental shelf.¹⁶⁹

Although the first route would be described as “the best commercial route”, but could also be described as “an impossible political course” for many reasons. First, this route means crossing two states "Lebanon and Syria" with unstable political environments and high-security risks, which will affect the international energy firms' orientations by avoiding investing in an area with political instability.¹⁷⁰

Second, the ongoing circumstances in Syria postpone any political settlement within the relative states to demarcate the maritime boundary. Finally, regarding the geographical standing of Syria and its alliances in the international natural gas map, Syria still suffers

¹⁶⁹ Michel Chossudovsky, “The militarization of the Eastern Mediterranean: Israel’s stake in the Baku-Tbilisi-Ceyhan pipeline.” *Global Research*, (2006): 2.

¹⁷⁰ Maya Bhardwaj, “Development of Conflict in Arab Spring Libya and Syria: from revolution to civil war.” *Washington University International Review*, (2012): 76-96.

from the internal war's consequences. A part of this crisis is the clash of interests of major players in the natural gas sector.¹⁷¹

As a strategic Russian ally, the Syrian regime would work to save its ally's interest in staying the major natural gas supplier of the EU. In that regard, the Syrian government refused the Qatar-Syria-Türkiye pipeline project, which was suggested for the first time in 2009 to carry the natural gas flows from Qatar to Europe through Saudi Arabia, Jordan, Syria, and Türkiye.¹⁷²

4.1.2. The Cyprus Effect

The other possible route to link Türkiye's and Israel's natural gas networks would cross the Cyprus continental shelf. In that regard, this project could be refused by the Cypriot government because it competes with the LNG terminal's aims in Cyprus for exporting Israeli natural gas to Europe through Cyprus-Greece-Italy, besides the effect of the historical dispute on this agenda.¹⁷³

In that context, Türkiye refuses Cyprus' offshore exploration and exploitation efforts based on the historical dispute regarding Cyprus. The Turkish government stated that the Cyprus-Israel EEZ delimitation agreement is "null and void for Türkiye."¹⁷⁴

The Cyprus question occupies the most significant space in the indirect natural gas policies between Türkiye and Israel. However, any efforts to link Türkiye and Israel's natural gas networks would somehow involve Cyprus' EEZ. However, Cyprus' direct collaboration

¹⁷¹ Ibid.

¹⁷² Nurieva, 'Natural Gas Factor in Israel-Türkiye-Russia', 121.

¹⁷³ Adar, Sinem, Ilke Toygü. "Turkey, the EU and the Eastern Mediterranean crisis: Militarization of foreign policy and power rivalry." *German Institute for International and Security Affairs*, no. 62, (2022): 3.

¹⁷⁴ "Press Release Regarding the Exclusive Economic Zone (EEZ) Delimitation Agreement Signed Between Greek Cypriot Administration and Israel." Republic of Türkiye Ministry of Foreign Affairs, Retrieved September 8, 2022. https://www.mfa.gov.tr/no_-288_-21-december-2010_-press-release-regarding-the-exclusive-economic-zone-eez-delimitation-agreement-signed-between-greek-cypriot-administration-and-israel.en.mfa.

with Israel is also at the heart of Türkiye-Israel natural gas policies for geostrategic and commercial factors.

Cyprus relies on introducing itself as a possible natural gas transit point to Europe. Israel and Cyprus, in that regard, adopted the same views after the Mavi Marmara incident and the collapse of Türkiye and Israel relations. While Cyprus described the direct pipeline project "Eastern Mediterranean Corridor" from Israel to Europe through Cyprus as "an alternative for Europe's energy supply." On the other side, Türkiye's official response confirms that Türkiye will remain the best transit route for the Eastern Mediterranean to Eurasia natural gas exports to Europe.¹⁷⁵

Characterizing Türkiye-Israel natural gas policies in terms of identifying the Cyprus effect would be described as the "Rubik's Cube." Many factors, directly and indirectly, affected the form of these natural gas policies. However, any characterizing efforts should take into consideration economic factors. The economics and politics of such deals should not be overlooked; all sides have attention to avoid direct disputes in the region; disputes could trigger international natural gas firms to withdraw their investment to avoid working in a risky area.¹⁷⁶

4.1.3. The Russian Effect

Russia has a main role in Türkiye-Israel natural gas policies; its role occupies one of the most considerable effects that form the final shape of these policies. While the Russian intervention in Ukraine affected the direct natural gas policies in each part of the region, Russia attempted to involve in any other potential natural gas supply to the EU since the new millennium started.¹⁷⁷

In 2004, Israel and Gazprom started the first negotiation process to build the Israeli natural gas infrastructure and the possibility of supplying Israel with long-term natural gas

¹⁷⁵ Gürel and Le Cornu, 'Can Gas Catalyse Peace in the Eastern Mediterranean?', 20.

¹⁷⁶ Zachmann Georg, Simone Tagliapietra, "Designing a new EU-Turkey strategic gas partnership." *Bruegel Policy Contribution*, No. 887 (2015): 20.

¹⁷⁷ Luft and Korin, 'Energy Security Challenges for the 21st Century', 91.

contracts via Türkiye. In that period, transporting natural gas from north to south via Türkiye was a promising idea, adding more favorable to the Türkiye-Israel natural gas agenda.¹⁷⁸

After the Israeli natural gas discoveries in the Eastern Mediterranean, Gazprom aimed to collaborate with Israel for two reasons. The first factor was to participate with any other potential chance to supply Europe, and the second was to open a new market in the Middle East and North Africa.¹⁷⁹

There were three possible collaboration scenarios between Israel and Gazprom in developing the Leviathan natural gas field; the first is the direct partnership. Israel saw this aim as a chance to participate with a new partner capable of providing influential investment in the production process, which would speed up the gas production process. At the same time, Israel saw this scenario would limit its ability to manage the flows for its aims.¹⁸⁰

The second scenario included selling natural gas amounts to Gazprom to supply its markets in the Middle East and the Far East. The third scenario combined the first two scenarios by creating a joint corporation with other shareholders to sell natural gas in Gazprom markets.

Although this collaboration failed, Russia, represented by Gazprom, is interested in this part of the world for its closeness to the European markets. Any possible partnership between Russia and any other player in the region will affect Türkiye's position as the primary transit state to supply Europe.

4.1.4. Impacts of the USA's Policies

After the Cold War's end, the United States of America was the only superpower; the international system diverted to a unipolar system. However, the influence of the USA has

¹⁷⁸ Arinc, 'The Natural Gas Geopolitics of Türkiye', 216.

¹⁷⁹ Nathanson, Roby, Ro'ee Levy. *Natural Gas in the Eastern Mediterranean Casus Belli or Chance for Regional Cooperation?*. Tel Aviv: IEPN, 2012: 34.

¹⁸⁰ Nurieva, 'Natural Gas Factor in Israel-Türkiye-Russia', 124.

decreased relatively starting at the beginning of the new millennium; despite that, the USA was responsible for safely securing the energy flow to the global markets. In that regard, the collaboration between Türkiye and Israel regarding natural gas policies was central to the USA's security strategy in the Eastern Mediterranean.¹⁸¹

In that context, the USA patronized any efforts to coordinate transporting natural gas from the Eastern Mediterranean to the global markets via Türkiye or other routes. Clearly, in terms of accomplishing this aim, the region must be stable, and any political disputes between Türkiye and Israel must be solved.¹⁸²

In the new millennium's second decade, two crucial events have reinforced Türkiye's sense of isolation. The first is the establishment of the Eastern Mediterranean Gas Forum (EMGF) in 2020, with its headquarters in Cairo, consisting of the Republic of Cyprus, Greece, Israel, Italy, Jordan, Palestine, and Egypt. It is also supported by France and the United States, who have applied to join the organization as permanent members and observers.¹⁸³

The second is signing of the Eastern Mediterranean Pipeline Agreement in 2020 between Greece, the Republic of Cyprus, and Israel. Türkiye considered both the "EMGF" and the "Eastern Mediterranean Pipeline" as elements to seek to isolate its role by marginalizing it in the Mediterranean.¹⁸⁴

The fact that the Eastern Mediterranean Gas Forum, the Eastern Mediterranean Pipeline, and other regional initiatives are supported by the United States and the European Union contributes to the conviction that Türkiye is being marginalized by its allies. Türkiye's assertive strategy in the Eastern Mediterranean aims to break the sensed blockade.¹⁸⁵

The United States of America looks at the region through a broader framework of its priorities in the Middle East, often linked to ensuring the flow of energy and protecting

¹⁸¹ Kumaş, 'Energy Policies of Türkiye', 35.

¹⁸² Ibid, 93.

¹⁸³ Ipek and Gur, 'Türkiye's isolation from the Eastern Mediterranean Gas Forum', 1.

¹⁸⁴ Ibid, 18.

¹⁸⁵ Aslim, 'Energy Sources in the Eastern Mediterranean', 41.

Israel. The United States is present in the Eastern Mediterranean region through its companies and its relations and mediation initiatives between some parties to the conflict, in addition to its military deployment in the Middle East.¹⁸⁶ Interestingly, the USA's dependence on the region's energy sources has declined in the past few years. Its LNG exports to Europe are increasing, which may affect its view of the region's natural gas in the future.¹⁸⁷

4.1.5. Impacts of the Palestinian Issue

Since establishing the Palestinian Authority (PA) in 1993, Türkiye, as a neutral state, has been seen as an acceptable mediator in the Palestinian question between Palestinians and Israel.¹⁸⁸ However, despite Türkiye's contributions to negotiations between both sides, Türkiye's mediation efforts terminated due to back-to-back predicaments between Türkiye and Israel. In 2009, Turkish Prime Minister Recep Tayyip Erdoğan forcefully blamed Israel's offensive on Gaza and leaved Davos's World Economic Forum conference. Following by Davos episode, the Israel attack on Mavi Marmara was the final straw.¹⁸⁹

Since the Mavi Marmara incident till 2022, Turkish and Palestinian political leaders have had many high-level official visits, with no visits between any Israeli and Turkish political leaders. Türkiye took a political stand regarding the Palestinian question in this period, deeply affecting its relationship with Israel. In 2021, The Turkish president stated:

The world must realize the nature of Israel as a terrorist state.¹⁹⁰

¹⁸⁶ Ibid.

¹⁸⁷ Zeror, Khaoula, Sigha Ahlam. "The American-Russian Rivalry in The Middle East The Syrian Crisis 2011-2016." MSc thesis, Larbi Ben M'hidi University, 2019: 5.

¹⁸⁸ Esra Çuhadar Gürkaynak, "Turkey as a third party in Israeli-Palestinian conflict: assessment reflections.", *Journal of International Affairs*, vol. 12, no. 1, (2007): 10.

¹⁸⁹ Genc Kaya, "Erdogan's Way: the rise and rule of Turkey's Islamist shapeshifter." *Foreign Affairs*, no. 98, (2019): 26.

¹⁹⁰ "President Erdoğan: World Should Know about Terror State of Israel." Ak Parti, October 04, 2022. <https://www.akparti.org.tr/en/news/president-erdogan-world-should-know-about-terror-state-of-israel-21-05-2021-16-12-09/>. [Accessed 08.09.2022]

This statement and many others, besides the keenness of Turkish President Recep Tayyip Erdogan and his aides, to justify the normalization with Israel as a not concession to defending the Palestinian cause and the insist that Al-Aqsa Mosque "represent a red line" for Türkiye. In that context, the Palestine issue has been seen as a source of a future threat to the relationship between Ankara and Tel Aviv, which could increase the chances of the impact of Israeli policies toward the Palestinians on the future of normalization with Türkiye.¹⁹¹

In March 2022, Israeli President Isaac Herzog visited Türkiye for the first time since the Mavi Marmara incident. In contrast, the visit has been considered a way to resolve differences between both sides, especially those arising from Tel Aviv's policies towards the Palestinian issue.

4.1.6. The Other Alternative's Effect

One of the most influential factors that profoundly influenced Türkiye-Israel natural gas policies. Israel has three possible routes to reach the global natural gas markets; the first and the second, as discussed before, are through Türkiye and Cyprus. However, Israel has another route via Egypt that carries more reasonable logic, mainly since the pipeline network already exists.¹⁹²

In June 2022, The European Union signed a memorandum of understanding with Israel and Egypt to export natural gas to Europe for three years, renewable automatically for two years,¹⁹³ as part of the European Union's quest for alternatives to Russian natural gas supplies, which have been reduced to the European continent due to Western sanctions on Russia, and with Moscow's insistence on Selling gas for Russian Rubles.

¹⁹¹ Bora Bayraktar, "The Palestinian Question in Turkish Foreign Policy from 1990s to 2010s." *Journal of Gazi Academic View*, V. 12, No. 24, (2019): 19–43.

¹⁹² Omar Sheira, "Turkey-Egypt relations: incentives to normalize." *Global Political Trends Center Policy Briefs*, no. 40, (2014): 8.

¹⁹³ Oxford Analytica. "Israeli gas export deal to the EU is in the pipeline." *Expert Briefings*, (2022).

In that context, Israel confirmed that this move does not contradict the talks with Türkiye regarding transporting natural gas to Europe via Türkiye. On the other side, It could be claimed that any possible agreement between Egypt and Israel will carry more incentives for Israel to re-evaluate its long-term projects with Türkiye, based on the idea that Israel's attention to collaborating with Egypt will add more positive aspects to the other political joint agendas.

In that context, it could be claimed that the European fear that Türkiye could use the natural gas flows to gain political improvements in other agendas. This conflicts with the leading European goal of diversifying the supplies through several suppliers instead of one. In that regard, The European Commission Chief, Ursula von der Leyen, stated that the agreement between the EU, Israel, and Egypt is a part of the EU's effort to diversify the natural gas supplies away from Russia by importing energy sources from "other trustworthy suppliers."¹⁹⁴

In addition, it could be claimed that the EU may invest in other routes to carry Israel's natural gas through Egypt and Cyprus to ensure the Cypriot interests in the region in light of the growing and constant skirmishes between Türkiye and Greece in the last five years.

4.2. The Strategic Partnership of Türkiye- Israel Natural Gas Policies

Despite the significant collaboration between Türkiye and Israel in a wide range of issues such as military collaboration, promotion of peace, and trade exchange. Yet, the same development has not been observed in the natural gas sector. This chapter analyzed the details of Türkiye-Israel natural gas policies by focusing on the significant influences that could affect this relations shape.

During the past ten years, “volatility” was an essential feature in the relations between Türkiye and Israel, which deeply affected any possible strategic partnership between both parties regarding the collaboration in the natural gas agenda. However, the announcement

¹⁹⁴ “Israel's EU, Egypt Gas Deal Does Not Hamper Turkey Talks.” Daily Sabah, June 16, 2022. <https://www.dailysabah.com/business/energy/israels-eu-egypt-gas-deal-does-not-hamper-turkey-talks-expert>.

of returning the full diplomatic relations and the re-exchange of ambassadors is considered a cornerstone of indicating the opening of a new page in the connections.

The signs of the return of the relations officially began with the visit of Israeli President Isaac Herzog to Türkiye in March 2022, during which he stated that the resumption of relations between the two parties should take place, but "with caution" and "in a thoughtful manner."¹⁹⁵

Based on the facts mentioned in this chapter, it could be claimed that one of the essential prominent Turkish motives for improving its relations with Israel is the endeavour to gain relative strategic gains with Israel regarding the natural gas agenda to strengthen its chance of being the only exporting route in the region instead of the Egyptian or the Cypriot routes.

This strategic partnership intersects with Türkiye's natural gas policies to diversify its imports. Meanwhile, Türkiye mainly depends on natural gas imports from Russia and Iran, as mentioned in the second chapter, to meet its natural gas demand, especially after the instability of supply caused by the Ukraine crisis. Therefore, Türkiye wants access to Israeli gas reserves for domestic use and export to Europe, which would strengthen its position as a natural gas bridge to Europe and help it to maintain an acceptable level of natural gas security.

A part of the core beliefs that feed these neorealist ideas for both sides is the perception that Türkiye nowadays becomes an alternative that can attract the necessary investments to fund the natural gas extraction efforts from the Eastern Mediterranean and export it to Europe, especially in light of the inability of the agreement between Egypt and Israel to compensate for the urgent European shortage of natural gas caused by the Russian-Ukrainian war.

On the other side, another part of this strategic partnership is Israel's perception that the efforts of linking its natural gas network with Cyprus through the Eastern Mediterranean gas pipeline project without solving the Cyprus question are unreasonable. This part was

¹⁹⁵ "Israel's Herzog visits Turkey, meets Erdoğan to 'restart' ties." Daily Sabah, March 09, 2022. <https://www.dailysabah.com/politics/diplomacy/israels-herzog-visits-turkey-meets-erdogan-to-restart-ties> [Accessed 29.08.2022].

also built based on US State Department's decision to stop supporting the project,¹⁹⁶ representing a significant opportunity for Türkiye to invest more in its relationship with Israel to show itself as an internationally acceptable route.

To conclude, despite the confluence of interests between Türkiye and Israel regarding the natural gas agenda yet, the natural gas policies between both sides mainly rely on the internal political situation influence and the recent political developments in the international arena, such as the Russian-Ukrainian war influence. This could create the atmosphere for more volatility, which could directly reflect on the Türkiye-Israel natural gas policies' gains. Meanwhile, Türkiye tries to maximize its interests by incorporating its efforts with international projects to carry natural gas to Europe, increasing its geostrategic importance and yielding possible future gains.

¹⁹⁶ "US withdraws support from EastMed gas pipeline project." Anadolu Agency, January 11, 2022. <https://www.aa.com.tr/en/world/us-withdraws-support-from-eastmed-gas-pipeline-project/2470881> [Accessed 03.04.2023].

CHAPTER 5 : CONCLUSION

This thesis aimed to discover and explain the natural gas policies of Türkiye with the EU and Israel since the beginning of JDP's party role in 2003 to answer the questions: "What motivates Türkiye's natural gas policies?" and "How do Türkiye's foreign policy and Türkiye's natural gas policies affect and integrate each other?".

To strengthen the thesis's arguments, this study utilized the Neorealism theory for its analysis power to realize how these actors act in the system to maximize their interests and accumulate more relative gains. A part of choosing this theory is the ability of the neorealist approaches to discover the complex interdependencies that rule Türkiye's foreign policies in its relation with the EU and Israel in the light of convergence elements in some cases and the spacing elements in others. Besides its ability to explain the various levels of channels of interactions between those actors.

It's worth mentioning that this thesis did not aim to compare Türkiye's natural gas policies with each actor. Instead, this thesis aimed to study Türkiye's natural gas policies with each actor independently by giving a broader explanation to find and answer what motivates Türkiye's natural gas policies with these actors. Therefore, each chapter of this thesis ends with a conclusion elaborating on the situation independently.

This thesis analyzed first Türkiye's natural gas profile to produce a better view that helped to understand the following chapters. Firstly, this study finds that Türkiye's total dependence on natural gas imports to meet its increasing demand made its natural gas security efforts fully supply-oriented.

In that regard, Türkiye's natural gas policies put heavy pressure on its foreign policies due to the permanent effect of improving and developing its relationship with natural gas suppliers, such as Qatar, Azerbaijan, and Iran, and potential suppliers, such as Israel, to increase its relative gains in the regional system. Which is characterized by a status of instability during the period studied by this thesis.

In that context, the pipeline and pipeline projects are essential to its natural gas policies since most of its supplies are transported via pipelines. In addition, the pipelines' participation in any joint collaborative scheme between Türkiye, the EU, and Israel.

For the first actor, the EU, the core inquiry of the chapter was the understanding of how could Türkiye's take benefits in great advantage of its geographical location in its dense interactions with the EU. The chapter tried to determine the deep motivations of Türkiye's foreign policies regarding natural gas policies and the tools to achieve these natural gas policies.

The chapter relied on the "Framing Analyses" method to understand the core beliefs that formed the political leaders' stands. Notably, Türkiye's foreign policies with the EU were ruled by a "conflictual policies" pattern. Although the early 2000s had many amity and enmity concepts between Türkiye and the EU. The "conflictual policies" pattern gained momentum in the last five years and became the dominant pattern. In that regard, as mentioned in the third chapter, a part of the inputs that feed this pattern is the EU fear that Türkiye could use the natural gas agenda to achieve relative gains on other agendas.

Based on that, this thesis concluded that the need of the EU to meet its increasing natural gas demand is an unfavourable aspect of Türkiye-EU natural gas policies. After the Russian-Ukrainian crisis in 2014, the EU's desire to obtain its natural gas resources from a large number of suppliers with few rations to reduce any possibility of using natural gas flows to achieve relative gains. This aim can be achieved only if the EU invests in the Turkish transport route in reasonable quantities. Therefore, these quantities will not enhance Türkiye's political position to earn political gains at the desired level.

This thesis believes that Türkiye can achieve more relative gains as an acceptable mediator between the conflicting parties in the Russian-Ukrainian War 2022. In addition, it can be claimed that one of the Turkish foreign policy motives is the possibility of taking advantage of its strategic geographical location to strengthen its balance in the regional balance of power by presenting itself as a third party to supply European needs of natural gas.

In that regard, Türkiye relies on the urgent European need to satisfy the large gap between the demand and supply of natural gas in its markets, which provides it with a historic opportunity that may not be repeated in the near future to terminate the intellectual barriers adopted by the EU since the Ukrainian crisis in 2014, which was mentioned in the previous paragraph.

However, this thesis emphasizes that Türkiye is not the only state that could help the EU to diversify natural gas supplies. Although its strategic geographical location, Türkiye's and the EU's foreign policies influence their natural gas policies, which are also ruled by other agendas, for instance, the Cyprus question. Therefore, the positive scene will not be drawn only by the advantage of the strategic geographical location.

In addition, this thesis concluded that Türkiye-EU natural gas policies have different levels that deepened the relative gains aims, which reflected in return on their foreign policies, each focusing on the relativity of the possible gains.

For Israel, this thesis concluded that Türkiye's and Israel's foreign policies reflected the natural gas policies of each party's attention to increasing its economic relative gains. Regardless of any political motives that intersect negatively with any other agenda, for instance, the Turkish stands on the Palestinian cause, the relative economic gains are the essential factor ruling this relationship.

In this context, this thesis noted that the trading exchange between Türkiye and Israel increased during the break of diplomatic relations. This fact shows the extent of the desire of both parties to reach the solid ground for economic agreements that consider foreign policies but in a manner that highlights the economic interest more than the political one.

In addition, Türkiye's dependence on imports to meet its increasing natural gas demand, besides the closeness of Israeli's natural gas resources, motivates the Turkish natural gas security efforts to enhance its foreign policies orientations into positive aspects with Israel as a consumer state and as a natural gas bridge to Europe.

However, a part of the thesis conclusion is also Türkiye's regional relative gains regarding the Cyprus question. In fact, the Cypriot option seems more logical to export Israeli natural

gas to Europe. By considering the illogical ability to transport Israeli natural gas through Syria's EZZ, so reaching Türkiye through Cyprus' EZZ is more likely to be accomplished. In this regard, this thesis believes that this solution may provide additional political space for Türkiye to achieve relative political gains in the Cyprus issue.



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Appendix: List of discourses of Türkiye-EU natural gas policies 2003-2021.

No.	The Statement	Year	Source
01	Schreiner, The Rapporteur of The Committee on Economic Affairs and Development, Europe Parliamentary Assembly: "We share the concerns of Turkey and other countries over the major environmental risks arising from the disregard of the existing environmental safety norms for oil and gas tanker shipments, especially in the Turkish straits."	2003	Council of Europe
02	Abdullah Gül, The Foreign Minister, Republic of Türkiye: "various reforms that the government of Turkey is conducting regarding the issue of Turkey's accession to the EU."	2003	Republic of Türkiye Ministry of Foreign Affairs
03	European Environment Information and Observation Network (Eionet): "Turkey has informed the European Environment Agency that it has completed the procedure of ratification of its EEA membership agreement."	2003	Eionet
04	Kalman Mizsei, Director of the Regional Bureau for Europe and the Commonwealth of Independent States: "The EU has had significant difficulty in its negotiations with Turkey, that, upon accession, Turkey would become the largest EU country and could end up changing the dynamics of the EU considerably"	2003	Harvard Kennedy School of Government - Harvard University
05	Joschka Fisher, The German Foreign Minister: "the European Union, now more than ever, has to extend its hand to Turkey."	2003	The Brookings Institution
06	Gerhard Schröder, The German Chancellor: "Turkey can only fully embrace Western values if it's given a chance."	2003	Deutsche Welle
07	The Republic of Türkiye, Ministry of Foreign Affairs: "We approved the Annan Plan, despite the sacrifices it entailed, while the Greek Cypriot tried hard to stall the negotiations, by filibustering."	2004	The Republic of Türkiye, Ministry of Foreign Affairs
08	Helmut Kohl, The former Prime Minister of Germany: "turkey had no chance of entering E.U."	2004	Hürriyet Daily News

09	Recep Tayyip Erdogan, the Turkish Prime Minister: "We Have Done our Homework."	2004	Deutsche Welle
10	Frits Bolkestein, The Dutch Commissioner of the European Commission: "Both EU leaders and Commissioners are secretly against Turkey."	2004	Euobserver
11	The European Council: "The negotiating framework must include that Turkey should work towards normalization of bilateral relations with the Republic of Cyprus."	2005	Centre for European Studies
12	A Six-person delegation, comprising of German and South African lawyers to DW: "Turkey is unfit to join the EU. With regard to the Kurdish issue, the improvements were merely theoretical."	2005	Deutsche Welle
13	Kostas Karamanlis, The Greek Prime Minister: "This pipeline is connecting two countries and two people together."	2005	Agence France Press
14	Recep Tayyip Erdogan, The Turkish Prime Minister: "This pipeline will help strengthen our friendship and put an end to speculation about Greek-Turkish ties."	2005	Agence France Press
15	Recep Tayyip Erdogan, The Turkish Prime Minister: "Turkey is a bridge between Europe and rich (oil and gas) resources in the Caspian region and the southern Mediterranean."	2005	Agence France Press
16	Kostas Karamanlis, The Greek Prime Minister: "The new pipeline project is a very important development that shows both countries can cooperate like never before."	2005	Agence France Press
17	Nikos Papaconstantinou, The spokesman of the Greek embassy in London: "Greek Cypriots have sovereign title rights to property and Turkey should do something about it if it is serious about joining the European Union."	2005	The Guardian
18	Dora Bakoyannis, The Greek Foreign Minister: "the European Union (EU) was not as yet ready for a union with Turkey."	2006	Hürriyet Daily News
19	Tanay Sidki Uyar, The Vice President of The World Wind Energy Association (WWEA): "After years of discussion, we have been able to convince the Turkish parliament to take a first step to strengthen the country's decentralised renewable energy sector, This law also brings Turkish energy policies closer in line with European Union legislation."	2006	The World Wind Energy Association (WWEA)

20	Gregor Woschnagg, Permanent Representative of Austria to the EU: "We are asking Turkey for not only important economic, but also political reforms. Obviously, there is decreasing political will to reform."	2006	EURACTIV
21	The EU presidency regarding the failure of talks between the European Union and Turkey: "The impasse was insurmountable."	2006	Deutsche Welle
22	Martin Bartenstein, The Austrian Energy Minister: "The planned pipeline to deliver Caspian gas to Europe via Turkey could help to diversify the EU's sources of gas."	2006	BBC
23	Constantinos Filis, Head of The Russia-Eurasia Centre at the Institute of International Relations in Athens: "The new pipeline project turns Greece into a link in the energy chain and creates a deterrent for any future crises with Turkey."	2007	Reuters
24	Christos Folias, The Greek Development Minister: "The two countries (Greece and Turkey) contribute to securing Europe's energy supply."	2007	Reuters
25	Nicolas Sarkozy, The French President: "We suggest a "privileged partnership" for Turkey instead of full EU membership."	2007	Aljazeera
26	Bahadır Kaleagasi, Head of The Turkish Business Association (TUSIAD): "a privileged partnership strategy would take EU-Turkey negotiations into "a very unethical and indecent phase."	2007	Aljazeera
27	The Republic of Türkiye, Ministry of Foreign Affairs: "It must also be kept in mind that Turkey has legitimate and legal rights and interests in the Eastern Mediterranean."	2007	The Republic of Türkiye, Ministry of Foreign Affairs
28	The Republic of Türkiye, Ministry of Foreign Affairs: "We expect the Greek Cypriot Authorities to end their calls for international tender which are not based on common understanding among the Eastern Mediterranean states, violating the joint rights of the two peoples on the Island on issues like oil and natural gas exploration."	2007	The Republic of Türkiye, Ministry of Foreign Affairs
29	The Cyprus Ministry of Foreign Affairs: "Turkey has no right whatsoever to challenge the	2007	The Cyprus Ministry of

	delimitation of the EEZ between the Republic of Cyprus and its neighboring States."		Foreign Affairs
30	The Greek Foreign Ministry spokesman: "Turkey's position is a flagrant violation of the fundamental principles of international law."	2007	The Greek Foreign Ministry
31	Abdullah Gül, The Turkish President: "We strongly emphasize our intention to forge ahead with plans to join the European Union."	2007	The Trumpet
32	The Republic of Türkiye, Ministry of Foreign Affairs: "The laws enacted by the Greek Cypriot government or agreements made with other interested parties have no validity for us."	2007	The New York Times
33	George Lillikas, The Greek Cypriot Foreign Minister: "Our country had the right to sign deals with neighbors."	2007	The New York Times
34	Mehmet Ali Talat, The Turkish Cypriot leader: "Our people would not renounce oil and gas rights in the Mediterranean."	2007	The New York Times
35	Erato Kozakou Markoulli, The Greek Cypriot Foreign Minister: "Turkey's threats over Cyprus' legal right to explore and exploit oil and natural gas reserves in its EEZ will have serious repercussions on Ankara's European Union accession course."	2007	The Cyprus Ministry of Foreign Affairs
36	Richard Holbrook, The U.S. Ambassador to Germany: "Turkey is to our national security what Germany was in the Cold War."	2008	The Republic of Türkiye, Ministry of Foreign Affairs
37	Recep Tayyip Erdogan, The Turkish Prime Minister: "Nabucco deal was a historic moment."	2009	DW
38	The Turkish foreign ministry: "The Nabucco project is expected to bring a new dimension to our relations, based on mutual trust and cooperation, with the European Union."	2009	DW
39	Suat Kiniklioğlu, The Foreign Policy Spokesman of the AKP Party: "Will Turkey's growing clout also open the door to the European Union? We expect to be treated with respect"	2009	The Daily Telegraph
40	Angela Merkel, The German Chancellor to Recep Tayyip Erdogan, The Turkish Prime Minister regarding the Turkish membership of the EU: "Germany's foreign policy is under review."	2009	The Daily Telegraph

41	Recep Tayyip Erdogan, The Turkish Prime Minister: "Turkey may reconsider its support for Nabucco if there is no progress on the energy chapter of its EU accession talks."	2009	Euobserver
42	Jose Manuel Barroso, European Commission President: "'Southern Corridor initiative' is the key priority project for the European Union."	2009	European Commission website
43	Hubert Vedrine, The Former French Foreign Minister: "From now on it was neither possible nor right to change the rules of the game for Turkey."	2009	Hürriyet Daily News
44	Pierro Moscovici: The Former State Minister for European Affairs: "Europe needs Turkey."	2009	Hürriyet Daily News
45	Jose Manuel Barroso, European Commission President: "We are determined to make the Nabucco pipeline a reality as quickly as possible."	2009	The Christian Science Monitor
46	Recep Tayyip Erdogan, The Turkish Prime Minister: "During the time of Mr. Sarkozy, this is not the case. It is an unfair attitude. The European Union is violating its own rules."	2009	The Guardian
47	The Spokesman of The German Federal Association of Energy and Water Management: "Nabucco Pipeline would significantly enhance Europe's security of supply."	2009	The German Federal Association of Energy and Water Management
48	Recep Tayyip Erdogan, The Turkish Prime Minister: "Now we have the opportunity to ship natural gas in the Caspian to Europe, Thanks to Nabucco"	2009	Anadolu Agency
49	Mikeil Saakashvili, The Georgian President: "Nabucco was not only an energy project but at the same time an agreement aimed at boosting cooperation and appreciated efforts of Turkey."	2009	Anadolu Agency
50	Sergei Stanishev, The Bulgarian Prime Minister: "thanks to Turkey and Erdogan and underlined the importance of the project with respect to the diversification of gas resources of Europe."	2009	Anadolu Agency
51	Werner Faymann, The Austrian Chancellor: "Nabucco would contribute a lot to European energy policy."	2009	Anadolu Agency
52	Gordon Bajnai, The Hungarian Prime Minister: "Nabucco project has political, economic, and social importance that would have an impact on all people."	2009	Anadolu Agency

53	Emil Boc, Romanian Prime Minister: "Nabucco is for a more competitive market and a more secure supply."	2009	Anadolu Agency
54	Egemen Bagis, The Turkish Chief Negotiator for EU talks: "Turkey would be a solution, not a problem for the EU."	2009	Anadolu Agency
55	Recep Tayyip Erdogan, The Turkish Prime Minister: "Energy projects indicated that Turkey should be a member of the European Union."	2009	Anadolu Agency
56	Andreas Theophanous, The Director of The Cyprus Center for European and International Affairs: "Turkey is blocking itself by not recognizing Cyprus as a member of the EU."	2010	The Atlantic Council
57	David Cameron, UK Prime Minister: "I'm here to make the case for Turkey's membership of the EU."	2010	EURACTIV
58	Turkey's Foreign Ministry: "Greek Cypriot government should not unilaterally sign international agreements without a solution to the division of the island."	2010	The Republic of Türkiye, Ministry of Foreign Affairs
59	Stefanos Stefanou, The Spokesman of The Greek Cypriot government: "No other country has the right to interfere in Cyprus' affairs."	2010	Daily Sabah
60	Recep Tayyip Erdogan, The Turkish Prime Minister: "Our country aims at contributing to the energy safety of Europe."	2010	Anadolu Agency
61	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Turkey's political support to Nabucco was full."	2010	Anadolu Agency
62	Levent Ozgul, The Strategy and Development Manager at Botas: "Nabucco will become an important project and will gain economic importance".	2011	Daily Sabah
63	Catherine Ashton, The Spokeswoman of The EU's Foreign Policy Chief: "The EU urges Turkey to refrain from any kinds of threats, sources of friction that could negatively affect good neighborly relations and the peaceful settlement of border disputes."	2011	Daily Sabah
64	The Republic of Türkiye, Ministry of Foreign Affairs: "It has been agreed that Turkey and the Turkish Republic of Northern Cyprus will conclude a continental shelf delimitation	2011	The Republic of Türkiye, Ministry of

	agreement should the Greek Cypriot Administration proceed with offshore drilling activities in the south of the Island."		Foreign Affairs
65	Demetris Christofias, The Cypriot President: "We will continue to exercise our evident sovereign rights, which includes exploiting natural resources, always within the parameters of international law."	2011	Daily Sabah
66	Recep Tayyip Erdogan, The Turkish Prime Minister: "It could provide naval escorts for oil and gas exploration vessels poised to begin work off northern Cyprus."	2011	Daily Sabah
67	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Survey vessels belonging to the Turkish oil exploration company TPAO could be given naval escorts."	2011	Daily Sabah
68	Ahmet Davutoglu, The Turkish Foreign Minister: "We want the Eastern Mediterranean to be a basin of peace, stability, and welfare. But if some say 'This is my back garden, I will behave as I wish.'"	2011	Daily Sabah
69	Recep Tayyip Erdogan, The Turkish Prime Minister: "Turkey expects to see that all parties involved make efforts so that the Greek Cypriot administration ends initiatives that cause tension, otherwise, we will do what we have to do."	2011	Daily Sabah
70	Egemen Bagis, The Turkish minister for European Affairs: "If the Greek Cypriots agree to stop, we'll stop too. But if they insist on proceeding, they know very well Turkey's attitude."	2011	Daily Sabah
71	Stefanou, The Speaker for the Greek Cypriot administration: "The natural wealth discovered in the Mediterranean does not solely belong to us, but also to the Cypriot Turks."	2011	Anadolu Agency
72	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "We would like to emphasize one more time that it is not right to delay Turkey's EU membership."	2011	Anadolu Agency
73	Ahmet Davutoğlu, The Turkish Foreign Affairs Minister: "We will not have relations during the Greek Cypriot EU Term Presidency."	2012	Daily Sabah
74	Ahmet Davutoğlu, The Turkish Foreign Affairs Minister: "The unilateral exploration of oil and natural gas by the Greek Cypriots around the island further intensifies the risks."	2012	New York Times

75	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Although there was no energy title opened during Turkey's EU accession process, the EU had to consider Turkey's works in the energy projects."	2012	Anadolu Agency
76	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Turkey was part of the solution to Europe's natural gas problem."	2012	Anadolu Agency
77	Joint statement between Taner Yıldız, The Turkish Minister of Energy and Natural Resources and Gunther Oettinger the EU commissioner for energy: "The cooperation will facilitate the eventual integration of the EU and Turkey energy markets."	2012	Anadolu Agency
78	The EU Commission: "We need a pipeline to carry natural gas from Azerbaijan to Europe via Turkey."	2012	Anadolu Agency
79	Ahmet Davutoğlu, The Turkish Foreign Affairs Minister: "Ankara is now considering a two-state solution for Cyprus."	2013	Daily Sabah
80	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "There is no business for companies that work with the Greeks."	2013	Daily Sabah
81	Recep Tayyip Erdogan, The Turkish Prime Minister: "EU needs Turkey for a global role."	2013	Anadolu Agency
82	Petr Necas, The Prime Minister of the Czech Republic: "We support Turkey's EU membership."	2013	Anadolu Agency
83	Ahmet Davutoğlu, The Turkish Foreign Affairs Minister: "The Southern Gas Corridor Project is not only an energy corridor but also a peace corridor."	2013	Anadolu Agency
84	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Turkey would continue its positive attitude to work on significant projects with the states in the region."	2013	Anadolu Agency
85	Guido Westerwelle, The German Foreign Minister: "Someday EU may need Turkey more than Turkey do."	2013	Anadolu Agency
86	Vittorio Prodi, European deputy: "The independence of the EU will be ensured by the Southern Corridor Gas Project, in which Turkey is a main actor."	2014	Daily Sabah
87	Aylin Çağlayan Özcan, The Head of The Sectoral Policies Department at Turkey's EU	2014	Daily Sabah

	Ministry: "Turkey is already harmonizing its energy policies with the EU's."		
88	Mevlüt Çavuşoğlu, The Turkish EU Minister: "Turkey is the best route for sending offshore natural gas from Cyprus to Europe."	2014	Daily Sabah
89	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Through the South Caucasus pipeline and its backbone, the Trans-Anatolia pipeline, we connect the Caucasus with the Balkans. I wish every country could understand the true value of these projects and contribute with us."	2014	Daily Sabah
90	Ahmet Davutoğlu, The Turkish Prime Minister: "The TANAP project is not only a project of energy but also a huge peace project. Instead of creating energy rivalries, we are determined to build cooperation."	2014	Daily Sabah
91	Ahmet Davutoğlu, The Turkish Prime Minister: "Turkey and the TRNC cannot be excluded from the East Mediterranean, we have rights on the natural resources of Cyprus, and we will not give up those rights."	2014	Daily Sabah
92	Ahmet Davutoğlu, The Turkish Prime Minister: Relations between Turkey and Greece are no longer impeded by a psychological barrier (...) Once the Cyprus issue is resolved, we will continue to work shoulder to shoulder with Greece on the East Mediterranean energy corridor."	2014	Daily Sabah
93	Recep Tayyip Erdogan, The Turkish President: "Our research vessel is now continuing its drilling activities. We will continue to be there as long as the Greek Cypriot administration and Greece continue to ignore our warnings on the issue."	2014	Daily Sabah
94	Gunther Oettinger, The Spokesperson of EU Energy Commissioner: "The Commission has been considering for years that Turkey is sufficiently prepared to start negotiations on the energy chapter, in our view, the chapter could be opened."	2014	Daily Sabah
95	Bela Szombati, Deputy Head of EU Delegation to Turkey: "The EU focused on Turkey's transit of natural gas to Europe."	2014	Anadolu Agency

96	Maros Sefcovic, The Vice-President of The European Commission: "The southern gas corridor and TANAP are key projects to which the EU attaches a very high political priority."	2015	Daily Sabah
97	Taner Yıldız, The Turkish Minister of Energy and Natural Resources: "Turkey no longer demands EU open energy chapter."	2015	Anadolu Agency
98	Recep Tayyip Erdoğan, The Turkish President: "Turkey would continue drilling gas in the Eastern Mediterranean as long as the Greek Cypriot administration insists on all rights to the gas reserves."	2015	Daily Sabah
99	Recep Tayyip Erdoğan, The Turkish President: "We want to use our central position between the east-west and north-south corridors in the most active and productive way."	2015	aily SabahD
100	Greek Cypriot opposition party AKEL: "Gas in the island could pass through Turkey, the negotiations that stalled after tension over gas exploration in the Eastern Mediterranean should be revived."	2015	Daily Sabah
101	Ahmet Davutoğlu, The Turkish Prime Minister: "The government is willing to cooperate with the energy supply and demand of Central Europe."	2015	Daily Sabah
102	Miguel Arias Canete, The EU Energy Commissioner: "Eastern Mediterranean natural gas passing through Turkey will change the energy game."	2016	Daily Sabah
103	Balazs Gargya, The Head of the Trade, Agriculture, Economy and Energy Policy Section of the Delegation of the European Union to Turkey: "We see Turkey as a strategic partner in energy and we wish to continue our negotiations in the field of energy."	2016	Daily Sabah
104	Berat Albayrak, The Turkish Energy and Natural Resources Minister: "Turkey is supporting TAP as it will make an enormous contribution to the EU's domestic energy market and security of supply as a potential member of the EU."	2016	Daily Sabah
105	Miguel Arias Canete, The European Commissioner for Climate Action and Energy: "Cooperation between Turkey and the European Union over energy continues and hasn't been slowed by the failed July 15 coup in Turkey."	2016	Anadolu Agency
106	Berat Albayrak, The Turkish Energy Minister: "We are working towards bringing gas via	2017	Daily Sabah

	pipeline from the Eastern Mediterranean to Turkey's internal market and then to European markets,"		
107	The Turkish commander-in-chief's office: "The TCG Gökçeada frigate has been assigned to carry out the task of monitoring the West Capella, a vessel that will perform drilling."	2017	Daily Sabah
108	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "Turkey and the TRNC will consider a different roadmap than unfruitful peace talks."	2017	Daily Sabah
109	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "The EU did not keep its word after the 2004 referendum. Now the embargo imposed on the TRNC should be removed immediately."	2017	Daily Sabah
110	Sigmar Gabriel, The German Foreign Minister: "Germany needed to take a tougher course against Ankara."	2017	DW
111	The Republic of Türkiye, Ministry of Foreign Affairs: "This attitude of the Greek Cypriot side, which does not shy away from irresponsibly jeopardizing the security and stability of the Eastern Mediterranean region, is actually the fundamental reason behind the failure of the Cyprus settlement negotiations to produce an outcome for the past half-century."	2018	The Republic of Türkiye, Ministry of Foreign Affairs
112	The Republic of Türkiye, Ministry of Foreign Affairs: "The Greek Armed Forces' hostile attitude is continuing both in the air and at sea."	2018	The Republic of Türkiye, Ministry of Foreign Affairs
113	Berat Albayrak, The Turkish Energy Minister: "Turkey will not allow the spread of ignorance toward and violations of Turkish Cyprus rights and will exercise its legal rights to the fullest extent."	2018	Daily Sabah
114	Recep Tayyip Erdoğan, The Turkish President: "The Greeks made provocative actions in the Kardak islets and repeated dangerous maneuvers despite Turkey's warnings."	2018	Daily Sabah
115	EU leaders: "Turkey is continuing illegal actions in the Eastern Mediterranean and the Aegean Sea. The EU urgently calls on Turkey to cease these actions and respect the sovereign rights of	2018	ababDaily S

	Cyprus to explore and exploit its natural resources."		
116	Ömer Çelik, The Turkish EU Affairs Minister: "The statement released by EU leaders is not acceptable for Turkey, it is the same EU that accused Greek Cyprus and Greece because of the failed Crans-Montana negotiations to resolve the problem of the ethnically split island last year."	2018	Daily Sabah
117	Sebastian Kurz, The Austrian Chancellor: " We call upon the EU to terminate full membership talks with Ankara."	2018	Daily Sabah
118	Berat Albayrak, The Turkish Energy Minister: "Turkey will continue to become an important energy partner for Europe."	2018	Daily Sabah
119	Fatih Dönmez, The Turkish Energy and Natural Resources Minister: "Turkey will not allow any unilateral hydrocarbon drilling and exploration in the Eastern Mediterranean Sea."	2018	Daily Sabah
120	Recep Tayyip Erdoğan, The Turkish President: "Turkey will not accept attempts to seize Eastern Mediterranean resources."	2018	Daily Sabah
121	Recep Tayyip Erdoğan, The Turkish President: "Reckless policies of Greece, Greek Cypriot administration in Mediterranean to backfire."	2018	Daily Sabah
122	Fatih Dönmez, The Turkish Energy and Natural Resources Minister: "We have warned South Cyprus a few times. We stressed that the Greek Cypriot side's unilateral and illegal move in the region would certainly have consequences."	2018	Daily Sabah
123	Mevlüt Çavusoğlu, The Turkish Foreign Minister: "Let those who come to the region from far away, and their companies, see that nothing can be done in that region without us. Nothing at all can be done in the Mediterranean without Turkey, we will not allow that."	2019	Daily Sabah
124	Fatih Dönmez, The Turkish Energy and Natural Resources Minister: "Turkey will continue defending peace and stability in the Eastern Mediterranean in accordance with its historical mission."	2019	Daily Sabah
125	Nikos Kotzias, The Former Greek Foreign Minister: "Turkey should be fairly included in the energy and trade developments in the Eastern Mediterranean."	2019	Daily Sabah
126	The Turkish Foreign Ministry: "Turkey's hydrocarbon-related activities in the Eastern	2019	Daily Sabah

	Mediterranean region are based on its legitimate rights stemming from international law."		
127	Recep Tayyip Erdoğan, The Turkish President: "Our Turkish kinsmen in northern Cyprus also have rights according to international law (...) We will not allow these rights to be usurped by those who have no business there."	2019	Daily Sabah
128	Hami Aksoy, The Turkish Foreign Ministry Spokesperson: "If it dares to arrest Fatih's employees no one should doubt that we will give the necessary response."	2019	Daily Sabah
129	EU Ministers for European affairs meeting: "We expressed serious concern over Turkey's current illegal drilling activities."	2019	Daily Sabah
130	Recep Tayyip Erdoğan, The Turkish President in a phone call with Kyriakos Mitsotakis, The New Greek Prime Minister: "Let's hope that it will be a new start for stronger Turkey-Greek relations since the two have been suffering from decades of tension as NATO rivals."	2019	The Archive of the Presidency of Republic of Türkiye
131	A draft statement of the EU Meeting: "In light of Turkey's continued and new 'illegal' drilling activities, the EU decides to suspend negotiations on the Comprehensive Air Transport Agreement and agrees not to hold further meetings of the high-level dialogues for the time being."	2019	Reuters
132	The Turkish Foreign Ministry: "The EU's failure to mention Turkish Cypriots who have equal rights to the natural resources of the island in its decisions showed how biased and partisan the EU is on the subject of Cyprus."	2019	Daily Sabah
133	Fatih Dönmez, The Turkish Energy and Natural Resources Minister: "We will never allow the usurpation and appropriation of the rights of the Turkish community on the hydrocarbon resources in the island."	2019	Daily Sabah
134	Recep Tayyip Erdoğan, The Turkish President: "TANAP does not only guarantee Turkey's energy security but aims to bolster the energy supply security of European countries as well."	2019	Daily Sabah
135	Hami Aksoy, The Turkish Foreign Ministry Spokesperson: "The EU acting under the pretext of union solidarity, should, first of all, end its unrealistic and prejudiced policies and double standards."	2020	Daily Sabah

136	Hami Aksoy, The Turkish Foreign Ministry Spokesperson: "We invite all EU members to abandon their attitudes that ignore the rights of Turkish Cypriots."	2020	Daily Sabah
137	Kyriakos Mitsotakis, The Greek Prime Minister: "Greece is always open to a dialogue with Turkey to delimitate the maritime zones."	2020	Daily Sabah
138	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "As a candidate for EU membership, Turkey shares many of the bloc's strategic interests and goals. Our borders are Europe's and NATO's external borders."	2020	Daily Sabah
139	Heiko Maas, The German Foreign Minister: "As long as Turkey continues to take this path, sanctions on Turkey will be a one-way street."	2020	Daily Sabah
140	Recep Tayyip Erdoğan, The Turkish President: "We are not subjected to anyone's permission concerning our seismic exploration vessels or our drilling vessels."	2020	Daily Sabah
141	Recep Tayyip Erdoğan, The Turkish President: "Turkey will respond to any harassment targeting Oruç Reis vessel."	2020	Daily Sabah
142	Hulusi Akar, The Turkish Defense Minister: "Dialogue over the Eastern Mediterranean should be the first option. Otherwise, undesirable situations would follow."	2020	Daily Sabah
143	Ibrahim Kalın, Turkey's presidential spokesperson: "Greece and EU countries must not waste the chance for diplomacy and take reciprocal steps."	2020	Daily Sabah
144	Çavusoğlu, The Turkish Foreign Minister: "A string of maximalist claims cannot be imposed upon Turkey through the EU, which has no competence over maritime boundary delimitation."	2020	Daily Sabah
145	Recep Tayyip Erdoğan, The Turkish President: "Turkey is ready to launch exploratory talks with Greece and appreciated Germany's efforts for mediation."	2020	Daily Sabah
146	Recep Tayyip Erdoğan, The Turkish President: "I hope that the EU supports our thoughts, abandons the biased stance against Turkey as a candidate country, and stops giving unconditional and unjust support to Greece and	2020	Daily Sabah

	the Greek Cypriot administration's maximalist discourse."		
147	Recep Tayyip Erdoğan, The Turkish President: "We will continue to give Greece and the Greek Cypriot administration the response they deserve. They have not kept their promises made during talks within the EU and NATO platforms."	2020	Daily Sabah
148	Angela Merkel, The German Chancellor: "Progress in EU-Turkey relations to benefit both sides."	2020	Daily Sabah
149	Jean-Yves Le Drian, French Foreign Minister: "The European Council has already decided to take measures against the Turkish authorities, now it is important for the Turks to take the necessary measures to avoid this."	2020	Daily Sabah
150	Simon Coveney, The Irish Minister of Foreign Affairs: "It's clear that last year was a particularly difficult year for the EU-Turkey relationship as a result of a series of factors. Our aim is to ensure that the relationship improves significantly in 2021."	2021	Daily Sabah
151	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "It is in our interests that minorities in both countries live in peace, it will have a positive impact on our relations."	2021	Daily Sabah
152	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "Turkey has implemented many inclusive practices with regard to its minorities. Such a positive approach is what we expect from Greece concerning its Turkish Muslim minority in Western Thrace."	2021	Daily Sabah
153	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "Greece keeps military forces on islands bound to be demilitarized by international law."	2021	Daily Sabah
154	Mevlüt Çavuşoğlu, The Turkish Foreign Minister: "Turkey is ready for dialogue without any preconditions to improve bilateral relations with Greece."	2021	Daily Sabah
155	Recep Tayyip Erdoğan, The Turkish President: "Whatever our rights are, we will take them one way or another. And we will carry out our oil exploration operations in the Eastern Mediterranean, Cyprus, and all those seas."	2021	Daily Sabah

156	The Republic of Türkiye, Ministry of Foreign Affairs: "The main cause of the tension in the Eastern Mediterranean in recent years has been Greece's and the Greek Cypriot administration's maximalist maritime jurisdiction area claims and unilateral acts that ignore Turkey's and the TRNC's rights and interests."	2021	The Republic of Türkiye, Ministry of Foreign Affairs
157	Massimo Gaiani, Italy's ambassador to Turkey: "Turkey's membership in the union, fervently and continuously supported by Italy."	2021	Anadolu Agency

