

Chapter Twenty-Two

Cooperation on Energy Security: The European Perspective

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Despite the emergence of the shale revolution in the United States, which led to a growing independence from hydrocarbon imports, energy security in the Eurasian region still represents a priority in the development of the political and economic relations across the Atlantic Ocean. In this context, energy cooperation between Turkey and its Western partners is no exception. In the last two decades, energy has been a central factor in shaping the foreign policy of Ankara, and it has dictated its partnership with the European Union.¹ On the one hand, the West's energy security concerns have reinforced the political dialogue with Turkey, granting Ankara a privileged place in the foreign policy objectives of the U.S. and its European partners. On the other hand, fluctuating strategic priorities have influenced the levels of energy cooperation and integration between Turkey and its Western counterparts.

While the energy security debate emerged at the international level in the aftermath of the 1973 oil crisis, key implications for relations between Turkey and its transatlantic partners surfaced only at the beginning of the 1990s. With the end of the Cold War, Turkey suddenly found itself in-between the vast hydrocarbon reserves located in the Caspian region and its Western consumers, eager to accede to new and diversified energy resources. Turkey was instrumental to the Washington-supported concept of multiple pipelines, aimed at preventing any actor from having a monopoly over the export of the Caspian energy resources.²

The reliability of Turkey as a transit country resulted in the implementation of the so-called “contract of the century,” the 1994 international agreement on the joint development of the ACG oil fields³ in the Azer-

¹ The Jamestown Foundation. “Azerbaijan and the Southern Gas Corridor: Implications for U.S. and European Energy Security.” Conference Report, September 2013.

² Weiss, Andrew S. et al. “Promoting International Energy Security—Volume 2: Turkey and the Caspian.” RAND Corporation, 2012.

³ Azeri, Chirag and deep-water Guneshli oil fields.

bajani sector of the Caspian Sea signed in Baku. The transit through Turkish territory allowed Azerbaijani oil to bypass the congested Bosphorus, ensuring a secure and profitable way to reach international markets.

With the rapid emergence of energy security concerns in the European Union at the beginning of the 2000s, the value of Turkey as an energy bridge between the East and West appeared clear across the entire transatlantic community. In this context, the launch of the Southern Gas Corridor—a pipeline network running from the gas-rich Caspian basin to the EU, thereby bypassing Russian territory—by the European Commission in 2003, expanded energy cooperation with Turkey to the gas sector and granted Ankara a central role in Europe's energy diversification strategy. Meanwhile, Turkey's rapid economic growth led to an impressive increase in domestic energy demand, forcing Ankara to expand its gas imports from abroad. The main outcome was a dependence on Russian supply, who became the top energy provider for the Turkish market. In the context of political tensions between Russia and the EU, the evolution of the energy cooperation between Moscow and Ankara—and in particular its implications for Europe's energy security—became a priority for the transatlantic agenda. Growing concerns about the use of Russia's energy abundance as a weapon aimed at Europe encouraged Washington to intensify its diplomatic pressure on Ankara, with a goal to both limit Moscow's energy leverage on its allies, and to reinvigorate energy cooperation between Turkey and the EU.

Today, Turkey's contribution to transatlantic energy security is vital, including the expansion of energy supplies from the Middle East through the Southern Gas Corridor (SGC). In particular, Ankara plays a fundamental role in the development and evacuation of gas resources located in the Eastern Mediterranean, where Turkey has a strong political footprint, and where it might be instrumental in speeding up energy cooperation to the benefit of the entire transatlantic community.

Turkey: The Gateway for New Energy Resources

Turkey is surrounded by roughly 70 percent of the world's energy resources. To the north, separated by the Black Sea, it borders with Russia, the global leader in terms of hydrocarbon reserves. To the east, it shares a border with the Caspian region, rich with vast oil and gas resources located in Azerbaijan and in Central Asian countries such as Turkmenistan and Kazakhstan. South-east, Turkey borders with Iran and Iraq, and in a

broader sense with the Persian Gulf, which is home to about half of the world's oil reserves and of 40 percent of the global gas resources. Finally, looking south, it is part of the Eastern Mediterranean region - which includes the territorial waters of Cyprus, Lebanon, Gaza, Israel, and Egypt—a region that is rapidly emerging as a new hotspot for the development of hydrocarbon resources. Due to its geostrategic location, Turkey has traditionally played a crucial role in ensuring secure access to energy resources for Western consumers.

At first, Turkey's transit role was mainly ensured through the Turkish Straits - the Bosphorus and the Dardanelles - which are still the only passage for oil tankers exiting or entering the Black Sea, going to or from the Mediterranean Sea in order to reach their market destinations. The flow of oil and products supplies—mainly from Russia, Azerbaijan and Kazakhstan—transiting through the Straits reached a peak of 3.4 million barrels per day in 2004, when they accounted for roughly 5 percent of total oil traded at the global level.⁴ Today, these values have stabilized to a little below 3 million barrels per day.⁵ In light of such intense traffic, an interruption of energy flows through the crowded straits is increasingly being perceived as a chronic and severe challenge to both Turkey's and Western energy security. In order to reduce these threats and minimize the related economic and environmental risks, Ankara and its transatlantic counterparts teamed up to find a solution to this problem. The Turkish government is particularly concerned about the risks derived by the intense hydrocarbon flows through the straits, and it has attempted to impose stricter curbs and to develop alternative routes for the energy supplies between the Black Sea and the Mediterranean.⁶

The realization of the Baku-Tbilisi-Ceyhan (BTC) oil pipeline, operational since 2006, is certainly the most visible result of these efforts.⁷

⁴ IHS CERA. "New Realities in Oil Transit Through the Turkish Straits," Special Report, Cambridge, 2011.

⁵ The decrease is due to the Russian decision to send part of its exports through Baltic Sea ports, and because of the activation of the Baku-Tbilisi-Ceyhan oil pipeline. The pipeline allows the transit of a million barrels of crude oil per year from the Caspian Sea to the Turkish port of Ceyhan, where they are loaded on boats to travel to their destination.

⁶ For more than a decade, Turkey has tried to promote the construction of a bypass pipeline that would reduce the need for tankers to transit the Bosphorus. The project would transport oil from the Black Sea port of Samsun across Turkey to the terminal at Ceyhan on Turkey's Mediterranean coast. Turkey's proposal contrasted with the Russian project to build a shorter pipeline that would originate in Bourgas on Bulgaria's Black Sea coast and terminate at the Greek port of Alexandroupoli.

⁷ Starr, Frederic S. and Cornell, Svante E. (Eds.). *The Baku-Tbilisi-Ceyhan Pipeline: Oil*

These efforts date back to the end of the Cold War, and were facilitated by the U.S. in an attempt to fill the regional vacuum followed by the disintegration of the Soviet Union. Establishing energy cooperation with the newborn Caspian republics became a foreign policy priority for the Western community: Azerbaijan, Kazakhstan, and Turkmenistan. These states are rich in oil and gas resources,⁸ and during the Soviet period they were the primary contributors to the hydrocarbon exports of the Soviet bloc. Due to their landlocked nature, these countries are entirely dependent on their immediate neighbors (i.e., Iran and Russia) to deliver their hydrocarbon supplies to Western markets. The exports of oil and gas from the Caspian region have been ensured by Soviet transportation systems for decades, and in the immediate aftermath of Soviet disintegration, Moscow was able to keep its involvement in the energy exports of its former Soviet subordinates.

Once these countries regained full control of their oil and gas deposits, they immediately sought alternative export options allowing their supplies to reach Western markets bypassing the Russian transmission systems. In this context, with the strong support of the U.S. and the rest of the transatlantic community, Turkey successfully presented itself as a pivotal player for the evacuation of the oil and gas supplies from the Caspian region.⁹ The signature of the “contract of the century” - through which the Azerbaijani government and the Azerbaijan International Operating Company (the AIOC)¹⁰ launched the joint development of the ACG oil fields¹¹ in the Azerbaijani sector of the Caspian Sea—was a clear testament to Turkey’s growing strategic position.

As publicly expressed by the Clinton administration and outlined on numerous occasions by various U.S. officials, transit through Turkey would have strengthened the independence of the Caspian republics and their economic cooperation with Turkey and the West, while promoting diver-

Window to the West. Central Asia-Caucasus Institute and Silk Road Studies Program, Washington D.C., 2005.

⁸ Most of the crude reserves belong to Kazakhstan and, to a lesser extent, Azerbaijan, while the latter has large natural gas deposits, mainly in the huge Shah Deniz field located in the Caspian offshore. In addition, Turkmenistan’s western desert is believed to hold the world’s second-largest natural gas stocks, estimated at about nine trillion cubic meters (Tcm). Source: BP Statistical Review of World Energy 2016, London. <http://on.bp.com/2bSW4Mf>.

⁹ Sasley, Brent. “Turkey’s Energy Policy in the Post-Cold War Era.” *Middle East Review of International Affairs* (Vol.2 n. 4, Rubin Center, Herzliya, 1998).

¹⁰ A group of ten international oil companies led by UK’s BP and U.S.’ Amoco.

¹¹ Azeri, Chirag and deep-water Guneshli oil fields.

sified and reliable energy sources for European partners.¹² The establishment of the Turkish route—although initially opposed by Western companies and business because it was more expensive compared to the transit from the existing Russian network—achieved another strategic goal for the transatlantic community: keeping Caspian pipelines from running south to Iran, thus preventing the Islamic Republic to control flows to international markets.

The political decision to continue with the BTC was made in 1999, after intense international debate on the financial and commercial feasibility of the initiative.¹³ During that period, the U.S. government decided to reconsider its unconditional support for the project, asking for stronger evidence of economic, technical, and environmental viability. After that, it took another three years for engineers and economists to guarantee the full sustainability of this initiative. With these reassurances, the U.S. administration granted public financial support to ease investment in the BTC through governmental agencies such as the Overseas Private Investment Corporation (OPIC) and the U.S. Export-Import Development Bank. The strong political and financial backing from across the Atlantic eventually encouraged the members of AIOC to establish the BTC Pipeline Company in August 2002.¹⁴ Within years, the advantages offered by the BTC compared to the other options that were available became evident to all international actors, the Caspian producers, Turkey, and the Western companies and consumers. The realization of the pipeline laid the basis for Turkey's positioning as a regional energy hub (while reducing environment-related risks in the Istanbul area) and for eventually ensuring a secure and economically advantageous energy route to the transatlantic community.

¹² Zarifian, Julien. "U.S. Foreign Policy in the 1990s and 2000s, and the Case of the South Caucasus." *European Journal of American Studies* (Vol.10 n.2, 2015).

¹³ The Intergovernmental Agreement was signed by the presidents of Turkey, the Republic of Azerbaijan, and Georgia during the OSCE Summit held in Istanbul on November 18, 1999. U.S. President Bill Clinton also signed the Agreement as a witness.

¹⁴ The foundation stone for construction of BTC was laid by participation of the Presidents of Azerbaijan, Turkey and Georgia, and the US Energy Secretary in Baku, in September of the same year.

Integration with EU: The Southern Gas Corridor

The energy partnership with Azerbaijan and optimism about Turkey's transit role acted as a catalyst for the development of another important initiative, this time in the gas sector. To ensure an outlet to Azerbaijan's offshore gas deposits, the governments of Azerbaijan, Georgia, and Turkey signed an intergovernmental agreement (in March 2001 in Ankara), accompanied by a purchase contract for the sale of large part of the Shah Deniz field production to Turkey, whose rapidly growing natural gas demand was fueled by the domestic economic boom. The double deal was followed by an agreement on "transit, delivery and sale of the natural gas via the South Caucasian Pipeline (SCP) system on the territories of Republic of Azerbaijan and Republic of Georgia," signed in September of the same year, in Baku. The agreement gave a green light to the realization of the so-called Baku-Tbilisi-Erzurum (BTE) pipeline, a conduit expected to annually deliver 6.6 billion cubic meters (bcm) of gas to Turkey along with 0.8 bcm to Georgia.¹⁵ The BTE delivered its first gas supplies to Ankara in 2007. Not only does it contribute to diversifying Turkey's gas imports, but it is also the initial section of the European Commission's Southern Gas Corridor.¹⁶ The Corridor—a pipeline network running from the gas-rich Caspian basin to the EU crossing the Turkish territory and thereby bypassing Russian soil—represents a policy priority and a fundamental test case for energy cooperation between Brussels and Ankara.

The Southern Gas Corridor has received bipartisan support and has been a priority for U.S. foreign policy since the George W. Bush and Obama administrations, as witnessed by the activism of various U.S. Special Envoys for Eurasian Energy and U.S. Special Envoys for International Energy Affairs across the region.¹⁷ Transatlantic arguments in favor of the opening of the Corridor include the diversification of Europe's energy supply, stronger economic development in the area via infrastructure projects and, in general, enhanced regional cooperation. In addition, the project would enable U.S. allies in Central and Eastern Europe to move away from—or at least reduce—their reliance on Russian gas supply, lim-

¹⁵ Socar. "Keeping energy options open - Azerbaijan has a key role to play in energy supply to Europe." *First Magazine*, 2009. <http://www.firstmagazine.com/DownloadSpecialReportDetail.630.ashx>.

¹⁶ Bozkurt, Giray Saynur (Ed.). *Blue Black Sea: New Dimension of History, Security, Politics, Strategy, Energy and Economy*, Cambridge Scholar Publishing, Newcastle upon Tyne, 2003.

¹⁷ The Southern Gas Corridor has been publicly supported by U.S. Secretary of State, Rex Tillerson, under the Trump administration.

iting Moscow's political leverage.¹⁸ From a Turkish perspective, the SGC is a key element of Ankara's strategic relations with the West, and particularly with the EU. As repeatedly highlighted by high-level officials, Turkey's role within the Corridor was expected to strengthen the country position in the accession process to the EU, and more general, its integration into the Western community.¹⁹

In Brussels' original plans, the SGC was expected to result from "the integration of multiple pipeline systems which would [have] transport[ed] gas not from a single supplier but from multiple sources."²⁰ These would include Azerbaijan, but also Iran, Iraq, and other potential exporters from the broader Middle East and North Africa (MENA) region. In the last decade, the nature of the Corridor has been reviewed on a number of occasions for political, geographical, industrial, and commercial reasons, and its current structure is very different from the one initially envisaged. In this context, the role of Turkey as a key transit country has never been called into question.

In the original proposal conceived by the European Commission in 2002, the key enabler of the Southern Gas Corridor was the 3,825 km-long Nabucco pipeline. The project aimed to deliver 31 bcm annually to Southeast and Central Europe.²¹ Turkey's territory, crossed from east to west by Nabucco's route, was central to deliver the Caspian gas to Baumgarten in Austria. However, despite the strong political support from both Brussels and Washington, the Nabucco project (and its successor initiative, Nabucco West²²) failed to gain the support of the Shah Deniz-producing consortium, mainly due to the commercial and financial shortcomings of the project, namely the lack of supplies in the early years and the insufficient gas demand in the Central European target markets. As an alternative to Nabucco, the

¹⁸ Tsereteli, Mamuka. "The Southern Energy Corridor: A Strategic Priority for the U.S.?" Analytical Articles, Central Asia-Caucasus Institute and Silk Road Studies Program, Washington D.C., 2015.

¹⁹ Koranyi, David and Sartori, Nicolò. "EU-Turkish Energy Relations in the Context of EU Accession Negotiations: Focus on Natural Gas." Working Paper n. 5, Global Turkey in Europe, 2013.

²⁰ Demiryol, Tolga. "The Geopolitics of Energy Cooperation between Turkey and the European Union." *L'Europe en Formation* (Vol. 54, No. 367 (Spring 2013)): p. 16, pp. 109-134.

²¹ RWE Press briefing. "The Nabucco Pipeline Project—Fourth Corridor to Europe." Berlin, 2009.

²² In May 2012, the Nabucco consortium revised its original plan, putting forward a shorter, cheaper, and less capable pipeline—Nabucco West—to transport Azerbaijani gas from the Turkish-Bulgarian border to Central Europe.

Trans-Adriatic pipeline (TAP) was selected to deliver Azerbaijani gas from the Turkish/Greek border to Italy via Greece and Albania.²³

In this context, Turkey's changing energy priorities contributed to determine the final decision. Ankara played a direct role in the establishment of what became the Nabucco project's death sentence, the realization of the Trans-Anatolian Pipeline (TANAP).²⁴ TANAP effectively replaced Nabucco by transporting Azerbaijani natural gas from the Georgian-Turkish border to the Turkish-European border (where it connects to TAP). The shareholders of the 16 bcm/year pipeline (which will gradually be increased to 24 bcm) include the Baku-controlled Southern Gas Corridor Closed Joint Stock Company,²⁵ with 58 percent of the shares, the Turkish company BOTAS with 30 percent, and BP with 12 percent, determining a significant power-shift in the hands of Azerbaijan.

While TANAP represented a major push for the advancement of the Southern Gas Corridor, blocked for years by the weaknesses of Nabucco, the realization of the pipeline represented a significant departure from the idea initially conceptualized by the European Commission (EC). In particular, powerful up-streamers such as SOCAR and Shah Deniz consortium-member BP took center stage in the Corridor, replacing the group of European companies expected to develop and manage Nabucco, thus vertically consolidating gas production and transport activities. Turkey—eager to secure additional volumes of gas at a lower price than Azerbaijan—played along and agreed to take part in TANAP. Driven by changing domestic energy priorities and intensified political clashes with the EU, Turkey's repositioning has been instrumental in Baku's attempt to acquire a much greater role throughout the whole Southern Gas Corridor value chain. At the same time, it downscaled the EU's role to one of a relatively passive spectator, with potentially disadvantageous long-term consequences for both Turkey and the EU.

²³ Sartori, Nicolò. "Energy and Politics: Behind the Scenes of the Nabucco-TAP Competition." IAI Working Papers, No. 13127 (July 2013). <http://www.iai.it/pdf/DocIAI/iaiw1327.pdf>.

²⁴ The realization of TANAP was sanctioned by the signature of a memorandum of understanding between Azerbaijan and Turkey on December 24, 2011, followed by an intergovernmental agreement and the "Host Government Agreement" on June 26, 2012.

²⁵ The SGC was created under the terms of an Azerbaijani presidential decree as the vehicle to consolidate, manage, and finance the country's interests in Shah Deniz, South Caucasus Pipeline (SCP), the Trans-Anatolian Pipeline (TANAP) and the Trans-Adriatic Pipeline (TAP). The Republic of Azerbaijan, through its ministry of economy, owns 51 percent of SGC's equity, while the remaining 49 percent is held by the State Oil Company of the Azerbaijan Republic (SOCAR) which is entirely owned by Azerbaijan.

Despite the changing nature of the Corridor, neither the West nor Turkey have a desire to halt their regional cooperation, and they try to keep the initiative at the top of their energy agenda, as demonstrated by the “EU-Turkey High Level Energy Dialogue and Strategic Energy Cooperation.”²⁶ From a transatlantic perspective, these outcomes do not alter Turkey’s importance in the Eurasian energy picture, but they do impose a deep reflection upon (possibly accompanied by new engagement initiatives) the status of the transatlantic energy partnership.

The Russian and the Eastern Mediterranean Dossiers: From Cooperation to Divergence?

As mentioned above, the Ankara-Baku bilateral initiative on the TANAP project contributed to alter the nature of the Southern Gas Corridor, and more in general to put under scrutiny the status of the energy partnership between the West and Turkey. In addition to flirtations with Azerbaijan, Turkey revitalized its energy dialogue with Russia, with significant results. As a first step, in December 2011, the parties reached a deal allowing the Gazprom-led South Stream pipeline to pass through Turkey’s Exclusive Economic Zone (EEZ). In exchange, Ankara secured significant price discounts from Gazprom, as Moscow agreed to renegotiate long-term oil-indexed gas contracts. This move was criticized by the EU, which brought Turkey’s reliability as a partner into question; Brussels had always considered the realization of South Stream a vital risk to the feasibility of the Nabucco project and—more generally—to the Southern Gas Corridor initiative.

Yet, Ankara’s strategic convergence with Moscow went even further. In the aftermath of the conflict in Ukraine and the annexation of Crimea in spring 2014, Russian president Vladimir Putin personally announced the suspension of the South Stream project, to be replaced by the newly conceived Turkish Stream pipeline.²⁷ The conduit, expected to link the Russkaya compressor station in Krasnodar Krai with the Turkish territory in Kiyıköy, would theoretically enhance the transit role of Turkey in the

²⁶ Tagliapietra, Simone and Zachmann, Georg. “Designing a new EU-Turkey Strategic Gas Partnership.” Bruegel Policy Contribution (Issue 2015/10, Brussels, 2015).

²⁷ Construction of the Turkish Stream gas pipeline began on May 7, 2017 in the Black Sea near the Russian coast.

region, but at the same time would have at least two major implications for transatlantic energy cooperation and security.

The first implication is Ankara's increasing dependence on Russia gas, which already contributes to 60 percent of Turkish consumption, due to an import capacity of 32 bcm ensured by the offshore pipeline Blue Stream and by the Trans-Balkans pipeline transiting through Ukraine, Moldova, Romania, and Bulgaria. The realization of Turkish Stream, although theoretically aimed at fully replacing the transit from the Ukrainian territory, would increase Gazprom's capacity to flood the Turkish gas market (with an additional 15.6 bcm imports infrastructure), strengthening Moscow's political and economic leverage over the country. The second implication relates to the possible use of Russia's influence on Turkey as a foreign energy policy tool towards the EU. Moscow could use its dominant energy position in the Turkish market and exploit its strategic influence on Ankara to slow down the development of the Southern Gas Corridor, in order to limit the success of the energy diversification policies undertaken by Brussels in the last decades.

The Turkish government is well aware of the risk of excessive gas dependence on Russia, and highlights the importance of developing and implementing a sustainable energy diversification strategy. However, political divergences with Brussels, coupled with impelling short-term financial and economic exigencies, may lead Ankara too close to Moscow and endanger its role of energy partner in the Eurasian region.

Moreover, Turkey has a great and obvious stake in development and export strategies for energy resources located in the Eastern Mediterranean.²⁸ The region emerged as a future gas-exporting region after the discovery of major gas fields in Israel (Tamar was discovered in 2009, and Leviathan in 2010), Cyprus (Aphrodite in 2011), and Egypt (Zohr in 2015). Both the U.S. and the EU have worked extensively to encourage the establishment of a framework of regional cooperation to overcome the political, commercial, and technological issues that impede its full development. Turkey is a crucial actor in this context: the position of the Turkish government on the status of Cyprus and the still-unresolved issue with the Turkish Republic of Northern Cyprus (TRNC), are two major

²⁸ Nicolò Sartori, Lorenzo Colantoni, and Irma Paceviciute. "Energy Resources and Regional Cooperation in the East Mediterranean." IAI Working Papers, No. 16127 (October 2016). <http://bit.ly/2rWiYOL>.

factors slowing down the exploitation of the hydrocarbon deposits from the island.

Even though the recently discovered hydrocarbon deposits are located in the waters off the southern part of the island (in Greek territory), Turkey strongly opposed the unilateral extraction of the resources. In 2014, Ankara sent two research vessels into block 9 and block 12, located more than 300 kilometers from the Turkish coast, in response to the first ENI and Noble drilling activities that followed the first round of concessions. The second round of concessions launched by the Cypriot government received even stronger opposition: Turkey complained against the “unilateral” and “irresponsible and provocative” move of Nicosia, threatening to exclude the companies involved from all future energy activities. The situation is further complicated by overlapping concessions with the blocks defined by both the Turkish and TNRC counterparts, which have been all assigned to the Turkish Petroleum Corporation (TPAO). The political volatility on the island and the resulting business uncertainty has discouraged private companies from operating in the area, thereby limiting the advancement of exploration and production activities.

The antagonism between the two governments on the island leads to limited options for gas exports from Cyprus, and in general from the Levant basin. In fact, one of the options available is the development of a subsea pipeline connecting Cyprus and Israeli gas deposits to Turkey, possibly extending the link to the Southern Gas Corridor and EU markets. This is generally considered the most feasible export routes for the Eastern Mediterranean gas, as Turkey represents a geographically close and economically logical export market for Cypriot and Israeli gas. However, the political situation in Cyprus—along with territorial disputes between Syria, Lebanon, Israel, and Palestine in parts of the transit area—prevents the materialization of this option, as well as the full development of hydrocarbon deposits located in the Eastern Mediterranean.

Conclusion

Energy security interests have been a powerful driver for the strengthening of Turkey’s transatlantic ties.²⁹ The strategic location of the country,

²⁹ Deni, John R. and Smith Stegen, Karen (Eds.). *Transatlantic Energy Relations: Convergence or Divergence?* Routledge, Abingdon, 2014.

ideally placed as a bridge between vast hydrocarbon resources in the Caspian and Middle Eastern region, and the remunerative Western energy markets, has been extensively used by Ankara to deepen its political cooperation and integration with its U.S. and European partners. However, over the last two decades, fluctuations in the strategic priorities of Turkey and its changing energy interests led Turkish authorities to make choices that were not necessarily in line with the objectives of the transatlantic community.³⁰

Despite these deviations, however, energy cooperation in the Eurasian region remains an important variable in the transatlantic security equation, and Turkey is a fundamental pillar in safeguarding U.S. and European interests in the area. Notwithstanding its tactical zigzagging, Turkish policymakers are keeping energy cooperation with the West alive, in large part as a counterbalance for an excessive dependence on potentially unreliable energy partners elsewhere.

³⁰ For instance, Ankara's energy flirtation with Baku, or the more worrisome strengthening of Turkey's energy ties with Russia.