



Hacettepe University Graduate School of Social Sciences  
Department of International Relations

**THE TRANS-CASPIAN GAS PIPELINE PROJECT: INITIATIVES  
FOR REGIONAL COOPERATION**

Leyla ABDULLAYEVA

Master's Thesis

Ankara, 2024



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## ACCEPTANCE AND APPROVAL

The jury finds that Leyla ABDULLAYEVA has on the date of May 29 successfully passed the defense examination and approves her Master's Thesis titled "Trans-Caspian Pipeline Project: Prospects for Regional Cooperation".

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i

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## ETİK BEYAN

Bu alıřmadaki bütn bilgi ve belgeleri akademik kurallar erevesinde elde ettiđimi, grsel, iřitsel ve yazılı tm bilgi ve sonuları bilimsel ahlak kurallarına uygun olarak sunduđumu, kullandıđım verilerde herhangi bir tahrifat yapmadıđımı, yararlandıđım kaynaklara bilimsel normlara uygun olarak atıfta bulunduđumu, tezimin kaynak gsterilen durumlar dıřında zgn olduđunu, **Dr. đr. yesi Elif R. ZDEMİR** danıřmanlıđında tarafımdan retilildiđini ve Hacettepe niversitesi Sosyal Bilimler Enstits Tez Yazım Ynergesine gre yazıldıđını beyan ederim.

*Leyla ABDULLAYEVA*

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## ABSTRACT

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The Caspian Sea is home to vast energy resources. In recognition of the vast importance of energy and supply security, the riparian states have attempted to finalize the delimitation process and bring the discussions surrounding the legal status of the Caspian Sea to a conclusion. Meanwhile, the gradual resolution process for the legal status of the Caspian Sea also paved the way for new infrastructure project proposals in the basin. One such project is the Trans-Caspian Gas Pipeline project which will transfer the Central Asian natural gas to the Republic of Türkiye and subsequently to the European market. The present study is an attempt at capturing a two year period of the discussions surrounding the Trans-Caspian Gas Pipeline project. In so doing, it also revisits the discussions around further cooperation prospects amongst the regional actors, headed by the Republic of Turkmenistan, the Republic of Azerbaijan and the Republic of Türkiye.

### Keywords

Trans-Caspian Gas Pipeline, Caspian Basin, Regional Cooperation, Energy Security



## ÖZET

Leyla ABDULLAYEVA, *Trans-Hazar Gaz Boru Hattı Projesi: Bölgesel İşbirliği Girişimleri*, Yüksek Lisans Tezi, Ankara, 2024.

Hazar Denizi, geniş enerji kaynaklarına ev sahipliği yapmaktadır. Enerji ve arz güvenliğinin büyük önemi sebebiyle, kıyıdaş devletler, Hazar Denizi'nin hukuki statüsüne ilişkin tartışmaları ivedilikle sonuca ulaştırmaya çalışmışlardır. Hazar Denizi'nin hukuki statüsüne ilişkin tartışmaların olgunluğa ulaşmış olması, havzada yeni altyapı proje önerilerinin yolunu da açmıştır. Bu projelerden biri de Orta Asya doğal gazını Türkiye Cumhuriyeti'ne ve ardından da Avrupa pazarına aktarması öngörülen Trans-Hazar Gaz Boru Hattı projesidir. Bu çalışma, Trans-Hazar Gaz Boru Hattı projesine ilişkin tartışmaların iki yıllık bir kesitini aktarmaya yönelik bir girişimdir. Çalışma aynı zamanda Türkmenistan Cumhuriyeti, Azerbaycan Cumhuriyeti ve Türkiye Cumhuriyeti'nin başını çektiği bölgesel aktörler arasındaki ileri işbirliği olanaklarını yeniden gündeme taşımaktadır.

### Anahtar Sözcükler

Trans-Hazar Gaz Boru Hattı, Hazar Havzası, Bölgesel İşbirliği, Enerji Güvenliği

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## ABBREVIATIONS

<b>BTC</b>	Baku-Tbilisi-Ceyhan Pipeline
<b>BTE</b>	Baku-Tbilisi-Erzurum Pipeline
<b>BRI</b>	Belt and Road Initiative
<b>CAC</b>	Central Asian-Center Pipeline
<b>CIS</b>	Commonwealth of Independent States
<b>CNCP</b>	China National Offshore Oil Corporation
<b>CPC</b>	Private Caspian Pipeline Consortium
<b>EU</b>	European Union
<b>INOGATE</b>	The Interstate Transportation of Oil and Gas to Europe
<b>NATO</b>	North Atlantic Treaty Organization
<b>OPEC</b>	Organization of Petroleum Exporting Countries
<b>OTS</b>	The Organization of Turkic States
<b>SCO</b>	Shanghai Cooperation Organization
<b>SCP</b>	Southern Caucasus Pipeline
<b>SGC</b>	Southern Gas Corridor
<b>SOCAR</b>	The State Oil Company of the Republic of Azerbaijan
<b>TANAP</b>	Trans Anatolian Gas Pipeline
<b>TAP</b>	Trans Adriatic Pipeline
<b>TCGP</b>	Trans-Caspian Gas Pipeline
<b>TRACECA</b>	The Europe-Caucasus-Asia Transport Corridor
<b>UAE</b>	United Arab Emirates
<b>UK</b>	United Kingdom
<b>UN</b>	United Nations
<b>USA</b>	United States of America
<b>USSR</b>	Union of Soviet Socialist Republics

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## INTRODUCTION

Safe and fair access to energy is important for both ensuring national security and maintaining global economic and political stability (Lovins and Lovins, 2001). According to the European Commission, energy security is 'the ability to ensure that future essential energy needs can be met by economically accessible, sufficient domestic resources and, where appropriate, stable external resources, supplemented by strategic stocks' (Miskiewicz, 2013). Meanwhile, the Caspian Region's importance primarily stems from its location between China-Russia and the Middle East, as well as its large amounts of hydrocarbon resources. The region boasts 3%-4% of the world's natural gas and oil reserves, both on land and in off shore fields (Oral, 2022). Additionally the still ongoing war in Ukraine, which started on February 24, 2022, has disrupted the gas flow in the region. Western sanctions against the Russian Federation and the Islamic Republic of Iran brought attention to the Caspian hydrocarbon resources within the context of energy security. A number of riparian states in the Caspian Basin started to re-emerge after the dissolution of the Soviet Union. Meanwhile, the Caspian Basin, lacking direct connection to the open seas, and with ethnic conflict hot spots in some of the coastal states, witnessed these small states to comply with the policies advocated by other powerful actors such as USA, EU, China and the Russian Federation. Additionally prolonged discussions over the legal status of the Caspian Sea brought projects like Trans-Caspian Gas Pipeline project (TCGP) to a standstill which aims to transfer natural gas from Central Asia to Europe via the Southern Gas Corridor (SGC) (Shafiyev, 2001).

Determining the legal status of the Caspian Sea has a direct influence on the regional cooperation and geopolitical partnerships. This issue efficiently halted multiple infrastructure projects, including the realization of the Trans-Caspian Gas Pipeline project. Determining whether the Caspian Sea is a lake or a sea is of vital importance because this will resolve the issue if the United Nations Convention on the Law of the Sea is valid in the Caspian. If it is designated as a sea this means that not only riparian states but also none-regional actors can

access the region (Nusenova, 2020). It is alleged that the main strategic goal for the Russian Federation is to ensure national security in its nearby geography while for the Islamic Republic of Iran it is to overcome political and economic isolation (Sari, 2018). Thus both countries stalled the determination of the legal status for over two decades. The partial agreement finally was reached in 2018 during the Convention on the Legal Status of the Caspian Sea. This allowed for the riparian states to finalize the delimitation of sea borders which let them to continue off shore energy field explorations. The Caspian Sea was declared as a “peace” sea, and any presence of non-riparian military forces in the basin was prohibited. This development eased the Russia Federation and the Islamic Republic of Iran’s security concerns to some extent. Article 5 of the Convention divides the sea into internal waters, territorial waters, fishery zone and common maritime space. Article 14 states that riparian states of the Caspian Sea are free to build submarine infrastructure: “Submarine cables and pipeline routes shall be determined by agreement with the party the seabed sector of which is to be crossed by the cable or pipeline” (Kremlin.ru, 2018). The article seems to open the way for the construction of new infrastructures, especially renewed the hopes for the realization of the Trans-Caspian Gas Pipeline project.

There is an argument that the Article 15 can be used to block or veto attempts to construct infrastructure as it demands littoral states to preserve the ecological system of the Caspian Sea and gives right to other riparian states to monitor environmental processes in territorial waters of other riparian states be it individually or with joint efforts (Abilov et al., 2020). In contrast with the claims that Article 15 is a tool to prevent any pipeline project, we argue that according to the Article 8 there are no obstacles for the construction of the Trans-Caspian Gas Pipeline project:

1. Delimitation of the Caspian Sea seabed and subsoil into sectors shall be effected by agreement between States with adjacent and opposite coasts, with due regard to the generally recognized principles and norms of international law, to enable those States to exercise their sovereign rights to the subsoil

exploitation and other legitimate economic activities related to the development of resources of the seabed and subsoil, 2. Within its sector, a coastal State shall have the exclusive right to construct, as well as to authorize and regulate the construction, operation and use of artificial islands, installations and structures. A coastal State may, where deemed necessary, establish safety zones around artificial islands, installations and structures to ensure the safety of navigation and of the artificial islands, installations and structures. The breadth of the safety zones shall not exceed a distance of 500 meters around them, measured from each point of the outer edge of such artificial islands, installations and structures (Kremlin.ru, 2018).

As such this article opens the way for the construction of a pipeline, in this case the TCGP.

It should also be noted that all Turkic Caspian states, share common ethnic, cultural, linguistic and religious heritage (Özdağ, 2022). The Republic of Türkiye's main priority is to become an energy trade center. Here, especially Turkmenistan's gas potential is considered as a vital component in achieving this goal (Akin, 2024). To transfer gas from Turkmenistan to the Republic of Türkiye the fastest and most secure, efficient way is via a pipeline stretching from the eastern coast of the Caspian Sea to the western shore, connecting to the existing South Corridor infrastructure in the Southern Caucasus. Despite having little energy resources itself, the Republic of Türkiye aims to become an energy trade center or "energy hub" and partially succeeded in achieving this goal in the natural gas transportation by joining Southern Gas Corridor<sup>1</sup>. The Article 8 is presented as a way opening possibilities for the construction of the TCGP, furthermore the main argument of this thesis is that while trying to bring

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<sup>1</sup> Three underground gas pipelines that pass through territories of the Republic of Azerbaijan, the Republic of Georgia and the Republic of Türkiye constitute The Southern Gas Corridor The project's aim is to transfer natural gas from Azerbaijan's Shah Deniz off shore field to the TANAP and subsequently to TAP pipelines (Firat, 2023).

back to life the Trans-Caspian Gas Pipeline project from a paper draft the Republic of Türkiye's attempt to construct TCGP project should also be considered as a stepping stone that set out a domino effect in the region within the scope of energy partnerships among littoral states and other regional actors.

The thesis also argues that the success of existing and planned energy projects and the stability of the region depend on the states' cooperation and mutual agreements, while also ensuring their own interests. While there is certainly competition among major players in the Caspian region, it is also evident that the region is a hub of cooperation.

It should be noted that there is no consensus in the field of International Relations about the circumstances that lead states to cooperate or to engage in conflict. While many paradigms examine the conditions of cooperation and competition between states, this study draws from the main premises of the liberal pluralist approach as framed by Viotti and Kauppi (1998). In this vein, the study attempts to underline the importance of cooperation between the regional actors based on the main assumptions of a pluralist "win-win" approach underlining the importance of cooperation among regional actors. In so doing, the study attempts to provide empirical evidence showing how TCGP project played a catalyst role in developing regional energy partnerships after the resolution of the disputes surrounding the legal status of the Caspian Sea.

In attempting to answer whether the TCGP project will lead to further partnerships and cooperation in the region or fuel tensions, the thesis attempts to provide empirical evidence to the effect that the TCGP project has strong potential to render the Caspian Sea into a site of cooperation.

It is with this aim in mind that the study focuses on both the policies of small regional states and the bigger powers in the Basin and attempts to discuss how the media outlets have reflected upon the TCGP project and its potential for furthering cooperation amongst the regional powers

In the same vein, the study also focuses on the Organization of Turkic States as a framework of reference to common cultural heritage and its potential to further improve the regional partnerships. It is with this aim in mind that the study attempts to bring evidence from the Organization's most recent four summits by media content analysis.

The thesis is composed of four main chapters. The first chapter revisits the Realist approach in IR and counter poses it against a 'pluralist' reading as discussed by Viotti and Kauppi et. al (1998; 2012).

The second chapter gives detailed analysis of how the issue of the legal status of the Caspian Sea affected regional political and geo-economic cooperation. The chapter is divided into three main sections. In the first section, positions of five littoral states, i.e, the Russian Federation, the Republic of Azerbaijan, the Republic of Kazakhstan, the Islamic Republic of Iran, and Turkmenistan's positions, as well as the 2018 Convention on the Legal Status of the Caspian Sea and its implications are analyzed. In the second part of this chapter major infrastructure project, the Southern Gas Corridor and its vital branches Trans-Anatolian Gas Pipeline (TANAP), Trans Adriatic Pipeline (TAP) are discussed from the perspective that this infrastructure projects further ease the realization of the TCGP. In the third part, parallel to the possible alternative routes for its realization the Trans-Caspian Gas Pipeline and its background are analyzed.

The third chapter attempts to provide an elaborate analysis of regional and non-regional players' interests within the scope of energy security and regional cooperation. This chapter initially discusses energy partnerships and geopolitical cooperation of five littoral states within the scope of energy security. Subsequently the second part discusses energy collaborations of non-regional actors within the scope energy security.

Finally, the fourth chapter will present the data compiled from a review of the media, conducted in various languages and dialects, including Russian, English, Turkish, Azerbaijani Turkish and Turkmen Turkish as well as five countries: the Russian Federation, the Republic of Türkiye, the Republic of

Azerbaijan, the USA and Turkmenistan media outlets regarding the summits held under the structural umbrella of the Organization of Turkic States to transfer Turkmen gas to the western shore of the Caspian Sea, subsequently pumping it to the Republic of Türkiye via the Southern Gas Corridor. This final chapter starts with a brief background information of the OTS and continues with the presentation of data of four summits, the Summit Meeting of Türkiye-Azerbaijan-Turkmenistan Heads of State held in Avaza Region in Turkmenistan, the Extraordinary Summit of the Organization of Turkic States held in Ankara, the Meeting of Ministers Responsible for Energy of the Organization of Turkic States held in Budapest, the 10<sup>th</sup> Summit Meeting of Heads of States of Organization of Turkic States held in Turkestan city of Kazakhstan.

Last but not least, it should be underlined that this study aims to make an empirical contribution to the literature. A thorough literature review has been conducted to explore and depict the historical developments over the course of two years. The research predominantly draws on secondary sources including books, articles, theses, research papers. However, the last chapter also builds on a review of the relevant news articles on the subject.



## **CHAPTER 1**

### **SOME THEORETICAL CONSIDERATIONS**

Due to the increasing importance of energy and the important role it plays in the interstate power struggle and protection of national security, governments perceive energy as an economic, political and strategic tool and therefore frequently intervene in energy related issues (Van Der Linde, 2007). The Caspian Basin is one of the primary regions in the world in terms of oil and natural gas production, and its importance in energy security cannot be ignored (Sarkhanov and Huseynli, 2023). For this reason, considering the fact that the number of riparian states and non-regional actors in the Caspian Basin is crowded, different partnerships and collaborations are seen as inevitable outcomes to ensure security in the region (Lebow, 2007).

According to the realist approach, the balance of power concept is implemented to prevent the hegemonic power's victory (Viotti and Kauppi, 1998). The lack of access to the open seas necessitates energy transfer through multiple pipelines and states. This gives a better understanding to the existence of multiple energy transfer projects in the region (Özer, 2021), which requires cooperation and balancing to ensure energy security and supply in the Basin.

The pluralist perspective sees international integration as the formation of a community of states, it argues that these states are in constant adjustment by making sensitive agreements and manouvres against each other's moves (O'Leary, 1979). Accordingly, the collective's intentions are to ensure both its and its individuals interests thus the expectation of these collective interests shall be pluralistic rather than singular (Sezenler and Sadrazam, 2021). On the other hand, considering the fact that the Caspian Sea is a competition arena for regional actors, it is important for relatively young and small actors to carry out regional balance of power policies in order to maintain their own interests within the region. Therefore, while the Trans-Caspian Gas Pipeline project continues to remain as a theoretical project, in this chapter the thesis examines cooperation/interaction of regional actors from a pluralist lens while examining the balance of power theory and its resonance in regional policies.

## 1.1. THE REALIST APPROACH

### 1.1.1. Balance of Power in the Caspian

Classical realists argue that international relations are shaped by the power struggle and the balance of power that is the result of this struggle. Neo-realists, on the other hand, argue that anarchy and disorder in the international system are the main factors that determine the behavior of states (Ari, 2010). In anarchic international system states are the main actors that aim to ensure their continuity and interests. In such anarchic environment, conflicts and interstate tensions are resolved by actors' power capacity (Mowle and Sacko, 2007). Realism claims that a state's first move is to organize power domestically, and then to concentrate power internationally (Baylis and Smith, 2006). Waltz emphasizes the increasing significance of security. He claims rather that using power states should focus on how to effectively distribute power and on not asserting power for their own national interests (Waltz cited in Lomia, 2020).

As one of the forefathers of classical realism, Hans Morgenthau claims that states success in the international are depends on its ability to adapt to the balance of power in the anarchical system (Morgenthau cited in Dyson, 2010). The concept of balance of power is explained as an arrangement where no state can dominate or control other states (Sheehan, 2000). To explain further, weaker states form alliances with strong states either because they know that resisting the strong state would be futile or because they expect to gain something from their collaboration with the potential hegemon while said hegemon conquers others (Lemke, 2004). Stephen Walt (1985) argues that a safer strategy against this is to avoid being dominated by the hegemonic states by allying with states that cannot dominate their allies easily. As an example, after the collapse of the Soviet Union, the Russian Federation aimed to maintain control of the oil and natural gas in the Caspian Sea even though it was losing power. To neutralize the Russian Federation's dominant attitude the USA and the EU initiated new infrastructure projects and supported powerful energy companies (Çalışkan, 2020). Russian influence in the region and the increasing presence of non-regional actors in the post-Soviet area constitute the local

balance of power thus making it difficult for these local powers to operate more autonomously (Morgenthau, 1948) in Central Asia and Caucasus. The states of the Southern Caucasus have followed different paths towards ensuring their national security and regional economic and political alliance (Aydın, 2004).

Accordingly, international relations take place in an environment of uncertainty (Kirshner, 2022). Most realists argue that international relation exhibits the characteristics of complying with an order (Donnelly, 2004). Political realism required adherence to established rules and interstate interaction, but not adherence to the means used to achieve individual goals (Griffiths, 1992). Economic cooperation is an assumption of the pluralist approach, but despite that it is argued that different patterns and levels of economic interdependence within the great power system have profound impact on balance of power policies. Economic ties raise concerns about mobilizing economic resources and political supports to counter anticipated threats in status quo states (Papayouanou, 1997). Thus, it can be said that economic cooperation affects the priorities of status quo powers in making balancing promises and using force in their balance of power policies. For example, while the country importing natural gas may remain vulnerable to increases in natural gas prices and sanctions that may be imposed by different states, the country exporting natural gas may remain vulnerable to importing countries turning their attention to alternative suppliers (ACER and CEER Market Monitoring Report, 2023).

The main goal for realists when ensuring energy security is to always have sufficient supply and diverse routes of supply (Kelly and Leland, 2007). The geographical location of the Caspian region and the importance of costly oil and natural gas pipelines stretching through various regional countries show that the current political moves and strategies in the Western and Eastern powers (Cohen, 2009). Although realist approach doesn't reject cooperation between states, it has a pessimistic and skeptical attitude towards cooperation. On the other hand, pluralism emphasizes the benefits of cooperation, rather than focusing on the reason why cooperation will not occur. Pluralism, which has an optimistic attitude about cooperation, also argues that economic cooperation will

enable the resolution of conflicts between the parties (Arı, 2010).region are essentially played around determining which states and institutions will share the revenue (Manning and Jaffe, 1998). For this reason, Caspian states have to balance their foreign and security priorities according to the strategic agendas of Western and Eastern powers (Cohen, 2009). Although realist approach doesn't reject cooperation between states, it has a pessimistic and skeptical attitude towards cooperation. On the other hand pluralism emphasizes the benefits of cooperation, rather than focusing on the reason why cooperation will not occur. Pluralism, which has an optimistic attitude about cooperation, also argues that economic cooperation will enable the resolution of conflicts between the parties (Arı, 2010).

The emergence and development of small states was the result of material and normative changes in the international system, globalization and the decrease in external threats (Maass, 2014). As such, the emergence of the Republic of Azerbaijan, the Republic of Kazakhstan and Turkmenistan as new regional states in the Caspian Basin is an important development. These small states boast vast amounts of hydrocarbon deposits and play crucial role in energy transportation through their territories.

After gaining independence, the Republic of Azerbaijan, which possesses large amounts of energy reserves, found itself at the center of geopolitical triangle which was dominated by the Russian Federation, the Islamic Republic of Iran and the Republic of Türkiye, each side having different goals and interests (Bağirov, 2001). The First Karabakh War in the early 1990s left its imprint on the Azerbaijan intellectuals and bureaucrats alike. Thus the country's policy makers' emphasis have been on maintaining a guarded attitude toward the Russian Federation, alleged to have backed Armenia (Kuchins et al., 2016). In return, the Republic of Azerbaijan has prioritized extra-regional relations to balance out the Russian Federation's role in the region (Walker, 2012).

The Republic of Azerbaijan plans to export Central Asian hydrocarbon resources, especially Turkmenistan's natural gas, to the world market via its territories and to become a commercial transit point between Asia and Europe by facilitating trade with Central Asian countries. These are the main reasons the Caspian region is of vital importance for Azerbaijan (Frappi and Garibov, 2012). To counter the Russian Federation's energy policies in the region the Republic of Azerbaijan has started implementing energy security and cooperation policies to transfer its oil and natural gas to other countries through alternative routes (Özer, 2021). An excellent proof of the Republic of Azerbaijan's successful policy to ensure its long-term interests are the TANAP and its European extension TAP infrastructure projects within the scope of the SCG, which was designed and financed entirely by the Republic of Azerbaijan (Shiriyev, 2015).

Following the dissolution of the Soviet Union Turkmenistan was engulfed in economic uncertainties, lack of sufficient military capacity and surrounded by fragile neighbors. These factors led Turkmenistan to base its policy on an unusual principle defined as "positive neutrality" (Sabol, 2016). Neutrality is a form of government generally associated with small states and since small states that chose this form of government tend to have less military capacity, they have to adopt policies and strategies that increase their security as much as possible (Simpson, 2017). In this case the neutrality of the state is not an outcome of any war or the outcome of an agreement between powers but a result Turkmenistan's voluntary and independent choice (Anceschi, 2009). In accordance with its reportedly neutral status and obligation reflected in the neutrality law, Turkmenistan asserts that it refrains from participating in any military blocs and alliances, to allow the establishment of military bases on its territory or its use by other countries for military purposes (Shikhmuradov, 1997). This declared neutrality strategy aims to attract foreign investments on an equal basis and diversify natural gas transfer routes to the global markets (Kachelin, 2023).

Stephen Walt argues that states consider the balance of threats when forming alliances. They do not just evaluate threats based on the total power differences (Song, 2023). When forming alliances, states either create a balance by joining alliances against the primary threat or "jump on a bandwagon" by aligning themselves with the state that poses the greatest danger (Walt, 1985). Lebow on the other hand argues that weaker powers can have more influence when they have larger goals and use their resources as bargaining power during times of crisis by forming alliances with other smaller powers instead of seeking a strong ally (Lebow, 1997). For instance, natural resource-rich countries of the Caspian Basin and the Organization for Economic Development and Cooperation (OECD) countries are concerned about increasing import dependency and prefer to strengthen their positions by using their resource wealth (Agt, 2014).

Sometimes states may prefer soft balancing in their relations. Pape argues that soft balancing emerged in response to the Bush administration (Pape cited in Saltzman, 2012). Although soft balancing is essentially based on non-military means, its main concerns include reaching military expectations (Pape, 2005). Soft balancing occurs when states develop alliances or limited security understandings with each other, often to balance a potentially threatening state or rising power (Brooks and Wohlforth, 2005). Here we can argue that the alliances between the states that formed a unity in the region through shared ethnic, cultural and linguistic similarities under the umbrella of the Organization of Turkic States falls within these lines. The Organization acts as a guarantor of cooperation based on international norms to maintain peace, security, and good neighborly relations (Ekici, 2017).

Additionally soft balancing generally relies on limited arms build-up, temporary cooperation in regional or international institution. But if security competition intensifies and the hegemon becomes a threat, these policies can be transformed into clear, harsh balancing strategies (Brooks and Wohlforth, 2005). Such a balancing trend is observed among the Caspian Basin countries.

For example, Kazakhstan, which is trying to diversify its energy routes, aims to strengthen its position by cooperating with the Republic of Türkiye (Nurgaliyeva, 2016). Another riparian state, the Republic of Azerbaijan's policy makers, adopted a balancing policy in the country's foreign affairs, prioritizing cooperation with Euro-Atlantic structures. The decision takes into account the Republic of Azerbaijan's geopolitical relations with the Russia Federation and the Islamic Republic of Iran, which are its immediate neighbors (Raszewski, 2016). Another example is Turkmenistan, which maintains a neutral position towards potentially risky relations and remains committed to positive and reliable collaborations (Anceschi, 2009).

Since energy resources are fundamental for the economy and the military, they are also vital in the struggle for power and influence beyond state borders, within the context of exercising power, and in ensuring their security. The main reason why geopolitical factors are of vital importance in terms of energy security is that a majority of energy supplies is subject to international trade. Therefore, the security of the energy supply largely depends on cross-border geopolitical factors (Novikau and Muhasilovic, 2023). Thus the Republic of Türkiye is an important player in the region and is considered a middle power due to its material power capacity and its desired roles in international politics (Oğuzlu, 2023). In order to achieve its goal of becoming an energy trade center, the Republic of Türkiye has to establish close relationships with the riparian countries and gain access to the hydrocarbon resources of the Basin (Roberts, 2010). However due to the increasing interest in the region and the abundance of actors in the race to determine energy security, the main goal of local players is to ensure that a single foreign actor does not establish hegemony in the Basin (Alierta, 1999). To achieve this, developing multilateral cooperation in the energy sector is crucial, as this can lead to partnerships in other areas as well (Bayramov, 2022). The Republic of Türkiye's cooperation with the regional actors also extends beyond the energy sector

## 1.2. A PLURALIST APPROACH

### 1.2.1. The Caspian Basin from a Pluralist Perspective.

The pluralist approach, unlike the Realist approach, focuses on power and international *cooperation* (Viotti and Kauppi, 1998). The pluralist approach, which emerged as a response to the traditional paradigm in the 1950s and 1960s, acknowledges the significance of states as key players in the international arena. However, it also argues that transnational actors should be included in analyses of international relations (Aydın, 1996). Additionally it is argued that production and consumption should not be viewed as the exploitation of resources. Instead, the pluralists believe that it is important to focus on the distribution and sharing of resources (Tell, 1996). Ekici argues that countries that are economically interconnected will benefit from this interdependence and it will facilitate the establishment of peace and order in international politics (Ekici, 2017). When viewed through this lens, it is clear that there is a requirement to establish political coalitions at the international, transnational, and multinational levels, with a strategic and multi-faceted approach that emphasizes adaptation for effective management. This should be done in line with the concept of cooperative energy security in the Caspian region (Cutler, 2007).

According to the pluralist approach, institutionalization in international relations reduces uncertainty and fear. Robert Keohane and Joseph Nye in their late works for instance, argue that states, interest groups, international non-governmental organizations and transnational corporations are connected through various channels, forming a complex web of relationships (Keohane and Nye cited in Dunne, 2006). Here it is worth highlighting the growing influence of the Organization of Turkic States in the Caspian Region. This international actor plays a vital role in global politics by supporting its member states and acting as a mechanism to prevent excesses. The primary aim of the Organization of Turkic States is to foster social, humanitarian, and economic cooperation among its member states (Halefov, 2024). Some member states of



the Organization of Turkic States, namely the Republic of Azerbaijan, the Republic of Kazakhstan, Uzbekistan, and observer Turkmenistan, have relatively vast amounts of oil and natural gas reserves. Kyrgyzstan has a high potential for hydroelectric power, while the Republic of Türkiye has geopolitical features that can help the aforementioned Turkic states to access European energy markets easily (Gök, 2022). Despite the success of the Trans-Anatolian Gas Pipeline, the relatively small resource reserves of the member countries prevent the Organization of Turkic States from becoming a significant actor in the global energy markets. Therefore, it is deemed by some that the organization needs to strengthen its relations with Turkmenistan<sup>2</sup>, which possesses vast amounts of natural gas reserves to expand energy transportation via TANAP (Barisova et al., 2023). Since its establishment, the organization has been advocating for economic cooperation with the Parliamentary Assembly of Turkic States (TÜRKPAA), the Turkic Business Council, the Turkic Academy, and the International Organization of Turkic Culture (TÜRKSÖY), it also serves as the umbrella organization of existing cooperation mechanisms such as the Union of Turkic World Joint Chambers and Commodity Exchanges (Kıratlı, 2023).

Pluralists reject the notion that military security issues should dominate international politics, and instead emphasize socio-economic factors such as information, communication, and welfare. They argue that international politics is a multifaceted process, in which public and private actors interact at local, national, and international levels (Aydın, 1996). The Caspian region holds great significance in today's international affairs and global energy market due to its strategic location between the eastern and western parts of Eurasia. Private actors such as transnational and multinational energy corporations occupy very important position in the development and transportation of Caspian hydrocarbons. BP and Statoil are two major corporations that lead the exploration of the Azeri, Chirag, and Guneshli oil fields in the Republic of

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<sup>2</sup> Turkmenistan participates in Organization of Turkic States meetings as observer, since it is not a full member (TDT T. D., 2021).

Azerbaijan. BP has also been involved in exploring the Shah Deniz gas fields in the Republic of Azerbaijan (Misiągiewicz, 2013), while Chevron established the Tengiz Chevroil (TCO) joint venture by agreeing with the Republic of Kazakhstan oil company in the development of the Tengiz oil field, one of the largest fields in the Republic of Kazakhstan (Guliyev and Akhrarkhodjaeva, 2009). After experiencing an economic downturn in the post-Soviet era and facing disputes with Russia regarding payment for natural gas, Turkmenistan's policy makers decided to enter into an agreement with China's State Petroleum Corporation (CNPC). This allowed a foreign company to operate in the country's onshore field for the first time in the said state's history (Lídl, 2022). In this context, regional states view multinational companies as important partners due to their financial means and corporate structures, operating in multiple countries, and offering potential for capital mobility (Le´onard, Pulignano, Lamare, and Edwards, 2014).

Multinational corporations can be more effective than governments in achieving economic and environmental goals, making them a valuable tool for cooperation (Nye, 1990). Such multinational corporation is SOCAR<sup>3</sup>, which is the largest company of the Republic of Azerbaijan. It was created in September 1992 by merging two state oil companies, Azerineft State Concern and Azerneftkimiya Production Association (IEA, Energy Security, 2022). In 2008, it entered the Turkish energy market for the first time and continued to invest in various sectors like refinery, petrochemical, energy, logistics, distribution, and storage. By 2020, SOCAR completed the integration of these sectors and rapidly became the Republic of Türkiye's largest industrial holding company (Aydın, 2019). SOCAR has a long-term goal of delivering natural gas from Turkmenistan to the European market through the Southern Corridor. To achieve this, they support the Trans-Anatolian Gas Pipeline project, in which they have a 58% shareholding (Köstem, 2019). TANAP is one of the largest economic projects in the region and it increases the number of alternative suppliers of gas from the Caspian region to the EU. Additionally, TANAP has

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<sup>3</sup> The State Oil Company of the Republic of Azerbaijan (SOCAR).

the potential to bring Turkmenistan, the Republic of Kazakhstan, and other countries to the forefront of international energy markets through partnerships with various countries and regions (Furuncu, 2022). It can be said that the TANAP operation has made the Trans-Caspian Gas Pipeline project more feasible, which aims to transfer Turkmen gas beneath the Caspian Sea through the Republic of Azerbaijan and eventually reach TANAP.

Large-scale energy transportation projects have political objectives, but they also aim to serve the socio-economic interests of the countries involved (Usmanov and Velikaya, 2023). For instance, transporting Caspian natural gas to Europe helps eliminate the threat of Europe's dependence on Russia in terms of energy security. Additionally, it enables the Republic of Türkiye to become a hub for energy trade while providing the Republic of Azerbaijan with access to European markets for energy transportation (Öz and Aslan, 2019). The Republic of Azerbaijan is an important source of energy for the European Union however it does not have the same volumes of natural gas reserves as Russia. Consequently, the EU needs to rely on other countries, such as Turkmenistan and Iran, to meet its natural gas requirements. However, this requires the construction of permanent infrastructure that can transport natural gas at the capacity needed by the EU, which involves building pipelines that pass under the Caspian Sea (Aliiev, 2022).

Instead of underlining the threats and pressure tactics related to competitions in the energy sector, Nye (1990) for example, proposes that energy security can also be achieved through cooperation. As is also suggested by the news coverage studied in Chapter IV, this can also be observed in the Tripartite Summit of State Heads Held in the Avaza Region of Turkmenistan, the Extraordinary Summit of the Organization of Turkic States Held in Ankara, and the Astana Summit Meeting. The Republic of Türkiye's role in these summits should also not be overlooked. Its role in bringing the region's decision makers together in various summits is not only expected to contribute to the sustainability of peaceful relations in-between these countries but also is

expected to contribute to the said country's goal of becoming an energy hub. In recent years, the Republic of Türkiye's foreign policy approach has been focused on cooperation rather than competition. Drawing on an analysis of the discourses of the decision makers in the media, findings of Chapter IV will also support the view that this pluralist approach is based upon the recognition that cooperation and collaboration are essential in bringing forth 'win-win' political outcomes for the region's states (Novikau and Muhasilovic, 2023). Meanwhile, the regional cooperation over the Trans Caspian project is also expected to extend beyond the energy sector. An example of this is the establishment of a direct physical connection with Türkiye through Nakhchivan following the settlement of the Karabakh conflict in 2020. This connection, known as the Zangezur Corridor, is expected to create new transportation and energy routes that will unify Central Asia, the South Caucasus, and the Republic of Türkiye into a single geographical region. Even though the Republic of Azerbaijan's desire to open a direct road to the Nakhchivan region did not fully parallel Iranian policy makers' projections (Abkairov, 2022), the Republic of Azerbaijan continued its efforts to achieve status of a new player in the European gas market after the EU attempted to eliminate its dependence on the Russian Federation in its energy supply (EIU, 2023).

Geographical location plays a crucial role in ensuring energy security, particularly in the Caspian Basin. With the exception of the Russian Federation and the Islamic Republic of Iran, the other littoral states in the region lack direct international access, making cooperation with the neighboring countries necessary for the transfer of energy and goods. The Republic of Georgia is the only South Caucasus state with direct access to the Black Sea, and as such, it has a serious impact on the geopolitics in the region (Asadov, 2023). The South Caucasus Corridor runs through Georgia, and important strategic projects are being implemented between Georgia and Azerbaijan-Türkiye. Any interruption in these projects could result in economic, political, and strategic problems, which would be detrimental to the interests of the states investing in the project (Gasimov, 2023). Due to the increasing energy demands and the

energy crisis caused by the war in Ukraine, which started on 24 February, 2022, various states in a wide geographical area extending from Central Asia to Eastern Europe started cooperating (Asgarov, 2022).

While from a realist perspective, this could signal the coming of yet another turbulent era for the region, taken from a pluralist perspective, the vast hydrocarbon resources of the region, can also provide ample chances for increased collaboration for the Caspian basin states and the other actors, starting with their immediate neighbors.

In other words, the natural resources of the region may provide ample opportunities for the regional actors to strengthen their relations with each other not only in respect to energy security (Asgarov, 2022) but also in other areas.

### **Conclusion**

The pluralist approach suggests that dependencies in international relations can help foster balance of power. Meanwhile, the small Caspian states, especially within the framework of the Trans Caspian project, also seek to balance power relations via the exertion of soft power and diplomacy. Initiatives started by the Tripartite Summit of State Heads Held in the Avaza Region of Turkmenistan, the Extraordinary Summit of the Organization of Turkic States Held in Ankara, and the Astana Summit Meeting have all resulted from this pluralistic approach. It is to be hoped that these summits will serve as a starting point for the furthering of relations between the region's states as they continue to prioritize their common interests over their short term individual interests. It is also to be hoped that these regional efforts to provide for energy security will also bode well for the transfer of Turkmen gas to the envisioned energy trade center in the Republic of Türkiye, reaching the latter country though the Caspian Sea and subsequently via the Republic of Azerbaijan.

## **CHAPTER 2**

### **LEGAL STATUS OF THE CASPIAN AND THE TRANS-CASPIAN GAS PIPELINE**

In 1991 the Soviet Union collapsed, following this event three new riparian states emerged, leading to a new era of geopolitical struggle in the Caspian Basin. The main focus of this struggle was energy, with each country racing to capitalize on the natural resources of the region. As per 2018 assessments, the combined value of oil resources in the Caspian Basin was estimated to be 4 trillion dollars, while the natural gas resources were valued at over 2 trillion dollars (Garibov, 2019). These new littoral states aimed to utilize the vast hydrocarbon resources of the Caspian Sea to rebuild their economies (Kahraman and Merdan, 2020). This economic and geopolitical struggle has revealed the issue of determining the legal status of the Caspian Sea. Debates regarding the legal status of the Caspian Sea are among the factors that stalled the realization of the Trans-Caspian Gas Pipeline project (Chumakov, 2019). It is in this vein that the second chapter of this research will revisit the discussions regarding the Caspian Sea's legal status.

The first part of this chapter is divided into three sections and deals with the issue of the legal status of the Caspian Sea. It focuses on the possible solutions and has a total of six subsections. Each of the riparian states has claims to guarantee their own economic interests. Therefore, the first five subsections examine the attitudes of different riparian states regarding the legal status of the Caspian Sea.

The last section of this chapter will focus on the Convention on the legal status of the Caspian Sea, which was signed in the Republic of Kazakhstan in 2018. In this section, an attempt will be made to analyze and discuss the effects of this convention for the construction of the Trans-Caspian-Gas Pipeline project. A consensus regarding the legal status of the Caspian Sea will lay the ground for the realization of the project. It is one of the factors that will enable the TCGP.

The third part of the chapter will examine the brief history and background of the Trans-Caspian Gas Pipeline project and alternative routes that can be used to transport natural gas.

## **2.1. LEGAL STATUS OF THE CASPIAN**

The following section will focus on the Convention on the Legal Status of the Caspian Sea, which was held in Kazakhstan in 2018. The aim is to analyze and discuss the effects of the convention agreement on the realization of the Trans-Caspian-Gas Pipeline project. One of the key factors that need to be addressed for this project to be realized is finding a common solution for Caspian Sea's legal status. The Caspian Sea is the largest saltwater body in the world with no natural ocean connection. It is surrounded by the Republic of Azerbaijan, the Republic of Kazakhstan, the Islamic Republic of Iran, the Russian Federation, and Turkmenistan. Its area spans over 370,000 square kilometers, with a length of approximately 1,200 kilometers in the north-south direction and a width of approximately 320 kilometers. More than 80% of the maritime borders belong to the four former Soviet republics: the Republic of Azerbaijan, the Republic of Kazakhstan, the Russian Federation, and Turkmenistan, while the rest belongs to the Islamic Republic of Iran (Abilov, 2013). The Caspian Sea's importance is due to its geopolitical location and vast hydrocarbon reserves (Clawson, 1998). For a long time the primary cause of concern among the countries sharing the Caspian Sea was the legal status of the region. The dispute is based on the issue of deciding how to share the energy resources, who should manage these resources, and which transportation routes should be employed for their transportation (İşcan, 2010).

In 1993, the Caspian Sea's status was problematized by some states. The Russian Ministry of Foreign Affairs asserted that any activity in the Caspian Sea requires the permission of the Russian Federation, as the sole heir of the USSR, and the Islamic Republic of Iran according to the agreements signed in 1921 and 1940. The Heads of State of the Commonwealth of Independent States (CIS) signed an agreement in 1991, which established the CIS and the USSR's international obligations. The agreement states that the Russian

Federation is the sole heir of the USSR, and all international obligations of the USSR are assumed by the Russian Federation (Hasanov, 2016).

In 1994, the Republic of Azerbaijan finally reached an agreement on the 'Deal of the Century' with a corporate association of US and European companies. The agreement was about the processing of 'Azeri', 'Chirag' and 'Guneshli' fields in the Republic of Azerbaijan's part of the Caspian Sea.<sup>4</sup>

Similarly, in April 1993, the Republic of Kazakhstan came to an agreement with the US company Chevron to establish a joint venture called "Tengizchevroil" to operate the Tengiz field, the biggest oil field in Kazakhstan, for 40 years (Skvajina, 1999). These developments led to reactions from the Russian Federation and the Islamic Republic of Iran. Both countries managed to keep the Caspian Sea's status on the agenda and each riparian state created its theses to ensure its political and economic interests. They also tried to win the support of other states and international organizations (Çolakoğlu, 1998).

To address the issue of legal status, the riparian states initially sought to determine if the Caspian Sea should be classified as a closed sea or a lake. In terms of international law, there were two potential avenues for resolving this matter. If the Caspian Sea is designated as a closed or semi-enclosed sea under the United Nations Convention on the Law of the Sea (1982), each coastal state is entitled to a 12-mile territorial sea zone as well as an exclusive economic zone that extends 200 nautical miles. If there is overlap between the 200-mile zones, the boundary is established along the median line that is equidistant from the coastline of the countries that border the Caspian Sea. Alternatively, if the Caspian Sea is categorized as an international lake, it is divided into sectors along lines that connect the central part of the lake, where the borders of the riparian countries run along the coastline, and the resources in the water are shared equally among them (Zavyalova, 2017). In addition to the aforementioned viewpoints, there exists a third perspective regarding the

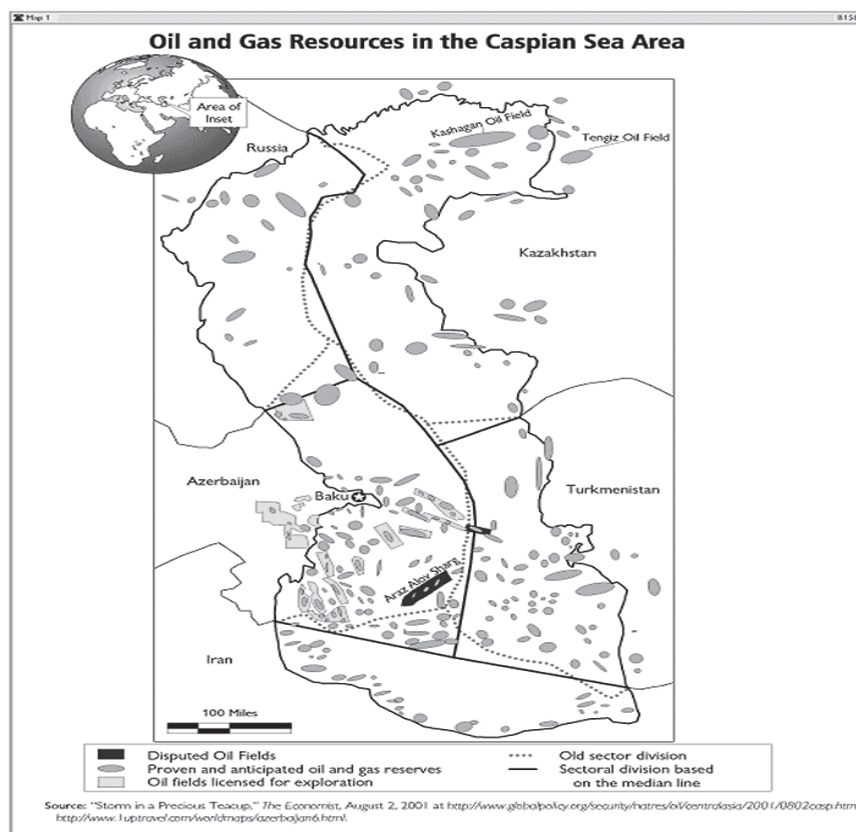
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<sup>4</sup> See especially Somuncuoğlu (2021) on the post Soviet Union Russia and the discussions on the status of the Caspian Sea.



classification of the Caspian as either a closed sea or a lake. This perspective argues that the Caspian is a unique body of water and cannot be classified solely based on the principles of maritime law and international lake division. Instead, it suggests a non-traditional approach such as joint utilization of the sea, beyond the jurisdiction of individual countries (Terzioğlu, 2008). The proposed method advocates for a division based on equal distance at the bottom of the Caspian, while retaining the water surface and biological resources as a shared area.

**Map 1. Sectorial division map of the Caspian Sea according to previous agreements and the new sea median line**



**Source:** (Misiągiewicz, 2013).

The Caspian Sea's legal status is a territorial issue and a matter of national security for the Caspian states. It is important to establish clear borders to prevent regional and global conflicts. Each state will have its borders not only on land but also at sea, which is crucial for state security and existence. In the

following section, an attempt will be made to examine the proposals of each riparian state for resolving legal status issue of the Caspian Sea.

### **2.1.1. Russia's Position**

The Caspian Sea is known to have vast oil and gas reserves, with the majority of them located in the sectors claimed by the Republic of Azerbaijan, the Republic of Kazakhstan, and Turkmenistan. On the other hand, the Russian and Iranian sectors have fewer energy resources compared to the other three coastal states (Becker, 2000). After the Soviet Union's dissolution, the three newly formed states, namely, the Republic of Azerbaijan, the Republic of Kazakhstan and Turkmenistan, selected new policies taking into consideration the possibilities for cooperation as well as the competitive edge the new geopolitical context forces upon them. Meanwhile, according to some authors (see inter alia Hasanov 2016), the Russian Federation and the Islamic Republic of Iran viewed these new policy formations as emerging threats. The Russian Federation and the Islamic Republic of Iran also developed common policies to prevent the multinational companies and western states from establishing influence in the region and taking part in the energy projects (Hasanov, 2016). Soviet -Iran agreements had previously prohibited the involvement of the third parties in the processing of marine resources. In recognition of the fact that the coastal states were not yet equipped to handle the financial, technical, and logistical challenges associated with the development of the Caspian Sea alone, Russia's priority rested upon restoring Moscow's control over the basin (Becker, 2000).

The Russian Federation has played a crucial role in resolving the legal status of the Caspian Sea. Its critics however (see inter alia Becker 2000; Harunoğulları 2018), allege that the Russian Federation has changed its policy on the issue three times so far. Accordingly, in the period of 1993-1996, the Russian Federation proposed the joint use of the water mass and the seabed outside the coastline. Then, in 1996-1998, the Russian Federation proposed to increase its territorial waters to 45 miles. At this juncture, the Russian Federation asserted

that the Caspian Sea is a lake because it does not have a natural outlet to the open sea. This situation meant that the Caspian Sea delimitations would be determined by the "joint use" regime. Then, in 1997, the Russian Federation brought up the issue of the status of the Caspian Sea and proposed a special agreement that was carefully designed. In this context, the Caspian Sea is defined as an inland lake with five countries on its shores. Again within this framework, the sea surface and bottom of the Caspian Sea can be allocated into national sectors only in the 12-mile section from the coast. Meanwhile, in the next 25-mile region, the sea surface and bottom would be defined as an "economic area", and the rest of the sea would be opened to "common use" (condominium) (Harunoğulları, 2018).

The Russian Federation's above-mentioned proposal was subject to criticism regarding the maps of the energy reserves in the Caspian. However, the project was thoroughly examined by littoral states during its preparation and it was alleged that if full sovereignty is granted within the 12-mile distance and "economic sovereignty" is granted within the 25-mile area, as envisioned in the project, the primary energy reserves of the Caspian would be accessible to all riparian states. Again by the same token, the primary oil and natural gas fields that Azerbaijan currently uses within the framework of the international corporate association would continue to be in the "joint use area" (Hasanov, 2016; Gökay, 1998).

The Russian Federation cited the example of the "Gulf of Fonseca" to support the idea of a condominium<sup>5</sup> in the Caspian Sea. However, the Gulf of Fonseca was granted common use status between El Salvador, Nicaragua, and Honduras by the International Court of Justice. This example is not applicable to the Caspian Sea, because the Caspian Sea before the dissolution of the USSR had two riparian states but the gulf of Fonseca was under the sole sovereignty of Spain before it was granted common use status as stated by Terzioğlu in 2008.

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<sup>5</sup> The condominium method, in international law, refers to a state or piece of land governed by more than one state with common and equal rights (Kılavuz, 2016).

Throughout this process, the Republics of Azerbaijan and Kazakhstan collaborated with global corporations within their sectors. Republic of Azerbaijan initiated talks in 1992 aimed at extracting hydrocarbons off its coast in the Caspian Sea. Eventually, Azerbaijan International Oil Co., led by British Petroleum (BP), spearheaded a series of agreements. This led to the formation of an international consortium called AIOC, which was established in 1995 (Becker, 2000). The first and most important agreement was signed with the Azerbaijan International Oil Co. in Baku on September 20, 1994. A Production Sharing Agreement<sup>6</sup> was signed between a consortium of 11 foreign oil companies led by (AIOC) the British Petroleum Company (BP) and the Azerbaijani state oil company SOCAR (BP Azerbaijan, 1996). Dubbed the "contract of the century," this eight-billion-dollar production-sharing agreement was a thirty-year contract. The contract envisaged the development of several offshore oil fields in the Azeri and Çıralı regions and the deepwater region of Güneşli. Other investors in this contract include American Amoco (17%), Pennzoil (4.8%), Unocal (9.5%), Exxon (5%), Russian Lukoil (10%), Norwegian Statoil (8.5%), Japanese Itochu (7.45%), British Ramco (2%), Turkish TPAO (6.75%), Saudi Arabian Delta (1.6%), and Azerbaijani state oil company SOCAR (10%) became partners (Gökay, 1998). Commentators observe that in order to appease Russia's responses to energy projects, the Republic of Azerbaijan aimed to gain Moscow's approval by involving Russian companies in energy projects. In September 1994, the Republic of Azerbaijan granted Lukoil a 10% share in the Baku-Tbilisi-Ceyhan (BTC) oil project. In November 1995, the Azerbaijani state oil company SOCAR awarded Lukoil with 32.5% of the shares of a new oil venture that would conduct research and development of

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<sup>6</sup> In a Production Sharing Agreement (PSA) setup, the host government assigns the task of exploring and extracting natural resources to an international oil company. The exploration risks are taken on by the international oil company, while the revenues are divided into two parts: "cost oil" and "profit oil". The "cost oil" is used to offset the international oil company's exploration and development costs, while the "profit oil" is the after-cost revenues that are shared between the international oil company and the host government (or its national company). The Production Sharing Agreement (PSA) regime has specific provisions that enable the national government to predict future production volumes and budget revenues (Campaner and Yenikeeff, 2008).

the Karabakh Oilfield. In February 1996, Lukoil was also involved in another oil project with a 10% stake to develop the Shah-Deniz oil field. Finally, in July 1997, SOCAR and Lukoil established a new oil partnership, with Lukoil holding a 60% stake in the Yalama field in the northern part of the Azerbaijani offshore sector in the Caspian (Kelkitli, 2019).

The first major project with foreign partnership for the Republic of Kazakhstan was the exploration of the Tengiz field. In 1993, a partnership agreement was achieved between Chevron and the Kazakh oil company, establishing the joint venture Tengiz Chevroil (TCO). According to this agreement, Chevron owned 50%, ExxonMobil 25%, the Kazakh government represented by Kaz MunayGaz, 20%, and Russia's LukArco 5% (Campaner and Yenikeyeff, 2008).

Russia developed a new strategy in the region after the aforementioned collaborations. In 1998, regarding the northern part of the Caspian Sea, an agreement was signed between the Russian Federation and the Republic of Kazakhstan, which included joint ownership of the water surface<sup>7</sup> and the principle of the median line of the seabed<sup>8</sup>. Similarly, Kazakhstan signed a comparable agreement with the Republic of Azerbaijan in 2001. Initially, Russia proposed leaving a 12-24 mile coastline of the Caspian Sea to the riparian states while dividing the remaining area for common use. However, it later changed its stance and proposed dividing the water bottom into sectors. In May 2003, Russia, Azerbaijan, and Kazakhstan signed a tripartite agreement based on "median line" for the delimitation of the Caspian seabed. According to this method, the width of exclusive economic zones is determined by drawing a middle line that is parallel and equidistant from the coastlines of the states. With this agreement, the Russian Federation succeeded in aligning the Republic of Azerbaijan and Kazakhstan with its position.

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<sup>7</sup> This agreement determined the modified median line based on equal distance from the negotiated baselines, except for a few parts that in principle ignored the equal distance due to islands, geological structures and other considerations (Makili-Aliyev, 2014).

<sup>8</sup> According to the same agreement, it was determined that sea waters and general activities there (shipping, limited fishing and environmental activities) would remain under common sovereignty (Makili-Aliyev, 2014).

### 2.1.2. Iran's Position

The Islamic Republic of Iran is a major oil producer in the Organization of Petroleum Exporting Countries, whilst most of its oil fields are located in the south of the country and in the Persian Gulf. Meanwhile, the Islamic Republic of Iran is subject to embargoes, alleged to be tied to its nuclear research. It should also be added that the country does not yet extract crude oil in the Caspian Sea, where other riparian countries, including the Republic of Azerbaijan, benefit from oil fields and where the border lines of the countries' usage areas are controversial (Karimov, 2014). The Islamic Republic of Iran's coastline is completely concave, deviating more from the general direction of the coast than other Caspian Sea bordering states (Abadikhah, 2023).

**Left: Map2. The division of the bottom of the Caspian Sea according to the 2018 Aktau convention**

**Right: Map 3. Where borders should be determined at the bottom of the Caspian according to the Iran's perspective**



**Source:** (Abadikhah, 2023)

As previously mentioned, the Islamic Republic of Iran, with the shortest coastline in the Caspian Basin, has proposed two solutions for the sharing of the Caspian. The first proposal involves dividing the seabed equally among the five coastal countries, with a 20% share each, while the sea surface would be

allocated for common use. Critics have deemed this proposal as lacking in valid legal principles and posing significant geographical challenges (Hasanov, 2016). According to Iranian officials, the Caspian Sea should be considered a "Closed Lake" and utilized collaboratively by all states rather than each country claiming their own section. Over the years, Iran has faced challenges such as US trade sanctions, shifting power dynamics in the region, and being excluded from key agreements. These factors have aligned the Islamic Republic of Iran with Russia on the matter of their stance in the Caspian Sea, including the pursuit of alternative pipeline projects (Çalışkan 2020). The Islamic Republic of Iran's decision makers' primary concern seems to be concentrated on the presence of foreign powers in the Caspian Region, particularly the increasing influence of the US and the EU countries. According to the secondary literature on the subject, Iranian decision makers feel surrounded and feel that Iran is not receiving its fair share from the Caspian Sea. Accordingly, the country asserts that the Western countries and their associated international oil companies have politicized the legal status of the Caspian Sea. All in all, the country's decision makers are said to pursue policies aimed at keeping the international actors at bay (Özer, 2012).

In 2018, the Convention on the Legal Status of the Caspian Sea was signed in Aktau, Kazakhstan. According to this agreement, the bottom of the Caspian Sea will be divided using the "straight baseline principle"<sup>9</sup>. The method for establishing the flat-foot line will be determined by a separate agreement between all parties (Kremlin.ru, 2018).

There is an issue with the Islamic Republic of Iran's Caspian coast as it is curved inward, making its "straight baseline" more concave and deviating

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<sup>9</sup> The "straight baseline principle" is defined in Article 1 of the 2018 Convention on the Legal Status of the Caspian Sea as the line connecting relevant/appropriate points on the coastline and forming the baseline in places where the coastline is indented, or the line connecting from places where there are a number of islands along the coast in the immediate vicinity. (Kremlin.ru, 2018). According to the said article, the use of the straight baseline is limited to two criteria: (1) the coastline is deeply indented and discontinuous; (2) There is a border of islands along the coast and in its immediate surroundings (Abadikhah, 2023).

further from the general direction of the coast. Additionally, there are no effective islands that can be used to determine a straight baseline. This puts the Islamic Republic of Iran at a disadvantage, while Turkmenistan and the Republic of Azerbaijan have convex shores and a large number of islands, enabling them to obtain larger land with their straight baselines. However, the sixth paragraph of the first article of the convention states that if the coastal configuration provides a clear basis for determining the internal waters of a coastal state, this will be taken into account in the development of the method to reach an agreement between all parties. The method and conditions of establishing the straight baseline will be determined by a separate agreement between all parties, according to the fifth paragraph of the first article. Thus, the Islamic Republic of Iran expects a different agreement to be concluded in the future (Abadikhah, 2023).

Article 3.6 of the Aktau Convention states that only the armed forces of the five coastal states are to be allowed in the Caspian Sea. This provision in return is read as having eased the Islamic Republic of Iran's concerns about other countries' military presence in the area. Again according to the secondary literature (see inter alia Kınık and Erkan 2020), despite the Iranian decision makers' dissatisfaction with the delineation of maritime resources and coasts, the military provisions of the Aktau Convention was well received. Some commentators also extend the view that this provision can be considered as a reply to the policies aimed at the isolation of Iran in the region. It is in this vain that the resolution of border issues between the Islamic Republic of Iran, the Republic of Azerbaijan and Turkmenistan carry special importance. It is deemed that this would not only put an end to the isolation of the Islamic Republic of Iran in the region but would also allow the region's states to establish better relations in and around the Caspian Sea, (Kınık and Erkan, 2020).

### **2.1.3. Azerbaijan's Position**

Meanwhile, the Republic of Azerbaijan's policy has been characterized by consistent opposition to the Russian Federation's stance on the status of the



Caspian Sea. The foremost debate over the sea's status is shaped by the opposing narratives of these two countries over the status of the Caspian. Azerbaijani officials declared that they would not accept Russia's arguments pertaining to "status" (Hasanov, 2016). Azerbaijani officials asserted that, the crucial matter for the Republic of Azerbaijan is the division of the sea into areas of national sovereignty. They also stated that the Republic of Azerbaijan's main objective is for each coastal state to govern its respective region (Çalışkan, 2020). Compared to other countries in the region that share a border with a body of water, the Republic of Azerbaijan has taken an important step. In the 11th article of its constitution, adopted on November 12, 1995, the Republic of Azerbaijan underlines the fact that its territory is a unified, inviolable, and indivisible whole. Specifically, the internal waters of the country, the portion of the Caspian Sea that belongs to the Republic of Azerbaijan, and the airspace of the country are all considered part of the Republic of Azerbaijan's territory. By defining its national sector in this way within its constitution, the Republic of Azerbaijan has effectively secured its territorial integrity (Özer, 2012). Thus the Republic of Azerbaijan has rejected the demands made by Russia and Iran to cease its activities in its national sector until the legal status of the Caspian Sea is established. In this respect, the Republic of Azerbaijani officials have argued that the idea of joint use, as the Russian Federation asserts, is not as widespread. Instead, Azerbaijani officials state that the decisions made in the past regarding the Caspian Sea were fully compatible with the sectoral division. This is evident in the plans and programs of the Soviet Union from the 1950s, which were in favor of dividing the Caspian Sea among the riparian states. This approach is also reflected in the practices of the Soviet government in many other areas (Abdullayev, 1999).

However, following its declaration of independence, the Republic of Turkmenistan included in its constitution a provision that claimed the Caspian area extending 10 nautical miles from its coast as its own territory. Additionally, it proposed that the rest of the area should be jointly used by the coastal states. The Republic of Azerbaijan, on the other hand, considered the Caspian Sea to

be a lake situated on its borders and justified its position based on lake status law and principles. It persisted with this stance on the matter (Ceferov, 2023).

During this same period, one main controversial issue was the "middle line" issue between the Republic of Azerbaijan and Turkmenistan, which brought both countries, who share similar ideas, into a face-to-face situation. The Republic of Azerbaijani officials argued that when determining the median line, the extreme (closest) points between two opposite coasts should be determined and an average should be taken. Accordingly, as the Republic of Azerbaijan is situated in the middle of the Caspian Sea due to its insertion into the interior of the sea through the Absheron peninsula, its maritime borders extend over a larger area, and the disputed beds remain within the Republic of Azerbaijan's national sector (Oğan, 2001). Following on this line of argument, Azerbaijan officials also state that Turkmenistan's approach to determining the middle line in the Caspian Sea is purely mathematical, disregarding the coastlines and extreme points of island nations. Should this method be accepted, it would result in the Kepez/Serdar field remaining a point of contention, as well as the Azeri and Chirag fields being subject to dispute in the Turkmenistan sector (Kocaman, 2018).

#### **2.1.4. Turkmenistan's Position**

Turkmenistan and the Republic of Azerbaijan share similar interests when it comes to the legal status of the Caspian Sea and attracting investments from the West. Ranked fourth globally in proven natural gas reserves, Turkmenistan seeks to diversify its energy markets beyond the Russian Federation and China by exploring new opportunities in the West. Consequently, the country places significant importance on the Caspian Sea's said status gaining widespread recognition in a timely manner (Çalışkan, 2020). It's worth noting that Turkmenistan's official stance played a significant role in the prolonged ambiguity surrounding the legal status of the Caspian. During initial negotiations, Turkmenistan's position was somewhat unclear, as they stressed

the importance of dividing the sea into national sectors while also advocating for joint use of its resources (Hasanov, 2016).

Under Article 14 of the Aktau Convention, it was determined that parties could lay underwater pipelines and cables along the Caspian Sea floor, with the caveat that the sectors through which they pass need be in agreement (Kremlin.ru, 2018). As a result, much in resonance with the pluralist school of thought, this solution is expected to support a win-win approach, i.e., benefit the Republic of Azerbaijan, Turkmenistan, and the Republic of Kazakhstan, as well as enhancing their respective spheres of influence and providing official authorization for energy infrastructure development (Alvi, 2019).

However, even though the agreement paved the way for the possible construction of the Trans-Caspian Gas Pipeline project, it also states the need for coordination with other coastal states regarding the environmental impacts of infrastructure projects (Gurbanov, 2018). Furthermore, it is alleged that Turkmenistan has maintained its stance on solely selling natural gas at the border, without assuming any additional financial or geopolitical responsibilities for cross-border infrastructure projects (Garibov, 2019).

Meanwhile, the Central Asian gas exporters found themselves heavily reliant on the Russian Federation as their primary buyer and transit country due to the Soviet-era gas pipeline infrastructure. It was alleged that the Russian Federation used its dominant position to impose unfair pricing policies and then resell Central Asian gas at much higher prices, leaving the Central Asian countries with little bargaining power. To address this issue, the Central Asia–China Gas Pipeline was seen as a solution to reduce their dependence on Russia and strengthen their negotiating position with potential customers. In 2007, Turkmengaz, the national gas company, entered into a production sharing agreement with China National Petroleum Corporation (CNPC) to develop the right bank Amudarya gas field. As part of the agreement, CNPC committed to purchasing up to 30 billion cubic meters of gas annually for a

period of 30 years. The agreement also granted CNPC exclusive rights to explore and extract onshore gas fields in Turkmenistan (Aminjonov, 2021).

In mid 2010s Turkmenistan's economy experienced rapid decline. The fall of gas prices and decline in gas exports are considered main culprits of this rapid economic deterioration. In 2010 Turkmenistan leadership undertook the construction of the East-West Pipeline on its own (Lee, 2019).

Following the economic challenges faced in recent years however, Turkmenistan has also recognized the potential benefits of the Turkish market as a means of diversifying their gas exports and gaining access to the European market. As such, Turkmenistan's policy makers also started to align with a pluralist approach and gave weight to observing the summit meetings of the Organization of Turkic States and other observer members.

The Republic of Azerbaijan and Turkmenistan, two nations rich in energy resources, hold a crucial position in terms of energy security and pipeline diplomacy within the region. With their ongoing developments in the energy sector and involvement in pipeline projects, these two countries have the potential to greatly influence energy policies. This influence can also be further strengthened through full cooperation on the Caspian basin debate, as seen in the recent agreement between Turkmenistan and the Republic of Azerbaijan on the development of the "Dostlug" field (previously called Kepez and Serdar, respectively) on January 21, 2021 (Azertac, 2021).

#### **2.1.5. Kazakhstan's Position**

The largest area in the Caspian Sea among its coastal neighbors belongs to the Republic of Kazakhstan. Initially, the country viewed the Caspian Sea as a closed sea and supported limiting access to third-party states by adhering to the common use principle outlined in the 1982 UN Convention on the Law of the Sea (Butaev, 2003).

It was observed that it was following Turkmenistan's lead that the Republic of Kazakhstan established its territorial waters as extending 12 nautical miles from its coastline (see the fourth paragraph of the second article of its constitution), (The Law of the Republic of Kazakhstan, 2013). Subsequently, this distance was increased to 15 nautical miles in accordance with the principles set forth in the 2018 Aktau Convention. The Republic of Kazakhstan and Azerbaijan, as resource rich countries of the Caspian Basin, both advocate the same view. The most important difference in the approach of Azerbaijan and Kazakhstan to the Caspian is that while the Republic of Azerbaijan is in favor of dividing the entire Caspian into national sectors, the Republic of Kazakhstan is in favor of sharing the sea beds and joint use of the Caspian outside a certain exclusive region (Terzioğlu, 2008).

Since the collapse of the Soviet Union, the Tengiz, Kashagan, and Karachaganak fields in Kazakhstan's sector of the Caspian Sea have drawn the attention of international oil corporations (Umbach and Raszewski, 2016). As a result of the agreements made by the Republic of Azerbaijan with Western companies, Kazakhstan accepted and adopted the Republic of Azerbaijan's position and began to attract foreign investors to operate the Caspian fields (Pietkiewicz, 2021). Furthering its energy-oriented cooperation in the Caspian Sea, Kazakhstan joined the BTC pipeline in 2006 and began exporting oil to the West through this pipeline (European Commission, 2006).

Furthermore, the Republic of Kazakhstan is actively pursuing an energy trade with China. While China is focused on diversifying its energy sources, the Republic of Kazakhstan is looking to expand its export avenues. China places great importance on the development of onshore pipelines, and has invested in both domestic and transnational pipelines to the Republic of Kazakhstan in order to realize its diversification objectives. As a result, the Republic of Kazakhstan has become a crucial transit state for three branches of the Central Asia-China pipeline, i.e., lines A, B, and C (Raimondi, 2019). Since the pipeline network became operational in 2009, it has transported an impressive 390

billion cubic meters of gas to China as of the end of March 2022 (Aminjonov, Dovgaluk, 2023).

**Map 4. Central Asia-China oil and gas pipeline**



**Source: Chen and Fazilov, 2018**

Accordingly, the Republic of Kazakhstan's policy makers have also been engaged in diversifying market possibilities and in furthering regional and extra regional collaborations with a 'win-win' strategy in mind. The recent Kazakh success in the management of natural resources and the energy sector is also to be - at least partially - attributed to the Republic of Kazakhstan's policy makers' pluralist approach to international politics. Currently, the Republic of Kazakhstan continues to pursue a 'multi-actor' policy, which involves attempts at attracting foreign investments from various different states in and outside the Caspian basin (Raimondi, 2019).

#### **2.1.6. 2018 Convention on the Legal Status of the Caspian Sea**

During the 5th Summit of Heads of State of the Caspian Countries in Aktau, Kazakhstan on June 12, 2018, after 25 years of negotiations, an agreement was reached concerning the legal status of the Caspian Sea. The Caspian Convention was signed between the Republic of Azerbaijan, the Islamic

Republic of Iran, the Republic of Kazakhstan, the Russian Federation, and the Republic of Turkmenistan as part of the Fifth Caspian Summit. The agreement designates a special status for the Caspian Sea, and establishes that the depth of the water will not be subject to the 1982 UN Convention on the Law of the Sea, instead being determined according to the principle of a lake. However, according to those who are critical of the Convention text, the term "Caspian Sea" used in the Convention does not explain whether it is a "sea" or a "lake", and the use of the term "water body" does not provide a solution to the Caspian Sea problem (Abilov et al., 2020; Pietkiewicz, 2021).

Article 1 of the Convention divides the Sea into 4 regions:

1. In the Caspian Convention "Internal waters" are defined as "waters landward of the baseline" (Kremlin.ru, 2018).
2. "Territorial waters" are defined in the Caspian Convention as "the sea zone over which the sovereignty of the coastal state extends" (Kremlin.ru, 2018).
3. "Fisheries zone" is defined in the Caspian Convention as "a marine zone in which the coastal state has the exclusive right to harvest aquatic biological resources" (Kremlin.ru, 2018).
4. The "common sea area" in the Caspian Convention is equivalent to the "high seas" in the UN Convention on the Law of the Sea. This "area" is defined as "an area of water located outside the external boundaries of fishing zones and available to all parties." (Kremlin.ru, 2018).

Article 14 of the agreement gives other riparian states the right to individually or jointly monitor the environmental processes related to the pipe-laying project that will take place in the regional sectors of any basin country, which reveals that other riparian states can use this text to prevent any pipe project (Abilov et al., 2020). Despite this nuance this article is still considered as a ray of hope for the realization of the TCGP project. In addition, Article 15, paragraph 3 of the agreement prohibits "any activity that will harm the biological diversity of the Caspian Sea" (Kremlin.ru, 2018). The majority of commentators express concern that the Islamic Republic of Iran and the Russian Federation may take advantage of the environmental provisions of the Convention (Art. 1, 11, 14 and

15) to prevent the exploitation of oil and natural gas fields (Abilov et al., 2020; Anceschi, 2019).

Furthermore, the determination of state borders is not included in the agreement and that additional bilateral and tripartite negotiations and agreements between parties, as outlined in Article 8, are necessary (Bayramov, 2019). Essentially, this article proposes the delimitation of the seabed and subsoil into sectors, allowing for legitimate economic activities such as resource development between states with adjacent and opposite coasts. These activities need to adhere with the generally accepted principles and norms of international law and be resolved through bilateral and tripartite agreements. This paves the way for the Trans-Caspian Gas Pipeline project (TCGP), which will begin in Turkmenistan and extend under the Caspian Sea to Azerbaijan, as the debates concerning dividing of the seabed has currently come to a rest.

## **2.2. SOUTHERN GAS CORRIDOR**

### **2.2.1. Historical Background**

The Southern Gas Corridor (SGC) is a significant international project that has the potential to impact the balance of power in the region. The primary objective of this project is to transfer Central Asian natural gas to Europe, and it was identified as one of the six priority energy-related infrastructure proposals in the Second Strategic Energy Review of the European Commission in 2008:

A southern gas corridor must be developed for the supply of gas from Caspian and Middle Eastern sources, which could potentially supply a significant part of the EU's future needs. This is one of the EU's highest energy security priorities. The Commission and Member States need to work with the countries concerned, notably with partners such as Azerbaijan and Turkmenistan, Iraq and Mashreq countries, amongst others, with the joint objective of rapidly securing firm commitments for the supply of gas



and the construction of the pipelines necessary for all stages of its development. In the longer term, when political conditions permit, supplies from other countries in the region, such as Uzbekistan and Iran, should represent a further significant supply source for the EU (Seilm, 2022).

The preceding paragraph explains that the Southern Gas Corridor was created with the goal of broadening the transportation routes of affordable energy resources and securely delivering them to Europe. This initiative was also intended to diminish reliance on states that serve as sole energy providers (Morrison, 2018). While the corridor traverses five countries, approximately 50 countries are involved in the project in some capacity.

The urgency of the diversification strategy was heightened by the resurfacing of the conflict over Ukraine in 2014 and the issues surrounding gas supply in Europe. At that time, 80% of the Russian Federation's natural gas exported to Europe was flowing through Ukraine, making the Southern Gas Corridor a primary competitor to the Russia Federation. In 2022, embargoes were imposed on the Russian Federation due to the war in Ukraine, significantly impacting Ukraine's gas exports. The first sector of the SGC includes the Shah Deniz natural gas field and other Caspian Sea fields in the Republic of Azerbaijan's sector. The Baku-Tbilisi-Erzurum line, extending from Baku to Erzurum, constitutes the second part in the South Caucasus natural gas pipeline. Natural gas is then funneled into the Trans-Anatolian Natural Gas Pipeline and sent to Greece, before reaching Albania through the Trans Adriatic Pipeline (Khlopov, 2021).

The Republic of Azerbaijan's abundant gas reserves present a promising opportunity for Europe. However, realizing this opportunity hinged on identifying the optimal gas transportation routes to Europe. To this end, the Republic of Azerbaijan assumed a key role in establishing regional cooperation efforts as a

founding partner of the "Southern Gas Corridor" project, which has been hailed as the "Deal of the Century". Azerbaijan's contribution to energy diversification and supply, as a cornerstone of Europe's energy security strategy, continues to be of great significance today (Tagizade, 2019).

Meanwhile, in order to expand the capacity of Southern Gas Corridor and export Turkmen gas through the Trans-Caspian Gas Pipeline project by connecting it to existing infrastructures, a series of tripartite summit meetings took place between the heads of state of the Republic of Azerbaijan, the Republic of Türkiye, and Turkmenistan. During the "1st Summit of Heads of State of Türkiye-Azerbaijan-Turkmenistan" held in Turkmenistan on December 14, a "Memorandum of Understanding on Developing Cooperation in the Field of Energy" was signed among the three countries (Rehimov, 2022), as per preliminary efforts have commenced to transport Turkmenistan's gas to the Republic of Türkiye and Europe through the Republic of Azerbaijan.

## **2.2.2. Currently Functional Branches of the Southern Gas Corridor**

### **2.2.2.1. Trans Anatolian Gas Pipeline (TANAP)**

The TANAP pipeline, currently operational, is situated entirely within the Republic of Türkiye and accounts for 54% of the Southern Gas Corridor. The Republic of Türkiye is expected to consume 6 billion cubic meters of the natural gas transported through the project, while the remaining 10 billion cubic meters will be exported to the European market via TAP. Ultimately, TANAP is expected to facilitate the transport of gas from countries like Turkmenistan, Qatar, Iran, and Iraq, including Azerbaijani natural gas to the European energy markets through the Republic of Türkiye (Öz and Aslan, 2019). Thanks to TANAP, the Republic of Azerbaijan has gained a dominant position in natural gas exports. This project serves as a firm foundation for political and economic cooperation between the Republics of Türkiye and the Republic of Azerbaijan, with Azerbaijan being the key supplier of energy to Europe. Furthermore, TANAP enables the Republic of Azerbaijan to deliver its energy resources to the western market without being subject to any country's pressure (Abişov,

2018). The Baku-Tbilisi-Erzurum Pipeline, also referred to as the Southern Caucasus Pipeline Expansion, is the initial component of the Southern Gas Corridor (SGC) and operates alongside the Baku-Tbilisi-Ceyhan pipeline. This pipeline is capable of transferring 7.3 billion cubic meters of natural gas to TANAP at the Turkish border and along the Southern Gas Corridor (SGC), as stated by Morrison in 2018.

In December of 2022, the Republic of Azerbaijan and Romania entered into an agreement according to which, Romania will be a purchaser of the Azerbaijani gas. Since January of 2022, Romania has been receiving this gas, with a total of 300 million cubic meters set to be supplied by April 1, 2023. During the 9th Southern Gas Corridor Advisory Council Ministerial Meeting in Baku and Bucharest, a new agreement was signed for additional gas supplies. Under this agreement, Romania will be able to receive up to 1 billion cubic meters of gas from the Republic of Azerbaijan in 2023-2024. As a result, Hungary may be looking to follow in the footsteps of Bucharest and secure a similar agreement to purchase Azerbaijani gas starting in January of 2022 (Özsoy, 2023).

MVM, Hungary's state-owned energy group, has engaged in discussions with SOCAR, the Republic of Azerbaijan's state energy company, regarding commencing gas imports through Southern Europe by the end of 2023. During his visit to Baku in December 2022, Serbian President Aleksander Vučić conveyed that Belgrade will receive natural gas from Azerbaijan once the Bulgaria-Serbia and Serbia-North Macedonia gas connections are finished. All these agreements will be facilitated through TANAP and LNG transportation, as reported by Karimli in 2023. Since the pipeline's inception, 20.5 billion cubic meters of gas have been transported to the Republic of Türkiye, and 19.5 billion cubic meters to Europe through TANAP. The pipeline is being expanded to increase the initial capacity of 32 billion cubic meters, as noted by Cumhuriyet in 2023.

The TANAP project has elevated the Republic of Türkiye from being merely an energy transport corridor between the east and west to the status of an "energy

hub." In addition to TANAP, plans for a natural gas pipeline between İğdır and Azerbaijan's Nakhchivan region are in the works. SOCAR, the Azerbaijan State Oil Company, has invested a staggering \$20 billion in the Republic of Türkiye's energy sector as part of the TANAP project (Kabakçı, 2023). The Russian Federation's state oil company, Gazprom, saw its gas exports to the EU drop by 75% to 84 billion cubic meters in 2023. With the anticipated increase in capacity from the TANAP project, it is hoped that SOCAR may help close the gap with Russian natural gas (Alifirova, 2023). SGC has two branches: the Baku-Tbilisi-Erzurum (BTE), otherwise known as the South Caucasus Pipeline Expansion, and the TANAP, the final branch being the Trans-Adriatic Pipeline.

#### 2.2.2.2. Trans Adriatic Pipeline (TAP)

The Trans Adriatic Pipeline (TAP) boasts a capacity of 10 billion cubic meters and serves as a vital link between Türkiye and Italy. As the energy hub of Southern Europe, Italy's search for reliable energy sources became even more pressing due to the instability in Algeria and distrust in Russia. One notable feature of this project is its "physical reversible flow" capability (Morrison, 2018). BP, SOCAR, Snam S.p.A., Fluxys, Enagás, and Axpo are all partners in TAP, with shares of 20%, 20%, 20%, 19%, 16%, and 5%, respectively (TAP, 2015).

### 2.3. TRANS-CASPIAN GAS PIPELINE PROJECT

The Trans-Caspian Gas Pipeline project (TCGP) aims to transfer natural gas from Central Asia to Europe, thus diversifying Europe's energy supply chains via the Southern Gas Corridor. This pipeline is of great importance as it enables the transportation of Azerbaijani oil and natural gas to international markets, running parallel to Russia's existing pipelines (Aslanlı, 2017). As a result, the Republic of Azerbaijan has become a central player and its relationship with the Republic of Türkiye has gained further significance.

In the same vein, there is an emerging literature on the importance of furthering the relations between the Republic of Türkiye and Turkmenistan. For instance, Cutler (2020) claims that TANAP alone cannot meet the capacity of the project,

that Azerbaijani natural gas will be insufficient and that Turkmenistan's natural gas will prove to be a feasible and economical option in this regard (Cutler, 2020).

As per the ongoing war in Ukraine, it has been noted by some experts that the establishment of an energy center in the Republic of Türkiye could potentially allow the Russian Federation to export gas without objection and in this vain, Moscow would not oppose the Trans-Caspian Gas Pipeline project (Bovt, 2022), However, there has also been dissident voices who hold a different view (Annayev 2022).

### **2.3.1. Project Background**

During the mid-1990s, American companies embarked on the first TCGP project, which ultimately failed by the end of the decade. However, a few years later, the EU launched a more comprehensive initiative to ensure the energy supply security from the Caspian Sea basin, including Central Asia (Cutler, 2020). In 1999, Turkmenistan and the Republic of Türkiye signed a 30-year agreement for gas exports, while an intergovernmental declaration on the legal framework was signed with the five relevant riparian countries and transit states. Despite this, construction has remained in theory for various reasons (Çalışkan, 2017).

As per a statement on the matter, the project experienced a loss of momentum when BP-Amoco48 unveiled the Shah Deniz offshore gas field in the Republic of Azerbaijan in 1999. Recognizing the potential to export its own natural gas the Republic of Azerbaijan took necessary steps to do so.

The Russian Federation and the Islamic Republic of Iran have also been opposed to the construction of a pipeline on the Caspian Sea floor, citing environmental concerns. However, it is widely accepted that Moscow's reluctance stems from its desire to maintain its influence over Europe's gas supply by preventing the purchasing of Turkmen gas (Karayianni, 2017).

Meanwhile commentators also provide that Turkmenistan maintains an approach of "zero financial burden, one hundred percent efficiency" in pipeline politics (Shiriyev, 2015). Consequently, Ashgabat seeks to export through established pipelines or expand to areas with opportunities, such as China. To enhance market security, Turkmenistan should explore new markets beyond China, the Russian Federation, and the Islamic Republic of Iran. While the Turkmen gas export plan may appear to be at odds with the Islamic Republic of Iran and the Russian Federation, TCGP project or alternative routes could provide a win-win solution for all parties, including overcoming sanctions faced by both states (Abdülkerimov, 2024; Özdemir, 2022).

### **2.3.2. Alternatives Routes for the Trans-Caspian Gas Pipeline Project**

Despite receiving support from the EU, the TCGP project has yet to make any visible progress. The reasons for this lack of progress are numerous, including high costs, geopolitical conflicts, opposition from certain states, including but arguably not limited to the Russian Federation and the Islamic Republic of Iran, and disagreements among the coastal states about how to share the bottom of the Caspian Sea.

The planned length of the TCGP pipeline project, which would run along the Caspian bottom, is 338 kilometers. In a 2016 summary published by the the Republic of Azerbaijan Diplomatic Academy, it was recommended that compressed natural gas (CNG) be transported by tanker as an alternative until the TCGP can be completed. It's important to note that CNG should not be confused with liquefied natural gas (LNG), which requires costly liquefaction and regasification terminals at both the export and import terminals. While CNG is compressed, it remains in a gaseous state and can be transported in pressurized containers. However, due to its lower volume reduction ratio, CNG carrier ships can carry less fuel and energy than similarly-sized LNG ships (Sitaras, 2016).

An additional option to consider is the natural gas exchange approach. Through this method, Turkmenistan's necessary natural gas is imported by exchanging

gas between the Republic of Azerbaijan and the Islamic Republic of Iran. The Republic of Azerbaijan exports as much gas to Iran as they would purchase from Turkmenistan, and the Islamic Republic of Iran then pumps the same amount of gas to the Republic of Azerbaijan. The Azerbaijan-Turkmenistan partnership is also working to increase their Iran pipeline capacity, with the goal of increasing annual "swap" volumes to 5.5 billion cubic meters (O'Byrne, 2024). Despite the various challenges and obstacles, it appears that Turkmenistan's natural gas has made its way to the Southern Corridor, even without a direct pipeline connection.

**Map 5. Transport Map of Turkmen Gas to Azerbaijan and Türkiye**



**Source:** (Babaoğlu, 2023).

Trans Caspian Resources, an international consultancy company, is working to advance the Trans-Caspian Connector project. The initiative aims to connect the existing infrastructures of Azerbaijan and Turkmenistan in the Caspian Sea. The estimated cost of the project is between 500-600 million dollars (TURKMENPORAL, 2022).

As the news coverage examined in Chapter IV also suggests, there are also dissident voices in the secondary literature concerning the said projects. For example some express concerns over the realization of the Trans-Caspian Connector project (see e.g. Cutler, 2020).

Despite the debates surrounding the ongoing projects however, the parties involved are continuing to cooperate towards the development of the Trans-Caspian Gas Pipeline. Turkmenistan's Ministry of Foreign Affairs announced in July 2023 that the European Union recognizes the project as a 'promising

endeavor' and that there are no significant political, economic, or financial obstacles that would prevent its construction (Acar, 2023). The plan was for Turkmen gas to be transported by ship to the Republic of Azerbaijan and then pumped into the Southern Gas Corridor pipelines, which connects the Republic of Azerbaijan to Europe via the Republic of Georgia and Türkiye (Babaoğlu, 2023; Şimşek, 2024). The recent natural gas agreement signed between the Republic of Türkiye and the Republic of Azerbaijan is also expected transfer Turkmen natural gas through Georgia to Türkiye via existing Southern Gas Corridor infrastructure (Kabakçı et al., 2024)<sup>10</sup>.

### **Conclusions**

The issue of the Caspian legal status is said to have hindered the post-Soviet states' efforts to utilize and transfer the Caspian resources for nearly three decades (Janusz-Pawletta, 2021). It is also alleged that the Russian Federation initially sought to maintain its former Soviet-era dominance in the region, but the changing circumstances and the Russian Federation's desire to participate in the new energy collaborations led to a shift in attitude. Also during the same period, states have prioritized economic cooperation agreements instead of waiting for the legal status issue to be resolved. While the legal status issue continues to pose a challenge to cooperation, it has not entirely prevented progress in the region. The Republics of Azerbaijan and Kazakhstan's assertive approaches to energy projects have influenced changes in the former hegemon's attitudes, making them significant players in this region.

The Islamic Republic of Iran's lengthy coastline in the Caspian Sea has resulted in limited submarine resources in comparison to its neighboring countries. However, the Islamic Republic of Iran's unique approach addressing the status matter was disregarded, leading to the country's decision makers' decision to establish state boundaries through bilateral and tripartite agreements. These

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<sup>10</sup> This agreement envisages that by 2030, the Republic of Türkiye may receive additional gas volumes from Azerbaijani resources and natural gas from the Caspian region, primarily from Turkmenistan, with some of this natural gas being transported to Europe via the existing Turkish infrastructure (Kabakçı et al., 2024).



agreements aimed to facilitate lawful economic endeavors concerning the exploration and development of seabed and subsoil resources. Although the Convention is assumed to have resolved the status issue, riparian states are still facing potential obstacles when it comes to energy transmission projects (Abilov et al., 2020).

The Trans-Caspian Gas Pipeline project is currently in a state of uncertainty due to the unresolved status issue of the Caspian Sea. However, there are still opportunities to move energy through the region using alternative methods, which means that the project can be considered to have been theoretically realized. For instance, Turkmenistan and The Republic of Azerbaijan's agreement to swap natural gas through the Islamic Republic of Iran is a successful example of this. Moreover, Kazakhstan has been able to transport carbohydrates to the Southern Gas Corridor through tanker ships, which also supports this claim. The recent transportation of natural gas through TANAP and TAP lines to Türkiye and EU countries is a significant development for energy market diversification in the region.

## **CHAPTER 3**

### **CASPIAN BASIN GAS RESERVES AND REGIONAL/GLOBAL COOPERATIONS**

In view of the developments studied in Chapter II, actors continue to develop comprehensive plans to address the increasing demand for energy in an increasingly unstable international arena (Austvika and Rzayeva, 2017). The growing significance of energy security in global security dialogues has heightened the importance of these efforts. Energy security can be described as the ability to access adequate energy resources at a stable cost from a reliable source, using secure transportation channels such as pipelines or suitable sea routes, and ensuring equitable distribution (Sevim, 2009). The importance of pipelines has increased due to the rising demand for energy, the need to develop resources in difficult regions, and the renewed significance of geopolitical struggles. As oil and pipelines become increasingly politicized, the determination of pipeline routes is now more influenced by geopolitics than market forces (Klare, 2005). Excluding the United Kingdom, Norway, and the Netherlands, there are few European countries with significant resources, particularly in terms of gas fields (Önder and Maden, 2023). Given these circumstances, the Caspian region presents a viable option for the European Union to diversify its energy suppliers (Karagöl et al., 2016).

Not only do American and European businesses explore regional resources, but Turkish, Japanese, and Chinese companies also examine them as viable options (Preyger and Omelchenko, 2005). Nevertheless, the Caspian region poses significant risks for the development and transportation of its resources due to its restricted nature. Although the Caspian Sea presents an alternative for states seeking to broaden their resource supply, the countries that produce these resources in the region worry about diversifying their transfer routes and the countries that receive them.

In the pursuit of energy security, the potential of the Trans-Caspian Gas Pipeline project and the natural gas reserves of the Caspian Basin's littoral

states present a promising opportunity for regional and global actors seeking profit and interest in the region to promote their own policies. Despite the theoretical nature of TCGP project, the USA, China, the Russian Federation, and the Republic of Türkiye in the area are striving to indirectly secure their energy interests through other collaborations and partnerships. Moreover, by highlighting commonalities such as cultural heritage, ethnicity, language, and the belief system, the Organization of Turkish States has achieved considerable success in fostering regional cooperation in recent years (Akçapa, 2023).

**Map 6. Major Caspian oil and gas export routes**



**Source:** (Assenova et al., 2023).

This section focuses on energy initiatives of regional actors in the Caspian Sea from a perspective of regional cooperation. Separate subsections examine the strategic breakthroughs and moves made by both local and global actors in the energy gas pipeline. It's important to keep in mind that the region's vast hydrocarbon

reserves require transportation through various states' lands and waters, as it lacks direct access to the open sea. Despite their reservations and compromises, cooperation among these actors is essential for the delivery of energy resources in the region.

**Figure 1. Annual Natural Gas Production Amounts of the World and Caspian Riparian Countries**

	<b>Billion cubic metres 2020</b>	<b>Billion cubic metres 2021</b>	<b>Billion cubic metres 2022</b>
Azerbaijan	25,9	31,8	34,1
Kazakhstan	30,6	26,7	26,0
Russian Federation	638,4	702,1	618,4
Turkmenistan	66,0	79,3	78,3
Iran	249,5	256,7	259,4
Kuwait	12,2	12,1	13,4
USA	916,1	944,1	978,6
European Union	47,8	44,3	41,1
<b>Total World</b>	<b>3860,6</b>	<b>4053,4</b>	<b>4043,8</b>

### **3.1. GAS RESERVES OF COASTAL STATES AND THEIR ENERGY COOPERATION POLICIES IN THE BASIN**

#### **3.1.1. Azerbaijan and Natural Gas Cooperation in the Caspian**

The development of new pipelines and transportation routes spanning the Caspian Sea and Central Asia is opening the door for millions of tons of oil and billions of cubic meters of gas to reach international markets (Khaligova, 2022). The Republic of Azerbaijan's unique geography presents a challenge for its oil and gas marketing efforts, but the country's current foreign policy priority is securing its territorial integrity. Azerbaijani policy makers, with a clearly defined pluralist approach, underline that the Republic of Azerbaijan prioritizes its neighbors whilst also adding into the equation its traditional European trade partners, and cultivating strong connections with countries in the Islamic and Turkic world based on shared cultural and historical ties (Dragadze, 2000). As part of its multi-vector foreign policy, the Republic of Azerbaijan collaborates

closely with various international actors in trade, economic reform, and security areas.

The Republic of Azerbaijan's natural gas deposits have been estimated at 2.5 trillion cubic meters, according to the World Energy Statistics Review 2021 by BP. The country's strategic location as an alternative energy provider to the European Union has been acknowledged in the European Security Strategy document of December 12, 2003

As an oil and gas producer and transit country, Azerbaijan is an alternative source of energy resources from the Caspian and Central Asia to Europe... It will play an important role in this, including the opening of transportation routes....The EU has both direct commercial and political interests in promoting regional cooperation in various sectors, including energy and transport (European Security Strategy, 2007).

Indeed, the Republic of Azerbaijan continues to be a crucial partner for the European Union in achieving its energy diversification aims. As a result, energy-related matters have become fundamental aspects of the EU's bilateral relationship with the Republic of Azerbaijan, alongside the provision of technical assistance.

The EU has become a significant investor in both the oil and natural gas industry, as well as other sectors of the Azerbaijani economy (Aliiev, 2022). However, it's important to acknowledge that their partnership hasn't always been at this level. In 2015, the Organization for Security and Co-operation in Europe and the Council of Europe placed pressure on Azerbaijan to implement reforms related to human rights violations. The allegations took their toll on the relations. Concurrently, the Republic of Azerbaijan turned its attention to non-European organizations like the Shanghai Cooperation Organization (SCO), the

Parliamentary Assembly of Turkic States (TURKPA), the Organization for Democracy and Economic Development (GUAM), and the Organization of Islamic Cooperation (Cornell, 2011).

In retrospect, the Republic of Azerbaijan's interest in joining the Shanghai Cooperation Organization in 2015, a group largely led by the Russian Federation and China, can also suggest the Azerbaijani policy makers' desire to balance its relations with the West and the East. Moreover, membership in the SCO could have also been perceived as a means of facilitating to enter into bilateral trade agreements. In addition, the Republic of Azerbaijan has diversified its market possibilities by including the SCO and China into its list of possible markets, in addition to Europe (Altstadt, 2017).

Ever since the Republic of Azerbaijan gained its independence, its energy sector has been under the regulation of several significant ministries and institutions. Among these, the State Oil Company (SOCAR), the Ministry of Industry and Energy, the Tariff Council, and the Azerbaijan International Oil Company are the most crucial players in the sector. SOCAR, being the largest energy company in the Republic of Azerbaijan, is responsible for various comprehensive operations, including the production and export of petroleum chemical products, preparing oil and gas for refinery and transportation, and natural gas production and purification stages (Öztürk, 2013). As mentioned above, the Republic of Azerbaijan's energy fields are primarily managed by the State Oil Company, which holds a 51% of shares in the TANAP. As it was also stated in section 2.2. Southern Gas Corridor, the TANAP is also a crucial part of the Southern Gas Corridor (Morrison, 2018). Additionally, SOCAR acts as a partner in investment and cooperation agreements with neighboring countries, taking on the responsibility of constructing and operating oil and natural gas enterprises in the region (Times, 2024; Inbusiness, 2023). Around 2005, SOCAR's operations began to shift from managing resource leases to taking a more proactive role in information transfer and geopolitics. Some claim that this change was facilitated by the appointment of younger senior officials to SOCAR

management and the encouragement of using SOCAR to support foreign policy and integrate the state company with the government (Pomfret, 2012). SOCAR's international expansion began in 2007-2008 with the purchase and upgrade of the Republic of Georgia's Kulevi oil terminal on the Black Sea shore. Since then, SOCAR has opened offices in the United Kingdom, Romania, Switzerland, and the Republic of Türkiye. Plans are also underway to open almost 20 gas stations in Georgia (Pomfret, 2012).

Following the war in Ukraine, Ukraine closed the Western Line valves along its borders, resulting in economic hardships for the Russian Federation. In light of these circumstances, Azerbaijan opted for the Republic of Türkiye route for pipeline projects, considering both economic and political risks, given the shared national and religious identity between the two countries (Mutluer, 2019). Republic of Türkiye is Azerbaijan's primary partner in the Caspian region.

Meanwhile, the Second Karabakh War (October, 2020) underlined the significance of "energy demand security" and "transportation routes security" for the Republic of Azerbaijan. The Republic of Azerbaijan's energy resources coupled with the Republic of Türkiye's crucial geopolitical position linking Asia and Europe, cooperation between the two countries is deemed to be productive (Kalkan, 2022). Furthermore, some commentators also allege that the Republic of Türkiye's membership in NATO can also be expected to facilitate trade between the West and the Turkic countries (Mutluer, 2020).

The Baku-Tbilisi-Ceyhan project stands out as a significant milestone in regional cooperation following the Cold War. In that, some underline the importance of the persistent lobbying efforts of the United States based companies. The pipeline opened up alternative channels to transport oil from the Caspian region to Europe, reducing dependence on resources from the Russian Federation (Ibrahimov, 2010). Since its inception, the Republic of Kazakhstan and Turkmenistan have also joined in, with oil from both countries flowing through the pipeline since 2008 and 2010, respectively (Ibrahimov,

2010). The Baku-Tbilisi-Erzurum pipeline, also referred to as the South Caucasus pipeline, facilitates the export of Azerbaijani gas to global markets. It runs parallel to another pipeline, BTC (Aras et al., 2012), which, according to some commentators, has been supported by the West, or more specifically by US capital. In contrast, the Southern Gas Corridor has not garnered much US support and is primarily funded by the Republic of Azerbaijan and the Republic of Türkiye (Guliyev, 2019).

Due to the energy supply problem caused by the war in Ukraine, the European Union is actively searching for solutions to the energy crisis. One potential solution is to tap into the natural gas supplies in Central Asia. Meanwhile, the Republic of Azerbaijan has already completed the Southern Gas Corridor project and aims to become an intermediary/transit country in the transmission of Turkmen gas to European markets. However, it should also be noted that a strand in the literature do not consider the Republic of Azerbaijan as an emerging "middle power" despite its increasing diplomatic influence in the region (Bryza et al., 2020). It was mainly with the aim of addressing the transmission of Turkmen gas and the related issues that a trilateral summit meeting was held in Avaza, Turkmenistan on December 14, 2022, between the presidents of the Republic of Türkiye, Azerbaijan, and Turkmenistan. As is also studies in Chapter IV, this meeting also demonstrated Ankara's potential to play a crucial role in connecting the natural gas-rich Central Asian countries to Western countries (Ünver, 2023).

The Caspian Sea plays a significant role in energy cooperation and the development of relations between the European Union and the Caspian countries. It is also at the heart of logistics structures established through the Caspian region. Notably, these logistics structures include the Europe-Caucasus-Asia Transport Corridor (TRACECA) program, which was initiated in 1993 (mfa.gov.tr, 2022), and the Intercountry Oil and Gas Transportation to Europe program (INOGATE), launched by the EU in 1995 to foster regional cooperation (minenergy.gov.az, 2020). The INOGATE program is focused on



achieving several key objectives, such as enhancing the energy security of EU states by tackling challenges related to energy export/import, supply diversification, and energy transit issues (Ibrahimov, 2014). Despite these goals being aligned with EU policies, there is currently no pipeline project in place to facilitate the transportation of Caspian oil and natural gas to EU countries (Dursun, 2011).

As non-regional actors continue to enter the cooperation arena in the Caspian, Saudi Arabia and the UAE remain invested in the Republic of Azerbaijan to counter Iranian influence in the Caspian region (Dorsey, 2021). Meanwhile, Total Energies of France has begun producing roughly 1.5 billion cubic meters of gas per year from the Republic of Azerbaijan's Absheron gas field. Furthermore, Baku is tasked with fulfilling commitments to supply gas to neighboring countries The Republic of Georgia and the Republic of Türkiye, in addition to meeting increasing domestic demand. To address the challenge of meeting higher export needs in 2022, a complex gas swap agreement with Turkmenistan and Iran was briefly discussed which has since expanded and may continue to do so (O'Bryne, 2023).

The Republic of Azerbaijan is also a supplier of energy to countries in the Middle East. To give an example, it exports electricity to the United Arab Emirates (Rahimov, 2024), and the Islamic Republic of Iran. Reportedly, the Islamic Republic of Iran's stance during and after the Second Karabakh war vis-a-vis Armenia and Azerbaijan in 2020 also had an effect on paving the way for improved relations between Azerbaijan and Israel (Hasanoğlu and Amuyeva, 2023). In fact, as of January 2024, Azerbaijan has exported a substantial quantity of oil to Israel, totaling 523,553.89 tons and valued at 296,946.74 thousand US dollars (STMEGI, 2024). This impressive figure left Israel in a leading position in the list of countries importing Azerbaijani oil.

The Republic of Georgia plays a crucial role in the realization of two major oil and gas pipelines in the region, namely the Baku-Tbilisi-Ceyhan (BTC) and the

South Caucasus Pipeline (SCP). While its position in the energy chain may appear secondary, its significance cannot be overstated. The Republic of Georgia's role is paramount in shaping the dynamics of power and interest that link the Caspian states, Western powers, and Russia (Valigi, 2014). Moreover, the establishment of the Baku-Tbilisi-Supsa, Baku-Tbilisi-Ceyhan and Baku-Tbilisi-Erzurum pipelines had a profound impact on the geopolitical landscape of the South Caucasus and bolstered the strength of the Republic of Azerbaijan and The Republic of Georgia. These pipelines have proven to be highly lucrative offering a distinctive prospect for the Trans-Caspian Gas Pipeline to secure Europe's economic advantages and political clout in the area, thereby unlocking the potential for increased global investment (Latsabidze, 2023).

The Republic of Azerbaijan places significant value on logistics projects in the region, in addition to energy initiatives. The Trans-Caspian International Transport Route (TITR) - also known as the Middle Corridor - is a crucial transportation route that connects the economies of China and Europe. Meanwhile, the Central Corridor plays a key role in bolstering trade ties between Asia and Europe. The Baku International Maritime Trade Port is undergoing modernization works, which are centered on the key point of the project and the largest port of the Caspian Sea. Upon completion of these upgrades, the port will be capable of receiving up to 25 million tons of cargo and 500,000 TEU of goods per year. This development will significantly enhance the Republic of Azerbaijan's position in maritime transport (Mammadov, 2024).

In recent years, decision makers increasingly adopted foreign policies that prioritize national interests and resist external pressure. Other countries in the region have also become sufficiently assertive and aware of their potential to resist external normative pressure. It can be said that the Republic of Azerbaijan is a leading example in the region, as other states are likely to follow its lead (Gils, 2020). Based upon the news analysis in Chapter IV it can be argued that the Republic of Azerbaijan has established stable partnerships with both Western and Central Asian countries by demonstrating its reliability as an

energy supplier whilst skillfully balancing the presence of major players in the region and achieving its own strategic and economic objectives, thus opening the door for potential collaborations in many fields.

### **3.1.2. Iran and Natural Gas Cooperation in the Caspian**

Following the dissolution of the Soviet Union, the newly formed states in the Caucasus and Central Asia faced a challenge in accessing the open seas, leading to increased emphasis on diplomacy with the Islamic Republic of Iran. Consequently, countries seeking to enhance their relations with these regions had to explore multiple transportation routes spanning across the Islamic Republic of Iran, the Russian Federation, the Republic of Türkiye, China, and Afghanistan. The Islamic Republic of Iran boasts the second largest reserve of natural gas in the world, followed by the Russian Federation. 17% of global proven natural gas reserves and one-third of the Organization of Petroleum Exporting Countries (OPEC) reserves are situated in the Islamic Republic of Iran. As the third largest gas producer globally, the Islamic Republic of Iran's share in world gas production is 5%. In 2022, the Islamic Republic of Iran's natural gas production reached a staggering 4.043 trillion cubic meters (Exarhea, 2023). The Islamic Republic of Iran's strategic partnership with global and regional actors is largely due to its possession of the world's largest natural gas field, the South Pars / North Dome energy field. Located within the borders of the Islamic Republic of Iran and the State of Qatar and containing a massive 51 trillion cubic meters of reserves, this field has made energy policy a vital component of the Islamic Republic of Iran's foreign relations. To gain a deeper understanding of the Islamic Republic of Iran's energy policy, it's essential to consider its foreign policy and the role its hydrocarbon resources play in shaping it (Kalehsar, 2021).

In the literature, it is generally assumed that Iran's geopolitical and geostrategic advantages have not been enough for this country to establish regional dominance (Alizada and Erol, 2021). In trying to bring an explanation to this situation, some authors prioritize the role of culture. For example, Başaran

(2017) and Çiçek (2022) allege that while Shiism unites different ethnicities in the region, the dissolution of the Soviet Union and the emergence of new states, particularly the Republic of Azerbaijan, have created other concerns for the Islamic Republic of Iran. According to this strand of authors, Irani decision makers' concerns focus on the assumed national orientation of the Azerbaijani Turk population in the Islamic Republic of Iran towards the Republic of Azerbaijan (Başaran, 2017). Some commentators remarked that Azerbaijan's recent participation in the Karabakh war and the prospect of the Zangezur Corridor connecting Nakhchivan and Azerbaijan by land, allegedly exacerbated Iran's external security concerns (Çiçek, 2022).

The same strand of literature (see e.g. inter alia Mahdi, 2023) also alleges that the Islamic Republic of Iran provided support for the Republic of Armenia in relation to its concerns over its Turkish speaking constituency's assumed orientation towards the Republic of Azerbaijan. It is alleged that this support has included military aid and cooperation, as well as an agreement signed in November 2011 to export 365 million cubic meters of gas from the Islamic Republic of Iran. This agreement was then renewed in August 2023, with plans to double the current capacity. It is estimated that the gas pipeline between the Islamic Republic of Iran and the Republic of Armenia has the potential to export up to 1 billion cubic meters of gas annually, with only one-third of this capacity currently being utilized (Mahdi, 2023).

Meanwhile, the Islamic Republic of Iran is also taking measures to establish partnerships with the neighboring countries as a means of counterbalancing the political and economic isolation that has been imposed upon it by 'the West'. It has been previously noted that the Islamic Republic of Iran's favorable geographical location makes it a potential resource for regional countries looking to expand their access to international waters and export opportunities. As a result of the Western sanctions, the Islamic Republic of Iran has sought to strengthen its ties to with other states in the region, particularly in the energy sector. Consequently, the Islamic Republic of Iran has collaborated on a

number of infrastructure projects aimed at fostering greater connectivity between the region and global markets. Examples of such projects include the Korpeje-Kurt Kui pipeline, the Dauletabad-Sarakhs-Pipe line, and the Khangiran pipeline, which Iran implemented with Turkmenistan in 1997 (Raimondi, 2019).

Following the dissolution of the Soviet Union, the Caspian Sea basin became a renewed priority for the Islamic Republic. As the Islamic Republic's influence in the region grew, so too did its relationships with the riparian states, including intensified ties with the Russian Federation. Cooperation between the Islamic Republic of Iran and the Russian Federation in the energy and transportation sectors has been shaped by changing realities and cyclical conditions in the regional geopolitical landscape, and is always in sync with the current conditions. This cooperation includes joint efforts to construct the Resht-Astara Railway line and electrify the Garmsar-Inceburun Railway line, in addition to oil and natural gas agreements. The goal is to increase the Islamic Republic of Iran's capacity for sea, rail, and land transportation, enabling the re-export of Russian oil and food products. Both the direct Caspian Sea route and transit routes via the Republic of Azerbaijan and Turkmenistan are utilized in this diversified approach (Aslanlı, 2022). Furthermore, an agreement was reached between the National Iranian Oil Company (NIOC) and Gazprom, Russia's leading energy company, to invest \$40 billion in oil and natural gas ventures. Additionally, a \$10 billion investment initiative was established to enhance the Gulf Kish and Kuzey Pars gas fields and boost daily natural gas production to 10 million cubic meters. The \$15 billion investment scheme, aimed at developing six different oil fields to counteract the declining pressure in the South Pars field, one of the world's largest natural gas reservoirs on Iran's maritime boundary with the State of Qatar can be read as a testament to the evolving perceptions of the Iranian policy makers and their take on furthering regional collaboration projects (Aslanlı, 2022).

Over the past few years, the Islamic Republic of Iran has been working to reduce energy-related tensions with other countries in the Caspian region. Due

to its strategic location as the only country connecting the Caspian Basin and the Persian Gulf by land, the Islamic Republic of Iran has become a crucial player in regional cooperation and in the search for new transportation routes for energy resources (Aslanlı, 2018). The Islamic Republic of Iran has leveraged its advantageous position by implementing diplomatic efforts to establish strong bilateral and trilateral relationships. For instance, Iranian policy makers view Turkmenistan as a promising partner for trilateral cooperation due to its line of foreign policy (Mohsenin, 2001). As a tangible example of such collaboration, a tripartite "swap"<sup>11</sup> agreement involving the Republic of Azerbaijan, Turkmenistan, and the Islamic Republic of Iran provides 1.5-2 billion cubic meters of natural gas per year from Turkmenistan to Azerbaijan (O'Byrne, 2023).

It is crucial for the Republic of Kazakhstan to foster its relationship with the Islamic Republic of Iran and prioritize its efforts to export both agricultural and petroleum goods to the global market through the Gulf. Furthermore, the trade and transit operations between the two states via the Caspian Sea and railway are vital for the east-west transportation corridor (Arslanlı, 2022). The Islamic Republic of Iran's approach to the Organization of Turkic States promoting collaboration among the countries of the region is noteworthy. Amongst the stated aims is the goal to unite states that share the Turkish language and cultural ties. Although the region is already competitive in various fields, some observers allege that the Islamic Republic of Iran has been wary of the organization's potential impact on the rise of Turanian ideology (Gündoğdu, 2023).

In the Islamic Republic of Iran, the management of oil and natural gas fields is primarily handled by domestic businesses. This is mainly because of the fact that many international investors have been hesitant to enter the Iranian energy market due to concerns around sanctions. Despite the signing of the

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<sup>11</sup> According to the agreement, Turkmenistan aims to sell 5 to 6 million cubic meters of gas per day through Iran's pipelines (O'byrne, 2023).

Comprehensive Joint Action Plan<sup>12</sup>, also known as the nuclear agreement, the French company Total and China's CNPC were among the few foreign companies to invest in the Southern Pars Field, which is shared with the State of Qatar. However with the resumption of sanctions, both companies chose to withdraw from the Islamic Republic of Iran, leaving behind all of their investments (Iran Energy Report, 2020).

Despite these challenges, the Islamic Republic of Iran has recognized the increasing importance of imports, transit, gas exchange, and trade in the region, and is working to increase its share in energy trade with neighboring countries. As part of these efforts, the Islamic Republic of Iran is collaborating with the Russian Federation, the State of Qatar, and Turkmenistan to establish a gas center in the industrial region through the Assaluy project (Irna, 2023). The Islamic Republic of Iran is also working with the Russian Federation and India to create a sea and railway connection that will link South Asia to Northern Europe, providing an alternative to Egypt's Suez Canal (Dorsey, 2021). Despite competition and cooperation among countries and oil companies, the Islamic Republic of Iran remains an attractive opportunity for those looking to tap into its oil resources and benefit from its relatively growing economy (Konukçu, 2017).

The Islamic Republic of Iran plays a crucial role in the Republic of Türkiye's ambition to establish a gas trading hub. Currently, the Republic of Türkiye imports 9.6 billion cubic meters of Iranian gas annually through a pipeline connection. Nevertheless, the Republic of Türkiye hopes that the Islamic Republic of Iran will allow access to Turkmen gas through its own pipeline network to facilitate the import of Turkmen gas. However, international sanctions have put the Islamic Republic of Iran in a challenging position. The

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<sup>12</sup> On July 14, 2015, Iran and the EU3+3 (Germany, France and England, the United States, China, Russian Federation) signed the Comprehensive Joint Action Plan in Vienna. The primary objective of this plan is to prevent Iran from reaching the nuclear weapons development threshold. The detailed plan came into force in 2016, and its success will provide compelling evidence for the effectiveness of sanctions in deterring nuclear armament, rather than military measures (Bayar, 2016).

expiration of the gas import agreement with the Republic of Türkiye in 2026 and uncertainty around renewal plans only add to the difficulty. While this presents an opportunity for the Islamic Republic of Iran, its reliability as a partner remains a question (O'byrne, 2024).

The Islamic Republic of Iran holds significant influence in the global energy market thanks to its abundant energy resources. Despite facing obstacles such as sanctions and political pressures, the Islamic Republic of Iran remains a pivotal player in the industry. The future of Iran's energy cooperation policy is shaped by a variety of factors, including ongoing nuclear negotiations, the Russian-Ukraine War, the rise of China, and tensions between Arab countries and Israel. The balance of international politics and the Islamic Republic of Iran's own political landscape must be taken into account. Although the Islamic Republic strives to act based on its own political and economic goals, it is constrained by global balances and sanctions (Caner, 2022).

### **3.1.3 Kazakhstan and Natural Gas Cooperation in the Caspian**

Among the members of the Community of Independent States (CIS), the Republic of Kazakhstan owns the second largest liquid hydrocarbon reserves after the Russian Federation. This country's foreign policy is also characterized as a pragmatic multi-vector approach, actively cultivating positive relationships with China, the EU, the Russian Federation, and the USA (Overland, 2014). The Ministry of Energy of the Republic of Kazakhstan estimates the country's recoverable natural gas reserves to be in the range of 4.03 trillion cubic meters (Parkhomchik, 2016). Approximately 98% of the Republic of Kazakhstan's natural gas deposits are mainly located in the western part of the country and 85% are concentrated only in a few big fields: Tengiz, Kashagan, Karachaganak, Canazhol and Imashevskoye (IEA, 2020). The gas production volume of the Republic of Kazakhstan reached 53.2 billion cubic meters in 2022. After the completion of the processing and purification process, marketable gas production, which expresses the volume of the gas offered for sale, has decreased by 5.4 percent, meaning it decreased 1.6 billion cubic



meters, to 27.8 billion cubic meters. While 19.3 billion cubic meters of this was consumed by the domestic market, 4.6 billion cubic meters were exported (Satubaldina, 2023).

Having the vast hydrocarbon reserves have generated significant international interest in the area, leading to a boost in external actors in the Caspian region and a decrease in the Russian Federation's influence. Despite these changes, the Republic of Kazakhstan has managed to maintain a balance between Moscow, the West, and the East, taking steps to protect its own interests. One key area of focus for Kazakhstan is the development of its "super fields" in the energy sector, which is seen as a crucial driver of long-term economic growth. To this end, in September 2013, the US's largest oil company, Conocophillips, sold 8.33 percent of its stake in the Kashagan consortium to China's CNPC for \$5 billion, a move that underscores Kazakhstan's commitment to securing its economic future.

Following the dissolution of the USSR, Turkmenistan and Kazakhstan were left with only one option for exporting gas - the Central Asian-Center (CAC) pipeline constructed during the Soviet era. However, due to its 40-year usage, the capacity of this pipeline is limited to 50 billion cubic meters. Additionally, since there are no alternative gas pipelines leading to the West, Turkmenistan and Kazakhstan previously, being forced to export their gas to Europe through the completely Russian-controlled Central Asia-Central (CAC) pipeline (Temnikov, 2019).

Since the 1990s, the Republic of Kazakhstan has actively collaborated with foreign companies to develop their energy resources, however, progress has been slower than that of the Republic of Azerbaijan. However, the involvement of foreign companies in the Republic of Kazakhstan's energy sector has led to the development of new infrastructure projects, which reduces their dependence on the Russian pipeline company, Transneft. For example, in 2001, the Private Caspian Pipeline Consortium (CPC) was established and later

extended to the Black Sea, in 2005 the Baku-Tbilisi-Ceyhan Pipeline (Pomfret, 2012). Due to sanctions against the Russian Federation's oil exports during the Russian-Ukraine War and various interruptions on the CPC line, the Republic of Kazakhstan has had to seek out new routes and agreements for oil export. On November 10, 2022, the Republic of Kazakhstan released a special roadmap to expand its oil exports which included a plan for the Baku-Tbilisi-Ceyhan pipeline to begin shipping 1.5 million tons of oil starting on January 1, 2024. While efforts are being made to increase the shipment tonnage, Kazakh oil can also be transported through the Baku-Supsa and Baku-Batumi pipelines (Yüksel and Topbaş, 2024). Furthermore it will take crucial part in the prevention of future problems in oil transmission through the Caspian Pipeline Consortium (CPC), allowing the Republic of Kazakhstan to transport oil to Europe through the Druzhba pipeline (Assenova et al., 2023). This is an important matter for the Republic of Kazakhstan as reliance on CPC is considered a key vulnerability in crude oil exports (Fitch Ratings, 2022; Reuters, 2022). Kazakhstan-China Pipeline is a transit infrastructure which is one of the most significant financial projects in the energy industry in the country. The Branch C<sup>13</sup> of the Turkmenistan-Uzbekistan-Kazakhstan-China gas pipeline, completed in 2016, is expected to see a surge in transit gas volume from 30 billion cubic meters to 55 billion cubic meters per year. Furthermore, the expansion of the Beineu-Bozoy-Chimkent pipeline is anticipated to bolster stable marketing gas export supply to China by 10 billion cubic meters per year, as per IEA's 2020 report.

In 2007, the Republic of Kazakhstan reached to an agreement with the Republic of Azerbaijan and ended up signing an inter government agreement, pledging to support the project by transferring 20 million tons of oil annually to the Baku-Tbilisi-Ceyhan Pipeline extracted from the Kashagan field (Assanbayev, 2014). By 2023, KazTransOil<sup>14</sup> had increased oil exports to 1 million 392 thousand tons

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<sup>13</sup> Central Asia-China Gas Pipeline (Branch A, B and C) consists of three main lines. While the A and B lines pump Turkmenistan gas, the line C is equipped with gas exported from Turkmenistan, Kazakhstan and Uzbekistan (Aminjonov and Dovgaluk, 2023).

<sup>14</sup> KazTransOil is a subsidiary of KazMunayGas, the national oil and gas company of Kazakhstan (ORASAM, 2023).

in the direction of the Baku-Tbilisi-Ceyhan Pipeline. During the same year, transportation of the Republic of Kazakhstan oil reached 3 million 376 thousand tons. In 2023, the transport of Kazakh oil, which was exported from the Aktau port, reached 3 million 376 thousand tons. The increase in transportation volume for exporting Kazakh oil from the Aktau port is due to the rise of raw material volumes which are transported to the Baku - Tbilisi - Ceyhan pipeline that has risen from 250 thousand tons to 1 million 392 thousand tons. It is 5.5 times higher than the same period of 2022. 1 million 57 thousand tons of oil was transferred by tankers in this direction specifically from the Tengiz field (ORASAM, 2024).

The Republic of Kazakhstan's foreign policy approach of maintaining a balance between Moscow, Beijing, and Washington, while actively pursuing a neutral stance in regional-global developments, is widely regarded as an effective strategy. This approach has bolstered its geo-political position both regionally and internationally. Notably, the Republic of Kazakhstan's foreign policy priorities have significant implications for the Turkic World and global politics. Furthermore, the Republic of Kazakhstan's chairmanship of the European Security and Cooperation Organization in 2010 (osce.org, 2010), as well as its initiation in important conferences such as the Astana Conference on Interaction and Confidence-Building Measures in Asia and the Shanghai Cooperation Organization, serve as evidence of its growing geo-strategic importance in the Asian region (Selim, 2022). Additionally, its policies have enabled Kazakhstan to have an important role in the Organization of Turkic States (Kenzhetay, 2021).

The growing importance of the Republic of Türkiye in the Republic of Kazakhstan's foreign policy is evident, with trade volume between the two countries increasing by 58 percent in 2021 to reach 5.3 billion dollars. The Republic of Türkiye now ranks as the Republic of Kazakhstan's fifth largest trading partner after the Russian Federation, China, Italy, and South Korea. The goal is to achieve a trade volume of 10 billion dollars, and the Republic of

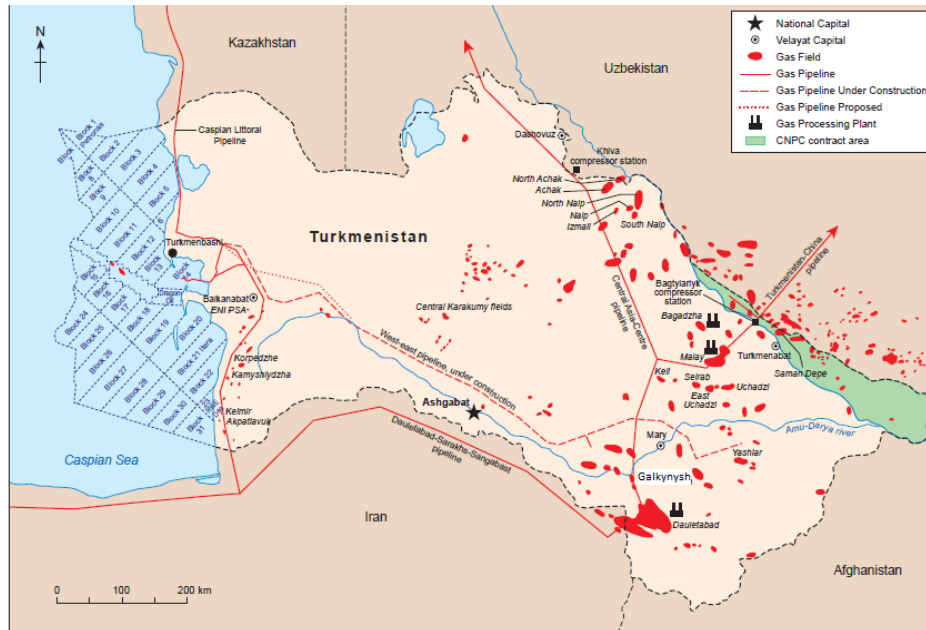
Türkiye is the third country, after the US and Switzerland, that has significantly increased its investments in the Republic of Kazakhstan. Official data shows that close to 3,000 Turkish companies with capital investments are operating in the country (Selim, 2022).

The 2050 strategy, which comprises the global principles embraced by the Republic of Kazakhstan, prioritizes energy security as a crucial component of the said state's agenda. Within this framework, the Republic of Kazakhstan remains committed to its strategies for extracting and refining abundant resources, guided by a steadfast policy of dependable strategic partnerships and mutual benefits in the energy sector (Abilkash, 2022).

#### **3.1.4. Turkmenistan and Natural Gas Cooperation in the Caspian**

Turkmenistan has adopted a multi-vector foreign policy and claims to have maintained its neutrality (Overland, 2014). BP data indicates that it ranks fourth in the world for natural gas reserves, with approximately 20 trillion cubic meters proven through discoveries on land and at sea - following the Russian Federation (38 trillion cubic meters), the Islamic Republic of Iran (32 TCM), and Qatar (25 TCM). As of the end of 2021, Turkmenistan's oil reserves were measured at 600 million barrels. During the same period, oil consumption was 153,400 barrels/day and production was recorded at 235,300 barrels/day. Furthermore, it was determined that Turkmenistan exported 59,600 barrels/day of crude oil and its derivatives (Erkan, 2023).

#### **Map 7. Turkmenistan's natural gas infrastructure**



**Source: Erkan, 2023.**

Turkmenistan plays a crucial role in the Trans-Caspian Gas Pipeline project, which, if realized, will have a significant impact on energy geopolitics in the region. However, it will also ensure energy security and promote regional cooperation in the South Caucasus. The pipeline system will consist of two branches, with the first line supplying the TAP/TANAP system and providing the second stage of the Trans-Adriatic Pipeline. This will activate the second string of the line, which will then feed the White Stream pipeline. Finally, the pipeline will begin from the Southern Gas Corridor, head towards the Black Sea coast (with a compressor station near Supsa in Georgia), and ultimately land in Romania (Cutler, 2021).

There has been a proposal by the USA since 1996 to transfer natural gas from Turkmenistan from the Caspian Sea's depths to the Republic of Azerbaijan's Sangachal terminal by building the TCGP. However, the pipeline has yet to materialize due to opposition from the Russian Federation, uncertainties around the legal status of the Caspian Sea, and the Islamic Republic of Iran's objections to the project (Karayianni, 2018). Turkmenistan insists on the expandable coast-to-coast Trans-Caspian Gas Pipeline project as the only viable option. Given the country's current economic crisis, natural gas is its only

marketable commodity, and it seeks to capitalize on opportunities to supply European markets (Bryza et al., 2020). Additionally, there are ongoing discussions about a natural gas "swap" agreement with the Republic of Türkiye to export Turkmen gas to Türkiye (Nebit-Gaz, 2024).

In recent years, the Republic of Türkiye has been actively seeking to develop energy relations with Turkmenistan. Obtaining Turkmen gas is of utmost importance to the Turkish government, as it would increase competition in the European energy market, particularly for the energy hub that is expected to be finalized in the Republic of Türkiye by 2024. The strategic value of supplying Turkmenistan's natural gas to the Republic of Türkiye and to the global markets via the Turkic states is vast. To achieve its goal of energy security, the Republic of Türkiye is committed to both bilateral cooperation with Turkmenistan and tripartite cooperation processes that involve the Republic of Azerbaijan. (Tosun and Dinçer, 2023)

In the mid-2000s, the Russian Federation was the primary buyer of natural gas from Turkmenistan. However, their sudden decision to halt purchases in 2009 resulted in approximately 150 wells being shut down. This situation is a significant concern as it highlights a serious energy security issue for Turkmenistan, given that energy exports account for 85% of the country's economic growth. While there have been some efforts to reduce reliance on the Russian energy market, Turkmenistan's diversification policy has taken center stage. The launch of the Russian Federation's "Power of Siberia" and "Power of Siberia-2" gas pipelines in 2019 and 2020, designed to provide natural gas to China, has led Turkmenistan to feel the pressure in the Chinese market (Annayev, 2020). As of February of 2024 Gazprom exported a considerable bcm of natural gas to China followed by Turkmenistan exporting nearly 2.4 bcm. As such, the Russian Federation took the lead and became the largest pipeline supplier of natural gas to China on a monthly basis (IntelliNews, 2024). Therefore, Turkmenistan's expansion into new natural gas markets is crucial for diversifying the buyers' energy markets and ensuring the country's

continued success in exporting gas to China and the Russian Federation (AZEMEDIA, 2022). The Turkmenistan-Afghanistan-Pakistan (TAP) project presents an alternative pipeline for Turkmen natural gas. If there is sufficient natural gas, India has expressed interest in extending the line to its own borders. However, the presence of pipelines that traverse multiple countries and transport oil to global markets raises security concerns (Gurbanov, 2011). Nonetheless, Turkmenistan has demonstrated its resolve to access diverse markets by turning to the east and exporting liquefied gas (LNG) to Pakistan through road transport, despite the temporary halt in the development of the Turkmenistan Afghanistan Pakistan India (TAPI) pipeline (Sarymbetova, 2023).

Turkmenistan has expressed a willingness to increase gas exports, but insists that any partnership in the gas sector must be based on clear standards and security guarantees. The future of the Trans-Caspian Gas Pipeline project hinges on Turkmenistan's determination and the guarantees provided by the TurkishAzerbaijani side. While the pipeline has the potential to boost gas extraction capacity, it is unlikely that Chinese companies, who are the primary importer and investor in Turkmenistan's gas industry, will relinquish their gas imports to support the project and ensure gas reaches Europe (Tarasov, 2022). Despite differing policies and strategies, all regional actors agree on the importance of cooperation in projects involving carbohydrate resources.

Despite facing obstacles, Turkmenistan has been successful in maintaining valuable partnerships and cooperation in the region. In 2021, the country produced an impressive 79.3 b.c.m. of gas, utilizing 36.7 billion cubic meters for its own use, while exporting 31.5 b.c.m. of gas to China and 10.5 b.c.m. to the Russian Federation. Additionally, Turkmenistan exports gas to Iran and Azerbaijan, with 2.6 b.c.m. of gas being exported to the Republic of Azerbaijan via the Islamic Republic of Iran in 2023. Remarkably, the volume of gas exports has nearly tripled compared to 2022 (Azatlık, 2024). Turkmenistan is also engaged in collaborative efforts with the Republic of Kazakhstan in the areas of maritime transport and infrastructure development, including the Kazakhstan-

Turkmenistan-Iran railway and the "Turkmenistan - Kazakhstan" international transit telecommunications system. Additionally, Turkmenistan has formed a working relationship with Iraq to address the energy supply problem. A five-year agreement was signed to export 9 billion cubic meters of natural gas from Turkmenistan to the Republic of Iraq. Furthermore, in 2022, Turkmenistan signed an agreement with the Republic of Uzbekistan to export 2 billion cubic meters of natural gas (gazeta.uz, 2023).

The Körpece natural gas pipeline spans 320 kilometers from Turkmenistan to Iran's Kurtköy. Its construction finished in 1997, and it has the potential to transport gas to the Republic of Türkiye and Europe in the future. Currently, the pipeline exports about 8 billion cubic meters of gas annually to Iran, with the possibility of increasing to 14 billion cubic meters. Additionally, a smaller pipeline called Dauletabad-Sarakhs-Khangiran was constructed to supply Turkmen natural gas to the Islamic Republic of Iran's domestic market (Milani, 2016).

Turkmenistan is highly invested in the security and sustainability of its energy policies, as it boasts the fourth largest natural gas deposits in the world and relies heavily on exports for its budget income. As such, the country places great value on cooperation with key players such as the Russian Federation, China, the Islamic Republic of Iran, and a number of other states. This collaboration serves as a crucial indicator for Turkmenistan's energy policy moving forward (Kanapiyanova, 2022). To further solidify its position, Turkmenistan aims to expand its transit routes and broaden its hydrocarbon export market. The country is also focused on minimizing the involvement of external actors while maintaining a safe distance from the geopolitical ambitions of its neighbors (Muratbekova, 2020).

### **3.1.5. Russia and Natural Gas Cooperation in the Caspian**

Following the collapse of the USSR, a power vacuum emerged in the Eurasian region, leaving Central Asia and the Caspian regions in the abyss.



Consequently, Russian policy makers deemed it necessary to fill in this vacuum. In that commentators generally agree that Russia's primary focus has been on maximizing its energy security by way of consolidating its influence over the Republics of Azerbaijan, Kazakhstan, and Turkmenistan while also minimizing the intervention of non-regional powers, and preventing the US from strengthening its presence in the region (Özdemir, 2022). As such, the Russian Federation's policies towards the Caspian region prioritize maintaining its influence and safeguarding its political and economic interests (German, 2014).

In the realm of energy transportation, Russian pipelines have had a few options due to the infrastructure inherited from the Soviets in Central Asia and the Caspian region. Gazprom has maintained control over the land transportation of Central Asian exports to foreign markets. The Republic of Kazakhstan had a stable import-export relationship with the Russian Federation in the energy sector until the Ukraine war, without any major changes (Can, 2021). Meanwhile, Putin's ascend to power marked a shift in the Russian Federation's Caspian Basin policies. In April 2000, Putin's official statement of the Security Council emphasized the Russian Federation's intention to utilize its economic influence in the region to benefit its economy (Kremlin, 2000). The Russian Federation has since approved the principle of multiple pipeline routes, allowing its companies to participate in multilateral projects and compete for geopolitical influence in the Caspian region. As a result, Russian companies were able to participate in the Baku-Tbilisi-Ceyhan (BTC) project after the Russian Federation withdrew its opposition (Bluth, 2014).

Both the Russian Federation and the USA hold interests in the region, not just concerning the former Soviet states, but also regarding their stances on the Islamic Republic of Iran. The Russian Federation's foreign policy has prioritized conflict avoidance and pragmatic diplomacy to establish strong, multifaceted relationships with all states in the region. The Caspian basin's natural resources are also deemed to be crucial for the Russian Federation (Margelov, 2002).

The Russian Federation's objectives include fostering cooperation among Caspian states to promote commercial investment in the region. The strategic location of the area further underscores the significance of the "North-South" international transportation corridor project, which links St. Petersburg with the ports of Iran and India, aligning with the Russian Federation's interests (Chirciu, 2022). It's worth noting that the objective of activating the 3,000 km corridor between Moscow and Tehran is to achieve independence from third-party transit and reach the Asian market (Rashid, 2023). The sanctions imposed by the USA and the EU following the war in Ukraine have made cooperation with neighboring countries more critical. Thus, a working relationship between the Russian Federation and the Islamic Republic of Iran is deemed to be essential by the policy makers. Despite their varying perspectives on significant issues, the NATO agenda and Western sanctions have brought the two countries together on many fronts (Alagöz, 2022).

It is widely recognized that the Islamic Republic of Iran, China, and the Russian Federation form a formidable resistance bloc against NATO (Uygur, 2023). While the Russian Federation seeks to create a united front against NATO and involve the Caspian riparian countries, commentators claim that it also aims to curtail China's sway in the region (Alagöz, 2022). It is also alleged that the Islamic Republic of Iran's participation in the Shanghai Cooperation Organization is intended to convey to the Caspian riparian states the message that their individual decisions carry greater weight than those of China (Alagöz, 2022).

The competition for power between the Russian Federation and the West has made identifying strategic geopolitical export routes a crucial undertaking. Despite controlling the northwest of the Caspian Sea, which only accounts for a fraction of its energy resources, the Russian Federation has devised a plan to collaborate with the Republic of Azerbaijan to tap into production revenues from resource development and transportation revenues through joint ventures and access to the Russian oil and gas pipeline system (Mammadzada et al., 2020).

Furthermore, an agreement was signed between Russian investors and the Islamic Republic of Iran for the development of seven oil and natural gas fields, amounting to a total worth of \$4.5 billion. Meanwhile, critics like Asgarov (2022) note that this development coincides with the rising number of visits made by US and EU officials to the region. As a result, it can be inferred that competition in the region has intensified (Asgarov, 2022). Moreover, the Russian Federation is seen to be in competition with China over the exporting of the Caspian energy resources. However, despite this seeming competition, China is looking for ways to expand its influence in the region without disrupting the Russian Federation (Iskender, 2022), and Russian diplomats exert the view that the two countries need to join forces given the growing pressures from the United States and the sanctions imposed by Western countries. Therefore, it can be said that the Russian Federation overlooks China's presence in the region due to the overlapping of interests that are critical for both countries (Durmuş, 2020). Since the onset of the war in Ukraine, there has been a noticeable shift in the balance of power in the region. Some observers suggest that China's influence is on the rise, while Russia's standing is dwindling (Umarov and Kassenova, 2024).

The growing collaboration and political reconciliation among the independent Turkic states in the Caspian Basin and its immediate periphery also parallel these developments. In the same vein, the Republic of Türkiye's expanding impact in both soft and hard power elements, as well as its efforts to support integration between the Turkic states with definite steps plays into the equation (Özsoy, 2022). Some commentators quite accurately state that it may be more accurate to evaluate the Republic of Türkiye's current position vis-a-vis the Organization of Turkic States not as the Russian Federation losing ground, but as Russia giving the green light (Ongun, 2022).

Despite China's growing presence in the region, the Russian Federation remains as a more significant partner for many of the regional states. For instance, the Republic of Azerbaijan counts the Russian Federation as its

biggest trading partner after the Republic of Türkiye and Italy while the Republic of Kazakhstan exported a staggering 68 million barrels of crude oil, more than 90% of its total output, through the Russian Federation in 2021. Furthermore, the two states enjoy robust cooperation across various sectors, including agriculture, logistics, etc. (Özsoy, 2022). It is evident that the growing partnership between the Organization of Turkic States and the Republic of Türkiye in the region is perceived by the Russian Federation as non-threatening. Furthermore, the establishment of an energy hub in the Republic of Türkiye holds significant importance for Russia in its efforts to navigate around Western sanctions and gain access to energy markets. Consequently, Russia regards the Republic of Türkiye as a valuable ally in this regard (Abay, 2023; Kabakçı and Morrow, 2023).

The Russian Federation places great importance on both its economic and security interests in the Caspian region. These interests include cooperating with regional states to develop commercial and economic relationships, utilizing their own energy transfer infrastructures, and producing and transporting energy resources (Naumkin, 2001). In order to achieve these goals, the Russian Federation is actively seeking partnerships and cooperations through various organizations and institutions in the region (Kazantsev, 2008). Additionally, the Russian Federation has not abandoned the EU market it lost after the war in Ukraine and is exploring alternative routes such as those passing through Poland and Ukraine. To this end, some policy makers are also supporting the idea of the establishment of an energy trading hub in the western part of the Republic of Türkiye. These initiatives are believed to further multilateral cooperation and allow the Russian Federation to effectively market its energy resources to a multitude of markets eventually.

## **3.2. ENERGY POLICIES OF NON-REGIONAL ACTORS WITHIN THE SCOPE OF ENERGY SECURITY**

### **3.2.1. EU's Caspian Basin Energy Policies Within the Scope of Energy**

As the second largest energy consumer globally, the European Union sources a majority of its energy needs through imports, accounting for 54% of its consumption. Within this ratio, oil constitutes 90%, while natural gas makes up 66%. An overwhelming majority of EU member states import 80% of their oil and 55% of their natural gas. Future forecasts suggest that by 2030, the Union's reliance on imported natural gas will escalate to 84%, while its dependence on imported oil will soar to 93% (Ultan and Saygın, 2022). In response to the Russian invasion of Ukraine, Germany cancelled the license agreement of the Nord Stream2 pipeline project with a capacity of 55 billion m<sup>3</sup> of natural gas further increasing the risk of European energy security (Turan, 2022). For this reason, energy supply diversification and security strategy have been at the center of the EU's gas policy. As a means of advancing its strategic objectives, the European Commission has identified the construction of a Southern Gas Corridor (SGC) as an imperative, linking the EU to the gas reserves of the Republic of Azerbaijan and Turkmenistan via the Republic of Türkiye. In December of 2020, gas from the Republic of Azerbaijan was transported via pipelines directly to European markets, marking a significant achievement and a testament to the Republic of Azerbaijan's ability to safeguard its interests in the Caspian region (O'Keefe, 2021). To bolster energy security, the EU has intensified its cooperation with Turkmenistan, a producer and exporter of natural gas in Central Asia. This aligns with Turkmenistan's aim of broadening its natural gas export routes, as it possesses the world's fourth-largest reserves of natural gas after the Russian Federation, the Islamic Republic of Iran, and the State of Qatar. Thus far, Turkmenistan has exclusively supplied the Asian states (Abdülkerimov, 2024).

Meanwhile, as the war in Ukraine continues to unfold, the EU is urging the oil rich Central Asian countries to distance themselves from the Russian Federation and to participate in the sanctions (Abdülkerimov et al., 2023).

The strategic importance of the Caspian region as a source of energy cannot be overstated, particularly in light of its potential to serve as a starting point for accessing the resources of Central Asia and the Islamic Republic of Iran. The Europe-Caucasus-Asia transport corridor (TRACECA) and the interstate transportation of oil and gas to Europe (INOGATE) align closely with the European Union's vision for the region's development (Gasumova and Gasumov, 2021). The TRACECA program was initiated at a conference in Brussels in May 1993, bringing together trade and transport ministers from the original eight TRACECA countries, comprising of five Central Asian republics and three Caucasian republics. During the conference, the participants agreed to launch a European Union-funded technical assistance program aimed at developing a west-east transport corridor from Europe, across the Black Sea, through the Caucasus and the Caspian Sea to Central Asia. The TRACECA members consist of the Republics of Armenia, Azerbaijan, Bulgaria, Georgia, Kazakhstan, the Kyrgyz Republic, The Republics of Moldova, Romania, Uzbekistan, Tajikistan, Türkiye, and Turkmenistan, Ukraine. All of these countries are signatories to the multilateral agreement, with only Turkmenistan pending ratification (TRASECA, 2024). Additionally, INOGATE programme was introduced as serving an international level energy cooperation initiative which brings together the European Union, the littoral states of the Black and Caspian Seas, and their neighboring countries.<sup>15</sup> Projects carried out under the INOGATE Programme receive funding from the European Commission, and the selection of project implementers is based on relevant tenders determined by the EC, without national participation (Minenergy.gov.az, 2020).

At the onset of the war in Ukraine, in February of 2022, Europe attempted to address its energy needs by turning to United States based LNG companies.

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<sup>15</sup> See especially Kuşçu Bonnenfant (2023).

However, this initiative was not successful as the increased distance led to higher costs and internal market dynamics hindered an uninterrupted energy flow. Despite plans to rely on LNG and the EastMed Project, Europe was unable to achieve its goal and the EU was left without a viable alternative to Russian natural gas. The EU is seeking to diversify its energy supply quickly and has turned its attention to the energy producing states of the Caspian Sea.

The Caspian Sea's energy-producing states have become a beacon of hope for the EU, which is searching for new ways to diversify its energy supply in a short amount of time. EU Commission President Ursula von der Leyen visited the region in 2022 to explore three possible routes for transporting energy to the European Union, these being the routes extending from the Russian Federation, the Islamic Republic of Iran, and the Republic of Azerbaijan (Reuters, 2022). Given the unique strategic challenges posed by both Iran and Russia, the pipelines through The Republic of Georgia and the Republic of Türkiye are particularly important for European energy security. The Southern Gas Corridor, which includes the Shah Deniz2 gas field in the Republic of Azerbaijan, the South Caucasus Pipeline extension (stretching through Azerbaijan-Georgia), the Trans Anatolian Pipeline passing through the Republic of Türkiye, and the Trans Adriatic Pipeline, is viewed as a more advantageous route than the now-canceled South Stream pipeline, which would have carried Russian gas under the Black Sea to Bulgaria (Mammadzada et al., 2020). The South Stream pipeline was canceled mainly due to Bulgaria's withdrawal from the project, as it was a crucial transit country for the pipeline. In response, the Russian Federation and its regional partners, including the Republic of Türkiye, introduced a new project known as Turkish Stream, or TurkStream (Gafarli, 2015). In November 2019, the offshore section of TurkStream pipeline began delivering natural gas to Bulgaria (Budapest Business Journal, 2019). Despite disruptions in gas flow to Serbia through Hungary in 2022, the two countries continue their energy cooperation with Gazprom. Furthermore, Hungary is integrating Azerbaijani natural gas into its energy import strategy (Niňajová, 2023).

On July 18, 2022, the Republic of Azerbaijan held diplomatic talks with EU officials, including President von der Leyen, and signed a Strategic Partnership Memorandum of Understanding in the field of energy between the Republic of Azerbaijan and the EU (Koyuncu, 2022). Trans Adriatic Pipeline has transported around 10 bcm of natural gas to Italy in 2023. Additionally, TAP is linked to the Interconnector Greece Bulgaria (IGB), which began operating commercially in October 2022. This connection allows Caspian gas to flow into Bulgaria, bolstering energy security in another European state. With TAP's presence in Greece and Albania, as well as its landfall in Italy numerous opportunities exist for transporting Azerbaijani gas to broader European markets (Hasanova, 2024).

It is important to acknowledge the Republic of Türkiye's growing significance in the EU's regional energy initiatives. The country's role in Europe's gas security has gained momentum in recent years, particularly with the emergence of new pipelines transferring natural gas from the Caspian region via TANAP and its subsequent branch TAP and from the Russian Federation via TurkStream following the war in Ukraine. In response to the changing energy landscape and regional dynamics, the Republic of Türkiye has strategically positioned itself as a key transit and trade center (Biresselioğlu, 2023). In this particular situation, some commentators state that there is apprehension among the EU countries that the Republic of Türkiye might agree to the Russian Federation's proposition of creating a shared gas trading hub, enabling Gazprom to transport its gas to the Republic of Türkiye. It is also in this regard that the significance of Turkmenistan as a natural gas exporter increases. The Trans-Caspian Gas Pipeline project, which can be easily linked to Azerbaijan's current functioning infrastructure, may also be expected to transport the required energy to Europe and undermine Russia gaining monopoly over the exports to EU member states (Heldung, 2024).

It appears that after the eruption of the war in Ukraine in February, 2022, and explosions that took out two out of three Nord Stream pipelines in September



2022 (Reed, 2022), Europe has shifted its focus away from the Russian Federation when it comes to energy supply. Both U.S. LNG and Norwegian pipeline gas played a crucial role in helping Europe navigate the economic impact of gas shortages of Russian gas supplies, while supporting Ukraine (Irié et al., 2024). Prior to the war in Ukraine, EU countries imported around 155 billion cubic meters of Russian gas per year, but this amount has since dropped to below 50 billion cubic meters. To support the EU's efforts to diversify its gas supply, promote clean energy, and produce 35 billion cubic meters of biomethane and 10 million tons of hydrogen to meet demand, the goal of reducing net greenhouse gas emissions by 90% by 2040 has been set. The Republic of Türkiye is expected to play a key role in achieving these targets (Temizer, 2024).

### **3.2.2. US Caspian Basin Energy Policies Within the Scope of Energy Security**

In 1993, one year after Bill Clinton became US president, he formed a working group dedicated to the Caspian Sea (Nesibov, 2006; Meherremov, 2007). The US government's stated aim with regards to the pipelines in the area was to establish multiple routes to minimize the risk of any one country obstructing the flow of goods to global markets (Leach, 2003). The United States has sought to further certain objectives through its involvement in energy development in the Caspian region. One of these objectives is to further US commercial interests and another one is to increase exportation of oil and gas by the Caspian states (Bluth, 2014, 55)<sup>16</sup>.

According to Amirova-Mammadova (2017) the US has pursued a regional policy that encompasses three main areas. Initially, the US has been involved in efforts to resolve conflicts in the South Caucasus. Additionally, the US has directed its focus towards developing the region's energy resources and building new pipelines to connect the Caspian basin to the global markets.

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<sup>16</sup> For a recent reading of the American geopolitical interests, NATO and Türkiye, see Kahveci and Kuşçu Bonnenfant (2023).

Commentators state that the objective behind this initiative was reportedly twofold: to lessen the reliance of Western states on oil imported from the Persian Gulf, and to lessen the Russian Federation's dominance over the transportation networks in the area. Again in the same vain, commentators also state that the US government has strived to isolate and restrict Tehran's involvement in constructing new energy transportation infrastructure in the Caspian region by actively intervening in the area (Amirova-Mammadova, 2017).

Energy is a fundamental element of United States foreign policy. Energy resources fall into the second and third categories as a means of supporting both the security of allies and global energy markets (Kalehsar, 2021). Since the fall of the Soviet Union, the Caspian region has been a focal point of competition particularly led by the US and the Russian Federation, and more recently China. The states in the Caspian region that regained their independence after the transition from a bipolar world to a unipolar world have attracted the attention of neighboring states like the Russian Federation and the Islamic Republic of Iran, as well as regional and global competitors. To this end, the USA, European states, and the Republic of Türkiye have developed policies for the Caspian region, which are closely tied to energy resources. These policies can be evaluated through energy resources. For this reason, it is impossible to think that the mentioned actors have developed any policy regarding the South Caucasus and the Caspian region, independent of the Caspian and ignoring the energy and strategic situation in the region (Nesibov, 2006).

Following the end of the Cold War, the US government assessed the potential of the Caspian basin as a viable energy source to compete with the Arabian Peninsula. To achieve this, the US allegedly sought to politically and economically isolate the former Soviet states from the Russian Federation, with a view to develop a new fuel and transportation system in the Caspian basin and to enhance the flexibility and sustainability of the global energy system (Mammadzada et al., 2020). It is in this vain that the US government is said to

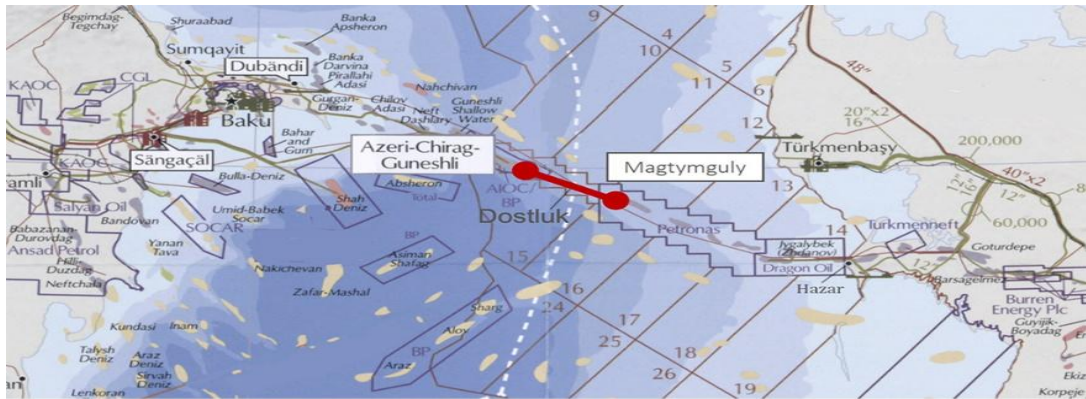
be concerned about the impact of Russian power in the region. The US efforts in return, are paralleled by the efforts of the Russian Federation, to establish increasing control over the pipe networks (Bluth, 2014).

In other words, both states are vying for economic advantages from the Caspian energy resources and are seeking to determine the best routes for energy transport. The USA is said to supplement the resources it imports from the Middle East with the Caspian energy and to transport it to western markets without relying on the routes running through the Russian Federation and the Islamic Republic of Iran (Kleveman, 2004). Meanwhile, the Russian Federation is being charged with using energy resources as a diplomatic 'stick' as revealed by the discussions centering around the crisis in the Ukraine (Kleveman, 2004).

North–South Corridor, is a railway route connecting the Russian Federation to the Indian Ocean via the Islamic Republic of Iran. The Project is gaining importance as a key transportation route for Moscow. However, the success of this project depends on the condition of infrastructure and the overall situation in Iran, presenting a challenge for the Kremlin. As the Islamic Republic of Iran is said to lack the resources to fund the corridor, substantial investments are required for its development, including funding for roads, ports, depots, and related infrastructure, which may necessitate repeated investments from the Russian Federation (Smagin, 2023). It is in this context that some of the regional players, headed by the Republic of Azerbaijan emerged as a significant contributor and potential transit point for the United States. The US efforts concentrate on establishing an alternative to the North-South Corridor which is currently under Russian control. To achieve this, an East-West Corridor was envisaged, with the Baku-Tbilisi-Ceyhan Oil Pipeline and Baku-Tbilisi-Erzurum Natural Gas Pipeline as its key components. To recap, the goal of this project is to transport oil and natural gas from Central Asia and the Caspian Sea through a route that is not subject to the influence of Russia and Iran. In addition, the Trans-Caspian Natural Gas Line Project has been proposed (Telli, 2015). During the Clinton administration, joint investments were made by the American

and Russian companies with a view to establish energy resource transportation networks within the Russian Federation and throughout the Caspian area (Kalicki, 2001). An intergovernmental framework contract formalizing BTC's position was signed between the presidents of the Republics of Azerbaijan, Georgia, and Türkiye during the OSCE summit on November 19, 1999. The Clinton government was also said to strongly support the development. The ceremony for BTC took place on September 26, 2002. As a result, the Republic of Azerbaijan has been further strengthened. Additionally, the Republics of Türkiye and Georgia have enhanced their strategic influence in the region (Kısacık, 2021).

**Map 8. Proposed connector map**



**Source: O'Byrne, 2021**

Efforts were made by the USA and the UK to broaden energy pathways from the Caspian Sea to enhance the maneuverability and sustainability of the global energy system. The key concern was determining the optimal route to the West. In 1999, the Republic of Azerbaijan launched construction on the Baku-Supsa oil pipeline, its inaugural oil line which passes through Georgia and leads to the West. The Azerbaijan International Operating Company (AIOC), a collaboration of 11 oil firms from the USA, UK, Japan, Norway, the Russian Federation, the Republic of Türkiye, and the Kingdom of Saudi Arabia, provided support for the construction of the Baku-Supsa pipeline. The pipeline's capacity, initially 115,000 barrels per day, was subsequently increased to 220,000 barrels. The construction of this pipeline, which is one of the alternatives for the export of

hydrocarbon resources from the Caspian Sea, represented a significant accomplishment in ensuring the energy security of the Republics of Azerbaijan and Georgia (Mammadzada et al., 2020).

A proposal from a US-based venture company suggested the transportation of natural gas extracted from Turkmenistan's reserves to Europe via the Caspian Sea. The plan involves a route starting from the Magtymguly oil field situated in the Turkmenistan sector, traversing the middle of the Caspian Sea, and passing through the Azeri-Chirag-Guneshli fields of the Republic of Azerbaijan. Accordingly, also a relatively brief "connector" pipeline (measuring 48 miles) can be constructed to link up with the oil field. The pipeline, which will have a capacity to transport 10 to 12 billion cubic meters of gas per year, will carry not only gas from the Turkmenistan field but also "associated gas" emitted as a result of oil drilling. This gas, also known as "flare gas", is currently is being burned; this is a practice that both wastes gas and contributes to climate change. Adherents of the project state that if completed, this project can contribute addressing the Turkmenistan's local supply shortages, with any surplus being exported to The Republic of Georgia and the Republic of Türkiye via the existing gas transit pipelines in the region (O'Byrne, 2021).

At the outset, the United States expressed support for the notion of creating a trans-Caspian link between the Republic of Azerbaijan and Turkmenistan, with the aim of transporting gas to Europe as a substitute for Russian gas. Nevertheless, perhaps owing to the fact that the US is now a significant producer itself, the initiative seems to have lost its weight as a primary concern (Guliyev et al., 2019).

### **3.2.3. China's Caspian Basin Energy Policies Within the Scope of Energy Security**

China is one of the world's top energy consumers, and is reportedly "committed to transitioning from non-renewable sources to renewable energy in its quest to achieve carbon neutrality by 2060". To this end, China is reportedly taking the

necessary steps "to ensure the consistent supply of natural gas", which is a critical element of its overall strategy. China is also observed to take steps to build connections with the neighboring countries, with the goal of accessing the abundant energy resources of Central Asia and the Caspian Sea (Kalehsar, 2021).

Exxon Mobile Energy Company's data predicts a 20% increase in global energy demand by 2040 with China and India accounting for roughly half of this surge (Exxon Mobile, 2019). Consequently, China has turned to the Central Asian states to fulfill its growing energy needs and has initiated critical energy projects with the Russian Federation, and other Central Asian countries: the Republic of Kazakhstan, Turkmenistan, and Uzbekistan. These projects are expected to cater a significant portion of China's energy requirements. The Turkmenistan-China Natural Gas Pipeline, Kazakhstan-China Oil Pipeline, and Turkmenistan-China Natural Gas Pipeline's extension to the Uzbekistan-China Natural Gas Pipeline are the primary conduits through which China meets a considerable portion of its energy demands, with the Turkmenistan-China pipeline responsible for 81% of China's natural gas imports (Kedikli and Çiçek, 2020). Additionally, China imports carbohydrates from the Russian Federation to diversify its energy resource imports and reduce its dependence on Middle Eastern resources (Wei, 2010). Throughout the Soviet period, Turkmenistan's pipelines were primarily directed towards Russia, which held a monopoly over Turkmen resources. Following its independence, Turkmenistan sought to gain control over its resource exploitation. This led to strained relations with the Russian Federation due to restrictive agreements governing their commercial partnership and a lack of investment in updating outdated infrastructure. Additionally, the 2009 pipeline explosion incidents further eroded trust between the two countries, while China offered substantial support for Turkmen gas market development. Subsequently, bilateral relations between Ashgabat and Beijing have steadily strengthened, positioning Turkmenistan to become China's main natural gas supplier (Di Placido, 2014).

Despite being geographically distant from the region, China has shown a keen interest in the Caspian Basin's energy resources due to its growing economy's energy needs and its desire to maintain its position as a global power. However, it is also noteworthy to state that while China has developed good relations with the Caspian states to increase its influence in the region, it has been careful not to take any steps that could harm its relations with the Russian Federation, especially after establishing a new 'strategic partnership' in the new post-Cold War era. With the Chinese economy growing rapidly together with the need to accelerate energy imports, China's interest in the Caspian energy has been on the rise. In 1997, China National Petroleum Corporation (CNPC) acquired a majority stake of 60% in the Zhanazol and Kekiyak fields located in Aktobe, the Republic of Kazakhstan. Furthermore, CNPC increased its shares by 25.4% in 2003, thereby gaining control of two significant gas fields in the Aktyubinsk region. Additionally, CNPC has invested in the construction of a pipeline that spans 2,900 kilometers from Atyrau to Alashankou on the Sino-Kazakh border via Kenkyiak (Bluth, 2014, 60).

There are several compelling reasons why the Central Asian states situated on the eastern coast of the Caspian are of great importance to China. Firstly, this region enables the People's Republic of China to broaden its resource base and to take a more proactive stance in energy pricing policies. Moreover, this area is deemed to be more dependable than the Middle East and facilitates on land transportation. Conversely, China has the capacity to offer substantial financial aid, extensive know-how, and support for the amelioration of certain aspects of the Central Asian energy sector (Eder, 2014).

The Central Asia-China Gas Pipeline (CACGP) spans 1,833 kilometers and connects Turkmenistan, the Republics of Uzbekistan, and Kazakhstan to China. Recently, its capacity has been increased from 55 billion cubic meters/year to 70 billion cubic meters/year. This pipeline provides a significant opportunity for the Central Asian Republics to increase their national income, as they have few options for gas exports due to competition with the Islamic Republic of Iran and

the Russian Federation. However, China may potentially hold a monopoly power position. The proposed Trans-Caspian Pipeline project could be viewed as a competition for limited gas supplies by China. Additionally, Turkmenistan's delay in production due to emergence of new consumer markets and increasing demand may lead to a contraction in supply and higher gas prices for China (Morrison, 2018). Despite this popular belief, China has made an announcement that it may be able to construct the Trans-Caspian Gas Pipeline project with a consortium made up of both European and Chinese companies. The country has stated that it is prepared to lay the 300-kilometer pipeline to the Caspian Sea, as well as build all necessary infrastructure, including drilling the required number of natural gas wells, designing and building gas treatment facilities and compression stations to provide clean gas to the pipeline. Meanwhile some critical commentators suggest that this stance stands in opposition to the previous assumptions (Cutler, 2022).

China has significant strategic interests in Central Asia, with regional stability and border security being crucial for social and economic well-being. Central Asia also serves as an important source of oil and natural gas for China's energy needs. The Shanghai Cooperation Organization (SCO), initially known as the Shanghai Five, plays a key role in Beijing's regional strategy and is a successful component of China's approach to good neighbor relations (Hu, 2004). As China's interests in the region evolved, being one of the regional organizations the Shanghai Five's mandate expanded to encompass trade and economic development. The organization declared that it was established with the primary objective of addressing issues related to border security, separatism, and extremism. Eventually, the Shanghai Five was rebranded as the Shanghai Cooperation Organization in 2001. China has also established bilateral relations with neighboring countries in areas such as culture, education, sports, and health, in addition to economic and political ties. Various agreements on cooperation in multiple fields have also been signed (Bossuyt, 2022).



Geopolitical and economic motivations are the main reasons behind the vision of a more assertive China, as promoted by the China's President Xi (McBrian et al., 2023). In this context, China's Belt and Road Initiative is a massive undertaking that spans multiple sectors and will have a far-reaching impact. It involves a staggering investment of one trillion dollars and encompasses a population of over four billion people. The project's goal is to connect Asia to Europe, covering 65 countries and 70% of the world's population (Akçay, 2017). Rather than a single route, the plan calls for the construction of six economic corridors that will link Asia and Europe. By prioritizing this project in its foreign policy, China is significantly increasing its influence in regions such as the Caspian Basin, where energy resources are abundant, as well as on the global stage (Umbach, 2019). The Belt and Road initiative, also known as the Silk Road initiative, is expected to have a significant impact on energy production, supply, and security in the Caspian Region (Naghiyeva, 2019). The utilization of this line is anticipated to foster robust and mutually beneficial relationships throughout Eurasia. Specifically, leveraging the strategic positions of Central Asia and the Caucasus for economic gain is expected to promote lasting progress in those states. Ultimately, this initiative is projected to enhance cohesion among regions and countries (Kaya, 2022).

#### **3.2.4. The Republic of Türkiye's Caspian Basin Energy Policies within the Scope of its Energy Security**

The Republic of Türkiye's strategic geographical location places it at the crossroads of energy corridors, where natural gas supply sources, markets, and continents meet. As a politically and economically stable NATO member, the Republic of Türkiye is deemed a reliable state for energy investments. With a robust energy infrastructure and essential strategic assets such as pipelines and natural gas storage facilities, the Republic of Türkiye has the potential to emerge as a leading gas center (Ağar, 2023). Considerations must be made as the Republic of Türkiye has the potential to become a significant natural gas trade hub. However, due to the country's geopolitical situation and regional tensions, there is a risk that political disagreements and regional conflicts may

impact the gas supply (especially during the winter months), thus hindering the Republic of Türkiye's ability to serve as a transfer hub. To avoid such issues, a proactive and multi-dimensional foreign policy approach is essential to address the potential challenges (Biresselioğlu, 2023).

The Republic of Türkiye's objective is to establish itself as a key energy trading hub in the global energy market, akin to the Title Transfer Facility (TTF) in the Netherlands. This would involve facilitating the exchange of natural gas, received from various sources via pipeline or as liquefied natural gas (LNG). The Republic of Türkiye's unwavering commitment to this initiative is evidenced by the recent agreement reached between the Republic of Türkiye and the Russian Federation. The agreement outlines a comprehensive roadmap for the establishment of a natural gas center in the Republic of Türkiye and the subsequent implementation of the project, in accordance with the said roadmap (Abay, 2023). The Republic of Türkiye also plans to establish a gas trading hub by partnering with Turkmenistan to expand its sources beyond the Russian gas (TASS, 2024). Currently, the Republic of Türkiye's natural gas infrastructure relies on two storage facilities: Silivri, which holds 4.6 billion cubic meters, and Tuz Gölü, which holds 1.2 billion cubic meters. The Republic of Türkiye aims to increase Tuz Gölü's capacity to 8.8 billion cubic meters by 2028, expanding the total storage capacity to 14.4 billion cubic meters (Kabakçı, 2024). In this regard on March 1, 2024, Türkiye and Turkmenistan signed a declaration of intent regarding the importation of Turkmen gas. Three potential routes for importation were considered, namely via Iran through a "swap" arrangement, through a "swap" between the Islamic Republic of Iran and the Republic of Azerbaijan, or via a pipeline under the Caspian (Erkalan, 2024; Kachemaykin, 2024).

The Republic of Türkiye has recognized the Eastern Mediterranean as another crucial area for establishing itself as a prime energy trade hub. This recognition comes from the region's proximity to highly promising territories, such as the Caspian Sea, the Russian Federation, and the Middle East. The Republic of Türkiye's energy policy in the Eastern Mediterranean mainly focuses on

exploration. Another significant aspect is participating in pipeline projects that transport natural gas extracted from regional states to international markets (Sarıkaya and Öztopal, 2022).

The European Union once looked to the Eastern Mediterranean as a potential solution to decrease its reliance on Russian gas.

In 2020, there are efforts led by Israel, towards for an Eastern Mediterranean (Eastern Mediterranean-EastMed) natural gas pipeline. Israel, Greece and Cyprus have signed a tripartite agreement, laying the groundwork for a 1900-kilometer pipeline that will transport natural gas from the Eastern Mediterranean to Europe (Euronews, 2020). During the same period, certain EU countries, particularly France, Greece, and the Greek Cypriot side, responded to Republic of Türkiye's exploration and drilling operations in the Eastern Mediterranean by criticizing the drilling activities. From time to time, Egypt and Israel also joined these countries in criticizing Republic of Türkiye's energy search efforts in the Mediterranean by signing agreements with one other. The EU has also denounced the Republic of Türkiye's drilling exploration and has expressed its intention to impose sanctions in response (Alan 2020).

Meanwhile, the Republic of Türkiye's ethnic and linguistic connections with the Caspian region is said to have fostered a special bond with the region's countries. It is also contended that following the fall of the Soviet Union, the Republic of Türkiye was quick to establish relationships with new states and was the first country to recognize their independence. The Republic of Türkiye's strategy rested on building lasting and positive connections with these republics. By pledging cooperation across various sectors, the Republic of Türkiye strengthened its ties with the region in the years since independence (Raimondi, 2019). The Republic of Türkiye, particularly through the Organization of Turkic States, has established an alternative cooperation platform for the Turkic nations. Additionally, a close study of the news in Chapter IV suggest, that the Republic of Türkiye's advancements in the defense industry serve as a crucial safeguard for the security of these states.

References are made especially to the advanced technological solutions offered by the Republic of Türkiye's relatively more developed defense industry (Yüce, 2022).

Among the stated aims and objectives of the Organization of Turkic States is to increase cooperation between the member countries by way of reference to their shared ethnicity, history, and civilization, all of which are expected to give way to a series of multifaceted partnerships. Again according to its stated aims, this partnership is expected to find support from the grassroots. As a result, bilateral and multilateral collaborations are expected to thrive within the organization, providing the Republic of Türkiye with ample opportunity to enhance its cooperation with the fellow member states.

The Republic of Türkiye currently imports almost 70 percent of its energy from overseas, at an annual cost of approximately \$60 billion. The Republic of Türkiye is actively seeking reliable and eco-friendly energy sources that are affordable and minimize the risk of supply disruption. Given its dependence on energy imports, the Republic of Türkiye, like other states in a similar situation, needs to focus on diversifying its energy resources. The Republic of Türkiye's unique geographic location enables the transportation of hydrocarbon resources from the Caspian Basin and the Middle East to Europe (Guney, 2016).

According to a vast majority of commentators, the Republic of Türkiye has implemented successful strategies in the Caspian Region, resulting in the achievement of its goal to benefit from three natural gas pipelines and one oil pipeline. Since 1987, the Western Route has transported gas through Ukraine, Romania, Bulgaria, and the Republic of Türkiye. Additionally, the Republic of Türkiye has been utilizing the Iran-Türkiye pipeline since 2001, the Blue Stream pipeline since 2003, and the Baku-Tbilisi-Erzurum pipeline since 2007 to supply energy. With the natural gas export pipeline from Türkiye to Greece operating since 2007 and the BTC crude oil pipeline operating since 2005, it is estimated that approximately 85 percent of the Republic of Türkiye's annual demand of 50

billion cubic meters is imported through these pipelines (Ediger and Durmaz, 2016).

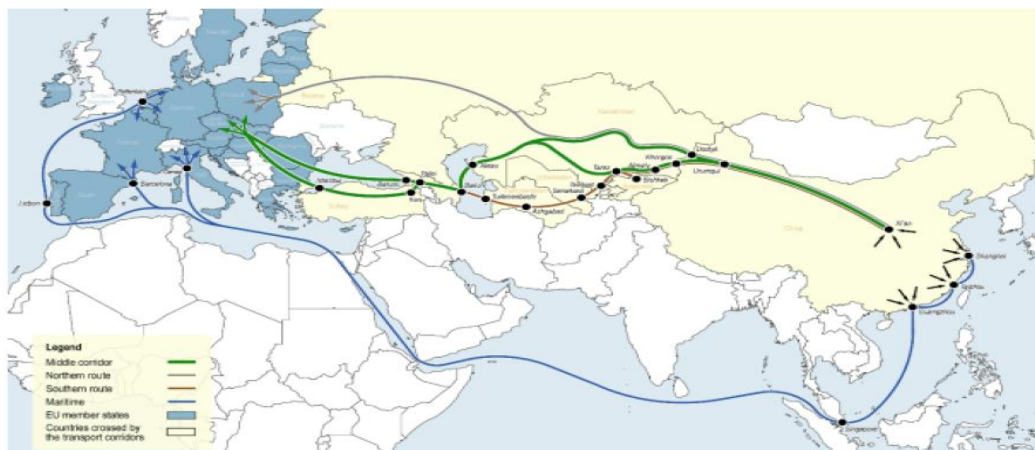
The Republic of Türkiye is also actively building stable bonds with the Republic of Kazakhstan. The Republic of Türkiye's commitment to forging a close relationship with the Republic of Kazakhstan led to the signing of the Strategic Partnership Agreement in 2009. Subsequently, the High Level Strategic Cooperation Council was established between the Republic of Türkiye and Kazakhstan in 2012 (Riamondi, 2019). Additionally, the Republic of Azerbaijan also holds significant importance for the Republic of Türkiye's energy security and its potential as a transit hub. It ranks third on the Republic of Türkiye's list of natural gas importers, accounting for 15% of the total imports. Interestingly, nearly 50% of the Republic of Azerbaijan's exports to the Republic of Türkiye are made up of natural gas (Aghabayli, 2020). The current and projected imports from the Shah Deniz field may have the potential of reducing its reliance on the Russian Federation and the Islamic Republic of Iran in terms of its energy supply. BTC, TANAP, and TAP projects are also seen as major steps in becoming a significant energy hub in the region (Kardaş, 2014).

The feasibility of the Republic of Türkiye becoming a crucial energy hub for Europe by utilizing its potential gas resources via the Southern Gas Corridor has been a topic of discussion. The EU has placed significant emphasis on incorporating Mediterranean gas reserves as part of the energy resources that could be integrated through the SGC and the Republic of Türkiye (South, 2016). In 2010, the USA conducted drilling activities in the Eastern Mediterranean that led to the discovery of natural gas reserves in Eastern Mediterranean. The estimated extractable gas in the maritime areas of Cyprus, Gaza, Israel, Lebanon, and Syria is 122 trillion cubic feet (about 3420 billion cubic meters). Further drilling studies unveiled that the Aphrodite field offshore Cyprus and the Tamar and Leviathan fields off the coast of Israel contain approximately 127 billion cubic meters, 300 billion cubic meters, and 620 billion cubic meters of gas, respectively. Some coverage in the press indicated that, these discoveries

raised limited concerns, about the impact that they might have on the balance of power in the region. The discovery of the Zohr gas field off the coast of Egypt, estimated to have a reserve of 840 billion cubic meters, has further complicated the situation (Winrow, 2016).

The Republic of Türkiye is actively involved in the Middle Corridor project, which seeks to establish a connection between the Republic of Türkiye and China through Georgia and Azerbaijan, the Caspian Sea, and beyond to the Republics of Kazakhstan, Turkmenistan, Uzbekistan, and the Kyrgyz Republic. This initiative not only aims to revive the historic Silk Road but also intends to be executed in tandem with the Belt and Road Initiative BRI project (Shenggao, 2023).

### Map 9. The Middle Corridor Map



**Source: Mammadov, 2024**

The Republic of Türkiye's significant location and the new possibilities for its emerging as a new prominent energy hub (Gasumov and Gasumov, 2021) has made it to the press coverage. Nevertheless, it is crucial for Ankara to formulate a comprehensive energy and economic strategy, which should take into account competitions and geopolitical risks, prioritizing the diversification of energy resources. All in all, it is necessary to ensure energy security and economic stability while reducing dependence on foreign energy resources (Şahin and Belet, 2023).

## **Conclusion**

This section attempted to revisit the current state of affairs in regional cooperation. In so doing, it attempted to revisit the individual countries' policies and make reference to the agreements being put in place in the last thirty years. Given the rising significance of energy and the multitude of stakeholders in the area, it is common for bilateral and trilateral relations to culminate in an agreement. However, the region's critical strategic significance and its hosting a multitude of hotspots also influence the strategic maneuvers of the regional and global players. The Trans-Caspian Gas Pipeline has now gained more of an importance for the national interests of the Republics of Azerbaijan, Türkiye, and Turkmenistan. In this vein, the Organization of Turkic States has also emerged as an international organization promoting cooperation between the Turkic states in the region as a network to further strengthen their ties in various fields including the energy sector. Particularly, the Middle Corridor exemplifies the progress made in this vain.

## CHAPTER 4

### MEDIA CONTENT ANALYSIS OF THE SUMMIT MEETINGS HELD FOR THE IMPLEMENTATION OF THE TRANS CASPIAN GAS PIPELINE

A new strand in the literature contends that the "geo-political power axis" has shifted from the US-West line to Asia and that the geopolitical context of the Central Asian Turkic Republics has gained significance.

The Organization of Turkic States which encompasses approximately 3% of the world's total land area, shares borders with the European Union in the west, the Russian Federation in the north, China in the east, and the Middle East in the south. Likewise, the Republic of Türkiye's access to the global sea lanes through the Mediterranean and its geographical proximity to North Africa is said to provide additional strategic advantages to the existing and potential partnerships in the region (Demir, 2022). This chapter will examine the possible role of the Organization of Turkic States in forging and strengthening the relations between the region's states and its reception in various different countries' semiofficial and official news outlets.

#### Map 10. Geo-political location of the Organization of Turkic States

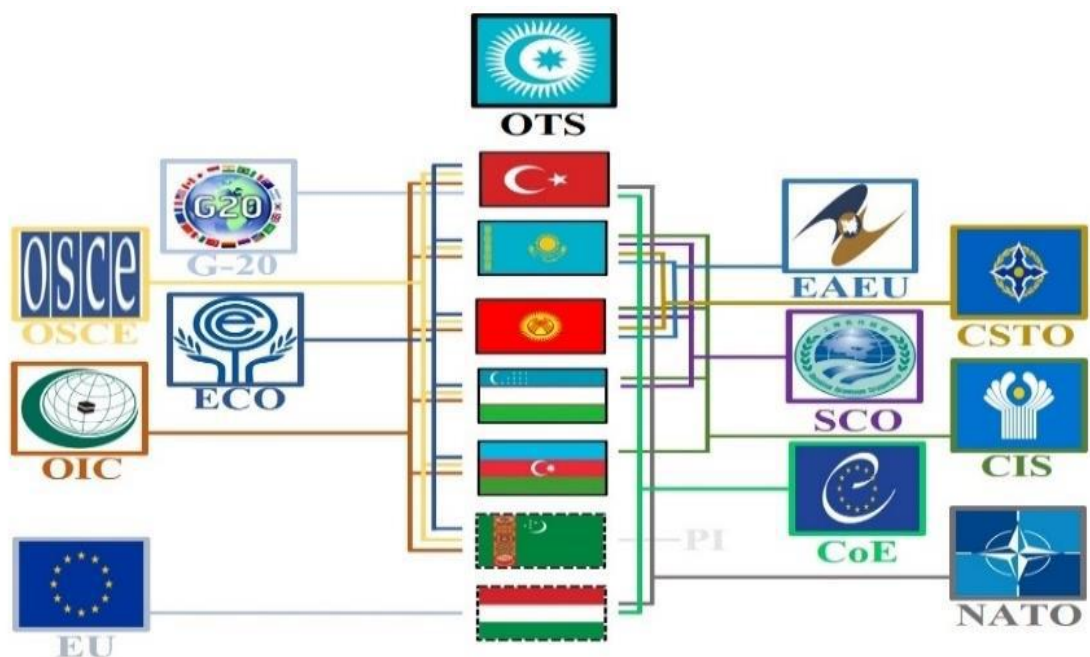


Source: Demir, 2022.



The Organization of Turkic States and its member states engage with multiple international organizations. The member states, as well as Turkmenistan, who serves as permanent independent observer state, are part of the Economic Cooperation Organization (ECO), the Organization of Islamic Cooperation (OIC), and the Organization for Security and Cooperation in Europe (OSCE). All member states, with the exception of the Republic of Türkiye, are members of the Commonwealth of Independent States (CIS). Likewise, the Republic of Kazakhstan and the Kyrgyz Republic are the only member states of the Collective Security Treaty Organization (CSTO) and the Eurasian Economic Union (EAEU), which are based in the Russian Federation. The Republic of Uzbekistan, the Republic of Kazakhstan, and the Kyrgyz Republic are all members of the China-based Shanghai Cooperation Organization (SCO). The Republic of Türkiye is a G-20 country, while the Republic of Hungary is a member of the European Union (EU). Both states are also members of the North Atlantic Treaty Organization (NATO) and the Council of Europe (CoE) (Demir, 2022).

**Figure 2. The Organization of Turkic States and Interaction of its members with other international organizations**



Source: Demir, 2022.

Following the dissolution of the Soviet Union, the Republic of Türkiye was among the actors that attempted to position themselves to fill in the void left by the Soviets. This decision not only strengthened diplomatic relations but also heightened discussions of Turkic countries' unity. In this process, semi-governmental and governmental organizations also played a role.

To give an example, with the establishment of Turkish Cooperation and Coordination Agency (TİKA) in 1992, Türkiye focused on boosting the economic activities in the region. Meanwhile, official and semiofficial agencies such as TURKSOY, TRT Eurasia, and the Summit of Turkic Speaking States attempted to further develop an array of cultural foreign policy initiatives. Of special note is the change of the name of the Organization at the 8th Summit of the Heads of State of the Turkic Council (held in Istanbul on 12 November 2021) and the determination of what steps to take to further the relations between the Turkic states with the Turkic World 2040 Vision Document (Emişan and Öztürk, 2022)

These cultural diplomacy initiatives in return, have been built around the concept of a cultural "Turkic realm from the Adriatic to the Great Wall of China", a Turanian idea which has resurfaced in the region since the early 1990s.

Amongst these cultural establishments, the Turkish Council was established on March 10, 2009 in Nakhchivan as part of the Nakhchivan Agreement, which prioritizes cooperation in political, economic, cultural, and other areas among its founding member countries including the Republic of Türkiye, the Kyrgyz Republic, the Republics of Kazakhstan, and Azerbaijan (OTS, Turkish Council, 2023). The primary objectives of the Turkish Council are to deepen collaboration among member states, contribute to global and regional peace, and uphold principles of human rights, democracy, and good governance. Additionally, it is anticipated that contributing and supporting economic, commercial, distribution, and energy collaborations, which act as the locomotive of integration in the Turkic world, will also contribute to economic integration in the region (Beyaz and Aktan, 2023). Amongst the stated aims is to embrace shared values in foreign affairs, set standards for business investments, promote knowledge exchange in science and culture, and enhance social

connections via mass media. Aspects like shared heritage, customs, and identity offer a solid foundation for these initiatives (Gök, 2022).

The Organization of Turkic States also played a most important role in this process. This chapter will attempt to offer an account of its summit meetings in an effort to write a first history of its development and to study its reception in various different states' news outlets.

In so doing, newspapers based in the Republic of Azerbaijan, the Russian Federation, the Republic of Türkiye, Turkmenistan, and the USA were reviewed. The significance of examining these summits lies in the fact that they often serve as a platform for showcasing the political views of their respective states.

In this respect, the news contents of highest-circulation newspapers of the Republic of Azerbaijan, the Republic of Türkiye, the Russian Federation, Turkmenistan and the USA were reviewed with a view to understand how the individual efforts of the regional powers were treated in the media coverage in these countries.

In so doing, the study specifically focused on online media coverage from three major newspapers and news agencies in the Republic of Azerbaijan, the Republic of Türkiye, the Russian Federation, Turkmenistan, and the U.S.A. Here, the country names should be taken as indicating the geographical milieu of the newspapers. The review covers the time period from the initial trilateral First Summit meeting of Heads of State held in Turkmenistan's 'Avaza' region from 14 December 2022 until 29 April 2024<sup>17</sup>. In the review process, Fraenkel and Wallen (2006) was used as a general frame of reference. Firstly, the news outlets were specified. Second, the unit of analysis (what is to be analyzed in the related material, whether words or phrases) was specified. Thirdly, categories were determined based on the discussion in the previous chapters. Finally, all content was analyzed with a qualitative approach (Fraenkel and Wallen, 2006). In the content analysis, 'whether the Trans-Caspian Gas Pipeline project can be viewed as a catalyst for regional cooperation or not' was a key

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<sup>17</sup> The day of submission for the present thesis was set as the 29th April 2024.

concern. Special attention was paid to the news articles discussing the project of bringing Turkmen natural gas to the Republic of Türkiye via a new infrastructure underneath the Caspian Sea or via other means (i.e. swap deals or in the form of LNG) in relation to the promotion of regional cooperation.

How this issue was treated in the said state's news outlets was also a key component of the analysis. Information was collected with a concentration on news and newspaper articles about the four summit meetings. To recapitulate, media content analysis covered news that appeared on the following meetings/summits:

1. Türkiye-Azerbaijan-Turkmenistan trilateral First Summit meeting of Heads of State held in Turkmenistan's 'Avaza' region on 14 December 2022
2. The Extraordinary Summit of the Organization of Turkic States Held in Ankara
3. The 3rd Meeting of Ministers Responsible for Energy of the Organization of States held on 30 March 2023 in Budapest, the capital of Hungary.
4. 10th Summit Meeting of the Organization of Turkish States with the slogan "Turkish Century" on November 3, 2023 in Astana, Kazakhstan.

For the Azerbaijan news outlets, news articles from four different media outlets were examined: "Azertac" being Azerbaijan's official news outlet, "Azərbaycan", "Yeni Müsavat" and "İki Sahil" newspapers. It is important to note that "Yeni Müsavat" is regarded as having a critical angle in Azerbaijan. Review involved "Azertac", "İki Sahil", "Yeni Müsavat", and "Azərbaycan", all of which are in Azerbaijani Turkish.

Turkish media outlets have also been examined. "Sabah", "Sözcü" and Hürriyet" newspapers were reviewed.<sup>18</sup>

Russian media outlets have also been examined "Известия" [Izvestiya], "Коммерсантъ" [Kommersant], "Ведомости" [Vedomosti] and official state

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<sup>18</sup> Also note that "Anadolu Ajansı", is regarded as the key news distributor agency.

news agency of Russia “ТАСС” [TASS] are amongst the Russian media outlets that have been examined.

Amongst Turkmenistan’s news outlets studied are the state's official news agency “Türkmenistan Bugün”, and newspapers “Нейтральный Туркменистан” [Neytralni Turkmenistan] (printed in Russian), “Türkmenistan”, and “Watan” both printed in Turkmen language.

Finally, “the New York Times” and “the Wall Street Journal” are the US based media outlets that I examined for the said summit meetings.

#### **4.1. MEDIA CONTENT ANALYSIS OF THE TRIPARTITE SUMMIT OF THE REPUBLIC OF TÜRKİYE-THE REPUBLIC OF AZERBAIJAN-TURKMENISTAN HEADS OF STATE IN THE MEDIA**

The content analysis covers the period between on 14 December 2022 and 17 March and 18 April 2024, starting from the date of the Türkiye-Azerbaijan-Turkmenistan trilateral First Summit meeting of Heads of State (hereinafter the First Summit Meeting) held in the 'Avaza' region of Turkmenistan.

##### **4.1.1. Content Analysis of News Concerning Energy Security in Media Outlets Based in the Republic of Azerbaijan Regarding the Tripartite Summit of Heads of State Held in the Avaza Region of Turkmenistan**

Table 1. shows the result of the analysis conducted on news about the First Summit Meeting gathered from selected Azerbaijani media outlets.

**Table 1. The number of news about the First Summit Meeting in Azerbaijani newspapers.**

<b>Newspapers and The News Agency</b>	<b>Total News about The First Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Azərbaycan	26	11
Yeni Müsavat	24	12

İki Sahil	51	23
Azertac State News Agency	10	9
<b>Total</b>	<b>111</b>	<b>55</b>

Upon examination, Table 1 reveals that Azerbaijani newspapers reported a total of 111 news items regarding the First Summit Meeting. The breakdown shows that Azerbaijan Newspaper published 26 news items, Yeni Müsavat newspaper published 24, İki Sahil newspaper published 51, and Azertac State News Agency published 10 news regarding the First Summit Meeting. Notably, İki Sahil newspaper reported the most news items about the summit, while Azertac State News Agency reported the least.

An analysis was conducted on news articles related to the Trans-Caspian Gas Pipeline project, focusing on energy security and other concerns. Table 1 revealed that Azerbaijan newspaper featured 11 articles, İki Sahil newspaper featured 23 articles, Yeni Müsavat newspaper featured 12 articles, and Azertac State News Agency featured 9 articles on the topic of energy security. İki Sahil newspaper had the highest number of articles discussing energy, while Azertac State News Agency had the lowest.

#### **4.1.2. Content Analysis of News Concerning Energy Security in Media Outlets Based in the Republic of Türkiye Regarding the Tripartite Summit of Heads of State Held in the Avaza Region of Turkmenistan**

Table 2. shows the result of the analysis conducted on news about the First Summit Meeting gathered from selected Turkish media outlets.

#### **Table2. Number of news about the First Summit Meeting in Turkish newspapers**

<b>Newspapers and the News Agency</b>	<b>Total News about The First Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Hürriyet	11	7
Sabah	10	6
Sözcü	1	0

<b>Total</b>	<b>35</b>	<b>21</b>
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As seen in Table 2, 35 articles appeared in the Turkish press on the First Summit Meeting. “Hürriyet” published 11 articles, while “Sabah” published 10. On the other hand, “Sözcü” newspaper had the smallest coverage with just one article. Thus, Hürriyet emerged as the leading publisher of news regarding the First Summit Meeting, whereas “Sözcü” newspaper stayed behind in terms of coverage.

According to Table 2, the news covering the issue of energy security in Hürriyet numbered 7, in “Sabah” newspaper 6. None appeared in “Sözcü”.

#### **4.1.3. Content Analysis of News Concerning Energy Security in Media Outlets based in Russia Regarding the Tripartite Summit of Heads of State Held in the Avaza Region of Turkmenistan**

Table 3. shows the result of the analysis conducted on news about the First Summit Meeting gathered from selected Russian media outlets.

**Table3. Number of news about the First Summit Meeting detected in Russian broadcasting organizations**

<b>Newspapers and the News Agency</b>	<b>Total News about The First Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Известия (Izvestiya)	3	0
Коммерсантъ (Kommersant)	3	3
Ведомости (Vedomosti)	2	2
ТАСС (Tass Russian News Ajansı)	17	13
<b>Total</b>	<b>25</b>	<b>18</b>

A review of Russia based newspapers revealed that a total of 28 news items appeared on the First Summit Meeting. The newspaper “Izvestiya” featured 3 news pieces, while “Kommersant” and “Vedomosti” both had 2 and “Tass” Russian News Agency had the highest number of articles with 17 news. It should be noted that the total number of news items about the meeting in

Russian newspapers was lower compared to Azerbaijani and Turkish press. Additionally, the issue of energy security was covered in 18 news items, with zero in “Izvestiya” newspaper, 3 in “Kommersant” newspaper, 2 in “Vedomost” newspaper, and 13 in “Tass” Russian News Agency.

#### **4.1.4. Content Analysis of News Concerning Energy Security in Media Outlets Based in Turkmenistan Regarding the Tripartite Summit of Heads of State Held in the Avaza Region of Turkmenistan**

Selected Turkmen press outlets were reviewed for the state-level evaluations concerning the First Summit Meeting held in the Avaza region of Turkmenistan. The examination of news in Turkmenistan newspapers was carried out in the Turkmen language in the “Türkmenistan” and “Watan” newspapers, and in the Russian language in the “Neytralni Türkmenistan” newspaper as well as “Türkmenistan Bugün” state information agency. The results of the content analysis conducted in Turkmenistan newspapers regarding the First Summit Meeting are categorized in the Table 4 below.

**Table 4. Number of news about the First Summit Meeting in Turkmenistan newspapers.**

<b>Newspapers</b>	<b>Total News about The First Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Нейтральный Туркменистан (Neytralni Turkmenistan)	4	4
Türkmenistan	7	4
Watan	2	1
Türkmenistan Bugün News Agency	13	11
<b>Total</b>	<b>26</b>	<b>20</b>

According to Table 4. a total of 26 news related to the First Summit Meeting were identified. “Neytralni Türkmenistan” newspaper published 4 news, “Türkmenistan” newspaper 7, “Watan” newspaper 2, “Turkmenistan Bugün” News Agency published 13 news. “Türkmenistan Bugün” News Agency gave the highest number of news about the meeting. The least number of news



appeared in “Watan” newspaper. The number of news covering the issue of energy security in the Turkmenistan media outlets was 20 news in total. Of these, “Neytralni Turkmenistan” 4, “Türkmenistan” newspaper 4, Watan 1, Turkmenistan Today News Agency 11 news touched on the subject.

**4.1.5. Content Analysis of News Concerning Energy Security in Media Outlets Based in the USA Regarding the Tripartite Summit of Heads of State Held in the Avaza Region of Turkmenistan**

News archives of two prominent American media outlets were examined in detail, especially for the First Summit Meeting, these being the New York Times, and The Wall Street Journal.

**Table 5. Number of news about the First Summit Meeting in US newspapers.**

<b>Newspapers</b>	<b>News about The First Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
The New York Times	0	0
The Wall Street Journal	0	0

In the previous chapters, it was noted that the Trans-Caspian Gas Pipeline project had received considerable backing during the Clinton administration. The United States has been a strong advocate for the project, citing its significance in bolstering energy security for the European Union and promoting diversified energy sources. Lately however, interest in this issue seems to have waned as the number of significant news items in the US based newspapers also indicate.

**Table 6. Frequency of references detected in selected articles about the First Summit**

Number of references	TCGP’s importance for the regional actors	TCGP’s potential contribution to regional cooperation
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detected in the articles about the First Summit	Geopolitical and strategic significance of the TCGP project	Common Cultural and Historical heritage	Regional and International Cooperation	Energy Security
Azerbaijan Newspaper	1	8	17	10
İki Sahil	4	14	30	23
Yeni Müsavat	3	7	12	11
Azertac State News Agency	0	3	5	4
Hürriyet	5	2	4	5
Sabah	3	2	4	6
Sözcü	0	0	0	0
Известия (İzvestiya)	0	0	0	0
Коммерсантъ (Kommersant)	2	0	0	0
Ведомости (Vedomosti)	2	0	0	0
ТАСС (Tass Russian News Agency)	10	0	4	7
Нейтральный Туркменистан (Neytralni Turkmenistan)	2	4	3	5
Türkmenistan	4	3	3	4
Watan Newspaper	1	1	1	1
Türkmenistan Bugün News Agency	1	5	10	10
The New York Times	0	0	0	0
The Wall	0	0	0	0

Street Journal				
<b>Total References</b>	43	54	102	94

## **4.2. MEDIA CONTENT ANALYSIS OF THE EXTRAORDINARY SUMMIT OF THE ORGANIZATION OF TURKIC STATES HELD IN ANKARA**

The 10th Summit Meeting of the Organization of Turkic States, originally scheduled for Turkestan, the Republic of Kazakhstan in October 2023 was moved to Ankara on March 16, 2023 at the urging of the Republic of Azerbaijan due to the recent earthquake in the Republic of Türkiye (TRTAvez, 2023). Turkmenistan, while not a member of the organization, attended as an observer. Main topic of the Extraordinary Summit of the Organization of Turkic States, (hereafter the Second Summit Meeting) was earthquakes and natural disasters, but energy projects were also discussed. In order to identify articles related to the energy discussion, search for keywords such as energy, energy resources, natural gas, gas, hydrocarbon resources, Southern Gas Corridor, Trans-Caspian Gas Pipeline, and Turkmenistan gas was used throughout the search.

On March 30<sup>th</sup>, 2023, the Ministers Responsible for Energy of the Organization of Turkish States gathered in Budapest to discuss energy security and gas supply to Europe via the Republic of Azerbaijan. The meeting, hosted by the Hungarian Ministry of Foreign Affairs and Trade, was a follow-up to the Extraordinary Summit held in Ankara earlier that month. However, the Minister of Energy of Turkmenistan and other state representatives were notably absent. Below a table for each selected country details the news published about the meeting. Priority was given to news items on the Second Summit Meeting.

### **4.2.1. Content Analysis of News on the Extraordinary Summit of the Organization of Turkic States and Energy Security in the Media Outlets Based in the Republic of Azerbaijan**

Table 7. shows the result of the analysis conducted on news about the Second Summit Meeting gathered from selected Azerbaijani media outlets.

**Table 7. Number of news about the Second Summit Meeting in Azerbaijani newspapers**

<b>Newspapers</b>	<b>News about The Second Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Azərbaycan	8	6
Yeni Müsavat	3	0
İki Sahil	40	2
Azertac State News Agency	5	2
<b>Total</b>	<b>56</b>	<b>10</b>

Upon examining Table 7, it evident that a total of 56 news items were found in Azerbaijani newspapers. Out of these, “Azərbaycan” newspaper had 8, “Yeni Müsavat” had 3, “İki Sahil” had 40, and “Azertac” State News Agency had 5. “İki Sahil” newspaper had the highest number of news related to the Second Summit Meeting, while “Yeni Müsavat” had the least. Furthermore, the issue of energy security in the Azerbaijani press was covered in a total of 10 news items. “Azərbaycan” newspaper published 6, “Yeni Müsavat” had none, “İki Sahil” had 2, and “Azertac” State News Agency had 2 significant news items on the issue.

#### **4.2.2. Content Analysis of News on the Extraordinary Summit of the Organization of Turkic States Held in Ankara in the Main Media Outlets of the Republic of Türkiye**

Following the earthquake that occurred in southeastern the Republic of Türkiye, on February 6, 2023, which was described as the 'Disaster of the Century', the Extraordinary Meeting of the Organization of Turkic States was held in Ankara on March 16, 2023, upon the proposal of the President of Azerbaijan İlham Aliyev (OTS, 2023). While the primary focus of the meeting was 'Disaster-Emergency Management and Humanitarian Aid', the matter of guaranteeing

energy security was also brought up (IHA, 2023). To analyze the statements made during the Second Summit Meeting, various sources such as “Hürriyet”, “Sabah”, and “Sözcü” newspapers were reviewed.

The news regarding the Second Summit Meeting is listed in Table 8.

**Table 8. Number of news about the Second Summit Meeting in Turkish newspapers.**

<b>Newspapers and the News Agency</b>	<b>News about The Second Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Hürriyet	7	7
Sabah	6	6
Sözcü	0	0
<b>Total</b>	<b>21</b>	<b>21</b>

A total of 21 news stories about the meeting were identified. 7 news in “Hürriyet” newspaper, 6 in “Sabah” newspaper, 0 in “Sözcü” newspaper were identified as a result of the examination. The newspaper that reported the least about the Second Summit Meeting was “Sözcü” newspaper with 0 news. The number of news covering the issue of energy security in Turkish newspapers are 7 news in “Hürriyet”, 6 in “Sabah” newspaper, 0 in “Sözcü” newspaper. “Sözcü” newspaper did not publish any news about the Second Summit Meeting,

#### **4.2.3. Content Analysis of News on the Extraordinary Summit of the Organization of Turkic States Held in Ankara in the Main Media Outlets Based in Russia**

The results of the content analysis in Russian newspapers regarding the Second Summit Meeting held in Ankara are listed in Table 9.

**Table 9. Number of news detected about the Second Summit Meeting**

<b>Newspapers</b>	<b>News about The Second Summit</b>	<b>Total News Concerning Energy and</b>
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		<b>other Security Issues</b>
Известия (Izvestiya)	0	0
Коммерсантъ (Kommersant)	2	1
Ведомости (Vedomosti)	1	0
ТАСС (Tass Russian News Agency)	11	8
<b>Total</b>	<b>14</b>	<b>9</b>

As seen in Table 9, no significant news items appeared in the “Izvestiya” newspaper on the subject, while “Kommersant” newspaper reported 2 news, “Vedomosti” newspaper reported 1 news, and “Tass” Russian News Agency reported 11 noteworthy news. Notably, “Kommersant” newspaper had the highest number of news regarding the Second Summit Meeting, while “Izvetiya” newspaper did not report any news about the meeting. Furthermore, when it comes to news mentioning energy security, “Kommersant” newspaper and “Tass” Russian News Agency had 1 and 11 news, respectively. However, no news related to the energy issue was found in “Izvestia” and “Vedomosti” newspapers through the content search.

#### **4.2.4. Content Analysis of News on the Extraordinary Summit of the Organization of Turkic States Held in Ankara in the Main Media Outlets Based in Turkmenistan**

Since Turkmenistan is not a member of the Organization of Turkic States, it participated in the OTS’s Extraordinary Summit Meeting held in Ankara as an observer country. As a result of the content analysis of Turkmenistan newspapers, the data shown in Table 10 was obtained.

**Table 10. Number of news detected about the Second Summit Meeting**

<b>Newspapers</b>	<b>News about The Second Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
Нейтральный Туркменистан (Neytralni Turkmenistan)	1	0
Türkmenistan	1	0

Watan	1	1
Türkmenistan Bugün News Agency	2	0
<b>Total</b>	<b>5</b>	<b>1</b>

As a result of the content analysis, 1 news about the Second Summit Meeting was detected in “Neytralni Türkmenistan” newspaper, 1 in “Türkmenistan” newspaper, 1 in “Watan” newspaper, and 2 in “Türkmenistan Bugün” News Agency. Among Turkmenistan newspapers, only one news item covering the energy security issue was identified in the “Watan” newspaper.

#### **4.2.5. Content Analysis of News on the Extraordinary Summit of the Organization of Turkic States Held in Ankara in the Main Media Outlets Based in the USA**

News about the Second Summit Meeting was searched for in “The New York Times” and “The Wall Street Journal”, as indicated in Table 11. No significant news items appeared in the three US based newspapers studied on the subject.

As discussed in the previous sections, it is commonly accepted that the US supports the Southern Corridor primarily with a view to ensure EU energy security. For this reason, the lack of news in the mentioned newspapers about the Second Summit Meeting is not taken as an indication of a negative stance vis-a-vis the realization of a Trans-Caspian pipeline project.

**Table 11. Number of news detected about the Second Summit Meeting**

<b>Newspapers</b>	<b>News about The Second Summit</b>	<b>Total News Concerning Energy and other Security Issues</b>
The New York Times	0	0
The Wall Street Journal	0	0

**Table 12. Frequency of references detected in selected articles about the Second Summit**

Number of referenced detected in the articles about the Second Summit	TCGP's importance for the regional actors		TCGP's potential contribution to regional cooperation	
	Geopolitical and strategic significance of the TCGP project	Cultural and Historical heritage	Regional and International Cooperation	Energy Security
Azerbaijan Newspaper	0	4	4	4
İki Sahil	1	5	7	1
Yeni Məsəvat	0	2	2	1
Azertac State News Agency	0	2	2	2
Hürriyet	0	2	3	1
Sabah		3	3	1
Sözcü	0	0	0	0
Известия (İzvestiya)	0	0	0	0
Коммерсантъ (Kommersant)	0	0	0	0
Ведомости (Vedomosti)	0	0	0	0
TACC (Tass Russian News)	1	0	1	1



Agency)				
Нейтральный Туркменистан  (Neutralni Turkmenistan)	1	1	0	1
Türkmenistan	1	1	0	1
Watan Newspaper	0	1	1	1
Türkmenistan Bugün News Agency	0	1	1	1
The New York Times	0	0	0	0
The Wall Street Journal	0	0	0	0
<b>Total References</b>	5	25	28	18

#### **4.3. MEDIA CONTENT ANALYSIS OF THE NEWS REGARDING THE MEETING OF MINISTERS RESPONSIBLE FOR ENERGY OF THE ORGANIZATION OF TURKIC STATES IN THE TURKISH, AZERBAIJAN, TURKMENISTAN, RUSSIAN AND US MEDIA OUTLETS**

The 3rd Meeting of the Ministers Responsible for Energy of the Organization of Turkic States took place in Budapest, the Republic of Hungary on March 30th, 2023. Hosted by the Hungarian Ministry of Foreign Affairs and Trade, the meeting addressed energy security issues and gas supply to Europe through the Republic of Azerbaijan. Attendees included Minister of Foreign Affairs and Trade of Hungary, Péter Szijjártó, Minister of Energy of the Republic of Azerbaijan, Parviz Shahbazov, Minister of Energy of the Kyrgyz Republic, Ibraev Taalaibek, Minister of Energy of the Republic of Türkiye, Fatih Dönmez,

Deputy Minister of Energy of the Republic of Kazakhstan, Askhat Khassenov, Minister of Energy of the Republic of Uzbekistan, Deputy Azim Akhmedkhadjaev, and Secretary General of the Organization of Turkic States, Ambassador Kubanychbek Omuraliev. Minister of Energy of Turkmenistan did not attend.

#### **4.3.1. Content Analysis of News on the Meeting of Ministers Responsible for Energy: Media Outlets Based in the Republic of Azerbaijan**

During the examination of articles that appeared in the Azerbaijani newspapers, news about the transportation of Turkmenistan gas to Europe and additionally news about the 3rd Meeting of Ministers Responsible for Energy were detected. Table 13. Shows the result of content analysis conducted throughout Azerbaijani media outlets.

**Table13. News detected in Azerbaijani newspapers about the 3rd Meeting of Ministers Responsible for Energy of the Organization of Turkic States**

<b>Newspapers</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total News about Summit of Ministers of Energy in Budapest</b>
Azərbaycan	1	3
Yeni Müsavat	0	1
İki Sahil	1	7
Azertac State News Agency	1	1
<b>Total</b>	<b>3</b>	<b>12</b>

A total of 12 news articles were detected in Azerbaijani newspapers regarding the 3rd Meeting of Ministers Responsible for Energy. 3 articles about the meeting were found in “Azərbaycan” newspaper, 1 in “Yeni Müsavat” newspaper, 7 in İki “Sahil newspaper”, and 1 in “Azertac” State News Agency. On the issue of energy security few news items appeared in Azerbaijan newspapers. None appeared in Yeni Müsavat newspaper, one in İki Sahil newspaper, and one in Azertac State News Agency.

#### 4.3.2. Content Analysis of News on the Meeting of Ministers Responsible for Energy: Media Outlets Based in the Republic of Türkiye

Very few news about this meeting appeared in Turkish newspapers.

**Table 14. News detected in Turkish newspapers about the 3rd Meeting of Ministers Responsible for Energy of the Organization of Turkish States**

<b>Newspapers and the News Agency</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total News about Summit of Ministers of Energy in Budapest</b>
Hürriyet	0	1
Sabah	0	1
Sözcü	0	0
<b>Total</b>	<b>0</b>	<b>2</b>

Few significant news items about the 3rd Meeting of Ministers Responsible for Energy were detected in “Hürriyet” and “Sabah” newspapers. Meanwhile, no significant news items about the meeting were detected on the issue of energy 'security' in the Türkiye based press organs.

#### 4.3.3. Content Analysis of News on the Meeting of Ministers Responsible for Energy: Media Outlets Based in Russia

Among the Russia based newspapers, only one news item about the meeting was found in Kommersant newspaper. Again, in this news, the issue of export of Turkmen gas was also mentioned.

**Table 15. News detected in Russian newspapers about the 3rd Meeting of Ministers Responsible for Energy of the Organization of Turkish States**

<b>Newspapers</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total News about Summit of Ministers of Energy in Budapest</b>
Известия (Izvestiya)	0	0
Коммерсантъ (Kommersant)	1	1

Ведомости (Vedomosti)	0	0
ТАСС (Tass Russian News Agency)	0	0
<b>Total</b>	<b>1</b>	<b>1</b>

Kommersant newspaper published 1 news and was found to be the only organization in the Russian press that published news about the meeting.

#### **4.3.4. Content Analysis of News on the Meeting of Ministers Responsible for Energy: Media Outlets Based in Turkmenistan**

In the Turkmenistan based media outlets no significant news items were detected regarding the Meeting of Ministers Responsible for Energy.

**Table 16. News found in Turkmenistan newspapers about the 3rd Meeting of Ministers Responsible for Energy of the Organization of Turkic States**

<b>Newspapers</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total News about Summit of Ministers of Energy in Budapest</b>
Нейтральный Туркменистан (Neytralni Turkmenistan)	0	0
Türkmenistan	0	0
Watan	0	0
Türkmenistan Bugün News Agency	0	0
<b>Total</b>	<b>0</b>	<b>0</b>

#### **4.3.5. Content Analysis of News on the Meeting of Ministers Responsible for Energy: Media Outlets Based in the USA**

Within the scope of this research, a search was carried out in selected US newspapers. No articles were found regarding the meeting held in the Republic of Hungary.

**Table 17. News found in US newspapers about the 3rd Meeting of Ministers Responsible for Energy of the Organization of Turkish States**

<b>Newspapers</b>	<b>Total News</b>	<b>Total News about</b>
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	Concerning Energy and other Security Issues	Summit of Ministers of Energy in Budapest
The New York Times	0	0
The Wall Srtreet Journal	0	0

**Table 18. Frequency of references detected in selected articles about the 3rd Meeting of Ministers Responsible for Energy of the Organization of Turkish States**

Number of referenced detected in the articles about the Third Summit	TCGP's importance for the regional actors		TCGP's potential contribution to regional cooperation	
	Geopolitical and strategic significance of the TCGP project	Cultural and Historical heritage	Regional and International Cooperation	Energy Security
Azerbaijan Newspaper	0	0	2	3
İki Sahil	0	1	1	4
Yeni Msavat	0	0	0	1
Azertac State News Agency	0	0	0	0
Hrriyet	0	0	1	1
Sabah	0	0	1	1
Szc	0	0	0	0
Известия (İzvestiya)	0	0	0	0

Коммерсантъ (Kommersant)	1	0	0	1
Ведомости (Vedomosti)	0	0	0	0
ТАСС (Tass Russian News Agency)				
Нейтральный Туркменистан (Neytralni Turkmenistan)	0	0	0	0
Türkmenistan	0	0	0	0
Watan Newspaper	0	0	0	0
Türkmenistan Bugün News Agency	0	0	0	0
The New York Times	0	0	0	0
The Wall Street Journal	0	0	0	0
<b>Total References</b>	1	1	5	11

**4.4. MEDIA CONTENT ANALYSIS OF NEWS REGARDING THE 10<sup>TH</sup> SUMMIT MEETING OF HEADS OF STATES OF THE ORGANIZATION OF TURKIC STATES IN AZERBAIJAN'S, TURKIYE'S, TURKMENISTAN'S, RUSSIA'S AND THE USA'S MEDIA ORGANISATION**

On November 3, 2023, the 10th Summit Meeting of the Organization of Turkic States convened with the theme "Turkish Century." The gathering included the heads of state from the Republic of Azerbaijan, the Republic of Türkiye, the Republic of Uzbekistan, the Kyrgyz Republic, and the Republic of Kazakhstan, as well as the prime minister of the Republic of Hungary in an observer role. Also present was the Head of Public Affairs of Turkmenistan, former President Gurbangulu Berdimuhamedov. It is worth noting that their initial meeting took place in Astana, Kazakhstan, back in 1996 (İlyasov, 2023). The TURKTIME summit's slogan is defined as follows: Traditions, Unification, Reforms, Knowledge, Trust, Investments, and Mutual Energy (president.kg, 2023). Amongst the summit's key objectives was also the launch of a joint action plan for implementing the transportation program among TDT countries, declaring the day of the February 6 Earthquake as the "Day of Remembrance and Solidarity for Disaster Victims" (TASS, 2023).

During the meeting, it was highlighted that the Republic of Azerbaijan has been central to stability in the region. The infrastructure and reconstruction efforts have yielded positive economic and social outcomes (Azerbaijan, 2023). President İlham Aliyev addressed the summit, speaking of the Republic of Azerbaijan's investment of nearly \$20 billion in the economies of Turkic states, the aid and investments made by OTS members to restore regional infrastructure in Karabakh, and the establishment of Joint Capital Funds such as the Azerbaijan-Uzbekistan Investment Fund and Azerbaijan-Kyrgyzstan Development Fund (ikisahil.az, 2023). President Aliyev also emphasized the Republic of Azerbaijan's logistics and transportation economic relations with Turkic states, with the Zangezur corridor making the Republic of Azerbaijan a logistics hub between the East and West (Gafarov, 2023).

During the Summit meeting, President Recep Tayyip Erdoğan emphasized the significance of the Zangezur Corridor transportation line's implementation, and stressed that energy and transportation infrastructure projects have always been crucial areas of cooperation among Turkic states. To illustrate, Erdoğan cited the Baku-Tbilisi-Ceyhan Crude Oil Pipeline, Baku-Tbilisi-Erzurum Natural

Gas Pipeline, and Trans Anatolian Pipeline as concrete examples (White, 2023). Furthermore, Erdoğan emphasized that the transportation of Caspian natural gas to the Republic of Türkiye and Europe will not only benefit the Turkic states but also enhance energy security in Europe. He proposed that collaboration should be established to eliminate obstacles to transportation and trade, improve transportation networks, and simplify border crossings and visa procedures. Erdoğan also suggested that the efforts to strengthen these collaborations should be intensified (White, 2023). During the Astana summit, Gurbanguly Berdimuhamedov, the Head of Public Affairs in Turkmenistan, revealed that they are continuously working towards bringing Turkmen natural gas to the Republic of Azerbaijan, the Republic of Türkiye, and the world market via the Caspian Sea. He also expressed his desire to export electricity through the same route and recommended that a road map be developed to encourage cooperation in the energy sector among the participating countries in CSA (Velhanov, 2023).

The Astana Declaration of the 10th Summit of the Council of Heads of State of the Organization of Turkic States was released at the conclusion of the summit (Kussainova, 2023). Article 50 of the declaration outlined the creation of a 'Turan Special Region'. Article 56 foresaw the development of physical, digital, and transportation infrastructure projects to improve the functionality of the Trans-Caspian International East-West Central Corridor and to promote transport cooperation among member and observer states. Article 60 establishes the Simplified Customs Line to streamline cargo transportation between OTS member and observer states. Finally, Article 66 outlines the simplification of customs procedures among member and observer states in order to enhance the competitiveness of the Central Corridor.

#### **4.4.1. Content Analysis of News on the Astana Summit Meeting and Energy Security in News Agencies Based in the Republic of Azerbaijan**



Table 19. shows the number of news articles detected in Azerbaijanian media outlets during content analysis regarding the 10th Summit Meeting of the Organization of Turkic States held in Astana.

**Table 19. News Identified About the Astana Summit Meeting**

<b>Newspaper</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total Number Of News</b>
Azərbaycan	8	9
Yeni Müsavat	0	5
İki Sahil	12	75
Azertac State News Agency	9	11
<b>Total</b>	<b>29</b>	<b>100</b>

Upon examination of Table 19, it has been determined that “Azərbaycan” Newspaper published 9 news, “Yeni Müsavat” 5, “İki Sahil” 75, and “Azertac” State News Agency 11 news. The newspaper that makes the most news is “İki Sahil” newspaper. News concerning energy issues we determine in “Azərbaycan” newspaper 8, “İki Sahil” 12, “Azertac” State News Agency 9, and no news in “Yeni Müsavat” newspaper.

#### **4.4.2. Content Analysis of News on the Astana Summit Meeting and Energy Security in News Agencies Based in the Republic of Türkiye**

Table 20. shows the number of news articles detected in Trukish media outlets during content analysis regarding the 10th Summit Meeting of the Organization of Turkic States held in Astana.

**Table 20. News about the Astana Summit Meeting**

<b>Newspaper</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total Number Of News</b>
Hürriyet	0	1
Sabah	4	10
Sözcü	0	0
<b>Total</b>	<b>8</b>	<b>27</b>

Upon examining Table 20, it is evident that “Sabah” newspaper are among the Turkish press organizations that covered the Astana Summit Meeting. “Sabah” published 10 news articles. From the total publications, “Sabah” had 4 articles that touched on the topic of energy cooperation and other issues.

#### **4.4.3. Content Analysis of News on the Astana Summit Meeting and Energy Security in News Agencies Based in Russia**

Table 21. shows the number of news articles detected in Russia based media outlets during content analysis regarding the 10th Summit Meeting of the Organization of Turkic States held in Astana.

**Table 21. News Identified About the Astana Summit Meeting**

<b>Newspaper</b>	<b>Total News Concerning Energy and other Security Issues</b>	<b>Total Number Of News</b>
Известия (Izvestiya)	1	2
Коммерсантъ (Kommersant)	1	2
Ведомости (Vedomosti)	0	2
ТАСС (Tass Russian New Agency)	3	16
<b>Total</b>	<b>5</b>	<b>22</b>

When Table 21 is examined, it is seen that in the Russian media outlets, “Izvestiya” newspaper published 2 news, “Kommersant” newspaper published 2 news, “Vedomosti” published 2 news, and only the “TASS” Russian News Agency published 16 news about the Astana Summit Meeting.

#### **4.4.4. Content Analysis of News on the Astana Summit Meeting and Energy Security in News Agencies Based in Turkmenistan**

Table 22. shows the number of news articles detected in Turkmenian media outlets during content analysis regarding the 10th Summit Meeting of the Organization of Turkic States held in Astana.

**Table 22. News Identified About the Astana Summit Meeting**

<b>Newspaper</b>	<b>Total News Concerning Energy and other</b>	<b>Total Number Of News</b>
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	Security Issues	
Нейтральный Туркменистан (Neytralni Turkmenistan)	0	1
Türkmenistan	0	1
Watan	0	1
Türkmenistan Bugün New Agency	4	8
<b>Total</b>	<b>4</b>	<b>11</b>

Upon examination of Table 22, it is apparent that within Turkmenistan's press organizations, the “Türkmenistan Bugün” News Agency featured 8 news pieces pertaining to the Astana Summit Meeting, while “Neytralni Turkmenistan” only published 1. “Watan” newspaper also published news on the matter. Notably, 7 of these news items focused on the topic of energy **resentment**.

#### 4.4.5. Content Analysis of News on the Astana Summit Meeting and Energy Security in News Agencies Based in the USA

Table 23. shows the number of news articles detected in the US media outlets during content analysis regarding the 10th Summit Meeting of the Organization of Turkic States held in Astana.

**Table 23. News Identified About the Astana Summit Meeting**

Newspapers	Total News Concerning Energy and other Security Issues	Total Number Of News
The New York Times	0	0
The Wall Street Journal	0	0

As seen in Table 23, no significant news items about the Astana Summit Meeting appeared in the US based press.

**Table 24. Frequency of references detected in selected articles about the Astana Summit Meeting**

Number of	TCGP's importance for the regional actors	TCGP's potential contribution to regional cooperation cooperation

referenced detected in the articles about the Fourth Summit	Geopolitical and strategic significance of the TCGP project	Cultural and Historical heritage	Regional and International Cooperation	Energy Security
Azerbaijan Newspaper	0	1	3	0
İki Sahil	3	18	24	10
Yeni Müsavat	0	0	0	0
Azertac State News Agency	1	3	3	3
Hürriyet	0	0	0	0
Sabah	0	0	0	0
Sözcü	0	0	0	0
Известия (İzvestiya)	0	0	0	0
Коммерсантъ (Kommersant)	0	0	0	0
Ведомости (Vedomosti)	0	0	0	0
ТАСС (Tass Russian News Agency)	1	0	8	2
Нейтральный Туркменистан (Neutralni Turkmenistan)	0	0	0	0
Türkmenistan	0	0	0	0
Watan Newspaper	0	0	0	0
Türkmenistan Bugün News Agency	0	0	0	0
The New	0	0	0	0

York Times				
The Wall Street Journal	0	0	0	0
<b>Total References</b>	7	22	44	16

### **Conclusion**

According to the review of the media, Azerbaijani media outlets have the highest number of articles on energy security. They published a total of 279 news pieces on the four summit meetings. Coming in at second place is the Republic of Türkiye, with a total of 85 articles. The news outlets in the Russian Federation published 62 articles, and Turkmenistan based outlets published 39. Meanwhile, it was also observed that no significant articles appeared in the US based press on the subject.

The present review of the press indicates that bureaucrats from Turkmenistan, Azerbaijan and of Türkiye all exhibit the highest level of interest and enthusiasm for energy security cooperation within the region. Overall, a study of the news coverage of the national and semi national news organs reveal that the decision makers of the Republics of Azerbaijan and Türkiye especially, exhibit the highest level of interest in fostering partnerships among the basin's actors and aim for greater participation towards the realization of the Trans-Caspian gas pipeline project.

## CONCLUSION

Within the framework of this study, a modest attempt was made to capture a two year span (2022-2024) of the discussions centering on the potential for regional cooperation within the scope of realization of the Trans-Caspian Gas Pipeline project. The media analysis which covers the years 2022-2024 on the mainstream news agencies' streams in Russian, English and Turkish suggests that the Caspian basin presents numerous opportunities for collaboration and cooperation among regional and non-regional actors. Accordingly, an overwhelming amount of work regarding the pipeline is still in progress, yet it has the potential to foster cooperation and enhance the inter-state relations between the actors that share the basin and Türkiye.

Likewise, the pipeline is of extreme importance both for the basin countries and the European Union in terms of securing its energy supply. This, coupled with the strategic location of the Caspian Sea makes the region a hub for 'great power politics'. A careful examination of the news, covering the Trans Caspian project which appeared in the mainstream news outlets of the Russian Federation and the United States of America suggests that competition will take its toll on the regional actors' interactions. Hence, perhaps the most important policy recommendation for the smaller actors in the region is to work within a pluralist framework of reference and to continue prioritizing a 'win-win' approach first with their neighbors and second with the great powers such as the Russian Federation, the United States and China that continue to build their relations within a realist framework of reference. It is imperative that the Caspian coastal states assume a significant role in fostering diverse collaboration. The attainment of this objective can be realized by cultivating an atmosphere of mutual trust by means of continued multilateral accords that abide by the international law. This is crucial to prevent the marginalization of smaller states within the region by more prominent actors.

The mainstream literature suggests that a Realist approach to international relations may help counterbalance the effects of 'great power politics' in the basin, which, more often than not tend to disharmonize the interstate relations

of the regional actors. Instead, this study has underlined the importance of maintaining a pluralist lens in counter-balancing the great power politics in the region and in maintaining peaceful relations despite the unbalancing effects of competitions reflecting onto the interrelations of the Caspian basin states and Türkiye.

The Caspian Sea's Legal Status Convention has had long-lasting effects on the region's political affairs, arguably hindering further cooperation between the region's states throughout most of the post-Soviet era. These changes have caused a shift in the policies of the regional actors, particularly smaller states. Interim, Turkmenistan, for example, has ended up collaborating with the multinational companies and transnational organizations. This has enabled the country to diversify its energy markets. However, the country's relations has also come under strain with its neighbors at certain points, only to be steered back to the 'normal' with careful diplomatic negotiations prioritizing a pluralist approach to international relations. On the whole, today, Turkmenistan's efforts, combined with the Republic of Azerbaijan and the Republic of Türkiye's attempts to access the Turkmen gas, and the EU's drive to reduce its reliance on Russian natural gas, offer hope for the pipeline's realization. The gas intended for the Trans-Caspian Gas Pipeline is currently being rerouted through alternative paths to the Southern Gas Corridor. Cooperation between Iran, Turkmenistan, and the Republic of Azerbaijan has facilitated this, allowing Turkmenistan to indirectly transfer its gas to the Southern Gas Corridor.

The Trans-Caspian Gas Pipeline project as a framework of reference continues to serve as a catalyst for partnerships and agreements in various sectors, particularly energy transfer, among the region's players. This occurrence is primarily analyzed by examining each actor's diverse collaborations in energy transit/export and other related fields. A careful analysis of the discussions around the Trans-Caspian Natural Gas Pipeline project suggests that it is difficult for it to reach its full potential in the near future. Nevertheless, through Iran or the South Caucasus route, small quantities of Turkmen gas can be transported to Türkiye and Europe in the coming years (Aslanlı, 2023).

Furthermore, the initiative itself is expected to set the groundwork for regional-scale bilateral/multilateral cooperation among small, large, and international organizations.

A review of the news outlets in the fourth part of the study suggests that the Organization of Turkic States has taken on a fresh role in fostering economic partnerships, energy cooperation in the Caspian, and other fields. To assess the organization's ability to facilitate cooperation and identify which member state is most receptive to new opportunities, a separate analysis of the Heads of State Summit Meetings was also conducted.

Finally, it should also be underlined that the forging of new partnerships between the Republic of Azerbaijan, Turkmenistan and the other Turkic states under the leadership of Türkiye has been a catalyzing factor in furthering stability and peaceful relationships in the region. This is especially important now, in the aftermath of Karabakh War and in the midst of the difficulties stemming from the war in Ukraine. Needless to say, these partnerships will also further accelerate the Republic of Türkiye's moves towards becoming an energy trade center. For this reason, the Republic of Türkiye is said to be determined to transport the Turkmen gas indirectly, even though the physical structuring of the Trans-Caspian Gas Pipeline does not seem feasible in the near future.

Developing partnerships with various stakeholders in the region can pave the way for energy transfer projects. Currently, the Caspian's status issue has been partially resolved, leading to the Russian Federation's approval of energy projects that can promote regional cooperation. However, it is important to note that the 2018 Convention on the Legal Status of the Caspian Sea mandates bilateral and multilateral agreements, which should not be overlooked. The current USA government's reduced support for regional partnerships, in contrast to the Clinton administration era, parallels the changing dynamics in the region, including the Karabakh War, sanctions against the Russian Federation, the Islamic Republic of Iran, and China's involvement. Therefore, any project regarding the sharing of the energy resources in the region must be approached



with balance and care, and should involve a careful examination of competitions.

However, it is also vital that the regional powers should continue to seek every opportunity to further strengthen their inter-state relations. In this respect, the initiatives started by the Tripartite Summit of State Heads Held in the Avaza Region of Turkmenistan, the Extraordinary Summit of the Organization of Turkic States Held in Ankara, and the Astana Summit Meeting as important benchmarks should be considered as important benchmarks for furthering the relations between the region's states as they continue to prioritize their common interests over their short term individual interests.

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## APPENDIX1. ETHICS BOARD WAIVER FORM

	<b>HACETTEPE ÜNİVERSİTESİ</b> <b>SOSYAL BİLİMLER ENSTİTÜSÜ</b>	Doküman Kodu Form No.	FRM-YL-09
		Yayın Tarihi Date of Pub.	22.11.2023
	<b>FRM-YL-09</b> <b>Yüksek Lisans Tezi Etik Kurul Muafiyeti Formu</b> <i>Ethics Board Form for Master's Thesis</i>	Revizyon No Rev. No.	02
		Revizyon Tarihi Rev. Date	25.01.2024

**HACETTEPE ÜNİVERSİTESİ**  
**SOSYAL BİLİMLER ENSTİTÜSÜ**  
**ULUSLARARASI İLİŞKİLER ANABİLİM DALI BAŞKANLIĞINA**

Tarih: 28/06/2024

Tez Başlığı (Türkçe): Trans-Hazar Gaz Boru Hattı Projesi: Bölgesel İşbirliği Girişimleri  
Tez Başlığı (Almanca/Fransızca): .....

Yukarıda başlığı verilen tez çalışmam:

1. İnsan ve hayvan üzerinde deney niteliği taşımamaktadır.
2. Biyolojik materyal (kan, idrar vb. biyolojik sıvılar ve numuneler) kullanımını gerektirmemektedir.
3. Beden bütünlüğüne veya ruh sağlığına müdahale içermemektedir.
4. Anket, ölçek (test), mülakat, odak grup çalışması, gözlem, deney, görüşme gibi teknikler kullanılarak katılımcılardan veri toplanmasını gerektiren nitel ya da nicel yaklaşımlarla yürütülen araştırma niteliğinde değildir.
5. Diğer kişi ve kurumlardan temin edilen veri kullanımını (kitap, belge vs.) gerektirmektedir. Ancak bu kullanım, diğer kişi ve kurumların izin verdiği ölçüde Kişisel Bilgilerin Korunması Kanuna riayet edilerek gerçekleştirilecektir.

Hacettepe Üniversitesi Etik Kurulunun Yönergelerini inceledim ve bunlara göre çalışmamın yürütülebilmesi için herhangi bir Etik Kuruldan izin alınmasına gerek olmadığını; aksi durumda doğabilecek her türlü hukuki sorumluluğu kabul ettiğimi ve yukarıda vermiş olduğum bilgilerin doğru olduğunu beyan ederim.

Gereğini saygılarımla arz ederim.

Leyla ABDULLAYEVA

Öğrenci Bilgileri	Ad-Soyad	Leyla ABDULLAYEVA
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DANIŞMAN ONAYI

UYGUNDUR.  
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\* Tez Almanca veya Fransızca yazılıyor ise bu kısımda tez başlığı Tez Yazım Dilinde yazılmalıdır.

	<b>HACETTEPE ÜNİVERSİTESİ</b> <b>SOSYAL BİLİMLER ENSTİTÜSÜ</b>	Doküman Kodu Form No	FRM-YL-09
		Yayın Tarihi Date of Pub.	22.11.2023
	<b>FRM-YL-09</b> <b>Yüksek Lisans Tezi Etik Kurul Muafiyeti Formu</b> <i>Ethics Board Form for Master's Thesis</i>	Revizyon No Rev. No.	02
		Revizyon Tarihi Rev. Date	25.01.2024

**HACETTEPE UNIVERSITY**  
**GRADUATE SCHOOL OF SOCIAL SCIENCES**  
**DEPARTMENT OF INTERNATIONAL RELATIONS.**

Date: 28/06/2024

Thesis Title (In English): The Trans-Caspian Gas Pipeline Project: Initiatives for Regional Cooperation.

My thesis work with the title given above:

- Does not perform experimentation on people or animals.
- Does not necessitate the use of biological material (blood, urine, biological fluids and samples, etc.).
- Does not involve any interference of the body's integrity.
- Is not a research conducted with qualitative or quantitative approaches that require data collection from the participants by using techniques such as survey, scale (test), interview, focus group work, observation, experiment, interview.
- Requires the use of data (books, documents, etc.) obtained from other people and institutions. However, this use will be carried out in accordance with the Personal Information Protection Law to the extent permitted by other persons and institutions.

I hereby declare that I reviewed the Directives of Ethics Boards of Hacettepe University and in regard to these directives it is not necessary to obtain permission from any Ethics Board in order to carry out my thesis study; I accept all legal responsibilities that may arise in any infringement of the directives and that the information I have given above is correct.

I respectfully submit this for approval.


Leyla ABDULLAYEVA

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	Programme	International Relations

**SUPERVISOR'S APPROVAL**

APPROVED  
Assl. Prof. Dr. Elif Renk ÖZDEMİR

## APPENDIX2. ORIGINALITY REPORT

	<b>HACETTEPE ÜNİVERSİTESİ</b> <b>SOSYAL BİLİMLER ENSTİTÜSÜ</b>	Doküman Kodu Form No.	FRM-YL-15
		Yayın Tarihi Date of Pub.	04.12.2023
	<b>FRM-YL-15</b> <b>Yüksek Lisans Tezi Orjinallik Raporu</b> <b>Master's Thesis Dissertation Originality Report</b>	Revizyon No Rev. No.	02
		Revizyon Tarihi Rev.Date	25.01.2024

**HACETTEPE ÜNİVERSİTESİ**  
**SOSYAL BİLİMLER ENSTİTÜSÜ**  
**ULUSLARARASI İLİŞKİLER ANABİLİM DALI BAŞKANLIĞINA**

Tarih: 03/07/2024

Tez Başlığı: Trans-Hazar Gaz Boru Hattı Projesi: Bölgesel İşbirliği Girişimleri  
Tez Başlığı (Almanca/Fransızca)\*:.....

Yukarıda başlığı verilen tezimin a) Kapak sayfası, b) Giriş, c) Ana bölümler ve d) Sonuç kısımlarından oluşan toplam 127 sayfalık kısmına ilişkin, 03/07/2024 tarihinde şahsım/tez danışmanım tarafından Turnitin adlı intihal tespit programından aşağıda işaretlenmiş filtrelemeler uygulanarak alınmış olan orjinallik raporuna göre, tezimin benzerlik oranı %25'tir.

Uygulanan filtrelemeler:

1.  Kabul/Onay ve Bildirim sayfaları hariç
2.  Kaynakça hariç
3.  Alıntılar hariç
4.  Alıntılar dâhil
5.  5 kelmeden daha az örtüşme içeren metin kısımları hariç

Hacettepe Üniversitesi Sosyal Bilimler Enstitüsü Tez Çalışması Orjinallik Raporu Alınması ve Kullanılması Uygulama Esasları'nı inceledim ve bu Uygulama Esasları'nda belirtilen azami benzerlik oranlarına göre tezimin herhangi bir intihal içermediğini; aksinin tespit edileceği muhtemel durumlarda doğabilecek her türlü hukuki sorumluluğu kabul ettiğimi ve yukarıda vermiş olduğum bilgilerin doğru olduğunu beyan ederim.  
Gereğini saygılarımla arz ederim.

Leyla ABDULLAYEVA

Öğrenci Bilgileri	Ad-Soyad	Leyla ABDULLAYEVA
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	Programı	Uluslararası İlişkiler

**DANISMAN ONAYI**

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\* Tez Almanca veya Fransızca yazılıyor ise bu kısımda tez başlığı Tez Yazım Dilinde yazılmalıdır.  
\*\*Hacettepe Üniversitesi Sosyal Bilimler Enstitüsü Tez Çalışması Orjinallik Raporu Alınması ve Kullanılması Uygulama Esasları İkinci bölüm maddesi (4/3'te de belirtildiği üzere: Kaynakça hariç, Alıntılar hariç/dâhil, 5 kelmeden daha az örtüşme içeren metin kısımları hariç (Limit match size to 5 words) filtreleme yapılmalıdır.

FRM-YL-15 Rev.No/Tarih: 02/25.01.2024 1

	<b>HACETTEPE ÜNİVERSİTESİ</b> <b>SOSYAL BİLİMLER ENSTİTÜSÜ</b>	Doküman Kodu Form No.	FRM-YL-15
		Yayın Tarihi Date of Pub.	04.12.2023
	<b>FRM-YL-15</b> <b>Yüksek Lisans Tezi Orjinallik Raporu</b> <i>Master's Thesis Dissertation Originality Report</i>	Revizyon No Rev. No.	02
		Revizyon Tarihi Rev. Date	25.01.2024

<b>TO HACETTEPE UNIVERSITY</b> <b>GRADUATE SCHOOL OF SOCIAL SCIENCES</b> <b>DEPARTMENT OF INTERNATIONAL RELATIONS</b>		Date: 03/07/2024
Thesis Title (In English): The Trans-Caspian Gas Pipeline Project: Initiatives for Regional Cooperation		
According to the originality report obtained by myself/my thesis advisor by using the Turnitin plagiarism detection software and by applying the filtering options checked below on 03/07/2024 for the total of 127 pages including the a) Title Page, b) Introduction, c) Main Chapters, and d) Conclusion sections of my thesis entitled above, the similarity Index of my thesis is 25 %.		
Filtering options applied*:		
1. <input checked="" type="checkbox"/> Approval and Declaration sections excluded		
2. <input checked="" type="checkbox"/> References cited excluded		
3. <input type="checkbox"/> Quotes excluded		
4. <input checked="" type="checkbox"/> Quotes Included		
5. <input checked="" type="checkbox"/> Match size up to 5 words excluded		
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Kindly submitted for the necessary actions.		
Leyla ABDULLAYEVA		

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**SUPERVISOR'S APPROVAL**

APPROVED  
Asst. Prof. Dr. Elif Renk ÖZDEMİR

\*\*As mentioned in the second part [article (4)/3] of the Thesis Dissertation Originality Report's Codes of Practice of Hacettepe University Graduate School of Social Sciences, filtering should be done as following: excluding reference, quotation excluded/included, Match size up to 5 words excluded.