



Strategic positioning and energy challenges for Türkiye in the Black Sea

November 21st, 2023

On November 21st, 2023, the Türkiye and Middle East program of the French Institute of International Relations (Ifri) hosted a conference on Türkiye's strategic positioning and energy challenges in the Black Sea. This in-person event was held in English at Ifri. It consisted of two panels. The first panel addressed the general strategic outlook and military questions in the region, while the second one focused on cooperation in the energy sector. The panels were organized in a manner to nurture dialogue between French and Turkish experts and stakeholders.

Panel 1: The Russia-Ukraine War and its Implications for Security in the Black Sea and Caucasus Region

Mustafa Aydin, professor of international relations at Kadir Has University and president of the International Relations Council of Türkiye

Isabelle Lasserre, senior reporter, Le Figaro

Chair: Dorothée Schmid, Director of the Türkiye/Middle East program at IFRI

Summary:

Control over the Black Sea has been disputed for centuries, as it has continuously been a fault line between rival powers. Today, it is a major theatre of operations in the strategic competition between Russia and the West. Putin's main objective in his "near abroad" is the recovery of former USSR territories.

Against this backdrop, Russia hopes to change the Black Sea into a "Russian sea", counter to the efforts of NATO and Türkiye, more specifically, and to drive the United States out of the region. The annexation of the Crimean Peninsula in 2014 was an early instance of this tug-of-war between Russia and NATO. The Black Sea is bordered by two EU States, 3 NATO countries (counting Türkiye), and Russia, which is trying to establish itself as the dominant power in the region. Moreover, since it is at the crossroads, the instability produced by the power struggle in the Black Sea could spread to the Caucasus, Europe, and the Mediterranean basin. As a result, NATO is increasingly aware of the fact that it could be drawn into a conflict one day due to tensions in the Black Sea.

According to the perspective of Turkish stakeholders, the country's foreign policy had several priorities regarding Black Sea security before the outbreak of the Ukraine War. After the end of the Cold War dissolved Türkiye's big northern neighbor, a new balance emerged in the Black Sea. The Turkish navy became the largest and most powerful one in the region. This status quo lasted until around 2011-2012 when Russia returned as the dominant power.



After the Cold War, the Turkish state's priority was to maintain this balance of power, as it was the first time it didn't feel threatened by its neighbor to the north. Its next priority was to contain Russia through multilateral cooperation initiatives. Lastly, Türkiye upheld a literal application of the Montreux Convention, emphasizing that no foreign military ships should be allowed into the Black Sea. The convention is widely seen as one of the most important legal documents guaranteeing Turkish independence - and strategic power.

From 2008 onward, Russia became a "revisionist power", threatening the new system that Türkiye had put in place. It became the biggest naval power in the Black Sea and managed to surpass Turkish investments in the Black Sea region. Ultimately, Russia managed to connect its naval presence in the Black Sea and in the Mediterranean.

Since the start of the Ukraine War, Türkiye has not allowed any other country's military ships through its straits. The importance of this decision became increasingly evident as Türkiye's position regarding the conflict remained ambivalent. Erdogan condemned the West by criticizing the United States for not doing enough to prevent the war, he simultaneously called for Georgia and Ukraine to join NATO.

In the early days after the outbreak of the Ukraine War, Turkish diplomats expected strong pressure to revise the Montreux Convention. In fact, the United States had pressured neighboring countries like Romania and Georgia to advocate for a change of the Montreux Convention between 2005 and 2007, but eventually dropped the idea. This pattern repeats every time there is a major conflict in the region: the United States attempt to bring in more ships and Türkiye prevents them from doing so. Western countries' pressure to amend the Montreux Convention have been unsuccessful so far. Türkiye has even adopted a stricter position than in previous times: it is presently banning all naval forces from entering the region, even though the Montreux Convention stipulates military ship of warring parties from crossing the straits. This puts Türkiye in a crucial position of responsibility.

According to the commander in chief of the Turkish navy, Türkiye can ensure the security of the Black Sea on its own, even though there is a need to strike a balance with Russia. There are no consultations with NATO forces anymore at present. Consultations happen at a diplomatic level between the two countries' presidents, but these do not cover naval considerations as far as we know. There have been attempts to coordinate demining efforts between Türkiye, Romania, and Bulgaria, but they lack sufficient capacities to do so for now.

Assuming Türkiye will keep applying the Montreux Convention to the warring parties, other countries' ships could still be allowed to come and go. However, it would be dangerous to bring in NATO ships that could be targeted by Russia. Consequently, all stakeholders are happy with Türkiye's maximalist interpretation of the Convention since it maintains the overall balance of power. It is also worth mentioning that Türkiye has an ambitious program for acquiring Spanish-designed submarines.

From an economic perspective, as long as the war continues, and for a while after it ends, Russia and Türkiye reaching an agreement will be almost impossible. None of the region's countries want to cooperate or deal with Russia. The cooperation initiatives put forward by Türkiye were all suspended for that reason. The Black Sea has become hard to "operationalize" economically speaking.

Considering the replacement of its aerial fleet, we have witnessed Türkiye's continued interest in purchasing 40 Eurofighter Typhoon jets. The country's F15 jets are indeed aging. Half of the fleet needs



to be updated. By 2030, 80 aircrafts will be liable to be replaced or upgraded. This is not only a major issue for Türkiye. It would also constitute a weakness for NATO.

When shifting to the prospects the region's geopolitics, one finds that it is difficult to predict the end of the War in Ukraine. Everything else depends on that. However, one thing is certain. Regardless of the outcome of the conflict, Russia will end up weakened. The country's presence in the region is already weaker since a considerable part of their installations and soldiers were redeployed on the Ukrainian front. It is suffering major pushbacks. What remains to be seen is how Türkiye will react to these shifting parameters.

The Turkic council will certainly convene again, especially following Uzbekistan's accession. Regarding the Caucasus, everything hinges on how Türkiye manages its relationship with Armenia, and whether it can bring it into the Western fold. Türkiye has not yet made any significant moves in that regard. Normalization could be an opportunity to marginalize Russia further and restructure the geopolitics of the region. Some people might question the utility of this. The competition with Russia was very fierce in the 1990s and benefited neither Russia nor Türkiye. The current government might not be willing to ignite another geopolitical confrontation in the Caucasus. It might prefer to wait for Russia to weaken "naturally". Another important question is how Europe and the US will behave in the region, as they were ostensibly absent during the Karabakh war.

There seems to be no ostensible justification against opening the Turkish-Armenian border. The only discernible reason to halt this diplomatic initiative would be if Azerbaijanis were thinking of carrying out more operations in Karabakh. In that case, Turkey would wait for such maneuvers to end. In any case, the Armenians are ready to open the border. Türkiye is the one dragging its feet. No official reason is given for this reluctance. Opening the border would decrease Azerbaijan's interest in the Zangezur corridor.

Azerbaijan and Iran signed a deal on the possible opening of a corridor through Iranian territory. However, this agreement does not seem to be very applicable given the two countries' relationship. It is likely a performative act from Azerbaijan to show Armenia that they have other options.

Russia does not view the Türkiye-Armenia normalization process positively. Russian officials never really backed any of the attempts to normalize relations between the two countries. Back in 2010, when Türkiye and Armenia last signed agreements to improve their relations, Russia had encouraged Armeni. They haven't pushed for normalization since then. Russia probably supports Türkiye in the region as an opposition to the US.

While the future of the region depends on the outcome of the war, there is ample reason to refrain from being too optimistic. Even if Russia loses the war, it would not be the first time that country was weakened. It would still have the capacity to undermine its neighbors, especially in the Caucasus.



Panel 2: EU-Türkiye Cooperation on Energy Security and Transition

Kadri Taştan, GMF expert, non-resident senior fellow in GMF's Brussels office

Noemie Rebiere, energy security expert

Chair: Özgür Ünlühisarcıklı, GMF Ankara Office Director

Summary:

Energy security in the Black Sea region was discussed from two points of view. On the one hand, the conversation addressed the energy security of Black Sea countries. On the other, it approached the Black Sea region as a net exporter and focused on its role in the energy security of outside countries.

Europe's energy security is currently a major issue. Since the beginning of the 2000s, Türkiye has positioned itself as a geostrategic actor both for its own and the European Union's energy security. Like the EU, Türkiye is strongly dependent on energy imports, most notably from Russia. Türkiye is not only dependent on Russian gas, but also Russian oil, coal, and nuclear combustibles.

Since the outbreak of the Ukraine war, Türkiye has become one of the only gateways for Russian gas to reach the EU; in 2022, Russia proposed increasing its gas exports to Türkiye. As Russia and the EU wanted to bypass the Ukrainian territory, Türkiye became the strategic territory to pass across to bring energy to the EU from diverse sources. If relations between the EU and Türkiye become more strained, this tension will show even more.

The outbreak of the war has also shown the vulnerability of the offshore transportation of oil and gas. The specificities of the seabed of the Black Sea are thus that any infrastructure could be easily disrupted. A great variety of actors may have the ability to intervene at the depth of the Black Sea and major security issues may easily arise and lead to potential geopolitical turmoil in the entire region.

Therefore, Turkish and European decision-makers share an interest in making Türkiye a geostrategic actor to secure energy flows to its own country and the EU. The development of Türkiye's energy infrastructure underwent multiple stages. Since the EU's dependency on Russia is very high, its first objective during the war was to lower said dependency, aiming to stop all oil and gas imports from Russia in 2027. The corridor linking Azerbaijan to the EU is thus seen as an important alternative, even if it would only carry a low volume of gas.

Türkiye is also attempting to diversify its energy imports and is eyeing Iran, Azerbaijan, Algeria, Nigeria, Egypt, and the United States as providers. For Türkiye to become an energy hub, it would need to develop strategic infrastructures, such as gas and oil pipelines, storage facilities, terminals and interconnections with the EU. It has already worked on enhancing its storage capacity.

However, the potential of gas imports from Azerbaijan is limited: Azerbaijan has limited reserves, and the capacity of the Southern Gas Corridor linking it to Europe, would not be very high. For this reason, there is a growing interest in importing Turkmen gas via Kazakhstan. Turkmenistan has considerable reserves, but it faces a technical problem: there are no pipelines across the Caspian Sea. There have been plans to link Azerbaijan and Turkmenistan via the Trans-Caspian pipeline. However, Iran and Russia never gave their green light, which made the project impossible since the proposed pipeline



would pass through their exclusive economic zones. Another solution could be liquifying the gas and shipping it on the Caspian Sea, similar to earlier such shipments made between Kazakhstan and Azerbaijan. Another challenge is that Turkmen leadership is not entirely free to decide on the destination of its gas exports, as it is subjected to considerable Russian pressure.

Consequently, while Türkiye has many of the necessary infrastructures to become an energy hub, it faces multiple supply challenges. Renewables would be an alternative for the country, but they would require large volumes of long-term investments. Reportedly, the topic had been discussed with Qatar after the outset of the energy crisis. At the same time, Türkiye's nuclear program is widely seen as lagging behind.

It seems unlikely that Türkiye would join the East Mediterranean Gas Forum, as part of its attempts to diversify its energy supply sources. It was originally excluded from the organization due to its negative relationships with Greece, Cyprus, Israel, and Egypt, and even though it has improved its relations with these countries since 2020, it was never invited or asked to join the organization. Hence, it would be seen as a diplomatic defeat to ask to join the East Mediterranean Gas Forum. The recent deterioration in Israeli-Turkish relations since October 7 makes such an accession even more unlikely.

Türkiye also faces difficulties in liberalizing its energy market to comply with American and European demands. All Western countries are pushing Türkiye to do so, but the country has yet to agree to take a meaningful step in that direction. Turkish energy companies are monopolistic, which contradicts the country's aspiration to become an energy hub, as such hubs need to be free markets.

Gas exportation, more specifically, remains a complex issue. The EU obliged its members to liberalize the transportation and distribution of electricity and gas. Since the beginning of the 2000s, Europe's relationship with Russia deteriorated due to these policies. For example, the Third Energy Package obliged exporting countries to liberalize their own energy market.

Türkiye, however, is not keen to liberalize its domestic market and let third parties enter it, as advised by the EU. Russia supports Türkiye in refusing to apply EU regulations, through a project to develop a huge platform North of Istanbul. Russia also offered digital solutions, but conversations are ongoing on who would be responsible for this platform as both countries want to manage it. That being said, Türkiye seems increasingly willing to comply with the EU policy on liberalization, as it signed a treaty of Southeastern energy community, implying that it will reform its regulation in conformance to EU rules.