EUCERS Newsletter

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Introduction

Dear readers and friends of EUCERS,

It is my great pleasure to welcome you to this latest edition of the EUCERS newsletter, in which we present you with two articles.

In the first article, EUCERS Research Associates Marina Petroleka and Kalina Damianova assess Turkey's role in the EU's energy security structure.

In the second article, Alexander Klatte, an advisor in the German Parliament, asks the timely question whether framing makes a difference when it comes to energy politics.

Furthermore, the newsletter will inform you about the recent activities at EUCERS, including a portrait of our new Senior Research Fellow, Professor Nick Butler.

Feel free to keep us informed about your research projects and findings as we look to remain at the forefront of new knowledge and innovative ideas.
Thank you for your interest in EUCERS and for being part of our community.

Yours faithfully,
Thomas Fröhlich
EUCERS Newsletter Editor

In this Month's Edition:

ARTICLES

Do Geopolitical Changes Challenge Turkey's Role In EU's Energy Security Structure?

By Marina Petroleka and Kalina Damianova

Due to its geostrategic location, Turkey has become an integral part of the Southern Gas Corridor (SGC) – the EU's main gas supply diversification project, which aspires to enable natural gas supplies from the Caspian Sea region into European markets. However, relations between the EU and Turkey have become acrimonious following the failed coup in July 2016, the subsequent consolidation of power by Turkey's President Erdogan, and Turkey-Russia rapprochement, raising questions about Turkey's reliability as a core element of the European energy security structure.

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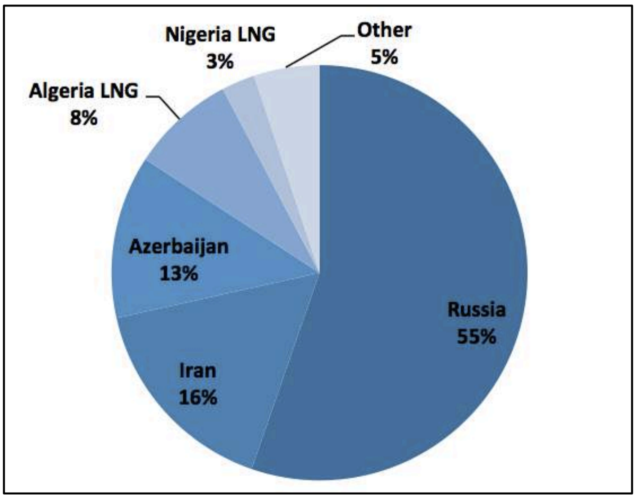
Changes in Black Sea region's political dynamics often have cascading consequences for the interlinked energy calculations. This article argues that events following the attempted coup may challenge Turkey's role in EU's natural gas configurations. Due to the pragmatic considerations of infrastructure networks underlying the EU-Turkey energy partnership and Turkey's desire to benefit from much needed transit fees, Turkey's role as a transit state of the Southern Gas Corridor is unlikely to be hampered. But, current tensions will most probably delay future mid-stream capacity additions from the Middle East, East Med and Caspian, via Turkey.

Turkey: Core part of EU's gas supplies diversification strategy

Turkey is highly dependent on imports to meet the vast majority of its rising crude oil and natural gas needs. Forecasts to 2025 suggest that Turkey will have a *net* import need of 56bcm (billion cubic metres), nearly 20% higher compared to 2015. According to the same forecasts, the EU-28 will increase net gas import demand by 28% over the same period, as domestic production contracts rapidly.[1] As both Turkey and the EU heavily rely on Russia for their gas imports, the two have aligned efforts for gas supplies diversification.

Turkey's Natural Gas Imports, By Country, 2015[2]



Turkey's geostrategic location, linking the energy rich Caspian Sea, Central Asian and Middle Eastern regions with Europe, has naturally made it a core part of EU's gas supplies diversification strategy.[3] The Southern Gas Corridor – consisting of the South Caucasus Pipeline Expansion (SCP), running from the offshore Shah Deniz II gas field to the Turkish - Georgian border; the Trans Anatolian Natural Gas Pipeline (TANAP) crossing

[1] Forecasts from BMI Research, Natural Gas Data

[2] *Turkish Ministry of Foreign Affairs*

[3] European Energy Security Strategy, May 2014, EU Commission, Europa website - http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0330&from=EN

Turkey to the Greek border, where it should be connected with the Trans-Adriatic Pipeline (TAP), crossing northern Greece and terminating in southern Italy – is a major pipeline diversification project for the EU. Turkey is right at the heart of it.

Map of Southern Gas Corridor[4]

1) Implications Turkey – EU Rift

Trust Eroded: Turkey-EU Relations

Trust – at times tentative- has been an essential element in the EU's energy security strategy in relation to Turkey. Breaking of this trust will bode ill for the energy relations and perceptions of energy security between the two.

A key member of NATO and a long-time EU membership aspirer, Turkey has been considered a traditional ally of the West. This has extended into the energy security sphere. With strong backing from the United States and the EU, Turkey inaugurated the Baku-Tbilisi-Ceyhan (BTC) oil pipeline in 2005. This established Turkey's aspiration, and the West's hope, that Turkey can become a major component of the Western (and specifically European) energy security structure, acting as a reliable transit partner and eventually even a hub for energy supplies. This extended -crucially- into the natural gas sector, with the Southern Gas Corridor (SGC) hailed as a major success of Europe's diversification efforts.

However, relations between the EU and Turkey have become notably acrimonious in recent years, becoming uneasy over negotiations over migrant flows in 2015 and 2016, and reaching a lower point following the failed coup in Turkey in July 2016. Turkey's increasing tendency of withdrawal from EU values and Western political norms, has alienated various EU governments and EU institutions, to the point where the EU Parliament passed an advisory vote on suspending Turkey's EU Accession negotiations, ongoing since 2005.

This growing mistrust has not been unilateral. Ankara has long felt disrespected by the protracted EU membership process and lack of concessions from the EU has made it view the process as a self-interested one, instead of mutually beneficial.[5] But it was not until the July 2016 putsch was thwarted, when Turkey visibly changed its rhetoric to the West.

In a public statement in August 2016, having successfully overcome the opposition and enhanced its political presence in Turkey, President R. Erdogan unequivocally showed his dissatisfaction towards US' refusal to hand over US-based Muslim cleric Fethullah Gulen, whom Ankara believes has orchestrated the July coup.[6] Additionally, Ankara, which in an effort to suppress domestic opposition detained thousands of civil servants from the military, government and education, closed a number of institutions and media outlets associated with Gulen, and suggested the return of the death penalty,[7] has been explicitly dissatisfied with EU's comments in regards with Turkey's post-coup measures.[8] In this context of increasing acrimonious relations between Turkey and the West, Turkish Foreign Minister Mevlut Cavusoglu has hinted that Ankara was now looking to other partners, such as Russia and China.[9]

2) Implications of Russia - Turkey Rapprochement

Turkish Stream and Russia-Turkey Rapprochement

Turkey has been Russia's second biggest gas customer, after Germany, and thus the continuation of Turkey's

4 Source: Trans Adriatic Pipeline https://www.tap-ag.com/the-pipeline/the-big-picture/southern-gas-corridor

5 Анкаре надоело унизительное отношение со стороны ЕС, заявил Чавушоглу, 15.11.2016, Риа Новости https://ria.ru/world/20161115/1481428427.html

6 Erdogan tells USA to choose 'Gulen terror group' or Turkey, 11.08..2016, EuroNews, http://www.euronews.com/2016/08/11/choose-gulen-terror-group-or-turkey-erdogan-tells-the-us

7 Erdogan ultimatum: 'US has to choose between Turkey & Gulen', 11.08.2016, RussiaToday, https://www.rt.com/news/355509-us-choice-turkey-gulen/

8 Turkey reacts angrily to symbolic EU parliament vote on its membership, 24.11.2016, The Guardian, https://www.theguardian.com/world/2016/nov/24/eu-parliament-votes-freeze-membership-talks-turkey

9 Turkish FM: West failed test following coup attempt, in danger of losing Turkey, 10.08.2016, RussiaToday https://www.rt.com/news/355404-eu-failed-turkey-test/

Russian gas imports also occupies a key place in Russia's efforts to keep its Eurasian gas market share.

Although Turkey has kept its close alliance with the West, it has also skilfully managed to manoeuvre in pursue of its own interests and keep a strategic partnership with Russia in spheres, such as energy and business. In the aftermath of the failed July coup, Turkey saw in Russia a supporter of its anti-Gulen claims.[10] This shifted Turkey-Russia foreign policy calculations. As the first major act to 'cement' the Russo-Turkish rapprochement, Presidents Erdogan and Putin signed a MoU in October 2016 re-setting in motion the construction of the Turkish Stream natural gas pipeline.[11] The pipeline should bring 16bcm of Russian gas into the Turkish market, for domestic consumption, diverting the supplies coming in from the TransBalkan pipeline.

The fate of Turkish Stream, however, remains uncertain. The driving reasons behind Turkish Stream project were not genuinely born out of commercial considerations. They rather emerged as an alternative of the halted South Stream project and Russia's quest to by-pass Ukraine for deliveries of natural gas to Europe. Although the project seems to be economically viable for Russia and Turkey, with a portion of costs for materials and pipes already sunk by Gazprom, its development was proven to be highly dependent on political considerations.

The continuation of Russia and Turkey rapprochement is fragile and in the short term depends on how the two will resolve their issues over the Middle Eastern conflicts and especially in regard to Bashar Al Assad's presidency. Beyond the question of the Syrian conflict, and longer term, Turkey-Russia relations are doomed to remain asymmetrical, with Russia having the stronger stance, as Turkey's main source of gas and the presence of military bases close to Turkish territory.[12] This asymmetry and the historical antipathy between the two Black Sea powers make this rapprochement tenuous.

Could Turkey Lose Interest in TANAP if Turkish Stream Materialises?

TAP/TANAP is due to bring first Azeri natural gas supplies to Europe by 2020. A total of 10bcm is marked for delivery to Europe via TAP, whereas Turkey should receive 6bcm initially in 2018. It is noteworthy, as a recent EUCERS/EWI study points out, that Turkey has agreed to take the smaller portion (6bcm) of the Caspian gas in favour of the EU, suggesting that although heavily reliant on Russia for its gas supplies, it does not necessarily seek diversification.[13] But, even in an event of increased Russia gas supplies to Turkey, satisfying more of its rising needs, Ankara is unlikely to lose interest in TANAP, as the much needed transit fees that Turkey will receive and the increase of its geostrategic importance and regional influence are crucial for Ankara.

Turkish Stream's European Ambitions A Long Way Off

There is an aspiration for Turkish Stream to enter into the South Eastern European market and reach Central and Western Europe, with a string running parallel to TAP. Although Greece has previously shown interest in receiving an extension of the pipeline, there has been no European momentum behind this initiative. The European Commission resisted on the grounds that it would go contrary to diversification efforts away from Russian gas.

If Turkey and Russia push for Turkish Stream expansion into the European market (under the auspices of the third energy package) they may encounter a much more resolute EC on the other side, under the current state of the relations between the three. For the moment, and while Gazprom is in the final stages of negotiations with the EU on settling anti-trust claims, it is unlikely that Russia will push for a European expansion of Turkish Stream.[14] Therefore, it will most probably remain a project focused on the Turkish market.

[10] Russia Successfully Thwarted Gulen Movement Activities - Turkish Deputy, Mop, 14.11.2016, Sputnik News, https://sputniknews.com/politics/201611141047424288-gulen-activities-russia-extradition/

[11] The project was impacted by the diplomatic rift between the two countries in late 2015, being put on indefinite hold in December 2015.

[12] Russia and Turkey's Rapprochement, Jeffrey Mankoff, 20.07.2016, Foreign Affairs, https://www.foreignaffairs.com/articles/turkey/2016-07-20/russia-and-turkeys-rapprochement

[13] Options for natural gas supplies diversification for the EU and Germany in the next two decades. Nov.2016, EUCERS, EWI, Adnan Vatansever, Herald Hecking et al. http://www.kcl.ac.uk/sspp/departments/warstudies/research/groups/eucers/pubs/strategy-paper-12.pdf

[14] While Visiting Greece Russian FM Lavrov Discusses Turkish Stream Pipeline, Ukraine, Syria , 03.11.2016, Greek Reporter, http://greece.greekreporter.com/2016/11/03/while-visiting-greece-russian-fm-lavrov-discusses-turkish-stream-pipeline-ukraine-syria/

3) Turkey's Future Gas Transit Role: Beyond TANAP?

Beyond 2020 and once the backbone of the SGC has been laid, there are considerations to use it for connecting other resources from the Middle East, the Caspian and the newly discovered offshore East Mediterranean fields.

Increased gas supplies from Iran are still unlikely due to domestic shortages and there are several political obstacles to laying a pipe from the East Med offshore into Turkey, but nevertheless in the longer term these are mulled as options for EU diversification of natural gas supplies.

List of planned and under construction natural gas pipelines to and via Turkey[15]

	Pipeline	Capacity, bcm	Destination
Southern Gas Corridor (SGC)	TAP	10 (20 future expansion)	Europe
	TANAP	16 (24 then 31 future expansions)	Turkey (6), Europe (10)
	SCPE	20	Turkey, Europe
	Turkish Stream	15.75 (String 1)	Turkey (aspiring to Europe in future)
	Iran Gas Trunkline-9 (IGAT - 9)	na	Turkey (possibly aspiring to Europe in future)
	KRG - Turkey Gas Pipeline	10	Turkey

The souring of relations between the EU and Turkey does not undermine the benefits of the SGC realisation, which will be hailed as a success for the EU's diversification strategy once operational. Considering aspirations for future gas transit from Iran, or other Caspian states into Europe (long term at this point), Turkey will be unlikely to find good reason to 'rock the boat' on the SGC or do anything to undermine the stability of the supplies.

However, the EU may proceed with caution on any major expansion or new trunks connecting to the SGC. If the *perception* of Turkey as reliable transit and most importantly trusted partner continues to be undermined, then the aspirations for the scale of the SGC may be downgraded. Expansions may face roadblocks and negotiations around access to the EU market may be prolonged as the EU prioritises alternative sources of imports such as more LNG from the US and Africa.

Conclusion

The growing political and diplomatic rift between Turkey and the EU bodes ill for energy relations between the two, which have traditionally been strong. Growing mistrust may undermine the perceptions of energy security provided to Europe by using Turkey as a transit.

Turkey's pivot away from Western political norms and values, which increases its political unpredictability worry the EU. Major infrastructure links under construction, namely the SGC, will enshrine a level of pragmatism and Turkey will remain a major part of the SGC and, by extension, of the European Energy Security Structure.

Longer term, a more troubled energy partnership, will lead to protracted negotiations, and cause project delays. In this regard, the likelihood of other gas projects transiting Turkey, beyond TANAP, such as potential East-Med or Middle Eastern gas supplies to Europe, could be undermined.

[15] Source: BMI information

Framing does not matter, when it comes to energy politics

By Alexander Klatte

Alexander Klatte is the press and communications advisor to Dr. Joachim Pfeiffer, spokesman for economic and energy politics of the CDU/CSU parliamentary group in the German Bundestag. Previously, he worked in Public Affairs for Gazprom and Wintershall. Alexander also gathered experience at the Federal Ministry of Economic Affairs and Energy (BMWi) and the Federation of German Industries (BDI). He studied social sciences in Berlin and Madrid.

In the mid-2000s, the energy security of natural gas became a top political issue in Germany and the United Kingdom. Germany as a traditional importer experienced recurring supply shortages caused by crises between Russia and Ukraine. UK's large domestic resources depleted noticeably and enforced a system change from the role of a net exporter to a net importer. The time from 2005 until 2015 represents an important period. Both countries have a similar share of natural gas in their national energy consumption mix and experienced disturbances in their usual way of energy acquisition and supply routine because events and new developments caused this routine to change over time.

These diverging and new sets of issues put both governments under pressure to perform, which they did by diversely framing them. However, this did not put the governments in control of the situation. They reacted and did not act. I argue that they had to adapt their framing according to objectively changing facts rather than constructing the frames according to their interests. They had no other option to frame the issues differently because of energy economic structures and political phenomena happening outside of their control, and when these factors changed, the frames had to change with them. This is a crucial point. Are frames led by facts or can frames bend reality? Of course, a certain reliance on facts must exist in frames, but the whole idea of framing is that people can be influenced to perceive issues alternatively. However, this did not happen in these particular cases. Hence, I ask how the German and UK governments framed natural gas security from 2005-2015 and what can be learned for the future?

The theory of political framing states that political actors can actively create and change frames similar to their interests. Frames are intended to influence the recipient to perceive the issue how their creators want them to. Frames are not constructed to reflect plain reality, but to reflect the interests of the constructor. Scholars see framing as "an unavoidable reality of the communication process, especially as applied to public affairs and policy. There is no such thing as unframed information" (Nisbet 2009). Very simply put: a frame is a thought organizer. It contributes to the construction of social reality. Just like a picture frame can determine what is in the frame and what is not - what is relevant and what is irrelevant. Frames can provide a structure to create a certain mentality. It "denotes an active, processual phenomenon that implies agency and contention at the level of reality construction" (Benford and Snow 2000: 614). The process of framing itself is about emphasizing aspects of the complex matter by using certain words. This does not necessarily add a false spin to the matter - it rather pares down some aspects and gives greater weight to other information of the matter: Taxes can be framed to be a social burden or a virtue; drug addiction can be seen as a personal or a societal problem.

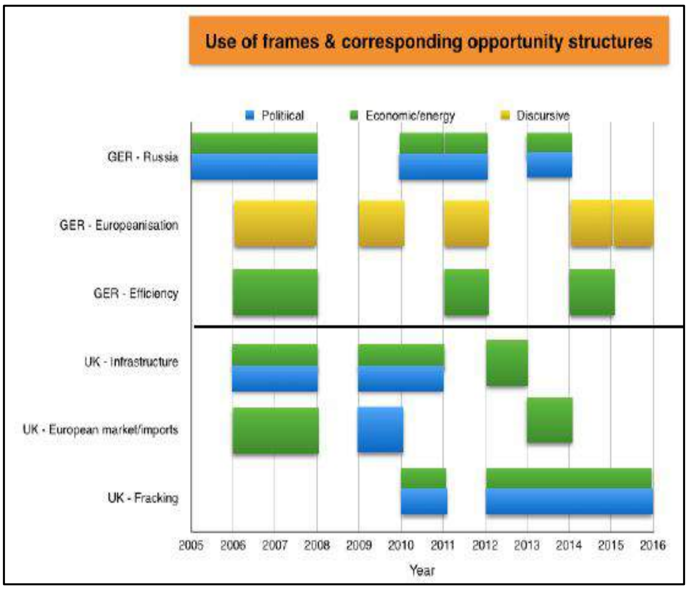
Generally, frames need an opportunity to resonate with the audience to be effective. What gives them resonance is the context in which they appear. This context can be described as a political opportunity structure (Benford and Snow 2000). It includes aspects such as electoral systems, partisan influences or public opinion. In addition I assume energy economics to be influential, because they set the possibility for framing in the first place. If a country imports all or most of its gas, a frame concerning domestic resources is useless, because it will not resonate with anything relevant to the audience.

To understand the issue at hand, I analyzed around 3000 governmental speeches plus written statements in the German context and filtered them by topic and relevance. For the United Kingdom I analyzed 75 ministerial statements before the House of Commons. Both, the UK and German government established three framings of energy security of gas over time. Germany created frames on Russian gas, energy efficiency, and Europeanisation. The UK formed frames on fracking, energy infrastructure, and European imports.

	UK		Germany	
management focus/area of application	domestic	foreign	domestic	foreign
supply	fracking	European im-ports	/	russia
demand	infrastructure	/	efficiency	europeanisation

The UK frames energy security in terms of a domestic supply matter, whereas Germany abstains from this focus. Both countries use a frame focused on Europe but in a quite different way. The UK emphasizes the fact that Europe is serving as an importer for Britain's supply management. Meanwhile, Germany first uses Russia as a foreign supply management frame for energy security and switches later to emphasizing the Europeanisation of gas supply among member countries who deserve solidarity because of their higher dependence on the single supplier Russia. Europeanization of such gas supplies will create a better demand management and balance throughout Europe and increase the energy security for both Germany and Europe as a whole.

When reviewing the different opportunity structures, we can see how almost all of the frames are influenced by practical constraints and inherent necessities. Almost every frame has partly or fully been influenced by factors stemming from energy economic structures in the respective country. The political opportunity structure is influential as gas is much more likely to be politicized than other energy sources in terms of energy security. This is due to the absence of a global gas market and the transport via pipeline. Additionally, the energy economic and political opportunity structure frequently appear together and occasionally share interconnections. The gas disputes between Ukraine and Russia, for example, are of major political influence for Germany because of its energy economic structure because it is the biggest importer of Russian gas in Europe. The UK on the other side is to a far lesser extent politically affected by these disputes since it does not import relevant volumes of gas from Russia. Chronologically, Germany first framed its energy security of gas in terms of reliable relations to the main gas supply country Russia. Over time, the repeated gas disputes between Russia and Ukraine lead toward a domestic frame on energy efficiency and an Europeanization frame of gas demand. The United Kingdom first established an infrastructure frame due to necessary energy system shifts in its new role as a gas importer. Over the years, this frame declined and was superseded by a domestic frame focusing on gas production and especially fracking. A European frame was also established, which stresses gas imports from a single European market. Only this frame is determined by factors of media and public opinion, which is why it is highlighted in the graphic above. The results imply that the frames are strongly influenced by practical constraints and inherent necessities of the respective energy system. Few political or discursive factors were found to be influential.



What do we take from this? Seemingly, framing is not "the name of the game" when it comes to energy politics. Certain facts and relations are hard to hide and demand recognition. Therefore, politics should not be so much about how to present and frame facts, but to use their diplomatic power to shape systematic factors. For example, to achieve gas security German-Russian relations need to be strengthened again after times of foreclosure instead of merely re-framing them. In December 2016 the EU-sanctions against Russia were extended for another six months. Berlin could have used this opportunity to press Russia to further strengthen its gas supply guarantees. Likewise, Nord Stream 2 could be reframed as an economic investment, which benefits both Russia and the European energy security. Energy security is important especially in light of the outstanding finalization of the European Energy Union. A strong and reliable import of gas means securitization of supply and makes unification easier. In terms of gas supply security, the UK on the other hand needs to face their new role as an importer and build proximity to the EU. This is pivotal after the Brexit-decision. Supply and demand of energy give the EU and the UK the opportunity to make a small step to reconstruct togetherness.

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ANNOUNCEMENTS

Professor Nick Butler joins EUCERS as Senior Research Fellow

We are delighted to share the news that Nick Butler has joined the EUCERS' team as a Senior Research Fellow. Nick Butler is Visiting Professor at the Policy Institute at King's. Before joining King's, he was Group Vice-President for Strategy and Policy Development at BP from 2002 to 2006 and previously BP's Group Policy Adviser. From 2009 to 2010 he worked for the Prime Minister as Senior Policy Adviser at 10 Downing Street.

Nick is also a member of the Strategic Advisory Council of Statoil, Energy Policy Adviser at the Cavendish Laboratory in Cambridge, and a Senior Adviser to Coller Capital, Linton Capital and Corporate Value Associates. From 2007 to 2009 he was Chairman of the Cambridge Centre for Energy Studies. He is a Non-Executive Director of Cambridge Econometrics, a Trustee of Asia House, a Vice-President of the Hay-on-Wye literary festival, as well as a regular contributor to the Financial Times. Nick's particular interests are international energy policy, including energy security; industrial policy; the future of higher education; and European issues and he is a regular contributor to the Financial Times.

EUCERS ON THE ROAD

Our team represents EUCERS at various conferences and events all over the world. This section gives a regular update and overview of conferences and interview contributions by EUCERS Director Professor Dr Friedbert Pflüger, Research Director Dr Frank Umbach and Associate Director Dr Adnan Vatansever, as well as by our Research Associates.

23.01.-27.01.2017 Natolin, Poland	Frank taught a Master's course on EU external energy governance" at the College of Europe.

PUBLICATIONS

Pflüger, Friedbert, "Energiepolitik zwischen Paris und Washington" (Energy Policy between Paris and Washington). In: BizzEnergy January 2017. http://bizzenergytoday.com/energiepolitik_zwischen_paris_und_washington

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If you have found our Newsletter interesting, wish to hear more about our activities, or, indeed, contribute with ideas or essays, please contact Carola Gegenbauer, Operations Coordinator EUCERS on carola.gegenbauer@kcl.ac.uk or call 020-7848-1912.

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ACKNOWLEDGEMENTS

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