

THE EAST MED PIPELINE PROJECT: EUROPE'S FOURTH ENERGY ARTERY

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Abstract: The evolutions regarding the energy cooperation among Greece, Cyprus and Israel have given a new boost towards the implementation of the EU principle of diversification in the field of hydrocarbons supply. The current paper aims to analyze the dynamic of the 'East Med pipeline supply choice' and evaluate it in terms of EU energy security. Beyond North Sea, Russia and North Africa, Eastern Mediterranean may represent the 'fourth energy artery' of Europe and this the main fact underlining the importance of the evolutions on the occasion of the agreement among the three partners in Tel Aviv in the 20th of March 2019. In addition, it is examined analytically why Turkey cannot become a rational option to be included in the overall planning referring to energy production in the region.

Keywords: East Med, Greece, Cyprus, Israel, Energy security, Geopolitics, Economic pillar

Introduction

The present paper aims to give answers to the problematique regarding the EU's energy imports and Eastern Mediterranean's potential contribution towards implementation of the EU main principle of diversification. The EU's principal aim of the diversification of energy providers and corridors has been identified more or less with the priority of limiting the relevant "over-dependence" from Russian hydrocarbons. The subject matter of the paper concerns the fact that non-Russian gas seems to exist in neighbouring regions such as the Eastern Mediterranean. From the empirical hypothesis that tested energy deals, it is deduced that there is the possibility for Israel and Cyprus to become adequately important energy providers for Europe without engaging co-producers or transit routes that oppose the EU diversification principle.¹ As it is explained below,

1. Ioannis Th. Mazis and Ioannis P. Sotiropoulos, "The role of energy as a geopolitical

such actors' internal demand is "locked" by Russian gas imports, while they are strategically inclined to act against the core strategic decisions of the EU.

These gas imports are absolutely important for the EU member-states' economic growth, while their prices influence directly the competitiveness of the EU economies on a global scale. With regard to the reasons the present paper focuses on gas and not other strategic goods such as oil, it is worth mentioning that gas is traded on the basis of bilateral agreements between producer and consumer. Moreover, it is transferred via established structures, meaning pipelines, and thus, it is easy to be manipulated especially seeing that LNG (Liquefied Natural Gas) technology is still relatively underdeveloped. On the contrary, oil is traded in international markets in a way closer to the logic of free market and multilateral free trade.² In addition, the focus on gas is reasoned by the relevant predicted increase of world consumption from 23% to 28% by 2025.³ In brief, easiness of political-strategic manipulation and the rising world consumption represent the two most important indicators explaining the international interest in gas. After the above-mentioned empirical remarks, the following questions have to be answered: Why is the implementation of the EU diversification principle considered critical? Is the Turkish option viable for the EU? Is the Eastern Mediterranean "new El Dorado" a viable solution and under which conditions could it remain like this?

Essentiality of diversification

The current chapter seeks to describe why the implementation of the EU diversification principle is considered critical. The diversification principle can be found at the core of the EU priorities with regard to the member-states' normal and uninterrupted energy supply. Thus, it is identified with the concept of energy security and consequently, the economic stability of the Union. In these terms, the European Commission has defined energy security and particularly energy supply as "ensuring that future essential energy needs are satisfied by means of a sharing of internal energy sources and strategic reserves under acceptable economic conditions and by making use of diversified and stable, externally accessible sources".⁴ Following this definition, energy security is considered and

factor for the consolidation of Greek-Israeli relations", *Regional science inquiry* VIII (2) (Special issue 2016): 27-44. Markos Troulis, "The energy factor in the Eastern Mediterranean: The hegemonic challenges for Ankara and the potentials of Greece, Cyprus, Israel and Egypt" [in Greek], *Foreign Affairs – The Hellenic Edition* 54 (2018): 100-109.

2. Brenda Shaffer, *Energy politics* (Philadelphia: University of Pennsylvania press, 2009), 34.

3. Ayhan Demirbas, *Methane gas hydrate* (London: Springer, 2010), 63.

4. As cited in: Yonca Özer, "EU energy security and the role of Turkey", *Turkish re-Civitas Gentium* 7:1 (2019)

implemented to the extent that any consumer has stable and normal access to a viable pipeline network and, consequently, necessary energy reserves. In the anarchic and full of uncertainty inter-state system, this stable and normal access is secure only when it is diversified. Essentially, energy security means obtaining multiple choices and becoming as independent as possible. This is the crux of the matter for energy politics and this is where the meaning of pipeline diplomacy is derived from. The EU diversification principle has been justified and its importance has been underlined by some specific facts; theoretical as well as empirical.

Firstly, the inherent significance of the energy product is an undisputed fact. The logic of the European Commission's above-mentioned definition is fully identified with the substance of gas as a "strategic good". Strategic goods are defined as items "for which the marginal elasticity of demand is very low and for which there is no readily available substitute".⁵ Strategic goods become more and more important as adequate quantities cannot be produced in the interior. For this reason, the definition of a good as "strategic" or the level of its strategic importance is not the same for the whole international system, but it is determined by internal consumption, internal - actual or potential - productivity, availability of substitutes as well as the level of dependence; i.e. to what extent energy imports are diversified. It could be also supported that apart from monopoly there is, also, monopsony; Russia is, also, dependent on the EU market in order to keep its economic growth, although it exports large quantities to substantial markets, like Turkey, Ukraine, Belarus and Japan (LNG) while, also, being paid high revenues for oil exports to China and other non-European markets.⁶ Therefore, the debate is dual and refers clearly to interdependence, rather to one-sided dependence.

Secondly, it is geopolitics and more specifically the economic pillar that matter. Such elements of power include "natural resources, population, industrial capacity, and level of scientific and technological development and innovation potential".⁷ The debate on energy security is both economic and political depict-

view of Eurasian studies 7 (2007): 117. See, also: European Commission, *Green paper: A European strategy for sustainable, competitive and secure energy* (Brussels: Commission of the European Communities, 2006), 10.

5. David Baldwin, *Economic statecraft* (New Jersey: Princeton university press, 1985), 214-215. Also: Hanns Maull, "Oil and influence: The oil weapon examined" in *Economic issues and national security*, eds. Klaus Knorr and Frank Trager (Kansas: The Regents press, 1977), 263.

6. Finn Roar Aune et al., "The future of Russian gas exports", *Economics of energy and environmental policy* 6 (2) (2017): 112.

7. Panayiotis Ifestos, *European political cooperation: Towards a framework of suprana-*

ing the European states' strategic leverage in the world. The extent of an actor's possession of or accessibility to raw materials is a decisive indicator when the correlation of power is measured. This is because raw materials feed the industrial and military capabilities and thus, they contribute to the implementation of national interests.⁸ In this sense, the debate on the diversification principle refers to the member-states' core priority; their survival. Besides, in theoretical terms, energy represents an element of power in two ways; on the one hand, it is a means contributing to economic growth and empowerment for the sake of hard power building and on the other hand, it is an effect defined as a tool for an increase of strategic and political leverage.⁹ For these reasons, it is found at the core of peer hegemons' interests.

Thirdly, in the recent years, the EU energy capabilities seem to decline sharply. Domestic production declined mainly with regard to the gas production in the North Sea. The output peak had been in 1999 and production since then has been declining steadily creating problems not only for the UK's and Norway's trade balance, but also for the EU's energy supplies, which have to be covered increasingly by other producers. It is worth to be indicated that even the United Kingdom, which is a gas producer itself, proceeded to imports for the first time in 2004 satisfying 1% of its internal demand and what is more interesting and worrying is that, by 2030, this number will have climbed to 75%.¹⁰ It has been mentioned already that "although about £14 billion (\$21 billion) was invested in the basin in 2013 on new production; maintenance and repairs cost a further £9 billion".¹¹ So, even the core gas producer among the European countries – i.e. the United Kingdom – becomes more and more dependent on imports.

Fourthly, the situation concerning the EU internal production seems to deteriorate because of the sharp rise of the internal consumption. The EU member-states have been demanding more and more energy in order to sustain their growth. The natural gas consumption rose about 30% in the 1990s, while envi-

tional diplomacy? (England: Gower publishers, 1987), 45.

8. Jakub Grygiel, *Great powers and geopolitical change* (Baltimore: The John Hopkins university press, 2006), 30. See, also: Klaus Knorr, *The power of nations: The political economy of international relations* (New York: Basic books, 1975), 80.

9. Knorr, *The power of nations: The political economy of international relations*, 9.

10. "UKCS oil and gas production projections", last modified April 5, 2015, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/414172/Production_prjections.pdf.

11. "Crude realities: The tumbling oil price piles more pressure on a sinking industry", last modified January 24, 2015, <http://www.economist.com/news/britain/21640344-tumbling-oil-price-piles-more-pressure-sinking-industry-crude-realities>.

ronmental considerations suspended nuclear energy and oil trade development. At the same time, the development of renewables – basically wind and solar systems – is extremely slow and inadequate to meet the increasing internal demand. Furthermore, the close to 209 Mtoe (million tonnes of oil equivalent) of natural gas gross inland consumption in 1990 rose to almost 387 Mtoe in 2013.¹² Under this lens, a declining internal production fails to satisfy an increasing demand.

Fifthly, as has been underlined already, the EU's increasing need for energy imports has been met by Russia. Considerations that energy dependence could become a political problem has led Europeans to look for alternative supplies and declare the principle of diversification. The great dependence on Russian resources led to the subversion of EU principles of market economy and competitive economic environment. It also led to a limitation of security of gas purchases for the member-states' markets due to relevant instability in transit countries such as Ukraine. Such tensions and the consequences regarding gas purchases have proved to be substantial obstacles highlighting the need for diversification. It is indicative that substantial percentages of the Russian gas purchases cross Ukraine towards the EU market, while the dependence of some EU member-states reaches, for instance, 89% in the case of Bulgaria and 100% for Slovakia.¹³ For this reason, political instability in Ukraine seems to affect energy security and consequently economic growth especially in the relatively new member-states of the Union in Eastern Europe.

Sixthly, peripheral instability seems to put into question any potential for cooperation with the alternative route of North Africa. One of the potential arteries is North Africa, but since the beginning of the "Arab Spring revolts", it has been destabilized significantly. The Arab Spring started out from Tunisia on the 19th of December 2010 after a street vendor's self-immolation. It was in this country where the first regime change took place on the 16th of January 2011 as a result of the revolts.¹⁴ Nevertheless, the most significant case study is Libya, which had been exporting gas to Europe already. The end of the civil war found Libya in chaos with the status of pariah state and absolutely eliminated from the world scene. Nowadays, Libya is politically torn (three subdivisions) and its future as

12. "Supply, transformation and consumption of gas - annual data", last modified February 18, 2015, http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=nrg_103a&lang=en.

13. Ariel Cohen, "Europe's strategic dependence on Russian energy", *The Heritage foundation: Background* 2083 (2007): 3.

14. Markos Troulis, "Challenges of metamorphosis in the Middle East: Religion-politics relations under construction" in *Transformation of the Muslim World in the 21st century*, ed. Muhammed Huseyin Mercan (London: Cambridge Publishing Scholars, 2016), 119.

a unified state is questioned. During the Libyan Arab Spring, a new democratized polity model was demanded since Qaddafi's autocracy was not acceptable anymore. However, at the expense of Libyan nationalism, it is indicative that individual groupings even claim their independence. Consequently, due to Qaddafi's divisive policies which were not compatible with his rhetoric, Libya's future polity remains unclear. Such evolutions have set back investments on gas reserves, which are poor anyway. It is indicative that Libya, which supplies Italy with gas via the Green Stream, is 45th in the world ranking of gas producers.¹⁵

The Turkish option in question

In the light of the above-mentioned parameters, the diversification principle seems to be an inescapable option for the EU policy-makers. Since it is a strategic good, energy is of vital interest for the economic and even political future of the European countries, which only have poor reserves at their disposal. Under this lens, it is deduced that the artery from the North Sea suffers from low productivity rates; the Russian artery is questionable due to "over-dependence" worries; and the artery from North Africa refers to very poor reserves in an unstable strategic environment. Therefore, in terms of the geography of the European perimeter and keeping in mind that the LNG technology is still under-developed, the fourth artery via Southeastern Europe seems to be the sole option. However, is the Turkish option viable for the EU? In the late 1990s, Turkey entered pipeline politics with the ambition to obtain such a role on behalf of the EU's energy trade contributing, in this way, to the European energy security. Turkey's bid for EU accession during the 1990s and especially after the Helsinki Summit in 1999 was linked to the promotion of this "energy asset". In particular, Turkey has presented itself as a main geopolitical checkpoint between the producing and the consuming countries of the East and the West respectively. This geographical advantageous position seems to be undermined by three specific phenomena.

The first is related with Turkey's inclination to manage its energy policies not in terms of rules of market economy, but of political manipulation. Thus, Turkey's participation in the gamble of energy trade has been identified with hegemonic practices. The most indicative example of Turkey's maximalist practices regarding energy trade refers to Nabucco. Nabucco has represented a potential gas pipeline – 3,300 km long – linking the Caspian region and particularly Azeri gas fields to Austria and subsequently, Central Europe and contributing, in this way, to the implementation of the diversification principle. This is due to the fact that its main

15. "Natural gas production", last modified April 5, 2015, <https://www.cia.gov/library/publications/the-world-factbook/rankorder/2249rank.html>.

suppliers would be non-Russian, meaning Azerbaijan and potentially Egypt¹⁶ or Turkmenistan. Hence, a reasonable amount of gas could be carried to Central and Western European countries strengthening the EU's diplomatic position against Russia and thus, inducing Gazprom to cheapen gas prices.¹⁷ In 2007, EU Commissioner Andris Pielbags stated characteristically that "we need to diversify our supply routes [...] through the nomination of coordinators for four key priority electricity and gas projects, one of which is Nabucco".¹⁸

An indication for the significance of the project was Russia's initial drive to "lobby Baku hard to export more of its gas via Russian pipelines",¹⁹ making in this way Nabucco an unsustainable investment. Turkey exploited its central positioning, exercising political pressures on the EU over the accession negotiations. Thus, it rendered Nabucco into a political-strategic tool. Especially, Recep Tayyip Erdoğan stated that his government would "review our position" on the Nabucco pipeline if its bid to join the EU were impaired.²⁰ Moreover, Turkey asked for keeping 15% of the gas and the right to re-sell it on terms defined by itself.²¹ In other words, Turkey wanted to behave like a producer while being just a transit country. Besides, according to the Minister of Energy Hilmi Güler, "we are entering into the European Union with pipelines".²² After 2012, the Nabucco Consortium proposed to build the "Nabucco West", a pipeline extending from the Turkish borders to Austria. However, the question arose of how the

16. For the role of Egypt in the regional energy politics, see: Ioannis P. Sotiropoulos, "Between two major geopolitical crises: The impact on South East Europe. Part I: The Ukrainian heritage", *South-East Europe Energy Brief-Monthly Analysis*, Institute of Energy for South East Europe (IENE), no. 139 (July-August 2014).

17. Katinka Barysch, "Turkey's role in European energy security", *Centre for European Reform* (2007): 4.

18. Andris Pielbags, speech 07/531, "Nabucco pipeline and security of supply", *Speech at the "High Level Conference on Nabucco"*, September 14, 2007, http://europa.eu/rapid/press-release_SPEECH-07-531_en.htm?locale=en.

19. Jeffrey Mankoff, "Eurasian energy security", *Council special report* 43 (2009): 21.

20. "Turkey blackmailing EU over gas pipeline, German minister says", last modified January 20, 2009, <http://www.dw.de/turkey-blackmailing-eu-over-gas-pipeline-german-minister-says/a-3962409>.

21. "Rus doğalgazına alternatif arayışı", last modified September 3, 2008, <http://arsiv.ntv.com.tr/news/458088.asp>. See, also: Saban Kardas, "Turkish-Azerbaijani energy cooperation and Nabucco: Testing the limits of the new Turkish foreign policy rhetoric", *Turkish studies* 12 (1) (2011): 62-63. Gareth Winrow, "Turkey and EU energy security" in *Turkey in Europe: The economic case for Turkish membership of the EU*, ed. Adam Hug (London: The foreign policy center, 2008), 61.

22. Gökhan Bacik, "Turkey and pipeline politics", *Turkish studies* 7 (2) (2006): 304.

Azeri gas would be carried up there. That role would be taken on by the “Trans Anatolian Gas Pipeline” (TANAP) through use of Azeri funds, an evolution essentially unfreezing the negotiations on the whole project, but still premature due to the political activism of the Turkish government.

The second problem is institutional and strongly linked to the accession negotiations between the European Commission and Turkey. In conjunction with the previous remarks, Turkish legal framework concerning energy and the interior is incompatible with the *acquis communautaire* (compliance with EU law) in many crucial aspects. Such hegemonic practices counteract the EU law and especially the core European principles of market economy and mutual benefits to an equal degree. The core of these principles was described in the Budapest Summit for the Nabucco pipeline on the 27th of January 2009. It was concluded that “[we attach] great importance to the diversification of hydrocarbon sources, markets and routes of delivery based on the principles of market economy, transparency, reliability, predictability, free competition and mutual benefits, as well as to the uninterrupted and secure supply of natural gas for the domestic markets of all countries at competitive prices and conditions”.²³ In order for this argument to be strengthened, it is worth mentioning that Turkey has denied ratifying the ECT (Energy Community Treaty), which is a *sine qua non* for its accession to the EU and sums up the above-mentioned EU principles.

The existence of obstacles due to Turkey’s non-compliance with the EU conditionality (non-ratification of the Energy Community Treaty, excessive demands over the Nabucco pipeline and lack of liberalization in its domestic energy market) as well as problems related to bilateral disputes with Cyprus (Cypriot issue) “froze” the negotiations over the chapter 15 of the accession negotiations dealing with energy issues for several years. Such policies may promote Turkey’s goal to become an energy hub, but at the same time increase the EU’s unrest concerning state manipulation of energy projects. Besides, the EU diversification principle refers to the over-dependence in the EU’s energy relations and hardly seeks to establish new ones. In the past, the EU Commission expressed this unrest as follows: “Some major producers and consumers have been using energy as a political lever” and thus, “external actor not playing by the same market rules nor being subject to the same competitive pressures domestically”.²⁴

The EU has recognized Turkey’s “considerable level of alignment with re-

23. Council of the European Union, “Nabucco summit (Budapest, January 2009) – Information from the Hungarian delegation”, Document 6252/09 published in Brussels on February 12, 2009.

24. “An external policy to serve Europe’s energy interests”, last modified July 23, 2009, http://ec.europa.eu/dgs/energy_transport/international/doc/paper_solana_sg_energy_en.pdf.

gard to the Energy Charter Treaty", which was ratified in 1998.²⁵ A point of concern remains in that Ankara has denied ratifying the Energy Community Treaty (ECT) Trade Amendment. The ratification of the ECT would harm Turkey's ambition to exert a dynamic and proactive energy policy, autonomous from external pressures and directives. However, it is one of the most important aspects of the EU conditionality as it is identified with major EU principles like liberalization, free market and competitive economic environment. Moreover, the EU's great interest in the ratification of the ECT is explained by the fact that the energy imports from other post-soviet states, except for Russia, as well as the East-West energy corridor would be secured under its provisions.

Another obstacle concerning Turkish accession into the EU deals with the lack of liberalization in Turkey's domestic energy market. This aspect does not refer simply to the issue of coordination of Turkish law with the European but, more practically, to the reliable and secure operation of the energy network leading to Europe as long as the Turkish state-owned company BOTAŞ is the major player in the pipelines' management. Significant steps were made with the 2001 natural gas market law, which "concerns liberalization of the natural gas market [...] so as to ensure supply of good-quality natural gas at competitive prices to consumers in a regular and environmentally sound manner under competitive conditions".²⁶ However, these were not adequate, as far as state manipulation of the energy market is concerned, as it continued to exist as a result of BOTAŞ's continuing dominant position in the market.

The final aspect of the second problem concerning the accession negotiations refers to Cyprus and the illegal Turkish invasion in 1974. Cyprus has been an EU member-state since the 2004 enlargement, while the unresolved status of the island's political problem has evoked a series of implications dealing with Turkey's candidacy for accession into the EU. The reason that drove Cyprus to block negotiations over chapter 15 has been twofold. Firstly, Ankara has refused to recognize the Republic of Cyprus and thus, no access to Turkish airports and ports respectively is permitted for Cypriot airplanes and ships. The second reason revolves around the energy issues and Cypriot plans to drill for hydrocarbons offshore.²⁷ According to the official Turkish position, the sea boundaries and the limits of the continental shelf have to be determined through a consensus process among all the coastal states and not unilaterally by one state. Thus, according to this view, Cyprus has no right to invest in drilling if the problem concerning sea boundaries is not settled first. Therefore, the "energy dispute"

25. Commission of the European Communities, "Screening report: Turkey - Chapter 15: Energy", Document published in Brussels on May 15-17, 2006.

26. Natural gas market law, Law No 4646, April 18, 2001.

27. Winrow, "Turkey and EU energy security", 62.

between Turkey and Cyprus as well as its implications for the former's accession into the EU seem to be based on the existence of the island's political problem.

The third problem refers to Turkey's internal gas demand, which is essentially "locked" by Russia.²⁸ Turkey's gas dependence on Russia had started in the 1980s through Turgut Özal's relevant agreements with Moscow but peaked dramatically after the inauguration of the Blue Stream pipeline in 2005. This is the world's deepest undersea pipeline extending from Russia under the Black Sea to a gas terminal outside Samsun and it has rendered Turkey dependent on Russian gas at 66% of its domestic use.²⁹ Vladimir Putin's visit to Ankara, in December 2014, was followed by an agreement on the construction of an additional pipeline parallel to the already-existing Blue Stream. The "Blue Stream II" is expected to further Turkey's dependence on Russia since 20% of the transferred product will be added to the overall gas purchases for its internal market. This data is extremely crucial because a general rise of gas purchases furthers the Russian leverage on the Turkish energy market.

This increasing leverage of Russian gas can be seen in the relevant diachronic data. In 1991, Turkey imported 142.4 bcm (billion cubic meters) while, in 2007, this number rose to 1,264.3 bcm.³⁰ Keeping in mind that the Azeri gas reserves are – in comparison with the massive Russian gas reserves – poor and there are obstacles regarding the Turkish-Iranian energy cooperation due to the continuing embargo, Ankara seems incapable to diversify its own imports let alone Europe's. Referring to the Russian political-economic leverage in the Turkish market, what is even more important is that natural gas represents the main energy pillar of Turkey's economic growth, since it is consumed primarily by industry. The industrial sector absorbs 45% of the imported energy, while the main gas exporting country is Russia.³¹

To put it bluntly, the evolutions in 2015 with regard to the Turkish Stream, which would be an extension of the Blue Stream II project, confirm Turkey's reluctance or inability to supply the EU with non-Russian gas. Essentially, the Turkish Stream is implemented in the place of Nabucco and thus, Russian instead of Azeri gas is going to be transferred to European markets. For this reason, it is deduced that Turkey's past hegemonic practices seem to continue steadily,

28. On the term "locking in demand", see: Cohen, "Europe's strategic dependence on Russian energy", 3-4.

29. Gökhan Bacik, "The Blue Stream project, energy cooperation and conflicting interests", *Turkish studies* 2 (2) (2001): 85-93.

30. "Turkey", last modified April 5, 2015, <http://www.eia.gov/countries/country-data.cfm?fips=tu#pet>.

31. Brenda Shaffer, "Turkey's energy policies in a tight global energy market", *Insight Turkey* 8 (2) (2006): 98-99.

with relevant consequences on the peripheral (in)stability and inter-state economic cooperation. It may be concluded that Turkey's participation in "the Qatar - Saudi Arabia - Turkey triangle", which is "the operator of the geopolitical factor of the Islamist movement",³² persuaded Turkish strategy-makers that this could be an adequate form of external balancing for the country or at least, a diplomatic asset in its relations with the West.

The rising Eastern Mediterranean option

After examining the Turkish option, the last question deals with whether the Eastern Mediterranean "new El Dorado" is a viable solution and under which conditions it can remain like this. The new gas findings in the Eastern Mediterranean and South-eastern Europe as a geographical corridor are located on the same conceivable line in respect with Europe and thus, they are often examined as interrelated. However, this fact hides some aspects of the problematique with the illegal Turkish invasion and occupation in Cyprus to be the most important. Turkey's practices have been undermining the independence of the Republic of Cyprus provoking problems for the normal exploitation of the continental shelf in the Eastern Mediterranean.

Natural gas potential in the Eastern Mediterranean has been estimated at about 122 trillion cubic feet (Tcf) with the Israeli fields of Tamar and Leviathan playing the leading role.³³ Of course, it is not neglected that the Eastern Mediterranean reserves cannot meet the European energy demands alone. They are 122 Tcf compared with Russia's 1,680 Tcf.³⁴ Nevertheless, they could play a supplementary role, which would be substantial for limiting Russian political leverage especially in periods of crises as has happened in the past in the case of Ukraine. Israel and Cyprus might become important energy providers for Europe without engaging co-producers or transit routes that would thwart the EU diversification principle, as Turkey would. This non-engagement could be achieved via two alternative reliable options described below.

Firstly, the region may become the fourth artery in the case of a deep-sea pipeline, such as the proposed East Med, offering secure and stable quantities for EU member-states. According to estimates, the pipeline could have a trans-

32. Ioannis Th. Mazis, "Geopolitical analysis of the Greater Middle East system in the present juncture", *Regional science inquiry journal* V (1) (2013): 163.

33. "East Mediterranean finds reveal area's gas potential", last modified September 3, 2013, <http://www.epmag.com/east-mediterranean-finds-reveal-areas-gas-potential-699581>.

34. "Russia", last modified April 5, 2015, <http://www.eia.gov/countries/country-data.cfm?fips=RS&trk=m>.

porting capacity of up to 15 billion cubic meters, while it would be approximately 1,700 km long.³⁵ It should not be neglected that such a development presupposes that both the Exclusive Economic Zone between Greece and Cyprus and the reserves themselves be declared.³⁶ In addition, it presumes that such an investment is sustainable.³⁷ It is worth pointing out that relevant pessimistic projections have been made especially by Turkish politicians, such as Ahmet Davutoğlu. He has referred to the East Med pipeline as “unsustainable economically and technically”.³⁸ However, at least up to now, the majority of analyses seem to favor the implementation of the East Med despite the projected high cost, while the recent findings in the Eastern Mediterranean have verified the pipeline’s sustainability.

The second option referred to the construction of an LNG terminal at the Cypriot port of Vassilikos. This started on by Total in 2013 and it would provide secure gas quantities to Europe by ships. Initially, the plant at Vassilikos would liquefy 5 million tonnes on an annual basis and this capacity would be expandable to 15 million tonnes.³⁹ Keeping in mind that, due to the compression procedure, 15 million tonnes of LNG are equal to 20.4 billion cubic meters of natural gas, these quantities would be quite important. Currently, any further construction has been suspended, since the East Med pipeline option has been forwarded.

It would be interesting to learn, and this could be food for thought for further research in the future, whether a comparative – more technical – analysis could be conducted with regard to the pros and cons of each option or the recommendation of another idea for the transit of Israeli and Cypriot gas to Europe.

35. “Eastern Mediterranean pipeline”, last modified April 7, 2015, http://www.depa.gr/uploads/files/poseidon/Eastmed%20pipeline%20for%20PCIs_ENG_final.pdf.

36. See: Ioannis Th. Mazis, “Geopolitics of hydrocarbons in the South-Eastern Mediterranean: Greek-Israeli-Cypriot relations and the importance of the EEZ of Kastellorizo”, *Civitas gentium* 3 (1) (2013): 51-57.

37. On the argumentation against the sustainability of the East Med pipeline, see indicatively: Noredidine Ghaffour, Thomas Missimer and Gary Amy, “Technical review and evaluation of the economics of water desalination: Current and future challenges for better water supply sustainability”, *Desalination* 309 (2013): 197-207.

38. “Turkey ‘would not accept’ Greece-Egypt Mediterranean deal”, last modified December 9, 2014, <http://www.hurriyetdailynews.com/turkey-would-not-accept-greece-egypt-mediterranean-deal-----.aspx?pageID=238&nID=75390&NewsCatID=345>.

39. “Vassilikos energy center”, last modified September 11, 2013, <http://www.mcit.gov.cy/mcit/mcit.nsf/All/02B6E904DE1DC822C2257B2100257B20?OpenDocument>.

For now, the viability of the Eastern Mediterranean option in broad geopolitical terms as well as the determining indicators involved in the light of exploitation and trade prospects have to be estimated and analyzed. In any case, adequate reserves seem to validate further research and the consequent scientific and political interest.

Concluding remarks

To sum up the central arguments of the treatise at hand, it is worth mentioning that Israel and Cyprus have the chance to become Europe's providers of non-Russian gas; i.e. an alternative option to the established monopoly. Of course, technological and financial parameters are determining indicators in the margins of this "energy game", but – at least for now – the key questions refer to the general strategic choices that the EU has to make. In this view, the added value of the Eastern Mediterranean reserves is bolstered by the independent role they can assume and, as has been analyzed, the endorsement of such an independent role presupposes that transit projects should not include non-EU options already dependent on Russian gas. Turkey's denial to comply with the EU conditionality excludes the state from any considerations for pipeline projects from Eastern Mediterranean to Europe, while Ankara's denial to recognize the Republic of Cyprus and the continuing military presence on the northern part of the island, against any essence of international law, represents a serious stake. The sustainability of a "fourth artery" is related with the inclusion or the exclusion of routes, that would thwart core Europeanization principles, such as market economy as well as compliance with international law.

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