The Basic Parameters of European Security of Energy Supply: The Trans Adriatic Pipeline Project-TAP-

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Abstract

The fact that global economies are growing rapidly, unequal geographical distribution of energy resources and the fact that no renewable energy resource can compete with oil and natural gas at least in the near future strengthens the energy subject. In this regard, energy demands of the developed countries and the world intensifies on the energy resources of Eurasia Region, especially from the giant Shah Deniz II field in Azerbaijan via Greece and Albania, and across the Adriatic Sea to Southern Italy, and further to Western Europe. The main factor of the energy demand isn’t the supply of energy for the least possible cost but the transfer of the needed energy via secure gas pipes so that the national economies can continue producing. The Trans Adriatic Pipeline (TAP) supports the European Union’s strategic goal of securing future energy supply. TAP will transport natural gas from the giant Shah Deniz II field in Azerbaijan, via Greece and Albania, and across the Adriatic Sea to Southern Italy, and further to Western Europe. This is an analysis of TAP project’s impacts on European Union’s energy supply security, Azerbaijan, Turkey and other European countries of the region.

Keywords: Energy Sources and Supplies, Pipelines, Eurasians, Caspian Basin;

1. Introduction

Trans-Adriatic Pipeline Project-TAP-In 2011 is a strategic energy project that Turkey signed with Azerbaijan and developed for transporting the new amount of natural gas located in the Shah Deniz - II basin in the land of Azerbaijan to the constant and strong European markets. TAP leads to changes both in pipeline policies and in the route points in the region from the Caspian to Europe. The portion imported from Russia is over 40% of Europe’s gas usage, and at the moment 13 natural gas pipelines are located in European countries, which were built by Russia. Regarding energy supply security between European Union Commission and Russia; the gas shortages the Union countries experienced, Russia’s monopoly policies, rising gas prices and finally the 2006 crisis between Russia and Ukraine forced Europe to produce alternative policies on new supply routes. The Southern Gas Corridor, in which TAP is also included, is one of the latest pipeline projects developed with concerns to ensure Energy Supply Security.

In this study, European energy supply security and what the basic parameters could be will be explained. Additionally, the TAP, which is within the Eurasian energy corridor for the European energy supply security; the
Trans Adriatic pipeline Project to carry Azerbaijani gas to Europe - and the likely impact of it on European Union energy supply security will be emphasized.
2. The new energy order and energy supply security

2.1. The new energy order

The Caspian Basin, where newly independent countries in the Caucasus region are located, which hosts a significant portion of oil and gas reserves, has attracted the attention of regional and global powers. The reasons for the Caucasus to be of great geopolitical importance can be listed as follows: 1. It is the gateway to Central Asia in geo-strategic sense. 2. In terms of Central Asia, the region is a direct gateway opening to Western markets. 3. Central Asia taken as a whole, the region has the potential for significant amounts of oil and natural gas. 4. In terms of the Russian Federation, it is a geopolitical connection line extending to the Mediterranean and Basra (Berkok, 1958: 332). The total proven gas reserves of the four countries; Azerbaijan, Kazakhstan, Uzbekistan, Turkmenistan, located in Caspian basin, equate to almost 10% of the world’s total (BP, 2013). The element that makes the region attractive for investment in new pipelines is that the existing lines in the region completed their economic and physical life.

After the independence process, it was observed that some countries in the region regionalized to assure their independence. The countries that have chosen this policy in particular are the Caucasus and the Caspian countries with important energy reserves of oil and natural gas. Because a large part of the Caucasus and the Caspian region countries have no outlet to the sea, it is essential for these countries to cooperate in order to protect their independence and freedom of movement. Caucasus and Caspian region, due to their geographical location, had been an area of conflict and influence in history between international actors (Mehdiyev, 2012:43). The most important security problem of these countries is to strengthen and protect the political and economic independence. Regional synergies are one of the platforms anticipated to be protective in this sense (Buzan, 1991).

In addition to the old reserves in the Caspian region; the discovery of new rich hydrocarbon reserves has led to the emergence of the idea that the region could be a second Middle East/Persian Gulf in the 21st century. In the near future; in terms of oil potential, Azerbaijan is expected to be not only an oil but a natural gas country with the discovery of the Shah Deniz-II detected to have a reserve of 2 trillion m3 (IEA, 2011).

Table 1: Proven natural gas reserves of the caspian region, production and world total,%, 2013 *

<table>
<thead>
<tr>
<th>Countries</th>
<th>Proven Reserves</th>
<th>Total World Reserves</th>
<th>Total World Production</th>
</tr>
</thead>
<tbody>
<tr>
<td>Azerbaijan</td>
<td>1</td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>1.3</td>
<td>0.7</td>
<td>0.6</td>
</tr>
<tr>
<td>Turkmenistan</td>
<td>17.5</td>
<td>9.3</td>
<td>17.6</td>
</tr>
<tr>
<td>Uzbekistan</td>
<td>1.1</td>
<td>0.6</td>
<td>1.7</td>
</tr>
</tbody>
</table>

Source: BP Statistical Review of World Energy June 2013, s.20, 24. * Trillion cubic meters

According to Table 1, although the region is a major force at present, the majority of the region’s oil and gas reserves have not been developed and reserve determination has not been made for a significant portion yet (Yücel, 2008: 165). As a large part of the oil and gas pipelines in Caspian region was built during the Soviet Union, there are also problems in most arising from lack of maintenance (Belet, 2013: 1001). In this regard, maintenance and repair work will need to be included in the transport projects to be carried out.
As seen in Graph 1, the Caspian region is also a region with growing energy reserves of natural gas. Because of this feature of the Caspian region, its energy reserves are stated to have a potential to rank third in the world in the near future (Borombaeva, 2002: 14). In addition to this case, natural gas is seen as the only fuel for which the global demand will increase seriously in the development of energy economy. Furthermore; natural gas, when we look at its share in world energy consumption around 2020, will exceed coal and settle for second place in the resource rankings after oil. World natural gas consumption, which is around 3.5 trillion cubic meters (TCM) today, will increase to 5 tcm in 2035. International Energy Agency (IEA), due to fuel substitution, foresees in 2035 that the total share of oil and coal in the total energy consumption will decrease to 42% with a decline of 15%. In this process, “natural gas” is the actual source that will have an increasing share and importance. IEA calls 21st century the “Golden Age of Gas” due to the nuclear energy stagnation surfaced after Fukushima disaster in Japan, the Kyoto measures trying to limit the consumption share of coal in electricity generation and due to the absence of another relatively cleaner energy source in a size that increased electricity consumption will be based on. Until a promising technical progress is developed in nuclear fusion and hydrogen, or new kinds of energy in the near future, natural gas will be used as the transition fuel of this century (IEA, 2012).

According to the IEA’s forecast, oil demand for the next 30 years will continue to increase worldwide; global oil demand, about 89 million barrels/day in 2012, will be reach 100 million barrels/day in 2035. China alone is responsible for half of the total net increase in oil consumption in the world. Especially due to the indisputable advantages in the transport sector of oil, it will continue to raise the energy import bills for economies. Especially Asian countries, including China and India followed by the countries of the European Union are expected to have an increase in import dependency.

3. European energy supply security and its basic parameters

Energy policy is one of the main determining factors in terms of international relations and foreign policy strategies of states in the 21st century. Energy dependence, while shaping the external security approach of countries, highlights the geopolitical moves to ensure the safety of energy sources and energy logistics and to establish control. In this context, the Middle East has left its place to the Caspian region, which is one of the most controversial areas of the 21st century with its oil and gas reserves (Sevim, 2013:108). In this respect, countries’
“political energy” assets gain great importance, and they have aimed to guarantee the security of energy with the strategies aimed at the energy sources to meet the energy supply in terms of sustainable energy strategies.

The prominent element in the energy demand of the World and developed countries is to transport the energy that national economies need in order to be able to continue their production, to countries by safe pipelines. The improvements in pipeline technology and the increased use of liquefied natural gas, natural gas have ceased natural gas to be a local commodity, and made it a part of international trade. Basically due to its increased weight in electricity production; natural gas, which will become the most strategic fuel at least during the first half of this century, will fill the space in the energy portfolio vacated by coal and nuclear energy. (IEA, 2005:80-6).

Countries with rich natural gas and oil resources including Azerbaijan and the Caspian region are developing various oil and gas pipeline projects in order to be able to supply them to world markets in a safe and economical way. In this process, the prominent element is not to get cheap sources at all costs, but to transport the energy - needed for the national economies to continue production without experiencing any downtime- to the countries through safe transport systems and routes. In this sense, the issue of energy supply security will be the most important policy variable marked by the 21st century. Maps and borders will change according to the new energy routes (Belet, 2013: 999).

3.1. The current and potential pipelines of Europe and prospective strategic projects

There is an uneven geographical distribution of energy sources on Earth and no renewable energy sources are considered to compete with oil and natural gas in the real sense on a commercial scale perhaps at least for the next 60 to100 years. With the reduction of reserves in the North Sea, which is one of the most important supply points of EU, EU is developing multiple pipeline routes and new approaches intended for the Caspian region and the Middle East in order to meet its energy needs predicted to increase in the near future.

When we look at the geographic distribution of reserves, about 40% of natural gas reserves and around 75% of oil reserves, including Russian Federation, are located in the Middle East and Central Asia. Turkey has been the most striking country with the most cost-effective transport route from these areas to Western countries and mostly to Europe, where there is a heavy demand for energy. Turkey, with its geopolitical position as a transit country, is of key importance for the transportation of oil and gas resources in the Caucasus and the Caspian region to Europe. Thus, the implementation of TAP - Trans Adriatic Pipeline Project-, which will carry Azerbaijani gas to Europe, has critical features especially for the European Union energy supply security and for Azerbaijan, Turkey and other regional actors. With the relationships that Turkey will develop in terms of energy supply security; It will grab an opportunity for a new impetus to the EU-Turkey relations taking the role of main terminal in the gas transit to Europe through TAP.

Turkey, which is the key country of the strategic transport lines and “Eurasian Energy Corridor” in Europe’s energy supply security, has had the opportunity to get a share in the production and especially in the distribution as a result of opening up the Caspian region oil and natural gas resources to international markets. Turkey’s geographical location is extremely convenient to transport the rich resources of the region to Western countries with a growing demand (Saatçioğlu and Kıcıkaksoy, 2004:30).

The presence of oil in the Caspian Basin has been known since the 8th century; the number of wells in the region of 120 in 1825 has reached 2272 today. After the necessary legal arrangements made in 1872, it has started to gain commercial importance since the beginning of the 19th century, has become one of the leading oil production centers of the world in a short time (Zhaiissetenbayev, 2004: 8-9).

The following main pipeline projects have been used in terms of ensuring EU supply security in Eurasian energy corridor so far: 1) the Yamal-Europe I, 2) Ukraine Pipeline, 3) Brotherhood 4) Soyuz, 5) Northernlights (Urengoi-Pomary-Uzhgorod / Trans-Siberia), 6) Blue Stream, 7) Baku-Tbilisi-Erzurum (BTE) - South Caucasus Pipeline-, 8) Green Stream, 9) Langeled.

European Union supports many large-scale projects simultaneously to close the energy gap and to diversify supply sources. Therefore, when delivering gas to Europe, it supports the safe routes passing through different countries excluding Ukraine and Belarus, which it has had disputes due to political and economic reasons. The new pipeline projects considered: 1) the Yamal-Europe II, 2) White Stream), 3) Nabucco, 4) Nord Stream), 5) South
Stream). Additionally, 1) Turkey-Greece-Italy Natural Gas Pipeline (Poseidon), 2) Blue Stream II, 3) Trans-Adriatic pipeline (TAP), 4) TANAP - Trans-Anatolia Natural Gas Pipeline projects, including Turkey, are being developed to transport Turkmen, Kazakh and Azerbaijani gas as well as the Russian reserves to Europe.

3.1.2. TAP-trans Adriatic natural gas pipeline and its basic features

Shah Deniz Consortium has chosen the TAP, the Caspian gas to Europe on 28th June 2013. The emergence of Azerbaijan’s Shah Deniz additional reserves in the Caspian Basin and its supply to Europe via Turkey will directly affect the energy markets, hence, the supply policies and price rigidity. In addition, delivering the natural gas resources in the Caspian region and Middle East to European markets and thus providing a diversity of supply for the increasing demand of Europe was the main objective of the Southern Gas Corridor (Figure 1). The fact that TAP has a capacity easily capable of up to 20 billion cubic meters and that TANAP can be supported by Northern Iraq and Eastern Mediterranean gas resources other than Azeri gas will be able to convert this pipeline into an important supply point for Europe. TAP project is of great importance in terms of the Balkan countries. Some countries that TAP passes through are dependent on a single source - Russia- in terms of gas supply. So, it poses risks in terms of energy security for these countries. Together with TAP, these countries will gain an important alternative source. Besides, the establishment of natural gas infrastructure in some countries such as Albania and Kosovo, which have yet to meet with natural gas, on the pipeline route will be in question (Ertem, 2013).

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Trans Adriatic Pipeline supports the strategic objectives of the European Union in terms of the future security of energy supply. TAP will be able to deliver Azerbaijan natural gas from the Shah Deniz II passing through Greece and Albania, a link of TANAP transiting Turkey, across the Adriatic Sea to southern Italy and further beyond Western Europe (http://www.trans-adriatic-pipeline.com). What makes this pipeline attractive is that it offers a short and direct link from the Caspian region to European markets with the most competitive gas tariffs. The project, depending on supply and demand in the current situation, has a capacity of 10 to 20 billion cubic meters per annum and has been designed suitably for expansion.

In addition to the route and the price advantages compared to the existing pipelines coming from the region, the most important feature of TAP is to plan the development of the natural gas storage facilities in Albania in the case of a downtime in delivery due to any operational and / or political reasons to ensure the supply security. TAP, along its route, is the only Southern Gas Corridor project not dependent public support (http://www.trans-adriatic-pipeline.com).

TAP, which is the important project of the Southern Gas Corridor, reaches different European markets and many consumers with this new energy route. Italy offers a huge potential for transporting natural gas to Western Europe besides being the target market for Trans Adriatic Pipeline. An accessible trade point will be obtained by connecting TAP with the destination point in southern Italy to the national network run by Snam Rete Gas Company. In addition to this, it will deliver the Caspian gas to the growing markets in Balkans and South Eastern Europe by connecting TAP to the regional networks over Albania. It will promote the development of local gas market, and will move the transportation system operators to Bulgaria with a new source thanks to the existing or planned infrastructures in Albania, Slovenia, Croatia, Bosnia and Herzegovina, and Montenegro. (http://www.trans-adriatic-pipeline.com).

The fact that the underground natural gas storage facility of TAP is planned to be positioned in Albania, which is a critical element in Europe’s energy supply security, will improve the security of gas supply for the energy consumers in South East Europe. This facility will also be able to provide flexibility for the price movements arising from seasonal changes in energy consumption.

1 TANAP: Trans Anatolian Natural Gas Pipeline - TANAP- is the newest latest project whose Memorandum of Understanding was signed on 26th December 2011 to transfer 10 BCM of Azeri gas to Europe via Turkey starting from 2017, with a connection to Europe by TAP (http://www.tanap.com/tanap-nedir).
3.2. Basic parameters of European energy supply security

Today we see that transportation sector’s share in the global energy consumption is 20% and a 3/4 of this total is consumed at land route transportation where vehicles use oil as fuel. (IEA, 2012). The oil crisis in 1970s and the increase of crude oil prices during 1973-74 by OPEC countries caused economically and socially long term negative effects. Industrialized countries’ economies were also affected negatively because of increased energy costs. (Pala, 2007, Alhajji, 2007).

The big transformation started between the International Energy Agency and the energy systems, decreases industrialized countries’ chances of living the crisis of the past. To eliminate the problems of the past that arose from high oil prices, those countries aside from looking for alternative energy resources, adopt policies that decrease their oil consumption mainly by spending R&D budget on conservative energy technologies and increase energy efficiency. (Bahgat, 2011).

Energy consumption density is an indicator of the relation between the economic output showing primary energy consumption and energy efficiency. Especially the developing countries, because of the fact that they can’t improve the technological plants, they consume more energy. Despite this increased energy consumption demand, as a result of not being able to produce enough and increase the capacity, industrial production and economical competition are affected negatively because of the limits of the energy supply. Particularly after the oil crises of 1970-73 there had been discusses on the effective and rational consumption of energy and technological competence and capabilities of the countries about renewable energy resources (Bahgat, 2011).

Today the basis of the energy geopolitics is supported by the fact that the global energy demand will increase by 50 % in the next 20 years and this increase will double in developing countries mainly in Asia -China and India mostly. For this reason, Eurasian- Caspian region becomes the first priority supply region at oil and natural gas procurement. Generally accepted purpose of the South Corridor, one of the main streams of the new energy region, is to supply adversity of energy resources that brings gas to Europe from Caspian Region. The Caspian Region at the center of Caucasian is becoming the main trade axis which acts as a link between the East and the West. Caspian Region starting from The Caucasia is becoming a prominent link in respect of being an alternative new route which shortens the way and also cost effective and secure routes becoming involved in the process.

Transit country Turkey is becoming prominent which builds complicated and mutual dependency relations including economical, political and security subjects twitch are the important elements of Eurasian energy corridor supply security. Turkey carries out the potential of creating sub regions that are integrated with the global region
thanks to the interaction of domestic and regional dynamics. This integration is very important in respect of the durability of Turkey’s political and economical stability.

3.3. Energy supply security and TAP

Russia made natural gas cuts in the past for reasons not related to economics and this had but the subjects of energy security and diversification of gas suppliers once more. Middle Asia is the most important alternative natural gas supplier to Europe. There is a well-developed pipeline network between the European countries aside from the pipelines that connect Europe to countries with natural gas reserves, mainly Russia. To make this network work effectively, it is necessary to secure the supply from countries with gas reserves.

European Commission has put forward the foundations of the relations to be built in the energy field with countries outside the EU with the document COM(2011)539 “The EU Energy Policy: Engaging with Partners Beyond Our Borders” dated September 7, 2011 and listed the priorities as follows: 1. Building the structure of the domestic energy market related to the external world 2. Strengthening the solidarity for a secure, sustainable and competitive energy market 3. Developing the means to access sustainable energy for the developing countries 4. A better introduction of EU policies to the countries outside EU (Özen, 2012: 59).

The importance of energy trade for Europe is supporting some big scale projects simultaneously to compensate energy deficit and diversify the supply resources. The starting point for the EU Commission is the document “Towards a European Strategy On The Security of Energy Supply” (EU, 2001) prepared by the commission itself. On the EC (2001) report, the necessity to provide energy supply security and diversity is emphasized as the main priority just like any other political document of the EU. Energy supply security is describes as “providing physical access to the energy products market with various prices to all consumers as a part of the sustainable development goal for the welfare of the public and a well-functioning economy.” (European Commission, 2001: 28-29)

As it can be seen in Figure 2, Eurasia and Middle East are the regions rich with energy supply resources. This ratio may be seen as a risk factor when taken into account that Russian Federation is having political and economical disputes with countries like Georgia and Ukraine on the pipeline route for the last 5-10 years. Endurance of the economical and political stability of the countries affects transportation costs as a risk premium. Downturns in the region may cause unpredictable cuts from the amount of gas transport, may lead to the increase of the prices and put the contracts at stake. One of the most important parameters of the energy supply security is that the supply regions-countries- carry manageable economical and political risks. Second factor is the diversification of both the routes and the supplier countries. Aside from that, now that the storage units TAP is planning to build in Albania are included in the pipeline projects, it will provide elasticity for the unpredictable gas cuts. Another important fact is, the Balkan countries went through a serious gas shortage in the past. With the Trans Adriatic Pipeline Project, natural gas will travel from Italy to the Adriatic Sea and this way transportation over Bulgaria - (in accordance with the EU security criteria) will be possible.

Middle and big scale projects along with the present pipelines, demonstrate clearly how competitive is the European natural gas market. In this respect, EU’s neighboring countries in the East have a strategic importance. Turkey plays an important role at minimizing the security risks of exporting oil and natural gas from Middle Asia to Europe on these routes (Erdağ, 2013: 869). Alternative transportation (Iran, Iraq) of these resources will be a big economical burden and carry serious security risks if present conditions are taken into consideration. Carrying the natural resources to Turkish and Western markets and transporting produced goods to new and dynamic markets has led and will lead to big changes in the regional economies.

Turkey recently built economical and trade relations with the Caspian region countries, Azerbaijan and Georgia primarily. As these relations strengthened, they influenced and shaped the political relations and set the infrastructure for the region to earn a regional identity. This situation in the Caucasian has brought the energy sector fore as the primary sector with Baku-Tbilisi-Ceyhan crude oil project which is seen as the main trade corridor of Western markets with the East since the beginning of 1990s. As a result of the economical and commercial performance of the countries of the region, the dreams of 1990s has begun gradually to become the reality with the enlargement of energy centered relations as to include different sectors and development of the transportation and communication infrastructure.
It is seen that the process has gained acceleration again with new projects and agreements like TAP And TANAP which were recently signed. New economical and commercial steps to be focused on areas other than the energy sector will be the developments that make it possible to define and later turn the entire Caspian Region into a commercial network. With the momentum the solidarity at the energy field provides, that process which began with the building of alternative pipelines Baku-Tbilisi-Ceyhan pipeline primarily, has become economical and social relations with strategically importance as a result of land route and railway networks. Turkey’s interest and support to the region is permanently increasing.

New perspectives to reach China over the Caspian Sea, primarily over Turkmenistan and Kazakhstan, and then to Middle and Far East and trade volume goals have become clear. In this context, the necessity of turning the Caspian region into a stable and secure transit area or corridor to reach certain purposes presents new political purposes. Such a region will be preferable by both Eastern and Western markets and actors for its stability and security. When we look at Turkey’s economical and commercial relations with the Caspian region, we see the Caucasian holding the priority. Azerbaijan is the target country and the priority partner in the Caucasus. On the other hand, Georgia play the key role to reach Azerbaijan and Middle-Far eastern markets and also to the southern areas of Russia.

Europe’s basic argument about the energy supply security is diversification of suppliers and routes. Figure 3 shows the present and probable connection routes in the Middle East. We see that the Middle East region is being deferred because of political unstabiliy and the existence of alternative routes with cost advantages. But it is necessary to point out that this is an important alternative within the supply security.
4. Conclusion

European Union’s priority is to provide the security and diversification of energy supply. In this respect, EU’s present oil and natural gas supplier around 50% Russia will maintain its position in the future. Middle Asia as being the additional secure energy suppliers, is developing strategic energy projects related to the Black Sea and Caspian Sea. Turkey’s vision of becoming an energy terminal within the Eurasia Energy Corridor has become more distinct with recently developed TANAP and TAP. When it is considered that the most suitable routes that transport natural gas from the production area in the Caspian Region and Middle Eastern countries to EU, the biggest gas importer of the world, pass through Turkey, it becomes clear that Turkey is important as a transit country and natural gas sector particularly has become prominent.

In the Eurasian and Caspian region, to meet Turkey’s gas demand and gas delivery to the EU, the uncertainty of the Caspian basin, due to the legal status problem. TAP and the pipeline to Greece or Italy over Turkey recently or the route to Italy over Albania is an important step in terms of Europe’s energy supply security.

Turkey has a special place at the center of energy transit routes that reach Europe. Today, 70% of the global oil and natural gas reserves are accumulated in the neighboring countries of Turkey. Using Turkey’s geographical position to increase energy supply security is in favor of both Europe and Turkey.

Caspian region’s energy resources will reach Europe for the first time with TAP and this situation will enhance the strategic importance of Azerbaijan and Turkey. When the Azeri gas reaches Turkey and Europe, it will motivate new pipelines and new resources to reach out Europe over Turkey. This corridor to be opened by the Azeri gas will make ready the resources of Israel and Northern Iraq in the next 3 years. After 2020 there will be no political problems and then Iran as a country at peace with the world, transporting its rich reserves over Turkey will not take anyone by surprise.
With TAP we will not only be able to reach important consumption centers of Europe over Italy but we will also be able to carry gas to Southeast European and the Balkan countries after 2025 with the doubled transportation capacity. Southeast European and Balkan countries –each with the potential of becoming an EU member- will make very important models for diversification of natural gas resources and routes of Europe. When we take into account that only the Russian gas is sold at these markets, new gas stream of the East over Turkey will weaken Russia in this game. With projects like TAP, Turkey and Azerbaijan developing new strategies together regarding Southeast European and Balkan countries, rise up to a critical level for the EU energy supply security by realizing the infrastructure investments which can be considered to be nonexistent today. Azerbaijan and Turkey with their experience in the construction, business and gas trade sectors, may become active players also in the EU market, the day these countries become EU members.

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