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Natural Gas Factor in Israel-Turkey-Russia "Energy Triangle"

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Abstract

Nowadays the importance of natural gas in global politics has been rapidly increasing, as bilateral ties between states in the natural gas field tend to become more interrelated. This study aims to reveal the existence of a coherent complex of trilateral relations between Russia, Turkey and Israel in the natural gas field. This study examines bilateral agreements in the natural gas sector, existing gas pipeline routes and international projects in the development of natural gas fields, gas production and further transportation. While implementing cognitive mapping as a main research method, the study concludes that we can speak of an "energy triangle" between Israel, Russia and Turkey.

Keywords: Natural Gas, Energy Security, Russia, Turkey, Israel

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İsrail-Türkiye-Rusya "Enerji Üçgeni" ve Doğal Gaz Faktörü

Guzel Nurieva*

Öz

Günümüzde doğal gazın dünya politikasındaki önemi hızla artıyor. Doğal gaz alanında etkin olan devletlerin birbiriyle olan ikili ilişkileri giderek artma eğilimindedir. Bu çalışma, doğal gaz alanında Rusya, Türkiye ve İsrail arasındaki üçlü ilişkilerin birbiriyle iç içe geçmiş blok varlığını ortaya koymayı amaçlıyor. Çalışma, doğal gaz sektöründe ikili anlaşmaları, var olan doğal gaz boru hatlarını ve doğal gaz alanlarının geliştirilmesi üzerine hazırlanmış uluslararası projeleri, üretimi ve nakliyesi konularını ele alıyor. Bilişsel haritalama araştırma yöntemini uygulanarak, çalışma Rusya-Türkiye-İsrail "Enerji Üçgeni" var olduğunu göstermektedir.

Anahtar Kelimeler: Doğalgaz, Enerji Güvenliği, Rusya, Türkiye, İsrail

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1. Introduction

States tend to face challenges when making decisions both on economic and political levels based on their strategic interests in the energy sphere, especially in the natural gas sector. By affecting states' foreign policies, natural gas factors as an indicator of the cooperation level between different world players. From this point, the analysis of bilateral relations between states in the natural gas sector becomes an important factor in understanding the role played by natural gas in politics.

Within the last eight years, the natural gas sector in the East Mediterranean and Middle East regions has undergone crucial changes. Beginning in 2009, Israel has discovered two huge natural gas fields – the Tamar in 2009 and the Leviathan in 2010.[1] These discoveries significantly influenced the state's domestic energy sector and added a new aspect into Israel's strategic interests – joint projects of gas production and further supplying third parties.

Since Israel has changed its status of gas importer into potential exporter, natural gas has began to redesign Israel's relations not only with neighboring states but also with states out of the East Mediterranean region such as Turkey and Russia. Despite political confrontations, in 2014 Israeli and Turkish energy companies conducted negotiations on construction of a subsea pipeline under the Mediterranean Sea transporting Israeli gas to Europe via Turkey. In parallel, Russia and Turkey signed an agreement on construction of the TurkStream gas pipeline under the Black Sea aimed to supply Russian gas to Turkey and transit it to Europe.

Taking into account the aforementioned circumstances, this study raises a following question: is it possible to consider the existence of a coherent complex of trilateral relations between Russia, Turkey and Israel in the natural gas sector? In order to answer this question, it is required not only to scrutinize bilateral relations between Russia and Turkey, Turkey and Israel, and Israel and Russia; but also to examine interconnection between these bilateral ties. The natural gas factor within this complex serves as an

[1] Until 2009 Israel has discovered the Noa and Mari-B fields in the Mediterranean contained 32 bcm of natural gas. These discoveries collectively known as Yam Tethys made by in 1999 Delek Energy and Noble Energy were the first commercially recoverable discovery of fossil fuel in Israel. / Brenda Shaffer, "Israel—New natural gas producer in the Mediterranean", *School of Political Sciences,* University of Haifa, Israel, p. 5380.

instrument to display how three chosen states are interconnected to each other in the energy sphere, and how implementation of their energy policies vary due to particular qualities of their bilateral relations, but necessarily with connection to third part.

The analysis based on cognitive mapping research method detects ambivalent interrelatedness of these three sets of bilateral relations in energy sphere. The existence of such complex or "triangle" of relations undoubtedly influences political ties between the three states. Thereby, subsequent developments in these trilateral relations between Russia, Turkey and Israel in the natural gas sector will affect political agendas in the regions where these states play important role including the Middle East. The study, which ends up with the Russia-Turkey-Israel "energy triangle" scheme, creates a fundamental basis for the deeper understanding the role played by natural gas in international relations.

2. Natural Gas in Russian-Turkish Relations

There are two main characteristics of modern Russian-Turkish relations in the natural gas sector. The first is Turkey's strong dependence on Russian natural gas supplies. The second is Turkey's position as a possible alternative transit state for supplying Russian natural gas to Europe.

The first element is determined existing supply contracts and the available gas transportation system. As of January 2017, there are two operational pipelines, which supplies Russian natural gas to Turkey - the Trans-Balkan pipeline and the Blue Stream pipeline. The very first supplies of Russian natural gas to Turkey began in 1987 via the Trans-Balkan pipeline through Romania and Bulgaria.[2] Ten years later Russian company Gazprom and Turkish company BOTAŞ "entered into a 25-year commercial contract for 365 billion cubic meters of gas to be delivered to Turkey via the Blue Stream gas pipeline."[3] Prior to 2003, when commercial supplies of gas via the Blue Stream pipeline started, Russian gas had entered Turkey only through Ukraine, Moldova, Romania and Bulgaria.

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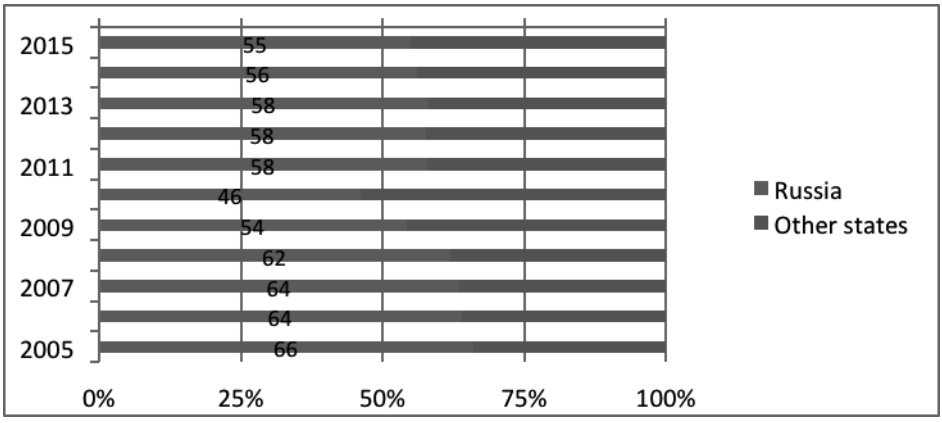
2 "Turkey", Gazprom Export Company official website, http://www.gazpromexport.com/partners/turkey/

3 "Turkey", Gazprom Company official website, http://www.gazprom.com/about/production...

Turkey has a strong dependence on Russia for a large share of its total natural gas imports. Figure 1 shows Russia's share of Turkey's total natural gas imports from 2005 to 2015. The graph shows that the share of Russian gas in the 10-year period consistently accounted for more than 50% of Turkey's total gas imports, with an exception in 2010, when the Russian share decreased to 46.2% [4] of total gas imports. Such a sharp decline was caused by the widespread decrease of gas consumption in Turkey due to the world economic crisis. Russia's natural gas share peaked at 65.9% in 2005 and has decreased to 55% in 2015 due to the expiration of certain contracts.[5]

Figure 1. The Share of Russian Natural Gas in Total Natural Gas Imports of Turkey, 2005-2015 (in %)



Source: Based on materials of www.enerji.gov.tr

The second aspect of Russian-Turkish energy relations is Turkey's position as one of a key transit states for importing natural gas from Russia, the Caspian region, and the Middle East, to European markets. This undoubtedly provides Turkey an advantage in gas prices and strengthens state's energy security. The basis of the strategy to become an "energy hub" lies in a fundamental principle of Turkey's current foreign policy – "strategic depth".

[4] Doğal Gaz Piyasası Sektör Raporu, Enerji Piyasasi Düzenleme Kurumu, Doğal Gaz Piyasası Dairesi Başkanlığı: Ankara, 2013, p.23, http://www.enerji.gov.tr/File...

[5] Ham Petrol Doğal Gaz Sektör Raporu, Türkiye Petrolleri Strateji Geliştirme Daire Başkanlığı, May 2016, p.28, http://www.enerji.gov.tr/File...

This concept was elaborated by Turkish Foreign Minister Ahmet Davutoglu in his book "Stratejik Derinlik" where he emphasized that the value of a nation is founded by its geostrategic location on the map and its historical depth. Geostrategic location provides Turkey an opportunity to maintain a confident energy policy by satisfying its own energy consumption needs, natural gas storage, and re-exporting energy resources.

Several political crises in Ukraine, which led to notable cut-offs of Russian gas supplies to the Eastern and Western Europe in 2006, 2009 and 2014, caused the Russian government to focus on alternative options to export natural gas to European market bypassing Ukraine. The first option was to construct a pipeline under the Black Sea from the city Anapa in Russia to the Bulgarian port of Varna. In spite of the fact that construction of the pipeline began in December 2012, the project named "South Stream" was not realized because of political disputes between Russia and European Union.[6] The remarkable thing is that Russia's official rejection of further construction of the "South Stream" pipeline was announced in Turkey – the second option for exporting Russian gas bypassing Ukraine.

During the joint press conference of Russian President Vladimir Putin and Turkish President Recep Tayyip Erdogan in Ankara on December 1, 2014 Vladimir Putin stated that "taking into account a position of the European Commission which does not facilitate the implementation of the project and the fact that we still do not receive the permission for construction from Bulgaria, Russia under current conditions could not continue to implement the project."[7] During the same press conference the Russian President expressed an intention to strengthen Russian-Turkish cooperation in the energy sphere and to construct another gas pipeline "in order to meet the growing needs of the Turkish economy".[8] The Memorandum

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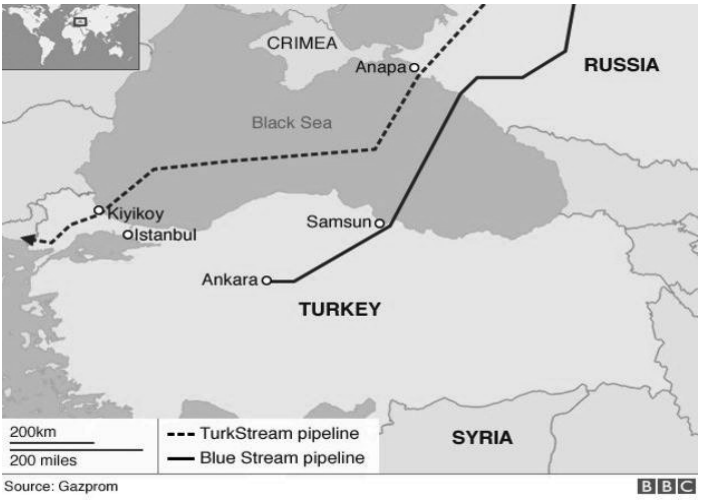
[6] In September 2014 the European Parliament adopted a resolution "The situation in Ukraine and the state of relations between the European Union and Russia" where EU countries called "to cancel the planned agreement with Russia in the energy sector, including through the "South Stream" pipeline". Source: *"The European Parliament approved the extension of sanctions against Russia",* 18.09.2014, https://www.politforums.net/eng/ukraine/1411044861_0.html

[7] "Совместная пресс-конференция с Президентом Турции Реджепом Тайипом Эрдоганом" (Joint news conference with the President of Turkey Recep Tayyip Erdogan), 01.12.2014, http://kremlin.ru/events/president/news/47126

[8] "Совместная пресс-конференция с Президентом Турции Реджепом Тайипом Эрдоганом" (Joint news conference with the President of Turkey Recep Tayyip

of Understanding on the construction of an offshore gas pipeline from Russia to Turkey across the Black Sea signed by Gazprom and BOTAŞ on December 1, 2014 initiated the beginning of a joint project "TurkStream".[9]

Map 1. Routes of the Turk Stream and Blue Stream gas pipelines



Source: http://www.bbc.com/news/world-europe-34995472

The beginning of the new project was planned to have "a capacity of 63 billion cubic meters, with 14 billion cubic meters slated for Turkish market and nearly 50 billion cubic meters carried to the delivery point on the border between Turkey and Greece."[10] It was planned for the first gas supply through the TurkStream pipeline to start in December 2016. Despite high expectations about the project it has been delayed due to a political crisis between Russia and Turkey which started on November 24, 2015 with the shooting down of Russian aircraft Su-24M near the Syria-Turkey borders by a Turkish Air force F-16.[11]

Following that accident the Russian President signed the 585 Decree on

Erdogan), 01.12.2014, http://kremlin.ru/events/president/news/47126

9 "TurkStream", Gazprom Export Company official website, http://www.gazpromexport.ru/en/projects/6/

10 "New gas pipeline towards Turkey", *Gazprom Press Center,* 02.12.2014, http://www.gazprom.com/press/news/2014/december/article208505/

11 "Политические разногласия РФ и Турции" (Political disputes between Russia and Turkey"), *TASS*, 25.11.2015, http://tass.ru/info/2471957

January 1, 2016; "On measures to ensure the protection of the Russian Federation citizens and the Russian Federation national security from criminal and other unlawful actions and the application of special economic measures against the Republic of Turkey."[12] According to this document the Russian Federation imposed a temporary prohibition on the import of certain types of Turkish goods and fruit, on the employment of Turkish nationals to perform certain works and on the sale of tours into Turkey. In addition, it suspended the May 12, 2010 visa-free agreement in respect of the travel of Turkish citizens.

During this year of strained political relations between Russia and Turkey, the TurkStream project had been left in the stage of offshore engineering surveys for the section within the exclusive economic zone and territorial waters of Turkey. The situation around the TurkStream project is an example of how a political dispute between states can negatively affect mutually beneficial economic projects. Together with the political discharge between Russia and Turkey in July 2016, representatives of Gazprom and BOTAŞ turned back to the negotiating table. Eventually, in October 2016 the Agreement on the TurkStream project was signed and further approved by both sides - on December 6, 2016 by the Turkish President and on February 7, 2017 by the Russian President.[13] The final version of the project includes "two lines with a capacity of 15.75 bcm a year each."[14] The first line will carry Russian gas to Turkey's domestic market and the second one will bring gas to Europe via Turkey. On May 7, 2017 the construction of the first line of the TurkStream project began.[15]

Undoubtedly there are advantages of the TurkStream project for both states. From the Russian perspective the new pipeline will contribute to the diversification of supply routes in the European market. Currently, Russia exports natural gas to Europe via three main lines: a transit route via Ukraine, a transit route from Yamal via Belarus and Poland, and the North

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12 *"Российско-турецкие экономические отношения" ("Russian-Turkish economic relations"), TASS*, 26.07.2016, http://tass.ru/info/2468527

13 "TurkStream", Gazprom Export Company official website, http://www.gazpromexport.ru/en/projects/6/

14 "Joint news conference with President of Turkey Recep Tayyip Erdogan", 10.03.2017, http://en.kremlin.ru/catalog/persons/122/events/54023

15 "TurkStream", Gazprom Export Company official website, http://www.gazprom.ru/about/production/...

Stream pipeline under the Baltic Sea. As Gazprom Head Alexey Miller stated in his interview, Gazprom plans to reduce gas supplies transiting via Ukraine by 2020 when the transit agreement with Ukraine expires and the new pipeline North Stream-2 is opened.[16] Three years prior Miller had already emphasized that "the role of Ukraine, as a transit state, will be reduced to zero…Gazprom has de facto abandoned Ukraine as a transit party".[17]

One of the reasons for such a decision is that the cost of transit via new North Stream-2 is lower than transit via Ukraine. According to the Gazprom official release "planned rate of transit via the North Stream-2 will account 2.1 dollar/thousand cubic meters on 100 km, while current rate of transit via Ukraine is 2.5 dollar/thousand cubic meters on 100 km."[18] Additionally, the North Stream-2 project is ecologically and technically more secure, as Ukraine did not invest in gas pipeline infrastructure modernization for decades. By April 2017, together with European partners on the North Stream-2, Gazprom had agreed on financing scheme with a total value of $ 10.32 billion.[19]

In the frame of long-term strategy on strengthening the competitiveness of Gazprom, TurkStream will represent an alternative gas route to southeastern and southern Europe. Although the end point is the same market, the opportunity to export energy resources through different means strengthens the energy security of the upstream state such as Russia. By diversifying energy export routes, the state prevents itself from being bounded to a single transit state, especially a state with weak economic and political conjuncture.

From the Turkish perspective, the TurkStream project will support the realization of the idea of an "energy bridge state" or an "energy transit

[16] "ИНТЕРВЬЮ-Газпром готовится увеличить долю поставок российского газа в Европу", *the Reuters,* 25.04.2017, http://ru.reuters.com/article/businessNews/idRUKBN17R14Z-ORUBS

[17] "Turkey", Gazprom Export Company official website, http://www.gazpromexport.com/en/partners/turkey/

[18] "ИНТЕРВЬЮ-Газпром готовится увеличить долю поставок российского газа в Европу", *the Reuters,* 25.04.2017, http://ru.reuters.com/article/businessNews/idRUKBN17R14Z-ORUBS

[19] "Nord Stream 2 AG и европейские энергетические компании подписали соглашения о финансировании", Gazprom Company official website, http://www.gazprom.ru/press/news/2017/april/article327181/

state" between consumers in Europe and exporters in Asia. The lack of their own energy resources would be compensated by the advantages of Turkey's geopolitical position. In contrast to Ukraine, Turkey pursues a policy aimed to become not only a bridge within the international natural gas supply system but also to be "a trading center" where natural gas reserves could be stocked and exported. In this sense, joint project with Russia will make indirect contribution to the Turkish economy in the long term perspective and will provide to Turkey an advantage over European states. Even if advantages of a "transit state" position are limited, it opens up long term opportunities for economic growth.

Eventually, the TurkStream project will bring new levels for bilateral interaction in the energy sphere. As Russian President Vladimir Putin stated in a joint conference in Moscow with Turkish President Recep Tayyip Erdogan on March 10, 2017 "energy is a priority area in cooperation between the two states."[20] In the long term, strong cooperation in the energy sector will positively affect Russian-Turkish economic relations and make the energy sectors of both states more interconnected. Since the reliability of gas supply to consumers is among the highest priorities for Gazprom, it is essential for Russia to cooperate with a reliable partner such as Turkey to minimize transit risks. Thereby, Russia will become further dependent on the economic and political situations in Turkey. As for Turkey, the joint project with Russia will increase the Turkish dependency on Russian energy resources, but at the same time will provide an opportunity to meet growing domestic demand for natural gas.

3. Natural Gas as a New Component of Russian-Israeli Relations in Energy Sphere

The State of Israel from the beginning of its formation has been highly dependent on external energy supplies, which make its energy security strategically vulnerable. Although being geographically close to the world largest oil and gas reserves, the state has been isolated from them for years. Until 2004 Israel had no commercial oil and natural gas resources of its own, thereby the state was highly dependent on expensive oil import contracts with nations such as Mexico, Norway, and the United Kingdom; and on

[20] "Joint news conference with President of Turkey Recep Tayyip Erdogan", 10.03.2017, http://en.kremlin.ru/catalog/persons/122/events/54023

natural gas import contracts with Egypt.[21] Recently Israel's oil import revenues have been dominated by Russia and Kazakhstan. The value of crude oil coming from Russia and the CIS reached a peak in 2006, with 88% of the total amount of oil imported by Israel.[22] In order to diversify oil supplies and minimize the risks of their energy dependence on Russia, the Israeli authorities have taken an interest in the famous Baku-Tbilisi-Ceyhan oil pipeline.

Between the 1990s and 2000s, several energy companies discovered a number of natural gas fields on the Israeli offshore in the East Mediterranean Sea. This forced the Israeli government to revise its energy strategy by increasing the share of natural gas in its energy mix. Israel's new offshore gas reserves belong mainly to two groups: Yam Thetis Group and a BG partnership with Isramco and others. The two largest offshore fields, which had been discovered by 2000, are the Yam Tethys field, consisting of Noa and Mari-B fields, and the Gazze Marine field.[23]

Russia, by virtue of its geographical location, is the world's largest producer of crude oil (including lease condensate) and the second-largest producer of dry natural gas.[24] Russia's federal budget revenue is highly dependent upon oil and natural gas production and their exports. Natural gas export revenues of the Russian Federation in the beginning of the 2000s were estimated around 17% of their total exports. As can be seen from the Table 1, revenues from natural gas exports within the research period have never fallen below 11% of the Russian total export value. Moreover, in 2001 the income of natural gas exports exceeded 18% of Russia's total export revenues showing the significant impact of this resource on the Russian economy.

These two trends of the early 2000s have provided a necessary background to start negotiations between Russia and Israel on cooperation in the

[21] According to the International Energy Statistics, Israel Overview, https://www.eia.gov/beta/international/analysis.cfm?iso=ISR

[22] Ilya Bourtman, "Putin and Russia's Middle Eastern Policy", *The Middle East Review of International Affairs,* Volume 10, No. 2, June 2006.

[23] "Российско-израильские торгово-экономические отношения" ("Russian-Israeli economic and trade relations"), 17.11.2010, *Russia-Israel Business Council,* http://rus-israel.ru/analytics/news122

[24] "Russia", *International Energy Statistics,* https://www.eia.gov/beta/international/country.cfm?iso=RUS

natural gas sector. Since Israel intended to develop its own gas industry by constructing gas pipelines, distribution networks and power plants, the government expressed strong interest in the participation of Gazprom as a highly experienced company in this field. The negotiation process between the two states on the issue began in June, 2004[25] with the visit of a Gazprom delegation to Israel. Besides Gazprom's participation in the creation of a gas infrastructure in Israel, the parties also discussed the possibility of supplying Russian natural gas to Israel on the basis of long-term contracts. The option of delivering Russian gas to Israel across Turkey via the "Blue Stream" pipeline and constructing a new offshore gas pipeline across the Mediterranean was discussed. During the visit the parties signed an agreement establishing a joint Israeli-Russian working group on this project.

Table 1. Natural Gas Export of the Russian Federation in 2000-2015

Year	Amount of natural gas, in bcm	Value in million US dollars	% in total Russian export
2000	193.9	16644.1	16,7
2001	180.9	17770.0	18,5
2002	185.5	15897.3	15,5
2003	189.4	19980.9	15,5
2004	200.4	21853.2	12,2
2005	209.2	31670.5	13,1
2006	202.2	43806.2	14,7
2007	191.9	44837.4	12,9
2008	195.4	69107.1	14,8
2009	168.4	41971.4	14,1
2010	177.8	47739.3	12,1
2011	189.7	64290.1	12,4
2012	178.7	62253.3	11,8
2013	196.4	67232.3	12,8

[25] "Об итогах визита делегации ОАО «Газпром» в Израиль" ("About results of the visit of the Gazprom delegation to Israel"), Gazprom Press Center, 01.06.2004, http://www.gazprom.ru/press/news/2004/june/article54928/

2014	174.3	55240.3	11,1
2015	185.5	41844.3	12,2

Source: Based on data published by the Central Bank of the Russian Federation

Annual negotiations[26] on the participation of the Russian monopoly in the development of the Israeli gas industry lasted until 2009 but did not reach any concrete agreement between the two states. Despite being among the most discussed questions in Russian-Israeli negotiations conducted in 2000-2009, natural gas could not occupy any niche in economic relations between the two states within the first decade of the 21st century.

However, within the last 7 years the Israeli energy sector has undergone significant changes. In 2009-2010 a consortium led by US private company "Noble Energy" discovered the two biggest natural gas fields in the Israeli offshore in the Mediterranean Sea. The first one named Tamar is located 90 km from the coast. As of 2014 the natural gas reserve contains 246 bcm, "a quantity equivalent to Israel's total energy consumption over a 10-year period."[27] Deliveries of natural gas from the Tamar gas field began in March 2013.[28] The second field discovered by the consortium in 2010 - the Leviathan - became the largest one among proven reserves of natural gas in Israel, estimated at 620 bcm.[29]

Thereby, the total proved and probable offshore natural gas reserves and

[26] Based on materials prepared by Gazprom Press Center: "Об итогах рабочей встречи Алексея Миллера и Эхуда Ольмерта", 28.06.2005, http://www.gazprom.ru/press/news/2005/june/article55319/; "Об итогах визита делегации ОАО «Газпром» в Израиль", 19.03.2006, http://www.gazprom.ru/press/news/2006/march/article55645/; "Об итогах рабочей встречи Алексея Миллера и Биньямина Бен Элиэзера", 23.06.2008, http://www.gazprom.ru/press/news/2008/june/article56600/; "Об итогах рабочей встречи Алексея Миллера и Биньямина Бен Элиезера", 08.02.2007, http://www.gazprom.ru/press/news/2007/february/article56054/

[27] The Natural Gas Sector in Israel, Ministry of National Infrastructures, Energy and Water Resources of the Israel, http://energy.gov.il/English/Subjects/Natural%20Gas/Pages/GxmsMniNGEconomy.aspx

[28] "The General Director of Restrictive Trade Practices Declares the Partners in the Natural Gas Reservoir "Tamar" to have a Monopoly on Israel's Natural Gas Supply", Antitrust Authority of Israel, 13.11.2012, http://www.antitrust.gov.il/files/32858/Natural%20gas.pdf

[29] "Israel's Leviathan gas reserves estimate raised by 16 pct", *Reuters*, 13.07.2014, http://www.reuters.com/article/israel-natgas-leviathan-idUSL6N0PO08Q20140713

resources of Israel have been estimated around 905 bcm as of 2015.[30] In near future Israel will be able to change its current status of energy importer to energy exporter, likely affecting geopolitical situations within the region. While Russia continues to be a supplier of oil to Israel, relations in the energy sphere between the two states will change too.

Map 2. Natural Gas fields in the East Mediterranean Sea

Source: http://www.economist.com

After Israel's discoveries of large natural gas fields Gazprom expressed their intent to participate in projects of natural gas exploration and production, as well as in their subsequent marketing in Israel and supply to third states. The new round of negotiations began in June, 2012 when the Russian President Vladimir Putin visited Israel and instructed Russian state oil and gas companies to increase cooperation with Israel in the energy sphere. As soon as Israel began to develop its own strategy in the natural gas industry, the need arose to cooperate with a partner who is highly experienced in the

[30] Ophir Gore, "Current Status of Oil and Gas Exploration and Production in Israel", Ministry of Economy of Israel, March 2016, http://www.assolombarda.it/servizi/internazionalizzazione/documenti/presentazione-di-o.-gore_

production and further supply of gas along with operation of LNG projects. Thereby, in September, 2012 the Israeli government decided to involve the development of the Leviathan gas field a huge international energy trust. Among the most likely candidates there was the Russian company "Gazprom".

There were three possible variants of cooperation between Gazprom and Israel in the development of the Leviathan field. The first option involved participation of Gazprom as a partner in development of the Leviathan gas field. The entrance of a new partner who is capable to provide significant investment in the field's development would certainly speed up the start of industrial gas production. The second option included Gazprom purchasing the gas from the Leviathan field and its further supply to the markets in the Middle East and Far East. The third option represented a combination of the first two variants: Gazprom as a partner exporting gas into the Middle East and Far East markets, by creating a joint company with other shareholders. Eventually, in December, 2012 after several rounds of negotiations, 30% of the share of the development of the Leviathan gas field was won by the Australian company "Woodside Petroleum".

Despite losing the bid in the Leviathan field the Russian monopoly was still interested in entering into the market of gas exploration, production and supply. In February, 2013 the "Gazprom Marketing & Trading Switzerland AG", the Swiss subsidiary of Gazprom, signed an agreement with Levant LNG Marketing Corporation on buying 4.2 bcm of LNG per year from the Tamar gas field over a period of 20 years beginning in 2017. The agreement follows an earlier Letter of Intent signed between the two parties in March 2012. According to the agreement, Gazprom has a right to sell Israeli gas to Asian markets.[31] By signing this agreement the beginning of a new stage in economic cooperation between the two states in the natural gas sector could be considered. Negotiations on bilateral cooperation in the gas sector continue to be held.

[31] "Gazprom Marketing and Trading Switzerland AG signs Heads of Agreement with Tamar upstream consortium", 26.02.2013, http://www.gazprom-mt.com/WhatWeSay/News/...

3.1. Natural gas factor in Israel-Turkey relations in energy sphere

Between 2005-2008 Israeli authorities conducted negotiations with Turkey, Georgia and Azerbaijan on potential partnership in Baku-Tbilisi-Ceyhan oil pipeline (BTC) and Baku-Erzurum-Ceyhan gas pipeline also known as South Caucasus Gas Pipeline (SCGPL), in parallel to consultations with Gazprom regarding the linking of the Israeli gas transporting system to the Blue Stream project by constructing a subsea gas pipeline. Both pipelines are aimed at bypassing Russia and channeling Central Asian oil and gas to Western markets. By doing so, Israeli authorities demonstrated an intention to find the most profitable solution for diversifying oil and gas supplies and reducing the state's high dependence on a single supplier.

The SCGPL gas pipeline runs from the Shakh Deniz natural gas field in Azerbaijan via Georgia to Turkey, and then transits additional volumes to Greece and Italy. The pipeline is strategically very important because it "would have gained the very high importance if a Trans-Caspian natural gas pipeline be constructed, one that could move gas from Kazakhstan and Turkmenistan westward by hooking into the natural gas pipeline in Azerbaijan."[32] In situating the connection of the Turkish and Israeli gas transporting systems, the SCGPL pipeline becomes an actual competitor to the Blue Stream. Basically, the main idea of both projects is similar – to link the Turkish and Israeli gas infrastructures by constructing a pipeline under the Mediterranean Sea in order to transport natural gas resources to the Red Sea via the shortest route. The question remains, which pipeline the new one, be connected to: the Russian-Turkish Blue Stream or the SCGPL gas pipeline, which is protected by the US-NATO?

In this way the decisions made by Turkey and Israel on that issue played a crucial role. On April, 28, 2006 Israel and Turkey agreed to "construct four parallel pipelines beneath the Mediterranean Sea capable of carrying crude oil, natural gas, electricity and water."[33] The project aiming to connect the Turkish port of Ceyhan and the Israeli port of Haifa was sponsored by the European Industrial Bank. This was the point where the political interests

[32] Robert O. Freedman, "The Russian Invasion of Georgia – Its Impact on Israel and the Middle East", Autumn 2008, http://www.cria-online.org/5_2.html

[33] Jay Bushinsky, "Turkey, Israel to build Mediterranean pipeline / 4 legs would carry crude oil, electricity, natural gas and water", 28.04.2006, http://www.sfgate.com/news/article/Turkey-Israel-to-build-Mediterranean-pipeline-2498862.php

of Israel and Russia on regional energy issues became diametrically confronted. "Russian strategic goals are to prevent states around its borders from becoming pro-American and to increase control over the transportation of Russia hydrocarbons through the territory of its neighbors, as well as to control export of the neighbors' oil and gas by directing their flow via the Russian pipeline system."[34]

The project of the Ceyhan-Haifa oil and gas pipelines not only competed with Russia's interests, but also threatened Iran's striving for domination in transporting natural gas from Caspian basin to Europe. The planned route Baku-Tbilisi-Ceyhan-Haifa, undoubtedly, would have influence on Iran's gas exports and its geopolitical significance in the Middle East region. At the beginning of the Ceyhan-Haifa pipeline project it was planned to gain "strategic control of a land corridor, which extends along the Eastern Mediterranean coast, from the Israeli-Lebanese border, across Lebanon and Syria to Turkey, where it would link up with the port of Ceyhan."[35] As it turned out, later the project had to bypass the Lebanon territory, which was not occupied by Israel in the 2006 Lebanon War.

The Turkish-Israeli subsea pipeline project is another example of high interdependence between natural gas politics and geostrategic issues within the region. When, on May 2010, diplomatic relations between Turkey and Israel had been broken because of the killing of 9 Turkish citizens by Israeli authorities in the raid of a Turkish humanitarian aid vessel "Mavi Marmara"[36], bilateral cooperation on the project was frozen. After the "Mavi Marmara" incident the Turkish Ambassador to Israel was recalled and the Israeli Ambassador was expelled from Turkey. Intergovernmental relations between the two states collapsed until an official apology from Israeli Prime Minister Benjamin Netanyahu to the Turkish Prime Minister Recep Tayyip

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[34] Ariel Cohen, *Russia: The Flawed Energy Superpower*, *"Energy Security Challenges for the 21st Century"* edited by Gal Luft and Anne Korin, Greenwood Publishing Group, August 2009, p.104.

[35] Michel Chossudovsky, "The Militarization of the Eastern Mediterranean: Israel's Stake in the Baku-Tbilisi-Ceyhan pipeline", *Global Research*, 23.05.2006, http://www.globalresearch.ca/the-militarisation-of-the-eastern-mediterranean-israel-s-stake-in-the-baku-tbilisi-ceyhan-pipeline/2508

[36] Robert Booth, "Israeli attack on Gaza flotilla sparks international outrage", *the Guardian,* 31.05.2010, https://www.theguardian.com/world/2010/may/31/israeli-attacks-gaza-flotilla-activists

Erdogan in March 2013.[37] In June 2016 Turkey and Israel finally signed a reconciliation agreement, which covered Israeli compensation to families of those who killed in the "Mavi Marmara" incident.[38]

During the 6-year period of détente between Turkey and Israel the regional energy map underwent important changes. First of all, Israels discoveries of natural gas fields in the Eastern Mediterranean Sea created a foundation for new energy projects. Taking into account the intention of Turkish authorities to reduce the states dependence on a single energy supplier, the Eastern Mediterranean gas resources become more crucial for Turkey in ensuring such diversity. Hereby, in January 2016 Turkish President Recep Tayyip Erdogan stated "Israel is in need of a state like us in the region. We have to admit that we also need Israel."[39] After that statement Turkey and Israel began negotiations on implementing a joint project on constructing 292-mile subsea gas pipeline. The project, alternative to the LNG project from Israel via Cyprus and Greece to southern Europe, aims to export gas from the Leviathan to Ceyhan and transit it to European market. A contract, if it is signed, on supplying around 16-bcm gases per year will normalize political ties (at least in terms of eliminating the effect of the "Mavi Marmara" incident) and promote further economic cooperation between the two states. Moreover, if the ambitious subsea pipeline project is implemented, it will undoubtedly affect the balance of political power in the Middle East.

Nonetheless, the project has already faced a critical obstacle - the conflict between Turkey and Cyprus. A subsea pipeline from the Leviathan field to Turkey has two possible routes. The first would run through the executive economic zones of Lebanon and Syria, which means crossing two states with unstable political environment and high security risks. Moreover, ongoing war in Syria postpones further political settlement within the state that makes negotiations on such high-cost project almost impossible. The other route would cross the Cypriot continental shelf, which requires permission from the Cypriot government. Since a project on using the LNG terminal in Cyprus for the export of Israeli natural gas to Europe

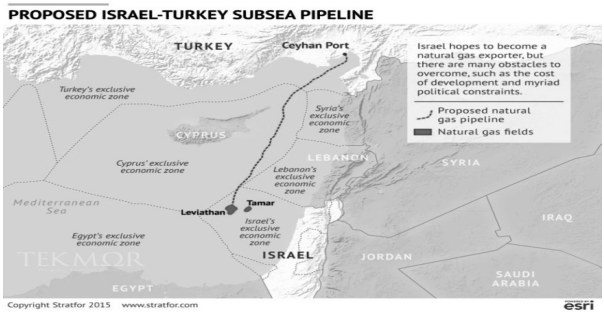
[37] Aybars Görgülü, Sabiha Senyücel Gündoğar, "Energy Relations between Turkey and Israel", "Middle East and North Africa Regional Architecture: Mapping Geopolitical Shifts, regional Order and Domestic Transformations", No. 3, November 2016, p.2.

[38] "6 Must Reads on the Israel-Turkey Reconciliation Agreement", *Haaretz*, 28 June 2016.

[39] "Erdoğan: Türkiye ve İsrail'in birbirine ihtiyacı var", *Posta*, 02 January 2016.

competes with the Turkish-Israeli subsea pipeline project, and Turkey does not recognize the Cyprus Republic, such permission seems impracticable under current political conditions. Still, if the Cyprus conflict is resolved and the Turkish-Israeli gas pipeline is constructed and becomes operational, energy consuming markets will diversify their import routes, which will affect the Russian Gazprom position in the region.

Map 3. The Route of Proposed Israel-Turkey Subsea Gas Pipeline



http://tekmormonitor.blogspot.com.tr/2016/07/private-sector-key-to-israeli-exports.html

In 2014 Turkish and Israeli energy companies began launching negotiations on subsea gas pipeline. Then, in October 2016, on the sidelines of the World Energy Congress, "Turkish energy minister Berat Albayrak and his Israeli counterpart Yuval Steineitz agreed to start talks after the six-year freeze of diplomatic ties between two states."[40]

As it was mentioned before, within the period of détente between Turkey and Israel the energy map of the Middle East had significantly changed. The second most influential issue in this context (after the Israeli gas discoveries) is the escalating Syrian Civil War. Due to the geographical position of Syria on the energy map the clash of interests of major players in the energy sector is seen as rather unavoidable. There were two enormous energy projects which had to cross Syrian territory and were planned before the Syrian crisis started. The first one is the Islamic Gas Pipeline Project (IGP) which presents the strategic cooperation between Iran, Iraq

[40] Murat Basboga, "Turkey, Israel To Discuss Pipeline: Steineitz", 14.10.2016, http://www.naturalgasworld.com/...

and Syria in the energy sphere. If it is materialized the project would end up being the largest natural gas pipeline in the Middle East, carrying gas from Irans South Pars field to Europe through Iraq, Syria, Lebanon and under the Mediterranean. It is worth mentioning that the beginning of the mass demonstrations against Bashar al-Assads regime appeared almost simultaneously with signing the memorandum between the counterparts of the project.

The second project is the Qatar-Syria-Turkey Gas Pipeline, which was planned to start in Qatar, cross Saudi Arabia and Jordan and finish in Syria. "In the area of Homs pipeline must divide into three directions - Latakia on the Syrian coast, Tripoli in northern Lebanon and Turkey. Homs, which also has hydrocarbon reserves, is the crossroads of the main project".[41] As a strategic Russian ally, the Syrian regime in 2009 rejected a Qatari offer to construct the Qatar-Syria-Turkey pipeline and gave a preference to ISG project.

In some extent the development of potential Israeli gas exports to European markets depended on which of the two projects would be implemented. "Israel faces a strategic and very dangerous dilemma. Naturally Israel is none too excited to see al-Assad's Syria, linked to Israel's arch foe Iran and Iraq and Lebanon, out-compete an Israeli gas export to the EU markets."[42] In this regard, the construction of the Iran-Iraq-Syria gas pipeline is definitely unfavorable to Israel, both from an economic point of view and by considering the political dissension between Israel and the states involved in the project.

As for the Qatar-Syria-Turkey pipeline, overcoming the political controversy with Turkey will make the possibility of Israel's joining the Qatar-Syria-Turkey pipeline project quite promising. Thereby, cooperation with Turkey on natural gas issues would reconstruct Israel's geopolitical position in the region. Finally, the implementation of any of the two competing projects of natural gas transportation from the South Pars/North Dome Gas Field to European markets - the IGP or the Qatar-Syria-Turkey gas pipeline – will

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41 Tyler Durden, "Competing Gas Pipelines Are Fueling The Syrian War & Migrant Crisis", 10.09.2015, http://www.zerohedge.com/news/2015-09-10/competing-gas-pipelines-are-fueling-syrian-war-migrant-crisis

42 F. William Engdahl, "Syria, Turkey, Israel and a Greater Middle East Energy War", *Voltaire Network,* 12.10.2012, http://www.voltairenet.org/article176200.html#nb16

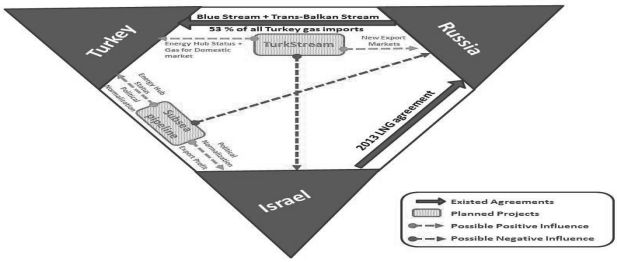
definitely affect the Russian-Israeli relationship.

4. Conclusion

Because natural gas has become one of the key components of world energy politics it has taken center stage in negotiations of the energy sphere between Russia, Turkey and Israel. After analysis of bilateral relations between Russian and Israel, Israel and Turkey, and Turkey and Russia, it is necessary to scrutinize all these ties in a broader context. In order to display the complexity of trilateral relations between the three states, the following "energy triangle" has been created by implementing the cognitive research method. The central role within the triangle is occupied by the natural gas factor.

Figure 2 demonstrates the interdependence and interconnection between the three sides and the three corners of the "energy triangle". As can be seen from the scheme, the Israeli-Turkish subsea gas pipeline project has a direct bearing on the strategic interests of Russian energy policy. While Europe is looking for reliable sources of energy outside of Russia, the subsea pipeline would likely be the first step to bypassing the largest European gas exporter. However, the agreement signed on the TurkStream project between Russia and Turkey will create competition to the subsea project. On the one hand, it will strengthen the Russian Gazprom presence in the European energy market. On the other hand, it will ensure Turkey's sustainable status of "transit state" coupled with lower gas prices for its domestic market. These two planned gas pipelines play the central role in the Russia-Turkey-Israel energy triangle, which is illustrated by intersecting red lines showing possible negative effects in the center of a triangle.

Figure 2. Russia-Turkey-Israel "Energy Triangle"



In this sense, both projects have benefits and disadvantages for Turkey. Russia, as the largest gas exporter in Europe, has a long history of steady and responsible business relations with foreign states in the energy sector; while Israel has little-to-no experience in the handling of large quantities of energy resources. From a political perspective Israel seems more reliable, because cooperation with Russia under Russia's tensions with the EU could have negative effects on Turkey's foreign policy regarding Europe.

As it can be seen from Figure 2 "the strongest side" of the triangle is Russian-Turkish energy relations. An intensive partnership between Moscow and Ankara in the gas sector is proved by both existing agreements and planned projects. Due to the discoveries of new gas fields in the Mediterranean Sea by Israel, Russia and Israel actually began to compete with one another in supplying gas to the European market by means of cooperating with Turkey. Turkey, while considering its relations with Russia and Israel, means to base its strategy on a realistic assessment of what energy interdependence actually requires. Here, the crucial point is actual implementation of the both projects. The construction of the TurkStream project already began in May 2017 while the Turkish-Israeli joint project is still in the negotiation phase.

According to described conjuncture it is worth to clarify perspectives for each state in the triangle. In spite of Gazprom's unsuccessful attempts to enter the Israeli natural gas sector in past, it is essential for Russia to intensify cooperation in the natural gas sphere with Israel, a state with huge potential in the energy sector. As for energy relations with Turkey, cooperation between Russia and Turkey in the energy sector is highly influenced by the political agendas of the states. Based on the experience of the negative effects of political crises on bilateral cooperation, it would be incorrect to consider the current relations between Russia and Turkey as strong ones, even if there are the most intensive within the "triangle."

To strengthen the status of being an "energy transit state" Turkey needs to intensify negotiations with Israel on the joint subsea pipeline project. Both states are interested in resuming economic relations which will open new opportunities for Turkish and Israeli companies, not only in the energy sector but in other commercial spheres as well. The situation around the Turkish-Israeli joint pipeline becomes more complicated due to a recently signed preliminary agreement between Israel, Cyprus, Italy and Greece

to export natural gas to Europe across the Mediterranean via a subsea pipeline. As Israel's Energy Minister Yuval Steinitz stated, 'the project was technologically and financially feasible and could be completed by 2025."[43] Moreover, the planned project is going to become the "world's longest and deepest subsea pipeline."[44]

Hereby, because of unsolved political disputes with Cyprus and unstable political relations with Israel, a project lobbied by Turkey would lose at the negotiation phase. If the Cyprus-Israeli subsea pipeline is constructed, it will negatively affect the Turkish position in the regional energy map. Therefore, the Turkish government would do better to overcome the negotiation phase of the Turkish-Israeli subsea project and move to project preparation and engineering stage.

Moreover, due to a long lasting implementation process, any such kind of energy project requires a huge financial investment, stable political environment both within participated states and in the region, reliable economic conditions within the region, and further exploration of the gas fields aimed to establish more proven gas reserves. Taking into account all of these components, it becomes obvious that decisions being taken recently in the frame of the "energy triangle", and being taken over the course of the next couple of years, will sharply redraw the current regional and global energy maps within the next decade.

Finally, based on conducted research, it can be concluded that the existence of an ambiguous complex of trilateral relations between Russia, Turkey and Israel in the natural gas sector occurs, and it can be applicable for further analysis of natural gas geopolitics. The existence of such a complex has been confirmed by meetings and official conversations held in June 2016 between the heads of the three states. On June 7, 2016 Israeli Prime Minister Benjamin Netanyahu paid a visit to Moscow dedicated to the 25th anniversary of restoring Russian-Israeli diplomatic relations. In the framework of the meeting, the two sides paid attention to the issue of cooperation in the energy sphere. Benjamin Netanyahu stated that there were no legal restrictions on Russian companies participating in gas

[43] Reed John, "Israel signs pipeline deal in push to export gas to Europe", *Financial Times,* 03.04.2017, https://www.ft.com/content/78ff60ca-184c-11e7-a53d-df09f373be87

[44] Reed John, "Israel signs pipeline deal in push to export gas to Europe", *Financial Times,* 03.04.2017, https://www.ft.com/content/78ff60ca-184c-11e7-a53d-df09f373be87

projects in Israel.[45] Vladimir Putin, in his turn, emphasized that Russia did not abandon the any of the gas projects under the Black Sea, including TurkStream project.

On June 26, 2017 Turkey and Israel agreed to begin the normalization process between the two states by ambassadorial exchange. It is noted that immediately after this agreement the states turned back to discussing the subsea pipeline from the Leviathan to Turkey. Just one day after, on June 27, 2017 the President of the Republic of Turkey Recep Tayyip Erdogan sent a message to the Russian President Vladimir Putin in which he expressed deep regret over the incident regarding the Russian SU-24 downed plane and stressed his readiness to make any effort to restore the traditionally friendly relations between Turkey and Russia.[46] After that message and following phone conversation between Recep Tayyip Erdogan and Vladimir Putin, the two states began the normalization process, which resulted in the signing of an agreement for the TurkStream project in October 2016. Thereby, the political confrontation between Russia and Turkey, which continued for 8 months, has been overcome.

All the events mentioned above occurred almost simultaneously which created a basis for considering them in a complex. As it was concluded earlier, decisions taken within the "energy triangle" redraw the current regional and global energy map. In addition to the energy aspect, changes within this complex or "triangle" of relations in the natural gas sector also reflect the political ties between Russia, Turkey and Israel which also subsequently affect the entirety of political conditions within the East Mediterranean and the Middle East regions.

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