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PREFACE

This proceeding includes some revised papers submitted to the international conference on "Trans-European Security Challenges" organized by the Ankara University European Union Research Centre (ATAUM), in cooperation with NATO Public Diplomacy Division and International Relations Council of Turkey. Within the framework of the conference which was held in ATAUM on 30 November - 1 December 2007, the main objectives are: to extend public knowledge and awareness about current security problems around the world; to draw attention of the wider academic, political, and bureaucratic communities as well as media to security and defense decision-making; to extend appreciation and knowledge on contemporary security challenges and the changing conditionalities in various sub-systems, such as Europe, Middle East, Black Sea, Central Asia and the Caucasus; to discuss the new problems threatening national/regional/global security and the methods of handling those threats; and to evaluate the role of international institutions in the emerging regional/international security systems.

Europe faces security threats and challenges. The post Cold War environment is one of increasingly open borders in which the internal and external aspects of security are indissolubly linked. Energy dependence is a special concern for Europe and large- scale agression against any member state is now improbable.

Instead Europe faces new threats which are more diverse, less visible and less predictable. Terrorism imposes large costs; it seeks to undermine the openess and tolerance of societies and it poses a growing strategic threats to the whole of Europe.

Europe has already entered in a new energy era, with an increasing external dependence and rising competition for global energy resources. These developments will have a significant impact on the EU's medium term energy security, as well as on its economic and sustainable development. It now becomes obvious that only with a coherent and coordinated energy policy will the European Union be able to tackle the forthcoming energy and environmental challenges in a sustainable manner.Today we are facing new challenging times for the world's energy sector and for mankind. Energy security and climate changes are again on the top of world's political agenda.

The key questions facing the European Union and Turkey are in the East and South. Turkey is the link, the corridor, the bridge to those regions.

To Turkey's East and South lies the greatest concentration of energy resources on the planet, far larger than those that lie in continental Europe. Within Turkey there is huge potential renewables capacity, large reserves for indigenous energy supply. And – perhaps most importantly – a modern and vibrant economy that is expanding and can create a hub for investment across the Eastern Mediterranean, the Black Sea and the Middle East.

Alongside to the transformation of threats, the probable types of responses to those threats have also altered the roles and policies of the security institutions of Europe. Apart from the radical change in threats and the instituional transformations, theoretical approaches in understanding European security have also been susceptible to scrutiny.

In order to create an atmosphere conducive for productive discussions, the conference bring together academics, independent security experts, and students as well as representatives of NGO's, private/public sector, and international institutions.

The papers of the book is published in the sessions order of the Conference.

We would like to thank to the contributors of this book who have kindly agreed to revise their papers, Ambassador Selim Kuneralp (Deputy Undersecretary, Turkish Ministry of Foreign Affairs), Mr. Vitaly Fedchenko (SIPRI), Assoc.Prof.Dr. Mustafa Kibaroğlu (Coordinator of the Transatlantic and Eurasian Security Studies Program in the Department of International Relations at Bilkent University), Ms. Aylin Gürzel (Doctoral Student and Research Assistant in the Department of International Relations at Bilkent University), Assoc.Prof.Dr. İlhan Uzgel (Ankara University, International Relations Dep.), Dr.Ömer Kurtbağ (Ankara University, Institute for Social Sciences, Department of International Relations), Assoc.Prof.Dr. Sevilay Kahraman (METU, International Relations Dep.), Ambassador Naci Sarıbaş (General Director, Department for EU Accession Process, Turkish Ministry of Foreign Affairs), Dr. Marat Terterov (Russia-Middle East expert, Gulf Research Centre, Dubai), Giuseppe Maria Sfligiotti (Former Director of OME), Assoc.Prof.Dr. Çağrı Erhan (Director of European Union Research Centre of Ankara University, Dr.Cenk Pala (Petroleum Pipeline Cooperation BOTAŞ, Head of the Department of Strategy and Development) , Dr. Antje Nötzold (TU Chemnitz).

On the organisational side, we are grateful to ATAUM staff, our project assitants, whose able handling made the gathering a success. We are also inebted to our supporting institutions NATO Public Diplomacy Division, International Relations Council of Turkey, Turkish Petroeum Corporation (TPAO) and Ankara University Rectorate for their generosity, without which

the meeting that gave rise this proceeding could not have been conveyed. The support and encouragement we received from Ms. Yeter Yaman-Naucodie of NATO PDD, Cenk Pala from BOTAŞ, Prof.Dr.Mustafa Aydın from IRC, Ret. Ambassador Akın Alptuna was indispensable. We are also grateful to Prof.Dr. Nusret Aras, the Rector of Ankara University.

Finally, Dr. Kaya Uysal, Mr. Mehmet Ali Yıldırım, Mr.Turan Bacı, Mr. Mustafa Kılıç from ATAUM, Sinem Açıkmeşe from IRC, our young project assistants Ms.Tuğba Çelik, Ms. İrem Erikan, Ms. Özlem Gencel , Ms. Deniz Çankaya and Ms. Neşe Asan deserve special appreciation in terms of their invaluable efforts for the organisation of the Conference.

AÇILIŞ KONUŞMASI
OPENING REMARKS

Selim KUNERALP*

I should first like to welcome and thank all participants, particularly the NATO Secretariat for having funded this important event.

Energy security has become a highly topical subject at a time when consumption of energy is rising fast in all countries. Therefore organising this meeting at this particular time is a good initiative.

Energy security has become an objective of foreign policy because it is essential for national security, economic stability and welfare. Energy security requires diversification of supplies and also of routes followed by hydrocarbons on their way from the supplier to the consumer. Energy security also makes it necessary for cooperation to take place between consumers and producers. Consumers will expect to obtain reliable and constant supplies at reasonable prices while producers will want stable markets for their products. As a result a form of interdependence develops between them.

Turkey's energy strategy is based on ensuring security of supplies. At the moment, Turkey can only meet 30% of its energy needs from domestic sources. The rest has to be imported. In that process, Turkey tries to diversify its sources of supply but also the sources of energy that is consumes. Renewable sources, as well as nuclear energy have recently begun to attract interest in this country as a result of these efforts.

Turkey is situated in a region, namely the Caspian and Middle-East that contains 2/3 of the world's known supplies of natural gas and oil. In order to help the countries of the region transport their products to Western markets, and in certain cases to contribute to their economic development, Turkey has conceived the East-West Energy Corridor concept.

This corridor's cornerstone is made up of the Baku-Tiblisi-Ceyhan oil pipeline and the Baku-Tiblisi-Erzurum gas pipeline. The BTC has a capacity of one million barrels a day and transports Azeri oil to the Ceyhan terminal on the

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* Ambassador, Deputy Undersecretary, Ministry of Foreign Affairs.

Mediterranean thus bypassing the Black Sea and Turkish Straits, and thereby eliminating serious environmental hazards. The BTC was inaugurated on 4 June 2006 and by 23 November 2007 more than 300 tankers had been loaded at the Ceyhan terminal. Since 16 June 2006, Kazakhstan has also become a partner in the BTC project.

The second principal element of the East-West Energy Corridor is the Baku-Tiblisi-Erzurum gas pipeline which was completed last July. This pipeline which transports Azeri gas across Georgia to Turkey has a capacity of 6.6 billion cubic metres.

The BTE has to be seen as part of the Trans-Caspian pipeline project that aims at transporting Kazakh, Turkmen and eventually Uzbek gas to western markets and link the countries of the Caucasus and Central Asia to Western Europe.

The Turkey-Greece Interconnector that was inaugurated only a couple of weeks ago plays an important part in this project. Once its extension to Italy has been completed, this pipeline will have the capacity to transport 3 billion cubic metres of gas to Greece and 8 billion cubic metres to Italy. With the inauguration of the interconnector, gas from the Caspian can now be transported to Western markets without crossing Russia. A major step has thus been made to diversify Europe's supply routes. This is a major contribution of Turkey to the EU's energy security.

Another important step in that direction will be made with the completion of the Nabucco project which will transport natural gas across Turkey, Bulgaria, Romania and Hungary to Austria and from there to other markets in Western Europe. Work on this pipeline that will have a capacity of 31 billion cubic metres has started and the EU has demonstrated its interest in the project by appointing the former Dutch Foreign Minister Van Aartsen as Commission coordinator for the project. Turkey has welcomed this move and encourages the EU and its member states to actively lobby Central Asian countries in favour of the project.

Moreover, work is also continuing on the Arab Gas pipeline and its connection from Syria to the Turkish grid is under consideration. Turkey is also interested in helping to develop Iraq's gas resources.

Once all these projects have been completed Europe will have acquired a fourth natural gas artery after those of Norway, Algeria and Russia. As already mentioned Turkey will have helped Europe increase its energy security and a new area of cooperation and interdependence will have been created between Turkey and the EU. However, joint efforts and a good dialogue between us are essential if we are going to make progress in this direction.

TRANS-EUROPEAN SECURITY CHALLENGES PROLIFERATION OF WEAPONS OF MASS DESTRUCTION IN THE EURASIAN REGION

Mustafa KİBAROĞLU[*]

Aylin GÜRZEL[**]

INTRODUCTION

With the end of the Cold War the strategic context that had long rested on a delicate nuclear balance has also come to an end.[1] The so-called "rogue states", as well as non-state actors which have developed state-like hierarchical command structures started to become influential actors in the political and military arena. The appearance of these political and quasi-military entities in the center-stage of international politics has broadly disturbed the long-running stability and predictability in the international system, and also threatened the international peace and security. Especially, the breakup of the 15 republics that constituted the Soviet Union brought about manifold problems, extending from the political, military and sociological to cultural and religious aspects of life in the newly independent states of Central Asia and the Caucasus.

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[1] It may be more appropriate to use the terminology of the age (i.e. the 1960s) where stability in superpower rivalry was believed to owe much to the existence of a "delicate balance of terror", so labeled after the work of Albert Wohlstetter, who was a leading strategist with the RAND Corporation. See Albert Wohlstetter, "The Delicate Balance of Terror," in Philip Bobbitt, Lawrence Freedman and Gregory F. Treverton, (eds.), **US Nuclear Strategy: A Reader** (London: The Macmillan Press, 1989), pp. 143 - 167.

Also equally worth considering, however, was the abolition of strict Soviet control over military installations, be they weapons production facilities or research laboratories. This has been the most serious concern of all to international security analysts in particular because a number of states, as well as non-state entities, have long been known to be in search of ways to acquire and/or develop weapons of mass destruction.

Often cited among these countries were Iran, Iraq, Libya and North Korea, which were on the record for offering former Soviet scientists a fortune to sell their knowledge to develop indigenous Weapons of Mass Destruction (WMD) capabilities for them. As a result of the US war on Iraq, and thanks to the radical shift of Colonel Qaddafi who decided to quit all of his country's programs related with the development of weapons of mass destruction, these two countries are dropped from the list. Yet, numerous attempts in the illicit trafficking of material, technology and knowledge used in the development of nuclear, biological and chemical (NBC) weapons, and their delivery vehicles such as ballistic missiles continue. Some of these attempts have been foiled by the security forces of various countries, while some others are believed to have been successful.

More importantly, however, beside these states of concern, some non-state actors are also identified as being involved in the illicit trafficking network for developing WMD capabilities. For instance, the Japanese cult Aum Shinrikyo[2] has a long record of criminal activity, including the Sarin gas attack in the Tokyo subway in March 1995. The cult is believed to be composed of a worldwide network of large numbers of scientist and experts working in many fields extending from medicine to engineering and from archaeology to natural sciences. Cult members were arrested during an attempt to buy uranium mines in Australia via the establishment of parent companies in order to conceal their activities, as well as to acquire a seed stock of the deadly Ebola virus under the guise of scholarly cooperation during an academic gathering in the middle of the outbreak of that disease in Africa.

Similarly, the world media was alerted soon after the attacks on the World Trade Center (WTC) in New York and on the Pentagon in Washington DC, that another non-state entity, namely Al Qaeda had also established a worldwide network reportedly in some 70 countries with the involvement of thousands of people from almost all strata of the population and with diverse professional backgrounds. The list of such non-state actors is not exhausted and includes clusters of peoples with different objectives, extending from those that uphold religious extremist principles to racist militia groups. What is of common concern to security analysts with respect to such non-state entities is their desire

[2] The cult's name means "the ultimate truth".

and the ability to gain access to WMD and/or the material used in their production. Should this happen, maintaining peace and stability in the world will become extremely difficult.

Motives for Proliferation of Weapons of Mass Destruction

Why does mass destruction weapons proliferation occur? There are theories explaining proliferation. Three perspectives try to explain the causes of proliferation. The realist perspective argues that states try to acquire nuclear weapons to "offset international security threats".[3] In other words, it is a response to feeling of insecurity of weaker states and a kind of balancing against foreign threats.[4] Therefore, states who wish to rely on self-help to protect their sovereignty and national security may embark on clandestine WMD programs of sorts.

Former US Secretary of State George Shultz has nicely summarized the security dilemma that the proliferation of nuclear weapons causes: "Proliferation begets proliferation".[5] In other words, every time one state possesses nuclear weapons to balance against another state it also creates a nuclear threat to another state in the region that, in turn, has to initiate its own nuclear weapons program to maintain its national security. This suggest that states who face nuclear adversaries will sooner or later develop their own arsenals unless they have credible alliance guaranties with a nuclear power.

Another perspective contends that ideas are produced by natural culture, or individual attributes.[6] Idealist approaches can explain much of the world views, motives and decision-making styles of specific state leaders. They argue that the "black box" of decision-making in states should be opened and examined how leaders make their decisions to acquire nuclear weapons. This model of nuclear weapons proliferation focuses on the domestic actors who have an effect on the decision of pursuing nuclear bomb.[7] Idealists do not see the bureaucratic leaders as passive recipients of political decisions; on the contrary, they suggest that decision-makers create the conditions for proliferation.

A third perspective focuses on norms concerning weapons acquisition. According to this perspective, state behavior is determined by deeper norms and shared beliefs about what actions are legitimate and appropriate in international

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[3] Peter R. Lavoy, "Nuclear Proliferation over the Next Decade", **Nonproliferation Review**, Vol. 13, No. 3, November 2006, p.435.
[4] Scott D. Sagan, "Why Do States Build Nuclear Weapons?: Three Models in Search of a Bomb", **International Security**, Vol. 21, No. 3 (Winter, 1996-1997).
[5] **Ibid**., p.57.
[6] Peter R. Lavoy, "Nuclear Proliferation over the Next Decade", p. 434.
[7] Scott D. Sagan, "Why Do States Build Nuclear Weapons?" p. 73.

relations.[8] A related literature has been created concerning the development and spread of norms within international regimes. This perspective has produced a debate about the role of global norms, but it has not developed a theory about their causal influence. On the other hand, there are many individual case studies which suggest that decision makers acquire nuclear weapons to enhance the international prestige of the state.[9] Why are some nuclear weapons acts considered prestigious while others produce opprobrium. How do such beliefs change over time? Barry O'Neill suggests that prestige arises from the interaction of beliefs spread over the group is largely social and reflexive in nature.[10] In other words, it is the widespread belief that for instance going nuclear is prestigious and is in their national interest.

Neither of the above-mentioned perspective has an adequate explanation for when and why policymakers choose to ignore any of these constraints, such as the Nuclear Non-Proliferation Treaty (NPT),[11] the Chemical Weapons Convention (CWC),[12] Biological and Toxin Weapons Convention (BWTC)[13] or the Comprehensive Nuclear Test Ban Treaty (CTBT).[14]

Scott Sagan suggests that multi-causality lies at the nuclear proliferation problem and predicting the future based on such an understanding of the past may still be problematic since the conditions that produced the past proliferation outcomes may themselves also be subject to change.[15] Sagan has suggested that proliferation can arise from one of the three foreign policy motivations. First, the need to match power for power, second, the desire to reinforce national self-esteem and, finally, the selfish demands of domestic constituents, usually military bureaucracies and their supporters. Any of these reasons can be enough

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[8] **Ibid**.,

[9] Barry O'Neill, **Nuclear Weapons and National Prestige**, Cowles Foundation for Research in Economics, Yale University, February 2006.

[10] **Ibid**., p. 2.

[11] The Treaty on the Non-Proliferation of Nuclear Weapons is an international treaty to limit the spread of nuclear weapons, opened for signature on July 1, 1968. There are currently 189 countries party to the treaty, five of which have "nuclear weapons state" status: the United States, the United Kingdom, France, the Russian Federation, and the People's Republic of China.

[12] The Chemical Weapons Convention is an arms control agreement which outlaws the production, stockpiling and use of chemical weapons. Its full name is the Convention on the Prohibition of the Development, Production, Stockpiling and Use of Chemical Weapons and on their Destruction.

[13] BTWC was the first multilateral disarmament treaty banning the production of an entire category of weapons (with exceptions for medical and defensive purposes in small quantities). It was the result of prolonged efforts by the international community to establish a new instrument that would supplement the 1925 Geneva Protocol.

[14] The Comprehensive Nuclear-Test-Ban Treaty bans all nuclear explosions in all environments, for military or civilian purposes.

[15] Jacque E. C. Hymans, **The Psychology of Nuclear Proliferation: Identity, Emotions and Foreign Policy**, Cambridge University Press, 2006.

to motivate the decision-maker for trying to acquire the bomb whether it is a nuclear bomb or a chemical or biological bomb.[16]

Why then states like Germany, Japan, Sweden, Canada and many others have not decided to "go nuclear" while they had the scientific and technological capabilities to do so? Demand side of proliferation suggest that there are many reasons state leaders have to "go nuclear" but rather how few have decided to take that root. Foreign policy decisions are most likely to have various indirect and direct effects to the country and a decision to go nuclear is a revolutionary one. This is a decision with potentially massive consequences that is why not every decision-maker can face the challenges of taking such a step and facing unpredictable consequences.[17]

Post-Cold War Security Challenges and Prospects in Eurasia

Proliferation of WMD still continues in the greater Eurasian landscape. There are two legally acknowledged nuclear weapons states in the region, which are Russia and China; three *de facto* nuclear weapons states that are Pakistan, India and Israel, and one threshold state namely North Korea. Added to these is Iran which has become a major concern since recently with its elaborate nuclear program.[18]

Demise of Soviet Union added to the threat posed by states trying to become nuclear powers. Now there is also the threat posed by non-state actors/terrorist organizations. The power and sophistication of criminal networks capable creating panic in the world and, in turn, disrupting the global economy is growing overtime. There are reports that Al Qaeda has tried to acquire nuclear weapons and that the Pakistani nuclear scientist Abdel Qader Khan sold nuclear technology to some states.[19] It is also known that parts of the Russian nuclear arsenal are not secure although the Nunn-Lugar Cooperative Threat Reduction Program (CTR) has reduced the danger from Russian "loose nukes".[20]

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[16] Bradley A. Thayer, "The Causes of Nuclear Proliferation and the Utility of the Nuclear Nonproliferation Regime", **Security Studies**, Vol. 4, No. 3 (Spring 1995), pp. 463-519.

[17] Robert Jervis, **The Meaning of the Nuclear Revolution: Statecraft and the Prospect of Armageddon**, Ithaca, N.Y., Cornell University Press, 1989.

[18] Mustafa Kibaroğlu, "Good for the Shah, Banned for the Mullahs: The West and Iran's Quest for Nuclear Power," **The Middle East Journal**, Spring 2006, Vol. 60, No. 2, Middle East Institute, Washington DC, pp. 207-232. Mustafa Kibaroğlu, "Iran's Nuclear Ambitions from a Historical Perspective," **Middle Eastern Studies**, March 2007, Vol. 43, No. 2, Routledge, Taylor & Francis Group, London, pp. 223 - 245;

[19] Bill Richardson, "A New Realism", **Foreign Affairs**, January-February 2008, p. 2.

[20] Matthew Bunn, Anthony Wier, **Securing the Bomb 2006**, Project on Managing the Atom, Belfer Center for Science and International Affairs, John F. Kennedy School of Government, Harvard University, July 2006, pp. 11-13.

The Proliferation Security Initiative (PSI) is another effective program that needs to be strengthened. The PSI is an international effort led by the US to interdict transfer of banned weapons and weapons technology. Yet, loosely guarded nuclear material is global problem and requires a comprehensive global solution. Fighting nuclear trafficking will require better international intelligence.

The proliferation of WMD has been declared by many, including politicians, diplomats, security analysts and experts to be the number one threat to the security and stability in the world. Al Qaeda is said to have stated that "it wishes to kill four million Americans, including two million children".[21] Hence, nuclear terrorism is the most serious threat the world faces. It seems as if nothing would stop terrorists from using a nuclear bomb if they ever get their hands on one. To improve global nuclear security environment there are some things that have to be done.

Former US Assistant Secretary of Defense, Ashton B. Carter argues rightly that "ancient [nonproliferation] regimes should be strengthened".[22] The weakness of the NPT and hence, nuclear proliferation regime was seen and the Additional Protocol of the International Atomic Agency (IAEA) was brought into force in September 2007 by 84 countries. Key elements of the Additional Protocol were, first, the IAEA was to be given considerably more information on nuclear and nuclear related activities. Second, IAEA inspectors have greater rights of access to facilities. Third, IAEA inspectors got automatic visa renewal. Last but not least, further evaluations of safeguards were expected to be developed by each state party. The greatest risk comes from nuclear proliferation comes from countries that have not signed or ratified the Additional Protocol. The limitations on the IAEA safeguards should be lifted through persuasion that states that have not ratified the Additional Protocol should do so as quickly as possible for the principles and rules of the Protocol can be fully applicable.

There are also some problems concerning the Biological and Toxin Weapons Convention, which was opened to signature in 1972 and entered into force in 1975. A long process of negotiations to add an implementation procedure (i.e., verification mechanism) began as early as 1990s. This was necessary to strengthen the treaty. Negotiations towards an internationally binding verification protocol for the treaty took place between 1995 and 2001. However, in July 2001 the US decided that the proposed protocol did not suit the American national interest. Later it was decided to suspend the Fifth Review Conference and it was agreed that an annual meeting of states parties and

[21] See, Bill Richardson, "A New Realism", p. 2.
[22] Ashton B. Carter, "How to Counter WMD", **Foreign Affairs**, September/ October, 2004.

experts would look at specific issues of concern. The Convention needs to be strengthened if halting proliferation of biological weapons is truly desired.

Chemical Weapons Convention, on the other hand, entered into force in January 1993. The current agreement is administered by the Organization for the Prohibition of Chemical Weapons (OPCW). Majority of countries in the world have joined the CWC, and as of January 2008, out of the 195 countries registered to the United Nations, 183 of them are party to the Convention. However, the problem with this treaty is that the implementation are pretty slow and faster implementations are needed for it to be successful in slowing down proliferation of chemical weapons all around the world.

Furthermore, Comprehensive Nuclear Test Ban Treaty has entered into force in 1996. This treaty is not yet in force and it can only enter into force after it is approved by all 44 countries whose ratification is necessary according to the terms of the treaty because of the presence of nuclear installations, big or small, on their territories. Even the US has rejected ratification of the CTBT on 13 October 1999. There is still ongoing debate concerning this issue in the US. However, if this treaty could be put into force then it would be easier to establish an international norm which would push other nuclear capable countries to sign too.

The Position of Turkey vis-à-vis WMD Proliferation

Turkey is in favor of strengthening all non-proliferation regimes and has set an exemplary precedent for its neighbors in the first place by becoming a State Party to all non-proliferation treaties, conventions as well as protocols. As such, Turkey expects from other nations to do the same. Otherwise proliferation in one country will trigger further proliferation which will diminish regional and global security. Dividing line between peaceful and military exploitation of nuclear energy is very thin and blurred.

Turkey's geographic location requires it to take necessary measures against the proliferation of nuclear, chemical and biological weapons as well as ballistic missiles as their delivery vehicles in its immediate neighborhood. In addition, Turkey is neighboring a number of states which are known to have WMD capabilities. In such a neighborhood, one might expect that Turkey would also embark on a crash program to develop its own WMD capacity. But this has been not the case for Turkey. On the contrary, Turkey has persistently pursued a policy to become state party to international non-proliferation agreements that sought to curb the spread of WMD and their delivery vehicles. Turkey upholds with great care its responsibilities stemming from international documents like

the Nuclear Non-Proliferation Treaty, the Chemical Weapons Convention, the Biological Weapons Convention, and the Comprehensive Test Ban Treaty.[23]

There are various rational reasons why Turkey has given its support to international efforts spent for strengthening the existing international non-proliferation regimes. It is mainly the widespread belief among the Turkish security elite that effective verification mechanisms of non–proliferation treaties may create serious impediments to aspiring states in their willingness in acquiring WMD.

During the ratification process of the CWC in May 1997, no serious debate has taken place in Turkey. Only, some parliamentarians suggested that it would be better if they waited to see the attitude of the US on the CWC issue so that Turkey's ratification should be "conditional" on the ratification of the Americans. This argument was based on the belief that "in an international agreement where the US takes no responsibility, Turkey's active involvement would not be necessary or imminent". Apart from this debate ratification of the CWC by the Turkish Parliament did not cause any difficulty in the military sphere either.

The Turkish military has never attempted building or deploying a chemical weapons arsenal, as there was no need for such a decision. Turkey, being a member of the North Atlantic Treaty Organization (NATO), it has closely followed the NATO strategies, and chemical weapons were not part of these strategies. Yet, NATO strategies favored the deployment of nuclear weapons in Turkish territory since the early 1960.[24]

Turkey also became a state party to the Biological and Toxin Weapons Convention by signing it in 1972. And ratifying with no reservations in 1974. Turkey not only had ratified the BTWC but had also ratified the Geneva Protocol as early as in 1925. This was actually the first international document that prohibited the production, stockpiling and use of bacteriological agents for weapons purposes. Turkey gives full support to the initiatives for strengthening and promoting the effectiveness of the BTWC. Turkish military elite is well aware that besides the obvious dangers posed by the existence of biological and chemical weapons there is also the possibility that they could be exploited by terrorist organizations.

Against the threats posed by the proliferation of WMD in its neighborhood, Turkey relied on the positive security assurances of NATO. Turkey also has number of advantages stemming from its geo-political and geo-strategic

[23] Mustafa Kibaroğlu, "Turkey's Sweet and Sour Policy against NBC Weapons", **Turkish Policy Quarterly**, Summer, 2004, p. 101-111.
[24] Mustafa Kibaroğlu, "Isn't it Time to Say Farewell to US Nukes in Turkey?" **European Security**, Vol. 14, No. 4, 2005, Routledge , Taylor & Francis Group, London, pp. 443-457.

position. In this respect, Turkey has developed a new military doctrine, namely "the land-air doctrine" which is considered to provide necessary credibility to deter even unconventional weapons from its neighbors.[25]

Turkey has also taken several steps after the Cold War to become a member of the Nuclear Suppliers Group (NSG).[26] Turkey has adjusted its national export control regime, namely laws and regulations, to that of the NSG countries. Turkey taken the same stance toward the Zangger Committee.[27] In addition, Turkey became a member of the Missile Technology Control Regime (MTCR) in 1997.[28] This regime has demonstrated clearly to the potential proliferates that there is a solid block against them that is unified in determination to fight against proliferation of missiles. Furthermore, Turkey signed the CTBT in 1996 that intended to halt to tests of nuclear devices both for military or "peaceful" purposes.[29]

Additional Protocol that was released by the IAEA as a result of "Programme 93+2"[30] Turkey has also become a state party to it by not only

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[25] Ali L. Karaosmanoğlu and Mustafa Kibaroğlu, "Defense Reform in Turkey", in **Post-Cold War Defense Reforms: Lessons Learned in Europe and the United States**, 2003, Istvan Gyarmati and Theodor Winkler (eds.), East West Institute, Brassey's, New York, pp. 135 – 164.

[26] The Nuclear Suppliers Group is a multinational body concerned with reducing nuclear proliferation by controlling the export and re-transfer of materials that may be applicable to nuclear weapon development and by improving safeguards and protection on existing materials.

[27] The Zangger Committee, also known as the "NPT Exporters Committee", essentially contributes to the interpretation of article III, paragraph 2, of the Nuclear Non-Proliferation Treaty (NPT) and thereby offers guidance to all parties to the Treaty. Article III, paragraph 2, of the NPT performs a vital function in helping to ensure the peaceful use of nuclear material and equipment. Specifically, it provides:
"Each State Party to the Treaty undertakes not to provide: (a) source or special fissionable material, or (b) equipment or material especially designed or prepared for the processing, use, or production of special fissionable material, to any non-nuclear-weapon State for peaceful purposes, unless the source or special fissionable material shall be subject to the safeguards required by this article."

[28] The Missile Technology Control Regime is an informal and voluntary association of countries which share the goals of non-proliferation of unmanned delivery systems capable of delivering weapons of mass destruction, and which seek to coordinate national export licensing efforts aimed at preventing their proliferation. The MTCR was originally established in 1987 by Canada, France, Germany, Italy, Japan, the United Kingdom and the United States. Since that time, the number of MTCR partners has increased to a total of thirty-four countries, all of which have equal standing within the Regime.

[29] Mustafa Kibaroğlu, "Turkey's Quest for Peaceful Nuclear Power", **Nonproliferation Review**, (Spring/Summer), 1997 Vol. 4, No. 3, Center for Nonproliferation Studies (CNS), California, pp. 33-44.

[30] The Programme formally began in 1993, when the IAEA Board of Governors requested that the Standing Advisory Group on Safeguards propose ways to tighten the verification regime for States with full-scope safeguards. The Programme's initial deadline was to be the NPT's Review and Extension Conference two years later, in April-May 1995 - hence its nick-name Programme

signing but also ratifying after some concerns among policy makers in Turkey, in July 2000. These concerns revolved around the fear that the excessive inspection rights given to IAEA inspectors may result to UNSCOM like applications in countries of choice. Such concerns were resolved through diplomatic negotiations.

Conclusion

Turkey is a country well aware that the international security environment has changed dramatically after 9/11. "Non-state actors, terrorist and states in non-compliance with non-proliferation and disarmament obligations and delays in the fulfillment of nuclear disarmament engagements and obligations, all change the delicate balance that the system of treaties has established over the last four decades"[31]. Turkey has shown that it fully recognizes the significance and value of the existing security assurances. Turkey understands the importance of the non-proliferation process and is willing to assist the process to continue. Turkey also highly values the assurance of total absence of nuclear weapons and other WMD in the Eurasian landscape.[32] The success of the non-proliferation regime depends not only on the adoption of the treaties but also on effective implementation of and compliance with their provisions. Turkey's long quest for peaceful nuclear power will hopefully be a fruitful cooperation that will surely be beneficial for all the parties involved, in the Eurasian landscape.[33]

'93+2'. The Conference's Principles and Objectives supported the Programme, stating that "...the Agency's capability to detect undeclared nuclear activities should be increased"

[31] Statement by Ambassador Baki İlkin, Permanent Representative of the Republic of Turkey to the United Nations, 2005 Review Conference of the Parties to the Treaty on the Non-Proliferation of Nuclear Weapons, New York, 3 May 2005.

[32] Mustafa Kibaroğlu, "EURATOM & ABACC: Safeguard Models for the Middle East?" in Jan Prawitz and James F. Leonard (eds.), **A Zone Free of Weapons of Mass Destruction in the Middle East**, United Nations Institute for Disarmament Research (UNIDIR), 1996, New York & Geneva, pp. 93 - 123.

[33] Mustafa Kibaroğlu, "Turkey's Quest for Peaceful Nuclear Power,".

NATO AND THE BALKANS

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INTRODUCTION

Considering NATO's position vis-a-vis the challenges arising from the Balkans, we need to make a clear distinction. First of all, it should be stated that NATO, as an alliance for collective defense, is remarkably successful in the sense that it survived the end of the Cold War and emerged as the arbiter of European security. In the absence of a rival alliance, it has been able to transform itself into the changing post-Cold War security environment and new tasks it has been assigned to tackle. However, whether NATO is successful in bringing greater stability and a lasting peace to the region is a controversial issue that this paper is trying to address.

Our first argument is that the developments in the Balkans have played a vital role for NATO to continue its existence as an institution and acquire new capabilities which will be needed in the new era. While the region benefited from the NATO missions, NATO too was the main benefactor throughout this process. Therefore, its involvement in the Balkans has served as a catalyst for the ongoing transformation of the alliance into a global security organization with a new range of missions and operations all over the world.

Secondly, it is arguable that the situation in Bosnia, Kosovo and the Republic of Macedonia is largely stabilized after NATO peacemaking operations. The Alliance has thus restored the necessary preconditions for stability, but this remains limited to enabling the EU to take over the harder

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tasks of not only going beyond the stabilization process and securing a lasting peace and order necessitated by a possible EU enlargement towards the region, but also helping the region's preparation for and compliance with the EU association and accession processes. Despite its relatively stabilizing effects, using Johan Galtung's concept of Negative Peace, we contend here that NATO engagement also has had some adverse impacts on the developments and progress in the region towards fully integrating into the Euro-Atlantic area. This outcome is also related to the fact that the Balkans in the 1990s has turned into a place where great powers tested their powers and capabilities and in some cases this struggle for influence has its undesirable effects on peacemaking process. Therefore, NATO missions and operations in the Balkans in this period cannot be taken as separate initiatives by the Alliance, but they are usually closely tied with the US hegemonic restructuring in the new era.

From Negative to Positive Peace

Johan Galtung has developed the concept of the conflict triangle which is based on direct violence, structural violence, and cultural violence. He also makes a distinction between negative and positive peace. As negative peace is characterized by the absence of direct violence positive peace is characterized by the overcoming of structural and cultural violence as well.[1] Negative peace is the absence of physical, verbal and psychological violence between individuals, groups and government. It represents the limited agenda and can be defined as minimalist agenda of preventing war which is advocated mostly by the American pragmatists.[2] On the other hand, positive peace encompasses the broader maximalist agenda insisted upon by the European structuralists.

Efforts to achieve negative peace emphasize: managing interpersonal and organizational conflict in order to control, contain, and reduce actual and potential violence. The concept of negative peace addresses immediate symptoms, the conditions of war, and the use and effects of force and weapons. Words and images which reveal the horror of war and its aftermath are often referred by writers, artists, and citizen groups in their efforts to stop it. Referring merely to the absence of war, negative peace should not be considered a solution to the existing, underneath problems. In fact, negative peace can obscure deep injustices which make a mockery of peace, and may contain the seeds of future conflicts. Any attempt, therefore, should address the root causes of the conflict.

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[1] Johan Galtung, "An Editorial," **Journal of Peace Research**, Vol. 1 No. 1 (1964), pp. 1-4; Johan Galtung, "Violence, Peace, and Peace Research," **Journal of Peace Research**, Vol. 6, No. 3 (1969), pp. 183-186; Martin Griffiths, **Fifty Key Thinkers in International Relations**, London and New York, Routledge, 1999, p. 129.
[2] **Ibid**., p. 129.

While negative peace means the secession of direct violence, positive peace means the removal of structural and cultural violence. Positive peace is more than the absence of violence; it is the presence of social justice through equal opportunity, a fair distribution of power and resources, equal protection and impartial enforcement of law. Thus, positive peace, for Galtung, requires social justice and most of all equality.[3] However, considering the situation in the Balkans starting from the 1990s, to achieve equality is by no means a priority by the international community since the region lacks necessary means for restructuring especially in the war-torn areas.

Efforts to achieve positive peace emphasize:

- Establishing peace through world order by supporting international law, compliance with multilateral treaties, use of international courts, and nonviolent resolution of disputes, participation in international organizations, trade, and communication.

- Establishing social equality and justice, economic equity, ecological balance; protecting citizens from attack, and meeting basic human needs.

- Establishing a civil peace which provides the constitutional and legal means necessary to settle differences nonviolently.

- Eliminating indirect violence which shortens the life span of people, sustains unequal life chances, or reduces quality of life for any citizen.

- Practicing conflict resolution as a foundation for building peaceful interpersonal and institutional relationships.

In short, as a process which assumes an interconnectedness of all life, the concept of positive peace involves the elimination of the root causes of war, violence, and injustice and the conscious effort to build a society which reflects these commitments.

NATO's Transformation

The Alliance's transformation has been realized in three phases: the first phase involves a transformation in its functions and structure. At the end of the Cold War, NATO stood between extinction and expansion. It could not remain the same, as an organization of the Cold War. The Alliance, in a relatively short time, could transform itself from a collective defense organization based on the security of its members, to a collective security organization defining its new functions almost at the same time the Cold War politics was dissolving in 1990

[3] Galtung, **Violence, Peace, and Peace Research**, p. 183.

and 1991 Rome and London summits. Transformation is not something static but a continuing and active process. Indeed, in 1999 the Alliance adopted a new strategic concept which regards the unpredictable regional crises at the periphery of NATO theatre as the main threat while ruling out a full-scale conventional aggression. In accordance with its new definition of the security threats, NATO also "moved away from a commitment to large standing armies and conventional warfare to flexible force structures designed to cope with a wide range of missions and tasks."[4] It was remarkable for the alliance to accomplish such a radical shift in such a short period of time. As Cottey pointed out, "while specific policies were controversial, the overall success of NATO in responding to the new European security agenda of the 1990s was undeniable."[5] Currently, there is a lively debate whether the Alliance needs an up-to-date strategic concept which would both meet further requirements of the ongoing transformation in its functions and roles and enable it to tackle the challenges posed by its military and political involvements in the Balkans and elsewhere beyond Europe.

In the second phase, NATO, in general terms proving itself somewhat successful in its operations in the Balkans, engaged into an enlargement process making it an alliance of 26 members today.

And in the third phase, NATO has begun to assume a global character, involving in missions and operations in the Middle East, Africa, Central and Southeast Asia even though the events of 9/11 and the US invasion of Iraq slowed down temporarily its progress towards a more globalized security pact because of the transatlantic rift between the US and its European allies over the US-led war in Iraq. However, having overcome this impasse in time, in recent years the Alliance has been able to play a peacemaking role in Afghanistan, train security forces in Iraq, give logistical support to the African Union's mission in Darfur, assist the tsunami relief effort in Indonesia and ferry supplies to victims of Hurricane Catrina in the US and to those of a massive earthquake in Pakistan.[6] There are more than 50.000 soldiers who are under NATO

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[4] Jim Seroka, "Security Considerations in the Western Balkans: NATO's Evolution and Expansion," **East European Quarterly**, Vol. XLI, No. 1 (March 2007), p. 27.

[5] Andrew Cottey, "NATO: Globalization or Redundancy?," **Contemporary Security Policy**, Vol. 25, No. 3 (December 2004), p. 393.

[6] **Ibid**., p. 391; Ivo Daalder and James Goldgeier, "Global NATO," **Foreign Affairs**, Vol. 85, No. 5 (Sep/Oct 2006), pp. 105-106; Thomas S. Mowle and David H. Sacko, "Global NATO: Bandwagoning in a Unipolar World," **Contemporary Security Policy**, Vol. 28, No. 3 (December 2007), pp. 605–609; Roberto D. Rivera, "Contributions of NATO, EU and OSCE to European Security: Threats and Risks," **Jean Monnet/Robert Schuman Paper Series**, Vol. 5, No. 7 (April 2005), p. 10; Miccinilli Máximo, "In the Name of the Nato," Centro Argentino de Estudios Internacionales Defence and Security Program, March 2006, p. 2; Kurt Volker, "The Road to North Atlantic Treaty Organization's Riga Summit," **The DISAM Journal**, Vol. 28, No. 3

command in operations and missions across the world. So, it moved from a point where its relevance and existence was at stake to an organization with global engagements. NATO's missions and operations in the Balkans have been the first step in NATO's global expansion. "NATO's initial involvement in the Balkans", Sloan notes, "developed with reluctance and considerable political difficulty during the 1990s, but became seen as the first example of NATO's continued relevance to twenty-first century security requirements."[7] In short, between extinction and going global, the Balkans lied somewhere in between.

With the end of the Cold War and the dissolution of the Warsaw Pact, NATO as an organization in search of a *raison d'etre*, has turned to the Balkans as a new area of operation. The missions in the Balkans have provided NATO with extremely important capabilities. Indeed, as Zamfirescu phrased out,

"Although unwanted and unintended by anybody, the tragic history of the Former Yugoslavia's dismantlement and its ensuing consequences have played, in a certain way, the role of a catalyst for the Alliances' adaptation to the post-Cold War period's new challenges and risks. In turn, NATO's adaptation has favoured both its willingness and ability to become an essential instrument for the gradual re-linking of the entire area to mainstream Europe."[8]

Concering the Balkans, NATO has been an institution functioning for various purposes and in this respect it seems to have served as a "utility tool." The Alliance has been used for conflict prevention purposes like the preventive deployment in the Republic of Macedonia, for implementing the embargo and no-fly zone missions like the Operation Deny Flight, military operations and strikes, as in Bosnia-Herzegovina and Yugoslavia, and for peacekeeping/peacemaking purposes as in Bosnia-Herzegovina and Kosovo. It is interesting that the same institution both functioned as peace enforcer and as a force to carry bombing campaign in Yugoslavia with or without UN Security Council sanction. NATO has thus, instrestingly, assumed the peacemaking missions in countries where it bombed. (Never before in history did such a situation occur.) Peacekeeping/peacemaking operations have also been of vital importance for NATO since its evolving strategy firmly requires the continuous involvement in peace implementation operations in the post-cold War world.

In fact, the word "peacekeeping" did not appear in either the new Strategic Concept or the Rome Declaration. The 1991 Strategic Concept made it clear

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(2006), p. 51-52; Mario Bartoli, "Assessing NATO Transformation," **NATO Review**, (Autumn 2006), [http://www.nato.int/docu/review/2006/issue3/english/art3.html].

[7] Stanley Sloan, **NATO, The European Union and the Atlantic Community: The Transatlantic Bargain Challenged**, Lanham, Rowman & Littlefield, 2005, p. 116.

[8] Elena Zamfirescu, "NATO and the Balkans," **Perceptions**, Vol. IV, No. 1 (March-May 1999), <http://www.sam.gov.tr/perceptions/Volume4/March-May1999/zamfirescu.PDF>.

that new security challenges would be multi-faceted in nature, multi-directional, and difficult to predict and assess. The political basis for the Alliance's role in the former Yugoslavia was established at the North Atlantic Council meeting in Oslo, in June 1992. At that time NATO Foreign Ministers announced their readiness to support, on a case-by-case basis, in line with their own procedures, peacekeeping activities under the responsibility of the Conference on Security and Cooperation in Europe (CSCE).[9] This step also included making available Alliance resources and expertise for peacekeeping operations. Later, in December 1992, following Allied intervention in support of UN objectives in the Adriatic, NATO foreign ministers agreed formally to extend the Alliance's support in peacekeeping to the UN Security Council. Ministers reviewed peacekeeping and sanctions or embargo enforcement measures already being undertaken by NATO countries, individually and as an Alliance, to give support the implementation of UN Security Council resolutions relating to the conflict in the former Yugoslavia. They indicated that the Alliance was ready to respond positively to further initiatives that the UN Secretary General might take in seeking Alliance assistance in this field.

Between 1992 and 1995, NATO became progressively engaged in the air and at sea in support of UN operations in the Balkans. These included several naval operations in conjunction with the Western European Union, to monitor and enforce the UN embargo and sanctions in the Adriatic. The Alliance also gave close air support to the UN Protection Force (UNPROFOR) in Bosnia and Herzegovina and authorised air strikes to end the strangulation of Sarajevo and other besieged areas denominated by the UN as Safe Areas.[10]

For NATO, the Balkans also produced many "firsts": the first out-of-area deployment; the first significant cooperation with other international organisations; and the Alliance's first peacekeeping operation, first preventive deployment, first use of force, NATO's first multinational peacekeeping operation with Russia and other countries to name some of them.[11] Having initial experience in the Balkans, NATO military doctrine now fully recognises the civilian dimensions of complex peacekeeping operations. Building on these

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[9] David S. Yost, **NATO Transformed: The Alliance's New Role in International Security**, Washington, US Institute of Peace, 2000, p. 1; Victor S. Papacosma, "NATO in the post-Cold War Balkans," **Journal of Political and Military Sociology**, (Winter 1996), [http://findarticles.com/p/articles/mi_qa3719/is_199601/ai_n8743276].

[10] Gülnur Aybet, "NATO's New Missions," **Perceptions**, Vol. IV, No. 1 (March-May 1999), [http://www.sam.gov.tr/perceptions/Volume4/March-May1999/aybet.PDF].

[11] "NATO in the Balkans," **NATO Briefing**, (February 2005), p. 5; Amadeo Watkins and Srdjan Gligorijevic, "NATO and the Balkans: The Case for Greater Integration," *NATO Review*, (Summer 2007), <http://www.nato.int/docu/review/2007/issue2/english/art3.html>.

practices NATO is seeking to stretch its area of operations to Afghanistan and to the Greater Middle East.

NATO's persistence in the new era through the missions in the Balkans region cannot be easily separated from the political strategic considerations of the US. The Balkans at the end of the Cold War emerged as one of the regions where the major powers tested their powers and capabilities, and NATO and the US had an exceptional place in this new political/strategic constellation. NATO's survival of the end of the Cold War was something imperative for the US if it were to remain as a hegemonic power. The US did not hesitate to use the Balkans for testing various conflict prevention and peacemaking operations. However, today the region seems to have lost its special significance for the US under G. W. Bush administration as new security challenges such as terrorism and proliferation take precedence over conflict resolution and peacemaking operations as evidenced by the takeover of NATO military missions in Bosnia, Kosovo and the Republic of Macedonia by the EU while the Alliance engages in missions in places beyond Europe where US interests are more at stake like Afghanistan, Iraq and Sudan.[12] But this is not to say that NATO and the US have involved in a full withdrawal from the region which is still crisis-prone and needs external help and guidance in order to maintain even a basic level of security, let alone integrate with the wider Europe.

NATO in Bosnia-Herzegovina

Bosnia represents the first NATO operations and missions in the Balkans. NATO began its Operation Deny Flight in April 1993 which is a NATO enforcement operation, monitoring no fly zone over Bosnia. As early as 1992, NATO warships also monitored the arms embargo imposed by the UN. After the support given to the UNPROFOR which was created to back up humanitarian efforts in Croatia, Bosnia was truly the first place that NATO carried limited air strikes against the Serb positions between 30 August and 20 September 1995. This operation, which is called Operation Deliberate Force, was conducted with a UN Security Council resolution and with this operation, NATO wielded air power against the Serbian positions for the first time in its history and played a critical role in bringing the Bosnian Serbs to the negotiating table. Under the terms of the Dayton agreement, NATO began its first peace implementation mission under IFOR which then turned into SFOR.[13]

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[12] Cottey, *op. cit.*, p. 395; Dick A. Leurdijk, "NATO's Shifting Priorities: From Peace Support Operations to Counter-Terrorism," Thierry Tardy (ed.), **Peace Operations after 11 September 2001**, Abingdon and New York, Routledge, 2004, pp. 65-71.

[13] Richard Holbrooke, **To End A War**, Modern Library Paperback Edition, New York, Random House, 1999, pp. 203, 216.

Thus, the first time in the alliance's history NATO forces were deployed on the ground.

The main force was deployed on 16 December 1995 after the final approval by the North Atlantic Council of the Operational Plan (OPLAN) and in accordance with the UN Security Council's Resolution 1031 of 15 December which authorised IFOR's mission.[14] IFOR troops, basically trained for warfare and combat, were initially reluctant to cope with policing requirements, as happened in many occasions including the forced evacuation of the Serbian populated suburb of Sarajevo. However, like any institution IFOR adapted itself to these kinds of functions. With 60.000 troops at the beginning the NATO-led mission was in general successful in terms of its declared objective, that is deterring or preventing a resumption of hostilities or new threats to peace.[15]

After the successful completion of the September 1996 elections in Bosnia, IFOR's mandate ended. Yet, with this peacemaking mission, it seems that NATO provided the conditions for what Galtung termed, the negative peace, that is the absence of conflict but not necessarily a structural and functional peace. It was quite obvious that the civilian side of the mission remained to be unfinished, potentially destabilizing already ethnically fragile country. With the approval of the North Atlantic Council, a detailed political guidance for a study to be undertaken by the NATO Military Authorities of post-IFOR security options was prepared and then, a two-year consolidation plan was drawn up in November and December 1996 following the intensive work carried out in Paris and London under the auspices of the Peace Implementation Council.[16] These works provided a background for NATO Foreign and Defence Ministers's decision on a reduced military presence which was viewed sufficient for consolidating the peace. Therefore, a Stabilisation Force (SFOR) was established and subsequently activated on 20 December 1996, the day on which IFOR's mandate expired. Under UN Security Council Resolution 1088 of 12 December 1996, its mandate as the legal successor to IFOR was to carry out the military aspects of the Peace Agreement in line with Chapter VII of the UN Charter.[17] Like IFOR, it was authorized to use armed force in order to conduct its mission and to protect itself when necessary.

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[14] "NATO Handbook," October 16, 2001, <http://www.nato.int/docu/handbook/2001/b05010301.htm>.
[15] "NATO in the Balkans," *NATO Briefing*, (February 2005), p. 5.
[16] "NATO Handbook," October 15, 2002, <http://www.nato.int/docu/handbook/2001/b05010303.htm>.
[17] "NATO Handbook," October 10, 2002, <http://www.nato.int/docu/handbook/2001/b05010401.htm>.

SFOR's main task was to help maintain the secure environment necessary for the consolidation of peace. Its specific tasks were as follows:[18]

- deterring or preventing a resumption of hostilities or new threats to peace,

- consolidating IFOR's achievements and promoting a climate in which the peace process could continue to move forward,

- providing selective support to civilian organisations, within its capabilities.

The Stabilisation Force was under unified command and a NATO-led operation directed and controlled politically by Alliance's North Atlantic Council, as stipulated by Annex 1 A of the Peace Agreement while it was NATO's Supreme Allied Commander Europe (SACEUR) that had overall military authority. With around 31.000 troops, it was not more than half that of IFOR. Despite its smaller size, however, it managed, in compliance with the terms of the Dayton Agreement achieved during the IFOR mission, to cope with the implementation of all the provisions of Annex 1A of the Peace Agreement. This involves:[19]

- stabilisation of the current secure environment in which local and national authorities and other international organisations can work; and

- providing support to other agencies (on a selective and targeted basis because of the reduced size of the forces available).

In December 1997, NATO Foreign and Defence Ministers made a number of additional decisions in relation to the implementation of the Peace Agreement in Bosnia and Herzegovina. In March 1998 the NATO allies agreed that SFOR would remain in Bosnia until significant progress has been made in the implementation of Dayton Agreement.[20] By the beginning of 2002, force levels had been downsized to around 19.000 troops. For the year 2002, more than 200 separate Civil/Military Coordination (CIMIC) projects were planned by SFOR. A Balkan Task force, a small multi-functional group of experts, was also established to deal with the planning. As increasingly becoming multinational, the Task Force was able to carry out many civilian tasks in areas stretching from law, economic and finance, agriculture, industry, commerce and business to structural engineering, transportation, utilities, housing, social

[18] **Ibid**.,
[19] **Ibid**.,
[20] **Ibid**.,

services such as education and public health, cultural affairs, government, management and political science.

Additionally, other tasks assumed by SFOR in the civilian sector included delivering food to villages isolated by bad winter weather conditions and participating in the maintenance and repair of roads and railways throughout Bosnia and Herzegovina in collaboration with the local authorities and other international agencies. It annually invested 5 to 7 million Euros in freedom of movement projects and planned to conduct various maintenance projects. From November 1995 to the end of the year 2001, security provided by SFOR resulted in more than 820.000 returns (387.000 refugees and 435.000 displaced persons).[21]

The experience in Bosnia has served as a helpful guide to NATO and provided it with unique gains and advantages for the transformation of its operational capabilities in future operations. These involve the building up the capacity to carry peacekeeping and peacemaking operations, to work with other nations, to develop civil-military coordination in peacemaking operations, to increase support activities for civilian areas. For instance, as well as promoting confidence and co-operation among the armed forces, activities encouraged democratic practices and nurtured state defence mechanisms in Bosnia and Herzegovina, such as the Standing Committee on Military Matters (SCMM), established under the Peace Agreement. From the onset the three main ethnic groups (Bosniacs, Bosnian Croats and Bosnian Serbs) were invited to participate on an equal ratio.

The improvements in Bosnia and Herzegovina's security environment which make troop reductions possible paved the way for the European Union to deploy a follow-on mission, in addition to the police-monitoring missions it is already running. When the SFOR mission terminated, NATO handed the mission to the EU in December 2004 (Operation ALTHEA) on the basis of a bilateral arrangement called “Berlin Plus”. After that NATO did not completely withdraw from Bosnia and left a Headquarter with 150 staff, focused on defense reform, counter-terrorism and preparing Bosnia first for Peace for Partnership and then for Alliance membership.[22] Though there was almost no casualty at this period, however, there were also issues that NATO was inefficient and incapable. First, in capturing war crime suspects, it lost some credibility. In fact, the North Atlantic Council has authorised SFOR to detain and transfer to the ICTY persons indicted for war crimes when SFOR personnel come into contact with them while carrying out their duties. SFOR actually facilitated the transfer

[21] “NATO Handbook,” October 10, 2002, <http://www.nato.int/docu/handbook/2001/hb05010405.htm>.
[22] “NATO in the Balkans,” **NATO Briefing**, (February 2005), p. 3; Sloan, **op. cit**., p. 118.

of 53 war crimes indictees to The Hague to stand trial, but these people did not have leading positions. "Their presence, and the political message it sends is a contributing factor to the climate of insecurity that limits refugee returns, particularly in minority areas."[23] Secondly, in fighting against organized crime NATO proved not very successful. There are still widespread networks of organized crime operating in the country and more worryingly they seem embedded within the political system itself vulnerable to the manipulation of criminal organizations.

Although one third of its original size, SFOR has been the main turning point in NATO operations in the region which set the precedent for the next mission in neighboring Kosovo.

NATO in Kosovo

NATO's role in Kosovo requires more attention due to the developments in this part of the Balkans. NATO's bombing campaign of 1999 against Yugoslavia was both a decisive landmark in the history of the alliance and a very critical turn in international politics. The importance of Kosovo for NATO lies first in the fact that the airstrikes against Yugoslavia were the first offensive action undertaken by NATO without specific UN endorsement, with activation order by the defense ministers. First time in history a country was bombed extensively for its maltreatment of an ethnic group. And first time in history again a country had to surrender through air power. Unlike Bosnia, the NATO operation was not limited to the communication and radar installations or Serbian artilleries, neither did it have the UN sanction. Actually, at first it had an accelerating, rather than preventive as initially conceived, impact on the ethnic cleansing and it inflicted a widespread if not collateral damage to Yugoslavia as a whole.[24]

In Kosovo, the Alliance was involved first in conflict prevention in cooperation with the OSCE, later in humanitarian assistance and then in imposing a peace settlement, peace enforcement and providing support to civil implementation. Second, NATO's intervention in Kosovo crisis is strongly related to the US policy in the region. Third, after nine years, state of affairs in Kosovo seems to be more difficult and NATO intervention and the subsequent peacemaking mission led to the gradual secession of a region, a quite unique case.

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[23] "Bosnia Report Card: Pass, Fail, or Incomplete?," United States Institute of Peace Special Report No. 40, December 11, 1998, <http://www.usip.org/pubs/specialreports/sr981211.html>.

[24] Frédéric Bozo, "The Effects of Kosovo and the Danger of Decoupling," Jolyon Howorth and John T.S. Keeler (eds.), **Defending Europe: The EU, NATO, and the Quest for European Autonomy**, New York, Palgrave Macmillan, 2003, p. 64.

In parallel to Bosnia, after the NATO operation ended a Kosovo Force (KFOR) was immediately formed as the second largest NATO peacemaking mission in the region. The Kosovo Force came initially under the overall command of the Supreme Allied Commander Europe (SACEUR). Then SACEUR transferred command and control to COMCINCSOUTH in January 2001, a move that was required by the necessity to adapt command and control arrangements for ongoing operations to the new NATO as well as by the evolving situation in the Balkans.[25]

UN Security Council Resolution 1244 of 12 June 1999, which determines what responsibilities the international community is entitled to assume during its interim administration of Kosovo, as well as the Military Technical Agreement on the withdrawal of Yugoslav forces and NATO's own operational plan (OPLAN 10413, Operation Joint Guardian), lay down the responsibilities of KFOR mission. These are as follows:[26]

- deterring renewed hostility and threats against Kosovo by Serb forces,
- establishing a secure environment and ensuring public safety and order,
- demilitarising the Kosovo Liberation Army,
- supporting the international humanitarian effort,
- coordinating with and supporting the international civil presence, the United Nation's Mission in Kosovo (UNMIK).

While KFOR comprised some 50.000 personnel at its full strength, it was then reduced to about 39.000 troops, provided by 19 NATO members and 19 non-NATO countries under unified command and control. It comprises troops from 16 Partner countries, including a Russian contingent. The incorporation of non-NATO countries into the operations takes place on the same basis as forces from NATO members. Russian forces enjoy some special arrangements but, in general, all participating forces operate under direct orders from the KFOR Commander through the KFOR multinational headquarters. Under the system of six-monthly command rotations, KFOR passed command to EUROCORPS, a five-European nation military force.[27]

The withdrawal of Serb security forces from Kosovo produced a public security and legal vacuum that the chief of the OSCE mission in Pristina, Daan

[25] "NATO Handbook," October 15, 2002, <http://www.nato.int/docu/handbook/2001/hb050303.htm>.
[26] "NATO in the Balkans," **NATO Briefing**, (February 2005), p. 6.
[27] "NATO Handbook," October 15, 2002, <http://www.nato.int/docu/handbook/2001/hb050303.htm>.

Everts, referred to as an "open invitation" to organized crime. In fact, the number of some serious crimes such as widespread murder, rapes or kidnapping has steadily decreased. For instance, in June 1999, when KFOR mission was launched in Kosovo the murder rate per week was 50. By spring 2000 the figure had dropped to seven weekly. There have been additional attempts on the part of KFOR in order to protect some 145 out of 151 patrimonial sites throughout Kosovo.[28] Despite the gradual diasappearance of these crimes, however, the province has become a hotbed of other organized crimes such as money laundering, smuggling and drug and human trafficking.[29]

In many respects, NATO's Kosovo bombing has more to do with the geopolitical considerations of the US than the security of the Albanians.[30] With the operation, NATO has shown the rest of the world that it could act, under US political and military leadership, independently of any international legitimizing sanction, as was the case with the lack of UN Security Council mandate for bombing Yugoslavia, and defeat any aggressor even from the air whenever it wishes to do so. As Vankovska put it,

"from NATO's perspective, Kosovo was really a test - not so much of moral beliefs as of its future missions. It was to serve as a proof of its *de facto* (but not *de jure*) shift of functions from a defensive (regional) alliance into an all-purpose one that could be used for interventions beyond NATO's area of responsibility."[31]

NATO thus served as not less than a tool of exercising US hegemonic power as the only remaining super power in the post-Cold War era. Indeed, the demands for a re-equilibrated alliance by the European allies after the end of the Cold War have been silenced by the fact that the bombing was almost completely conducted by the use of US military assets and hence the balance in favour of Washington within NATO was carefully maintained.[32]

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[28] "NATO Handbook," December 18, 2002, [http://www.nato.int/docu/handbook/2001/hb050305.htm].

[29] Andreas Heinemann-Grüder and Igor Grebenschikov, "Security Governance by Internationals: The Case of Kocovo," **International Peacekeeping**, Vol. 13, No. 1 (March 2006), p. 48; Peter W. Rodman, John Bolton and Lawrence Eagleburger, "Warning Light on Kosovo," The Brookings Institute, January 31, 2008, [http://www.brookings.edu/opinions/2008/0131_kosovo_rodman.aspx].

[30] Carl Boggs, **Imperial Delusions: American Militarism and Endless War**, Lanham, Rowman & Littlefield, 2005, p. 4; Biljana Vankovska, "NATO War over Yugoslavia: Civilian Control in Focus," Copenhagen Peace Research Institute, July 2000, [http://www.ciaonet.org/wps/vab01/].

[31] **Ibid**.,

[32] See Tariq Ali (ed.), **Masters of the Universe: NATO's Balkan Crusade**, London, Verso, 2000.

Yet, despite that the 78-day long NATO air campaign was a jeopolitics-driven act, it established the connection between NATO, as an international security organization, and human and societal security since the action was legitimized by humanitarian concerns. The US and its European allies suggested that when a political choice is to be made between human security and territorial integrity the former is preferred to the latter on their parts. But behind this preference lies the real motive underlying the war: it was a clear message to any regime which does not conform to the interests of the US.[33] Additionally, this "humanitarian" intervention still remains rather selective with regard to ensuring human security. This is evident in the fact that even though the Kosovo bombing was justified on the grounds that the lives of Albanian Kosovars were in jeopardy, NATO was far from providing security to the Serbs after the operation. As Welch noted, "since the official end to the conflict in Kosovo in June 1999 the euphoria which followed the entry of NATO troops into the province has drained away and ethnic violence has continued, this time targeted at the minority population."[34] Indeed, the first thing the Albanians did was to take their revenge on the civilian Serbs and other small groups like the Roma and Ashkalis. Their houses were destroyed and looted and as a serious threat to societal security of the Serbs, their identity in Kosovo was almost erased.[35] KFOR was also incapable of preventing the outburst of interethnic violence as we witnessed in the clashes in the divided town of Mitrovica in March 2004, "which exposed the soft underbelly of KFOR"[36] even though NATO forces were reinforced with additional troops from SFOR. All these events enhanced the perception that NATO lacked ability to provide an adequate level of security to non-Albanian communities. In short, "the status quo of the province [wa]s in reality little more than 1999 plus."[37]

While the picture in Kosovo seemed gloomier in many regards there was still no political solution agreeable to both sides for the province's final status because other events such as 9/11 attacks and the war on terror took more attention of the international community than the issue of Kosovo's future. Under these conditions, NATO and UNMIK found it easier to continue with the existing status quo which satisfies neither the Albanians nor the Serbs by

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[33] See Diana Johnstone, **Fools' Crusade: Yugoslavia, Nato, and Western Delusions**, New York, Monthly Review Pres, 2003.
[34] Anthony C. Welch, "Achieving Human Security after Intra-State Conflict: The Lessons of Kosovo," **Journal of Contemporary European Studies**, Vol. 14, No. 2 (August 2006), p. 229.
[35] **Ibid**.; Sloan, **op. cit**., pp. 118-119; Heinemann-Grüder and Grebenschikov, *op. cit*., p. 53; Mark Winther, "Kosovo: A Gordion Knot," **Baltic Security & Defence Review**, Vol. 9 (2007), pp. 89-90; Aidan Hehir, "Autonomous Province Building: Identification Theory and the Failure of UNMIK," **International Peacekeeping**, Vol. 13, No. 2 (June 2006), pp. 207-208.
[36] Welch, **op. cit**., p. 232.
[37] Winther, **op. cit**., p. 79.

avoiding making politically difficult decisions that would upset either side, thereby continually delaying the determination of the province's final status. It was this bleak outlook of the situation in Kosovo that compelled NATO to maintain a large troop presence in the province in 2005 whereas it felt more comfortable with turning over the mission in more secure Bosnia to the EU. Currently, there are still a 16.000 strong NATO peacekeeping force in Kosovo[38], but even this number, albeit being the largest NATO deployment in the Euro-Atlantic region, does not seem enough to ensure the security in the province when compared with the 1999 force level of almost 50.000 troops. In the meantime, despite the opposition of Serbia and Russia and the lack of a UN approval, international civil presence in Kosovo is being replaced soon following the declaration of independence by an EU rule-of-law mission called EULEX that comprised 2000 strong police and judicial force, which is expected to be fully operational by June 2008, from third parties like Turkey and the US as well as EU members.[39]

When it comes to the issue of Kosovo' status, UN Security Council Resolution 1244 considered Kosovo an autonomous part of Yugoslavia, thus reaffirming the commitment to the territorial integrity of Yugoslavia, and neither partition nor independence of Kosovo was on the agenda.[40] But in reality, during post-NATO 1999 campaign, Belgrad had no formal authority over the province which was turned into a *de facto* pretocterate under UN authority. This fact paved the way for Kosovo's eventual declaration of independence on 17 February 2008 without modification of UNSC Resolution 1244 and after long but inconclusive UN-brokered negotiations between Serbs and Kosovar Albanians though, unlike Montenegro, it has no legal right to independence since it was never granted republic status. Throughout the talks, Belgrad insisted on a solution of "more than autonomy but less than independence" while Pristina were deeply reluctant to agree on any solution that does not include an unconditional independence for Kosovo.[41] But in a broader

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[38] Anthony Loyd, **"Kosovo Deserves Its Independence,"** The Times, December 12, 2007, <http://www.timesonline.co.uk/tol/comment/columnists/guest_contributors/article3037002.ece>.

[39] "Kosovo's First Month," **International Crisis Group Europe Briefing** No. 47, March 18, 2008, <http://www.crisisgroup.org/home/index.cfm?id=5335&l=1>; "Kosovo Protests Turn Violent as EU Promises Support," February 21, 2008, <http://www.euractiv.com/en/enlargement/kosovo-protests-turn-violent-eu-promises-support/article-170464>.

[40] Alexandros Yannis, **Kosovo under International Administration: An Unfinished Conflict,** Athens, Hellenic Foundation for European and Foreign Policy (ELIAMEP), 2001, pp. 60-61; Goran Janev, "Kosovo Independence and Macedonian Stability: Is There Any Alternative to the Nationalistic Discourse," Florian Bieber and Židas Daskalovski (eds.), **Understanding the War in Kosovo**, London and Portland, Frank Cass, 2003, p. 304.

[41] Donald A. Graczyk and Symeon A. Giannakos, "The Face of Kosovar Albanian Nationalism: A Violent and Volatile Transformation of the Balkan Political Landscape," **Mediterranean**

context, the Kosovo status dispute also became a divisive issue between Russia and the US and other NATO allies which represent respectively the opposite sides in solving it, namely Russia staunchly backing the Serbian position on the one hand, the US and its allies siding with the Kosovar Albanians' quest for independence on the other. The full independence of Kosovo under Albanian rule then looks definitely a strategic gain for the US which has a huge military base (Camp Bondsteel) near the city of Ferizaj, gave an unconditional support to its separation from Serbia irrespective of the UN Security Council disapproval for this step and judged Kosovo a unique case which did not set any precedent against the Russian claims in this direction. This momentous event also signifies a major change in the meaning of NATO intervention: Again first time in history a country has become independent after and through a NATO bombing campaign. Hence, NATO intervention has played a critical part in achieving the US and Western objectives gradually in the region: it first involved in a military operation, deployed a large number of armed forces, comprised mainly US troops, and helped Kosovo build up the basic structures of an independent state in a manner which furnishes a potential precedent for other separatist movements seeking autonomy or independence at the expense of the nation state system. The negative peace conditions which laid the groundwork for the creation of a new Albanian-dominated state have thus been laid down by NATO engagement in the Balkans, with its frightening regional implications. Beyond this, however, it seems doubtful that the prevailing conditions in the newly independent Kosovo resulting from NATO mission are favourable for a peaceful multi-ethnic co-existence of separate communities of Kosovo. The likelihood of an enduring settlement which can be reached by a compromise agreeable to both sides is now ruled out altogether. Rather, NATO's *modus operandi* in the province has significantly blighted the prospect of creating a multiethnic and democratic Kosovo. "Such an outcome has been undermined by a U.S. promise to the Kosovo Albanians that their demands will be satisfied if they remain adamant and no agreement is reached with Belgrade."[42] Against this background, it can be concluded that as it is actively involved elsewhere NATO will have to retain or even reinforce its already robust military presence in post-settlement Kosovo even after independence for a long while in order to halt the outbreak of violence and protect Serbs and other non-Albanian communities.

Quarterly, Vol. 17, No. 4 (2006), p. 157; V. Petrov, ""Independence" for Kosovo or a Domino Effect," **International Affairs: A Russian Journal of World Politics, Diplomacy and International Relations**, Issue 003 (2006), p. 83.

[42] Rodman *et al*, *loc. cit.*

NATO in the Republic of Macedonia

The attack launched by NLA (the National Liberation Army) militants, who aimed to create a greater Kosovo, in spring 2001 against first Serbia and then the Republic of Macedonia sparked off a new crisis in the Balkans, with the possibility of developing another civil conflict in the region. Indeed, according to some analysts, in the face of NATO's intervention in Kosovo on the Albanians side, which was then viewed as a demonstration of its backup to their cause, the Republic of Macedonia's integrity was under a serious threat from the armed Albanian extremists.[43] However, following violent clashes on the border with Kosovo involving forces of the Republic of Macedonia and ethnic Albanian extremist groups reportedly based on Kosovo, KFOR initiated additional actions including increased ground and aerial patrols, anti-smuggling operations, and search and seizure operations. Reconnaissance and surveillance flights were also increased, as were intelligence gathering efforts. NATO's diplomatic efforts in southern Serbia led in part to the disarmament and demobilisation of the extremist groups there, in addition to agreement on confidence-building measures which would allow a return to normal life.

After long talks and the efforts put by the EU/US to convince the warring sides to stop fighting, the Macedonian government and militants came to an agreement on 13 August 2001 on a framework solution called the Ohrid Agreement. On 22 August 2001, upon the request of President Trajkovski of the Republic of Macedonia, NATO decided to assist his government in demilitarising NLA and disarming the ethnic Albanian groups operating within the country borders. The North Atlantic Council decided to conduct a limited 30 day mission codenamed Operation Essential Harvest with the aim of picking up and destroying all weapons voluntarily handed in by NLA militants.[44] The operation, which was started on 26 August, was carried out by some 3,500 NATO troops with logistic support. When it was completed in by early October, it had achieved more than anticipated, picking up more weapons and ammunition than expected.

The crisis management operation in the Republic of Macedonia involving not only NATO, but also the Organization for Security and Cooperation in Europe (OSCE) and the United States has thus been able to prevent the outbreak of a civil war and so represents a distinctive landmark in the history of international involvement in the Balkans.[45] NATO had brokered the cease-fire

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[43] Dana Allin, "South Balkan Conflict, NATO's Mission and the American Interest," the IISS/CEPS European Security Forum, Brussels, May 28, 2001, <http://www.eusec.org/allin.htm>.
[44] "NATO in the Balkans," **NATO Briefing**, (February 2005), p. 7; Sloan, **op. cit**., pp. 117-118.
[45] Leurdijk, **op.cit**., p. 72; Robert Serry, "NATO's Balkan Odyssey," **NATO Review**, (Winter 2003), <http://www.nato.int/docu/review/2003/issue4/english/art3.html>.

and secured an amnesty in 2001 by first disarming the NLA in Operation Essential Harvest and then contributing to the return of security in former crisis areas in Operation Task Force Amber Fox. By engaging thirdly in an intensive political dialogue with the former NLA leadership, the Alliance had helped the instant transformation of the former militant movement into a political party.

NATO's peacekeeping mission in the Republic of Macedonia was handed over to the EU in March 2003 and this mission was the first in which NATO assets had been made available to the EU. The Alliance is still maintaining a military headquarters in Skopje to assist the process of security-sector reform and liaise with KFOR on border security issues.[46] Meanwhile, the EU military mission Operation Concordia ended in December 2003 and was replaced by a police-monitoring and advisory mission.[47] Together with the European Union, the OSCE and the Stability Pact, NATO helped organise a conference on border security in Ohrid in the Republic of Macedonia in May 2003, in which all countries in the region participated.

In spite of all these advancements, Macedonia does not appear far from falling again into the trap of ethnic conflict which is evident in the tension between ethnic Macedonians and Albanians that broke out after the general elections in 2007. Also, the opposition party Democratic Union for Integration which represents Macedonian Albanians also boycotted the parliament in protest against the ruling VMRO-DPMNE party while the decision of the constiutional court to ban the use of Albanian flag was another sign of growing inter-ethnic animosity.[48]

CONCLUSION

In NATO's case, crises have been decisive in shaping its history and while initial ones in the Balkans have unquestionably helped it overcome an existential and legitimacy crisis after the demise of Cold War setting, today's security crises of post-9/11 era have the potential for leading NATO to a new and serious existential crisis, affecting its further involvement in the Balkans one way or another.

It is true that NATO engagement in the Balkans has so far contributed to the provision of relative stability and non-violence there. Over the past decade, by engaging in this highly unstable region, NATO has emerged as a new peacekeeper with determination and a muscle. But behind this positive outlook lies the disturbing fact that the Alliance has not been able to translate stability

[46] "NATO in the Balkans," **NATO Briefing**, (February 2005), p. 7
[47] Rivera, **op. cit**., pp. 14-15.
[48] Daniel Korski, "Macedonia: A Light unto the Gentiles?," January 08, 2008, <http://www.ecfr.eu/content/entry/commentary_macedonia_a_light_unto_the_gentiles/>.

into a systemic transformation through much needed economic and political reforms as the conditions in Bosnia, Kosovo and the Republic of Macedonia remains volatile. In other words, it simply helps perpetuate the status quo, diminishing the need to find lasting solutions to the existing problems.[49] Stability indeed has turned into a factor for facilitating manipulation by nationalist politicians, by creating the impression that the pressing problems are over, region is stable and things are going well. In this regard, NATO's mission is far from complete because of its members' hesitation in using their political weight in this direction despite some NATO-led initiatives of political engagement like the PfP.

In turn, the Balkans region has unquestionably played an ensuring role in persisting NATO's existence and relevance in international politics of the post-Cold War period. Here, the Alliance may take advantage of its experience, achievements and failures in the Balkans on the path to developing a new strategic concept which is now needed in response to the emerging threats and crises of the post–9/11 security environment and disorder such as terrorism, failing states or proliferation as well as human rights violations, ethnic cleansing and repression. However, the goals of a fundamental and peaceful transformation and complete integration of the Balkans into the Euro-Atlantic region go much beyond the capabilities of still-evolving North Atlantic Alliance. It seems that in view of the negative peace prevailing in the region, the Balkan nations need what Galtung calls a culture of peace. The EU rapidly emerges at this point as a more capable and competent actor which would assume this daunting task with its wide resources and its vast power of attraction as a successful model for the aspiring countries of the region.

[49] See David Chandler, **Bosnia: Faking Democracy after Dayton**, London and Sterling, Pluto Pres, 2000.

NATO-EU RELATIONSHIP: PARTNERS OR RIVALS?

Sevilay KAHRAMAN*

The complicated relationship between NATO and the European Union (EU) is not due to the fact that the two organizations are both trying to provide security policies in the same Euro-Atlantic area. Rather, the real challenge in their relationship derives from the fact that European Security and Defence Policy (ESDP) is a subset of Common Foreign and Security Policy (CFSP) of the Union and CFSP, in turn, is a part of European political integration and identity-building process. EU developments in the security and defence field were motivated by a desire to build a shared identity in world affairs and to reduce reliance on America. ESDP is both a political and strategic project. The quest for European security autonomy is not therefore, just the logical consequence of the end of the Cold War order in Europe but also related to the inner dynamics of postwar European integration movement.

Andreas Moens[1] has pointed out a fundamental contradiction in European integration since the foundation of NATO and the ECSC: a political and economic dynamic centred on the Community Europe while security and defence cooperation continued in the Atlantic Security Europe. While US's commitment to the defence of Western Europe by means of its leadership role inside NATO, formed backbone of the Atlantic Security Europe, NATO was a defensive alliance directed against potential aggression from the SU. It, therefore, did not resolve the main internal security problem of Western Europe, namely, the relationship between France and Germany. The establishment of an independent Federal Republic of Germany in 1949 necessitated a radical

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[1] Andreas Moens, "The Challenge and the Limits of NATO-ESDP Synergy" in Stephan Ganzle and Allen G. Sens (eds) **The Changing Politics of European Security**. Basingstoke and New York: Palgrave/Macmillan, (2007).

adjustment of the French European policy. The earlier policy of keeping Germany weak under the military and/or political control of other major powers had to be replaced with a new strategy by which the new German state could be anchored into the Western Alliance system politically, economically and militarily.

In the context of Cold War Europe and despite the considerable emphasis upon military issues, security essentially involved the survival and indeed ensuring the superiority of the capitalist system to communist Europe. In Western Europe, this was increasingly perceived in terms of economic integration. The EU, from its original conception in the form of the ECSC was always in the business of providing security[2]. This role derived from its very nature: the member states have developed between them a real pluralistic security community within which the threat of recourse to the use of force as a means of settling disputes is inconceivable. Such a view-which builds on the democratic peace tradition and supported by the EU's institutional structures and communicaton channels -stresses the significance of integration for its members at both elite and mass levels. The EU has emerged and evolved as a security community within the broader Atlantic Security Europe. The EU, however, remained very much a "nested security community" in the sense that the attainment of peaceful change in member states' relationship with each other took place under NATO's security umbrella and with American guarantee. Both provided a protective shield beneath which Western Europe was free to achieve its political and economic objectives without necessarily having to devote scarce resources to military defence.

Besides its role in contributing to ensuring peace and order in Europe, Atlantic Security Europe provided a unique opportunity for the EU to develop its international role as a civilian power, that is, an alternative power to two Cold War superpowers, with its preference for the use of non-military policy instruments to the military ones, and its commitment to ending power politics in the world at large. The civilian power aims to "bring to international problems the sense of common responsibility and structures of contractual politics which have in the past been associated almost exclusively home and not foreign affairs"[3]. Such a role and responsibility was not only confined to the continent but has been pursued in EU's conduct with the rest of the world. To its earlier project of eliminating war between the European powers, the EU has added the

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[2] Charlotte Bretherton and Vogler John, **The European Union as a Global Actor**. London and New York: Routledge, 2e, (2006), p.189.

[3] Francois Duchene, "The European Community and the Uncertainties of Interdependence" in Max Kohnstamm and Wolfgang Hager (eds) **A Nation Writ Large? Foreign Policy Problems Before the European Community**. London: Macmillan, (1973).

task of stabilizing and transforming its peripheries through its successive rounds of enlargement.

The EU as a security community and a civilian power was an integral component of the Cold War transatlantic bargain and as such, entailed costs for both partners: financial costs for the US defence budget, US troop commitments in Europe and an uneven burden-sharing problem across the Atlantic. NATO did not adequately determine the role to be played by West Europeans in their own defence[4]. In that sense, the failure of the Pleven Plan for a European Defence Community and its idea of an independent European defence capability in 1954, was a also defeat for American policy-makers, who looked to the development of an integrated Europe as a future partner which would shoulder a larger share of the burden of Western international order[5]. The failed attempt of developing a militarily integrated Europe did not remove the issue of German rearmament from the agenda. The Western European Union (WEU) was established, linking together Britain and the six ECSC countries in a mutual defence arrangement within which German rearmament would occur. In reality, the WEU remained subordinate to NATO, its military functions were explicitly integrated into NATO[6]. WEU did- however, informally act as a liaison mechanism both between France and NATO and between the UK and the EU[7].

The search for the coordination of national foreign and defence policies of the EU member governments continued with the French-inspired Fouchet Plan negotiations in 1960-61. Unlike the EDC, this initiative would not seem to bear substantial additional defence costs for the European allies. Despite this, the French proposal was perceived as an alternative hegemony project to NATO by her Community partners and negotiations eventually collapsed. This endless intra-European debate led French President de Gaulle to withdrew French forces from NATO's integrated structure-leaving military cooperation among other European defence ministries and armed forces firmly within the NATO framework[8].

Western Europe's self-image as a civilian power, was given formal expression under the European Political Cooperation (EPC), an intergovernmental structure and pattern of foreign policy cooperation among EU members in the 1970s and 1980s. Despite its limited external political

[4] C. Bretherton and J. Vogler, p.192.
[5] William Wallace, Foreign and Security Policy: The Painful Path from Shadow to Substance" in Helen Wallace, William Wallace and Mark Pollack (eds) **Policy-Making in the European Union**, 5e, Oxford: Oxford University Press, (2005), p.431.
[6] **Ibid**.,
[7] John Howorth, "The Euro-Atlantic Security Dilemma: France, Britain and the ESDP", **Journal of Transatlantic Studies**, Vol. 3/1, 39-54, (2005), p.180.
[8] William Wallace, p.432.

impact for the Union and its members, the EPC constituted a successful example of intergovernmental integration largely by means of informal processes of communication and convergence. Furthermore, the emergent mode of intensive transgovernmentalism in the EPC, later in the CFSP, provided a solid basis for a Franco-British political dialogue and diplomatic alliance inside the Union.

While remaining outside NATO's integrated structure, France has continued its attempts to rehape WEU as the organization for autonomous European defence. Tensions inside NATO over the deployment of Pershing II Missiles in Europe during the 1980s renewed debate on the security role and responsibilities of the European countries. A Franco-German defence dialogue was relaunched in 1982 and then extended to a reactivation and expansion of the WEU[9]. Its Ministerial Council stated in 1987 that "the construction of an integrated Europe will be incomplete as long as it does not include secuirty and defence", but it also defined WEU's mission to as " to strengthen the European pillar of the Alliance"[10]. Meanwhile, the EU governments agreed to broaden the scope of collaboration on, and coordination of foreign policy by bringing in the political and economic aspects of security to the EPC agenda.

Although the inner dynamics of European integration have partly shaped and influenced the gradual move towards European foreign and security cooperation, it was the radically transformed environment of the post Cold-War era that led to the establishment of CFSP, which above all, aimed to provide EU with a common defence policy and a common defence. The Treaty on European Union made it clear that the EU had competence to call upon WEU to implement its CFSP. In a declaration attached to the Treaty, the role of WEU was stated to be the defence component of the EU and the European pillar of the Atlantic Alliance. The dual role foreseen for WEU clearly reflected the divide between the Europeanists, led by France and the Atlanticists, led by Britain inside the Union. It was the new NATO Strategic Concept which was agreed at the NATO Rome Summit of 1991 that eventually built the basis for an intra-European compromise[11]. Nonetheless, the Alliances's new concept approved the development of European multinational forces, but also reaffirmed the primacy of NATO as the forum for defence cooperation[12].

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[9] Anne Deighton, (ed.) **Western European Union 1954-1997: Defence, Security, Integration**. Oxford: European Interdependence Research Unit, (1997).
[10] John Howorth, 2005, p.180.
[11] Anthony Forster, and William Wallace, "Common Foreign and Security Policy: From Shadow to Substance? in Helen Wallace and William Wallace (eds) **Policy-Making in the European Union**, 4e. Oxford: Oxford University Press, (2000).
[12] **Ibid**.,

While the politics of European security after the Cold War were dominated by debates over institutional adaptation and reform taking place simultaneously in the EU, WEU and NATO, developments in Eastern and South-Eastern Europe and the violent disintegration of Yugoslavia added a sense of urgency to the need for developing appropriate policies in response to dual challenges of integration and disintegration. While EU was on the way for developing a common Ostpolitik during the 1990s, both its and WEU's operational attempts remained modest in the field of crisis management. Despite WEU's assertiveness which was confirmed with the adoption of the Petersberg tasks (humanitarian and rescue missions, peacekeeping and crisis management, including peacemaking) in June 1992, efforts to improve the military capabilities of the European countries have taken place under the framework of NATO.

In recognizing European Security and Defence Identity (ESDI) in 1994, NATO gave support and legitimacy to European aspirations to co-manage security across the continent. NATO's recognition of ESDI opened the way for more intensive practical military cooperation with WEU and EU, leading to the Berlin Agreement of 1996. The core of the agreement was the concept of Combined Joint Task Forces (CJTF) which was intended to enable European governments to launch operations without direct US engagement but also with the right to use NATO's assets, particularly its Headquarters and command facilities. The buzzword for the complex borrowing arrangements was "separable but not separate", a formula which deliberately eschewed any suggestion of autonomy for the European allies[13]. ESDI expressed US willingness to accommodate French sensitivies as well as its own insistence that European partners should play a larger role in maintaining the security of Europe[14].

The 96 Berlin agreement has proven to have been both a breakthrough in NATO-EU relations and a bottleneck[15]. The idea that Europeans could undertake Petersberg missions in Europe without the help of NATO marked the beginning of a practical European security-building. This was the first time in which Atlantic Security Europe could be divided into missions with or without direct American participation. It led the way to future missions such as Operation Althea and EU Force (EUFOR) currently underway in Bosnia.

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[13] John Howorth, **Security and Defence Policy in the European Union**. Basingstoke and New York: Palgrave/Macmillan, (2007).
[14] Wallace, p.442.
[15] Andreas Moens, "The Challenge and the Limits of NATO-ESDP Synergy" in Stephan Ganzle and Allen G. Sens (eds) **The Changing Politics of European Security**. Basingstoke and New York: Palgrave/Macmillan, (2007).

But Berlin agreement brought to the fore an enduring bottleneck. The ESDI-based or European-only forces would be separable at the operational level but they would not really be separable in terms of planning and command structures[16]. In other words, the price EU would have to pay for having NATO support for its operations was that its members would not construct a second integrated military planning and command structure inside the Union. Community Europe could undertake military actions but in its planning and command, it would have to remain dependent on Atlantic Security Europe. Under ESDI, Europeans would therefore gain some freedom of manouvre without a real politico-military autonomy. It was for this reason that French rapprochement with NATO stopped short of re-integrating into its military command.

As NATO developed, so did EU. Irrespective of its initial inadequate performance, the TEU already laid down a revision of the CFSP pillar. The Amsterdam Treaty of 1997 incorporated the Petersberg tasks in the EU's external role and opened the way for the use of military force by the Union, alongside its civilian instruments. Integrating these into the CFSP was also a step in integrating WEU into the Union, an issue which became more prominent in the wake of the expiration of the Brussels Treaty, the founding treaty of WEU.

Already before the Treaty of Amsterdam entered into force, however, Britain and France issued the St. Malo Declaration that underlined the need for EU's "autonomous"crisis-management capabilities. The underlying driving factors behind ESDP are analysed in detail, suffice here to note that it was the inadequacies of ESDI, the continuing weakness of WEU and the inadequacy of the civilian capabilities of EU in Bosnia crisis, all together pushed for the emergence of ESDP. ESDI was transcended and replaced by by ESDP because the former did not smoothly work in practice. Not only was it dependent on the political direction of WEU which lacked it, but it also relied for its military capabilites on borrowing from the USA. Moreover, ESDI was predicated on a reorganization of NATO's command chain which the USA was simply not prepared to accept. ESDI had no thus real answers to the requirements of EU-only missions[17].

The St. Malo summit was revolutionary in the sense that it removed the obstacle which for decades had prevented EU from embracing security and defence as a common policy area and therefore from evolving as a global

[16] **Ibid**., p.190.
[17] John Howorth, (2007), p.44.

security actor[18]. EU would never become a credible international actor unless it acquires a military capacity of its own. ESDP would therefore, contribute to transforming EU's often invisible international presence into international actorness, hence matching its resort to a combined toolbox with a growing external political impact.

For nearly 50 years (1947-97), France and Britain had effectively blocked any serious European security cooperation by their contradictory interpretations of the likely impact of such an initiative for the transatlantic relationship, and about the balance of power and influence within Europe itself. Howorth[19] has called this the Euro-Atlantic security dilemma. London has long feared that such a move would eventually lead to US' abandonment of its engagement towards Europe, whereas, Paris conceived the same move as a necessary step for a more balanced transatlantic partnership. Both approaches seemed however, a reflection of normative aspirations rather than hard strategic analysis[20].

The significance of St. Malo lies in the practical convergence of the British and French defense positions with important consequences for EU and its relationship with NATO. By acknowledging that the Union must have the capacity for autonomous action, backed by credible miltary forces, the means to decide to use them and a readiness to do so, in order to respond to international crises, the declaration semed to accommodate Europe's political desire and authority with its new capabilities. The declaration envisaged a new relationship between EU and NATO, the former's ESDP contributing to the military transformation of NATO and hence the survival of the Atlantic Alliance.

The Franco-British initiative was incorporated into the EU's CFSP. The Headline Goals adopted at the Helsinki Summit in December 1999 called for the creation of a European Rapid Reaction Force (ERRF) of 60.0000 troops, deployable in 60 days and sustainable for one year and capable of full range of Petersberg tasks by 2003. Europe's capability commitment and improvement process gained momentum through the European Capability Action Plan which sought to ensure minimal compliance with the stated objective of operationality by 2003. Faced with outstanding capability shortcomings against the Helsinki Headline Goal, in June 2004, EU leaders adopted the new Headline Goal 2010. Henceforth, the EU has entered into a qualitatively different stage in its military force transformation process by means of the newly established battle-group

[18] Hanna Ojanen, "The EU's Responsibility for Global Security and Defence" in Hartmut Mayer and Henri Vogt (eds) **A Responsible Europe? Ethical Foundations of EU External Affairs**. Basingstoke and New York: Palgrave/Macmillan, (2006).
[19] John Howorth, (2005),
[20] John Howorth, (2007) p.36.

concept, the creation of the European Defence Agency (EDA) and the launch of the civil-military planning cell. Central to the Union's aspirations under the new Headline Goal is the battle-group concept, that is, units of 1.500 troops capable of high-intensity warfare, deployable within 15 days and sustainable for up to 30 days. Battle-groups will be employable across the whole range of expanded Petersberg tasks, including the fight against terrorism.

ERRF and the Battle-groups are definite, if limited steps towards a more credible role for EU in global crisis-management. There, however, remain a range of shortcomings: relatively low level of national and combined defence spending in Europe, disproportionate levels of national defence expenditures and wasteful spending patterns among EU countries, amounting to calls for more or wiser spending for Europe[21]. The EU would need to invest far more on the acquisition of new equipment and on research and development projects. Another challenge is that Europe's separate military forces are trained to very different levels of combat intensity: only Britain and France have forces trained to be able to cope with the requirements of full-scale warfare[22].

Overall, EU member states would need to achieve balance between their national independence in defence matters and the shared benefits of enhanced collective capacity generated by further integration (Ladzik 2006). EDA which was set up in 2004, can be seen as a necessary step towards more rational armament and defence planning and an integrated European defence market. The tasks of EDA include crisis management capability building, cooperation in purchasing and developing weapons system and contributing to a shift from national markets and national defence industries to European autonomy but also interoperablity with US[23].

Another ESDP breakthrough came in the field of operational planning: for EU operations under Berlin plus, an EU unit has been attached to NATO at SHAPE Headquarters. For most EU-only operations, an appropriate national Headquarters will be adapted to planning for multi-national operations. For some EU-only operations with civil and military dimensions, an autonomous EU civil-military planning cell is developed at ESDP Headquarters[24].

The creation of ESDP marked an evolution from an essentially civilian notion of CFSP. Yet, in parallel to its military capabilites, the civilian capabilities of EU have continued to evolve after Helsinki through the Civilian

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[21] Jeanette Ladzik, **European Security and Defence Policy.** Federal Trust Policy Brief 26, 3 April 2006, (2006).
[22] Venusberg Group, **A European Defence Strategy**. Guterlosh: Bertelsmann, (2004).
[23] John Brady and Ben Tonra, The European Defence Agency, Serious Opportunity-Daunting Challenge. **CFSP Forum**, Vol 3/1, (2005).
[24] John Howorth, 2007, p.112.

Capabilities Conference of 2004 and the Civilian Headline Goal 2008. In terms of policy tools, ESDP would thus comprise three elements: military, civilian, and conflict prevention ranging from pre-conflict to post-conflict reconstruction phases and to be implemented from short-term to longer term[25].

Civilian crisis management is regarded as being one of the distinctive features of ESDP which enabled the Union to become an increasingly demanded partner for other organizations, notably UN and NATO. While its unique ability to combine civilian and military instruments is an important asset externally, the need for ensuring coherence between the Council and the Commission or between EU bodies and national actors remains a bone of contention inside the Union.

The year 2003 saw three major developments in the context of ESDP: the war in Iraq, the launch of the EU's first missions and the adoption of the European Security Strategy (ESS) document. As the EU becomes more active and its international role is increasingly accorded recognition, the provision of an overall strategic direction for its external activities becomes all the more imperative. The ESS is intended to fulfil that demand. Through its analysis of the global setting of EU foreign policy in terms of both challenges and opportunities, the ESS seeks to promote a shared vision of the EU's role in the world and more effective use of its policy instruments[26]. With the broad aim of providing "a Secure Europe in a Better World", the ESS commits the Union to three strategic objectives-addressing key threats, building a secure neighbourhood and promoting an international order based on effective multilateralism. ESS might thus be seen as implying the EU's increasing global responsibility not only for security but also for international norms[27].

While EU's approach to threat assessment echoes US thinking on these matters, the European strategy for assessing threats differs considerably from the US preference for potentially pre-emptive action. It reflects the dual hard and soft approaches and emphasizes the importance of long-term civilian measures in addressing the root causes of threats, for example, by linking security and development, as well as shorter-term responses including ESDP instruments[28].

Whether the EU at all can be said to be a credible security actor depends on two key questions, however: first is its capacities and second its degree of

[25] E. Michael Smith, "Implementation: Making the EU2s International Relations Work" in Christopher Hill and Michael Smith (eds) **International Relations and the European Union**. Oxford: Oxford University Press, (2005).
[26] Bretherton and Vogler, 2006, p.181.
[27] Ojanen, 2006, p.44.
[28] Bretherton and Vogler, p.182.

independence in relation to NATO and the UN[29]. While independence of the EU as a security agent is far from complete, the capabilities commitment process has already been consequential; it has affected the capacities of other key actors. The challenge that lies ahead of ESDP simply is sharing capabilities with NATO or taking over NATO's functions[30].

Through NATO, the EU can get access to such military assets and capabilities that it needs but does not itself possess. This is indeed the basic content of the Berlin plus arrangements of 1999. Under the agreement, EU enjoys assured access to NATO planning; presumed access to NATO assets and capabilities and a pre-designated Europeans-only chain of command under the Deputy Supreme Commander Europe (DSACEUR). Such assets can be seen to enhance EU's independence and crediblity as an international actor; it has the means to deliver what it promises and does not need to spend resources for assets that can be borrowed from another organization, and thus avoids unnecessary duplication of resources. However, the need to borrow NATO's assets can also be perceived as a problem: it maintains EU's dependence on NATO/US and can reduce its autonomy[31].

US formally welcomed the EU's shift towards greater self-reliance, but remained concerned about potential European challenges to its leadership of NATO. This led to its conditional support for an autonomous ESDP, known as "3 D's", namely, no decoupling between NATO and EU at the strategic planning level, no duplication of the existing assets of the Alliance and no discrimination between EU member states and the non-EU European allies of NATO. In 2000, Americans added several new conditions to Albright's "3 D's"[32]. The first was that ESDP should primarily be about military capabilities improvement than about institution-building, a view shared by Britain but opposed by France. The second additional condition was NATO's right of first refusal for military operations so that ESDP would not challenge its primacy. Thirdly, US insisted for the creation of formal links between EU and NATO in order to avoid potential areas of transatlantic conflict and a possible competition with US defence firms. These conditions were reaffirmed at the time of George W. Bush's first meeting with NATO partners in June 2002, with the consequence of blurring the distinction between ESDI and ESDP beyond the level of rhetoric. Overall, as Howorth[33] has argued, US attitudes towards Europe in general and ESDP in particular shifted from being dominated by sceptics and critics in 1999-2000 to being increasingly characterized by proposals for

[29] Ojanen, p.37.
[30] **Ibid**., p.44.
[31] **Ibid**.,
[32] Howorth, 2007, p.140-141.
[33] **Ibid**., p.137.

partnership in 2005-6. Nonetheless, some analysts still remain cautious about NATO-ESDP realtionship not least because they tend to view it as the manifestation of a deeper structural crisis of the transatlantic partnership, a crisis about the nature of the US-European relationship, about American global strategy and NATO's role in it[34].

Relations with the US in general and with NATO in particular have long been a key contsraining factor and also a driving force in the evolution of European foreign policy. As stated previously, the most siginificant factor which obscured European security cooperation during the Cold War was the contradictory positions of France and Britain, giving rise to a Euro-Atlantic security dilemma. In the transformed context of post-Cold War Europe, the Atlanticist countries (Britain, the Netherlands, Portugal and recently Poland) embarked on ESDP with a view to saving NATO, that is to say, out of necessity, but have progressively come to believe in the project in its own right, or out of choice. While the post-neutrals (Austria, Finland, Sweden, Ireland) retain a clear distance from NATO, they have begun to play a real part in ESDP especially in its civilian crisis management, mainly because it corresponds to their security culture and their experience in UN peacekeeping operations. Germany, too, has come to construct its security identity through ESDP, which offered choices that were absent in NATO: crisis management rather than the pursuit of American global strategy, multilateral decision-making rather than unilateral pressure from Washington, and perhaps above all, external political inflence as opposed to risk of marginalization[35]. More specifically and common to all, the choice between the ERRF (mandated, responsive, rare) and NATO's Response Force (NRF) (non-mandated, pre-emptive and frequent) drew them closer to ESDP[36]. Convinced of NATO' operational command capacity for effective military intervention in the Balkans during the Bosnian crisis, France has pursued a balancing act between NATO and the emerging European security project throughout the 1990s. From the French perspective, NATO would retain responsibility for more serious operations involving collective defence, whereas Europeans would handle increasingly autonomous crisis-mangement operations in a complementary fashion. The difficulty of planning and implementing a real "transatlantic"military operation during the war in Kosovo has led France to re-emphasize the cardinal feature of ESDP; autonomy not just in the sense of US/NATO giving greater command authority to Europeans but autonomy as a prime mover in constructing ESDP as the

[34] Christopher Layne, "Death Knell for NATO? The Bush Administration Confronts the European Security and Defnce Policy", **Policy Analysis**, 394, (2001).
[35] Howorth, 2007, p.53.
[36] **Ibid**., p.153.

European pillar of the transatlantic partnership[37]. Despite having signed up to the Prague Declaration in November 2002, France does not believe that NATO is optimally configured to assume a global role unless there will emerge a more balanced transatlantic partnership[38].

Hence, beyond the narrow institutional or military issues of NATO-ESDP relations, there lies the overall problem converging and/or diverging political preferences and normative stances of the USA and of the EU[39]. EU-NATO Declaration on ESDP (June 2002) confirms on paper the equality of the two organizations. It lists the following principles as the basis of relations:

-partnership, ensuring that crisis management activities of both organizations are mutually reinforcing, while recognizing that EU and NATO are organizations of a different nature;

-equality and due regard for the decision-making autonomy and interests of both;

-effective mutual consultation, dialogue and cooperation and transparency;

-coherent, transparent and mutually reinforcing development of the military capability requirements common to the two organizations.

To this end, EU is ensuring the fullest possible involvement of non-EU European members of NATO within ESDP. NATO is supporting the latter in accordance with the relevant Washington Summit decisions, and is giving the EU assured access to NATO's planning capabilities.

However, in the context of America's ongoing military involvement on a global scale and the trend toward globalization of NATO after Prague, the availability of such assets cannot be taken for granted. Increasingly, the EU will likely to move further down the road to autonomy. However, to be able to build up its military capability and planning for overseas missions, EU also needs to strengthen its structured dialogue with NATO. Many questions remain about the politics of EU-US global strategy coordination and about cooperation between ERRF and NRF[40]. Subsequent to NATO's military transformation, NATO-EU cooperation has continued albeit on a limited and suspicious basis[41]. Problems of asymmetry and hierarchy as well as those of inclusion/exclusion have predominated the European security agenda. These inner structural problems of NATO might well undermine its role of helping the EU to achieve its autonomy

[37] **Ibid**., p.156-160.
[38] **Ibid**., p.159.
[39] **Ibid**., p.161.
[40] **Ibid**., p.171.
[41] G. Allen Sens, " The Politics of Changing European Security" in Stephan Ganzle and Allen G. Sens (eds) **The Changing Politics of European Security**. Basingstoke and New York: Palgrave/Macmillan, (2007).

and tend to perpetuate an unequal partnership on two sides of the Atlantic. This has led to growing significance of a direct EU-US framework as a forum for transatlantic dialogue, a pattern which implies that NATO's purpose and role needs to be re-defined. Disputes within the Alliance continued in the wake of the Riga Summit in November 2006, primarily over a US proposal to create a global partnership forum that would serve as a link between NATO and partner countries around the world. This proposal is regarded with suspicion by some European governments, who see the forum as another attempt by America for linking NATO with its own global strategy[42]. Under the re-elected Bush administration, US has tended to prioritize military institutions over diplomatic ones, unilateral approaches over multilateral ones, war-fighting over nation-building and post-conflict reconstruction and ad hoc coalition-framing over NATO as a collective politico-military alliance.

Perhaps, an alternative way of conceiving of the relationship between EU and NATO other than being an exclusively zero-sum game or a positive-sum game, is to underline the ties of complex interdependence between the two: ESDP needs and remains dependent on NATO for many aspects of planning, command and control and logistics. NATO needs ESDP-given the EU's strength in global civilian crisis-management, its evolving partnership with UN and other regional organizations-as a source for legitimizing its coercive action. Despite the strength of mutual dependence between the two, each organization has its own reason of being and posseses different ontological qualities which have shaped their subsequent transformation in relation to one another, as well as their mutual perception of one another. Compared with NATO, EU is an organization of integration, pursuing its own integrationist approach to security which, has proved quite effective in transforming it into a security community with a propensity to expand outward. The original conception of EU as a civilian power has been reframed as Normative Power Europe, after the Union has acquired a more visible and direct (interventionist?) approach to European and global security. EU's partners, especially US remain suspicious about the Union's normative stance so long as it suffers from a capability-expectations gap in CFSP/ESDP. The EU, for its part, will remain cautious about transformation (globalization) of NATO in the cause of US global strategy unless this runs parallel to a political re-structuring of the alliance. However, EU's continuing dependence-autonomy dilemma within the transatlantic alliance remains the key hurdle. What still matters perhaps is not what EU is but what EU does under its ESDP.

Even though the transtatlantic relationship is undergoing a crisis of identity and search for a shared ultimate strategic purpose, I would like to conclude by

[42] **Ibid**., p.16.

drawing attention to the significance of the US-EU relationship for global order and governance. A world in which Europe and America are increasingly uncooperative or even at odds on security matters will neither be stable nor be responsive to regional and global risks and challenges. Increased divisions on security matters within the Euro-Atlantic area would erode the foundations of a global order, both a multilateral and multipolar one. The EU has particular responsibility in this regard: On the one hand, it has made effective multilateralism a constant principle of its external relations. On the other hand, it could and should serve as a model to others[43]. The challenge for the US is therefore to share responsibility for security with the EU and the UN.

[43] Ojanen, p.49.

GEOPOLITICS OF EUROPEAN ENERGY SECURITY AND THE TURKISH LINK

Naci SARIBAŞ*

Excellencies,

Ladies and Gentlemen,

- It is a great privilege for me to chair this session with the attendance of three distinguished experts dealing with energy security.
- Professor Mustafa Aydin of University of Economics and Technology
- Mr Marat Terterov of Dubai Gulf Research Centre
- Giuseppe Maria Sfligiotti, former Director of OME (Mediterranean Energy Observatory).
- I would like to thank them for sparing their valuable time to be with us today. I also would like to extend my thanks to the conveners for inviting me to chair the session as well as to share my views with you on European energy security with a focus on Turkey's role in it.
- In this session, our speakers are going to discuss European energy security by focusing on the geopolitics of hydrocarbons and global political uncertainties, the dialogue between producer and consumer countries as well as the Russian perspective on European energy security.
- As the chair, I am going to make a brief introduction to open the discussion for our speakers.

Ladies and Gentlemen,

- There is no doubt that energy is at the core of all economic activities.

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* Ambassador, Director General for EU Affairs Ministry of Foreign Affairs

- If energy is this much indispensable, then we must pay utmost attention to its security.

- There are many aspects of energy security including reliable, continuous and affordable supply, the physical security of existing infrastructure, the integrity of the distribution systems across the continent and the use of strategic stockpiles and reserves to address short term disruptions.

- It is a well-known fact that Europe is not one of the luckiest continents on the earth in terms of energy self-sufficiency. It will always depend on import of energy resources and maintain its place in the global energy market at the receiving end.

- This entails us to concentrate on the international aspects of energy security. Every country in Europe is taking measures to enhance its national energy security, but I believe that national measures cannot assure the full security of energy in Europe, because energy security of Europe today is essentially a matter of foreign policy. In this respect, solidarity and a coherent foreign energy policy in Europe is needed.

- Europe's renewed interest in energy security has been influenced by both internal and external factors. Steadily rising energy prices, declining European energy production and a fragmented internal energy market have contributed to anxieties over Europe's ability to meet future energy demand. The strain on global demand exerted by the emerging economies of countries such as China and India, persistent instability in energy producing regions, the threat of terrorist strikes against energy infrastructure and Russia's energy power are all rising topics in Europe over how to address external influences that could affect future energy requirements.

Ladies and Gentlemen,

- Unlike most of the other economic activities, energy is still mostly a state-controlled domain. This makes it a foreign policy matter. Majority of the world's oil production is still in state-controlled hands. Only four percent of identified oil reserves are controlled by the leading multinational oil companies.

- Despite the low rate of economic growth and ever increasing efficiency of energy use, demand for energy in Europe is constantly growing.

- Alternative energy resources or renewables still count for small portion of European energy. Therefore, for now and for quite a long foreseeable future, hydrocarbons, namely oil and gas will remain to be the main energy resources to keep the European economy running.

- This means constantly growing energy imports for Europe.

- The EU's 27 member states account for approximately 17 per cent of the world's total energy consumption. In 2005, about 80 per cent of the energy consumed within the EU was from fossil fuels.

- According to the European Commission, EU member states import approximately half of their oil and gas supplies. If current trends continue, import dependence could rise to 65 per cent by 2030. Russia, Norway, the Middle East and North Africa are the largest suppliers of EU energy. In 2004, Russia accounted for 26 per cent of the EU's oil imports and 29 per cent of natural gas imports. Today, oil, natural gas and coal account for 80 per cent of the energy consumed in EU.

- Forecasters predict that natural gas consumption in the EU will double over the next 25 years, and gas has rapidly become Europe's fuel of choice for power generation. European natural gas consumption currently represents 17 per cent of world consumption. The other half is imported primarily from the Russian Federation (%29) and Algeria (%13). European gas imports are expected to reach slightly over 80 per cent by 2030. Several EU member states are totally dependent on Russian natural gas for their domestic energy consumption. (Czech Republic, Estonia, Finland, Austria)

- According to the forecasts of International Energy Agency, by 2020, energy imports of Europe will account for 80 per cent of its oil supplies, which is 60 per cent today, and, for 60 per cent of its gas supplies, against 40 per cent now.

- Surveys indicate that currently there is no global shortage of oil or gas to meet such demand. However, the challenge in the supply security is that the remaining reserves of energy resources are heavily concentrated in a limited number of regions and countries mostly having political instabilities.

- High demand has also raised questions regarding the future availability of global oil and gas reserves. Although significant shortages are not projected for the next several decades, uncertainties over future exploration and production in areas such as Russia and the Middle East have raised concerns about long-term supply availability. The International Energy Agency (IEA) estimates that close to $16 trillion in new investments may be needed over the next 30 years to meet future global energy demand.

- All of these issues have led Europeans to begin to plan more seriously for their energy future and to make energy policy a higher priority within the European Union.

- Still large resources, but controlled by a limited number of countries when coupled with growing demand and trade inevitably translate the security of supply into a strategic competition.

- International Energy Agency figures indicate that more than 65 per cent of daily global demand for oil will be traded internationally by 2020.

- In order to cushion the global competition to have access to energy resources, Europe can do things within the continent, such as increasing energy efficiency, developing more dependency on renewables, improving the infrastructure for uninterrupted flow of hydrocarbons.

- However necessary these domestic measures are, they are bound to remain insufficient in the face of energy trade that is rapidly becoming an important element of international relations, particularly that of European foreign policy.

- In short, it is a must for Europe today to engage in energy diplomacy to assure security of energy supplies. The key to achieve security is to maintain and improve diversity of sources and routes of supply. This is in fact where Turkey comes into the picture, to which I will come back later.

- Without an active energy diplomacy, it is hard to imagine a secure Europe getting more and more competitive with continuous economic activity backed by uninterrupted energy supplies.

- This active diplomacy inevitably calls for dialogue among consumer markets or countries, producer countries and transit countries, to which Mr Sfligiotti will come back in this session.

- Not surprisingly, Russia is a dominant actor in this equation. Europe's relations with Russia matters and vice versa. The dependence is mutual between the two. More than a third of EU gas imports come from Russia. Europe needs these resources to run its economy.

- Taking the projections of European energy consumption and supply into account, it becomes clear that the most important energy security challenge facing the EU over the next 20 years will be Europe's ability to diversify the sources of its energy imports and the modes of transit that will bring those supplies to Europe.

- Diversity matters to the producers, too, as much as to the consumers.

- In addition to the dialogue between consumers and producer, Europe also has to take measures to provide physical security to its energy infrastructure.

- It is not only international problems, one of which Europe witnessed in 2006, that may adversely affect secure flow of resources, but threats to secure energy supply may also come from a number of different sources: Terrorist attacks or natural disasters.

- All the foregoing suggests the need for a European strategy to prevent disruption as well as for arrangements to minimise the effects on supply levels in the event of a major international crisis or a terrorist attack or a natural disaster.

- However, even the best elaborated strategies may disappoint us, if we fail to build these strategies depending on reliable partners, which brings us to the second part of my presentation that is the Turkish link.

Ladies and Gentlemen,

- I have explained so far that the energy security is a matter of foreign policy. Thus, it is inevitably one of the strategic priorities of Turkish foreign policy.

- Turkey's energy strategy is a two-faceted one. On one hand, this strategy entails providing energy supply security for Turkey and on the other, contributing to a more secure and stable international energy market by diversifying energy sources and routes between east and west and north and south as a natural energy bridge. When we look at where Turkey is located on the world map, it is not hard to find out why Turkey is pursuing such a well elaborated strategy on energy security. Three fourths of the world's proven oil and gas resources are located in regions neighbouring Turkey.

- Turkey has long been working on various projects to realise the goals of its strategy.

- It is anticipated that 6 to 7 percent of the global supply of oil will transit Turkey within 5 years.

- The common challenge but also a great opportunity for Turkey and Europe, as well as the United States, is to guarantee affordable, secure and uninterrupted flow of hydrocarbon resources from the Greater Caspian region and the Middle East to our markets.

- In this respect, projects such as BTC, BTE, Samsun-Ceyhan oil pipeline, Trans-Caspian natural gas project, Nabucco, Turkey-Greece interconnector, which has become operational just 10 days ago and will be connected to Italy are crucial elements of diversifying sources and routes to achieve secure, stable and sustainable transport of energy to European markets through a reliable partner, a transit country and a potential energy hub in the region that is Turkey.

- The Port of Ceyhan on our southern shores is in the course of establishing itself as a major energy hub. One of the many advantages of the Ceyhan Terminal is the existence of an established infrastructure that allows for loading VLCCs as well as ULCCs throughout the year.

- Ceyhan is anticipated to be the largest oil outlet terminal in the Eastern Mediterranean in a few year's time.

- Having said that, I have to reiterate that unilateral initiatives and efforts are not sufficient to provide energy security. Turkey, as a key element of the European energy security, and the EU need each other to meet this end. EU's staunch support to the strategic projects that I have just mentioned is essential.

Ladies and Gentlemen,

- Within the broader perspective of European energy security and Turkey's role in it, which I have briefly tried to explain, there lies another aspect of mutual relevance to the both that is the negotiations on chapter 15 "Energy" and on chapter 21 "Trans-European Networks (TEN-E)" in Turkey's EU accession negotiations.

- Turkey's growing function as an east-west corridor for oil and gas is further testimony to the positive impact of accession. It already has a central place on the route through which these resources will be transferred to western markets, making it a reliable partner for the energy security and diversity of resources for Europe. I would imagine that it would be preferable for the Union itself to have this terminal within a member state.

- As a negotiating candidate country, Turkey follows energy related developments within the EU with close interest. We regularly examine and attach significance to the Policy Papers adopted by the European Union to find out how we can benefit from and contribute to them. We welcomed the adoption of the Energy Action Plan in March, which clearly shows that Turkey's strategy of diversification of routes and supply sources to ensure Europe's energy security.

- A high level Conference under the title "Turkey and the EU: Together for a European Energy Policy" was organised jointly by Turkey and the EU in Istanbul on 5 June. At the Conference, it was confirmed that a strategic energy cooperation will reinforce energy supply security of Turkey and the EU.

Ladies and Gentlemen,

- Turkey's accession process is proceeding. We hope that the momentum that we achieved in the negotiation process earlier this year will not be lost due to some political considerations that might arise from within the EU in the period ahead. We know that there exist other appropriate platforms to take up such political considerations.

- The bottom line is strategic priorities, such as the European energy security, should not fall victim to shallow interests of domestic politics of some countries.

- On the chapters Energy and TEN-E, Turkey wishes to be evaluated according to the merit of its level of technical alignment. A sustainable and stable negotiation process, free of political interventions, will further improve mutual strategic thinking between Turkey and the EU in all fields including energy security.

- In conclusion, as far as the energy issue is concerned, I would like to underline that Turkey takes both the strategic aspect and the acquis related technical issues very seriously. We are committed to our energy security strategy and open to cooperation for stable and secure energy markets. We are also committed to the technical reforms that are required by the Community legislation, an inseparable part of energy security in Europe.

- While the former is enhancing strategic cooperation and further mutual understanding on energy security, the latter prepares Turkey to integrate into the internal energy market. Maintaining this solid strategy and keeping the technical process running up to full integration through accession is our main goal.

Thank you for your attention.

MOSCOW'S ENERGY (IN)-SECURITY WITHIN THE CONTEXT OF CHANGING GEOPOLITICAL POWER SHIFTS IN EURASIA

Marat TERTEROV[*]

INTRODUCTION

There has been much discussion recently of European dependence on natural gas supplies from the Russian Federation and the need for Europe to diversify its gas imports away from Russia in order to lessen this dependency. Europe currently sources some 25% of its imported gas from Russia and the figure is likely to increase in the medium term, given the increasing demand for natural gas as an energy source within the European Union.[1] This in itself may not have been a cause for concern had the natural gas trade between Russia and the European Union (EU) not become so politicised since Russia's dispute with Ukraine led to gas supply disruptions in January 2006.[2] However, the chain of events since that time – including intermittent Russia-Ukraine gas disputes and the knock-on effects of these for European consumers; Russia-Belarus gas disputes and the possibility of further knock-on effects; the race to assert energy dominance between Russian Vs Western pipeline consortiums; Moscow's occasional energy stand-off with Poland and its Baltic neighbours; Moscow's energy nationalism and the reversal of production sharing agreements with international oil companies; talk of collusion between major gas producers; the emergence of national energy champions such as Russia's Gazprom – has

[*] Dr. Gulf Research Centre Dubai UAE.

[1] EU Commission, Annex to the Green Paper: **A European Strategy for Sustainable, Competitive and Secure Energy**; Brussels, 2006, p.25.

[2] For a summary of the causes and nature of the Russia-Ukraine natural gas dispute of winter 2005-06, see Michael Fredholm, **Gazprom in Crisis**,"Conflict Studies Research Centre Russian" Series; 06/48; Defence Academy of the United Kingdom, October 2006, pp.4-5.

elevated energy security to the top of the political agenda for Western policy makers.

Given the chain of events briefly introduced above, it is hardly surprising that European policy makers and energy executives should demonstrate concern over Russia as a reliable source of the energy supply and search for both further and alternative energy sources. Russia, for its part, has put energy to the top of its foreign policy agenda and has taken unequivocal steps to promote itself as the champion of (particularly European) energy security. Whilst realising that Europe is limited in its available options for sourcing its natural gas imports, and given the over-riding influence Moscow commands over (additional) Eurasian gas supplies which could make their way to EU markets, Russian state corporations such as Gazprom, the gas export monopoly, appear to be in a strong market position. In the current tight supply environment, Gazprom has been signing long-term gas supply agreements with European energy majors and, despite events such as Moscow's gas dispute with Kiev, is seeking to enhance its long term position as a reliable supply partner.[3]

However, the very fact that Gazprom has been recently signing long term supply agreements with German, French, Italian and other European energy majors underpins Moscow's own dependency on the EU market for its gas exports.[4] Europe pays Russia's Gazprom in the region of US$250 per 1,000 cubic meters of natural gas and in 2006 Gazprom exported some 160 billion cubic meters (bcm) of natural gas to European consumers.[5] This accounts for some 80% of Russia's total export of natural gas as well as for the sheer bulk of Gazprom's corporate profits.[6] In fact had it not been for Gazprom's exports to Europe, the giant corporation would be running at a net corporate loss, since its gas exports to the EU offset the losses the company currently makes on its gas sales to former-Soviet republics and domestic consumers within Russia. Russian domestic and ex-Soviet gas consumers are only now starting to accept the rules of the market and have traditionally been sourcing their gas from Gazprom at highly preferential (below-market) rates. The official line from Gazprom management, as of late 2007 is, however, that all of its gas recipients

[3] The most evident example of Gazprom seeking to promote itself as a reliable supply partner to European consumers was the G-8 St.Petersburg Summit of July 2006 where Russia explicitly proclaimed itself as the champion of European energy security. See a select range of articles in the London daily, The Financial Times which covered the St.Petersburg Summit.

[4] Gazprom's long-term gas supply contracts signed during latter 2006-early 2007 included, among others, those signed with Gaz de France and Italy's ENI.

[5] Kaweh Sadegh-Zadeh, **Russia: A Threat to the European Gas Security?**, MA Thesis, Department of War Studies, King's College London, pp.25-29, subsequently published in *Oil, Gas & Energy Law Intelligence* (Special Edition on Energy Security), Vol.5 (Issue 4), November 2007.

[6] **Ibid**.,

– no matter whether top-dollar paying EU customers or those within Russia/CIS accustomed to subsidies – will pay market rates for their natural gas supplies.[7]

The Russian economy has been growing in a very steadfast manner since 1999 and Moscow has now regained much of the international standing it had lost in the initial years since the collapse of the USSR. Domestically, President Putin's governments have been pursuing a social modernisation and economic development program which, at present, has given the Russian president widespread legitimacy within the country. The energy sector has been at the forefront of Putin's plans for national development, since Russia's oil and gas sector accounts for 40% of industrial production and contributes a similar 40% to tax revenues.[8] Gazprom, now one of the world's largest energy companies by market capital, is itself central to the Russian energy sector and the company now contributes a little over 10% of Russia's entire GDP.[9] Given that the Kremlin is the chief shareholder in the company, it is evident that revenues earned by Gazprom from gas sales to the EU market are subsequently helping prop up the Russian government and are de facto financing the country's modernisation program. Russia's other would-be gas export markets – China, the Far East or the LNG market – are still relatively under-developed and revenues generated from EU gas exports will continue to account for the bulk of Gazprom's profits for the foreseeable future.

Despite Europe's concern with energy security and questions over Russia as a reliable supply partner, it is in fact Moscow which may be in the more insecure position in relation to its natural gas trade with the EU bloc. Moscow will pursue what-ever strategies it can to both defend and expand its gas export position in the EU market, which is reflected by the long term gas supply agreements, investment-into transit state avoidance export pipeline projects, asset swaps with European partners as well as attempts to enter the gas distribution market within the EU.[10] The argument reflected above will be developed further in the ensuing presentation, which will be comprised of the following sections:

1. Main Contours and Conflicting Perceptions of the Energy Security Debate

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[7] This was announced by Gazprom's management at the annual conference Gaz Rossiya in Moscow in November 2007.
[8] Kaweh Sadegh-Zadeh, **op.cit**, p.10.
[9] **Ibid**.,
[10] For a useful if not debatable discussion on Russia's current energy strategy see the chapter by Jakub M.Godzimirski, **Pipelines and Identities: The Current European Debate on Energy Security, Shtockman and NEGP Case**, pp.154-180 (especially p.169), in Greg Austin and Marie-Ange Schellekens-Gaiffe (eds), **Energy and Conflict Prevention**, Madagaria European Foundation and the East West Institute, Brussels, 2007.

2. The Empowerment of Russia's Current Energy Policy Adventurism: Changing Geo-political Power Shifts in Eurasia.

3. Russian Foreign Energy Policy: Key Objectives

4. Russia's Energy (in)-Security: Despite the Political and Economic Revival under Putin

The presentation follows in the ensuing pages….

1. Main Contours and Conflicting Perceptions of the Energy Security Debate

(i) View from the West:

- Changing conceptions of energy security
- Tight external environment
- Increasing dependency on energy imports
- Limited and increasingly remote sources of supply
- Security of supply
- Security in diversity
- Faith in liberal market approach
- Concern over monopolistic energy trends
- Is Russia a reliable source of the energy supply?
- Russia Vs Ukraine/Belarus knock on effects

1. Impact of above on Russian gas deliveries to EU
2. Investment into gas storage facilities
3. Depletion of Russia's main fields and insufficient new investment
4. Recent bout of energy nationalism
5. Gazprom's aggressive expansion towards European downstream market

(ii) View from Moscow:

- Reliable energy supplies to EU since Soviet times
- Stable (inter-governmental) supply agreements with key EU energy partners
- St.Peterburg Summit (July 2006): Russian showcase of energy security

- Expansion of capacity for further gas supplies to Europe
- Key export pipeline JV's with EU partners

1. Nord Stream
2. South Stream
3. Blue Stream II

- European oil majors entering Russian upstream (Shtockman, Yamal, others)

(iii) So why is the West:

- Questioning Russia's reliability as a source of the energy supply ?
- Supporting Russia bi-pass export pipelines ?
- Accusing Russia of colluding with other producers and creating a gas OPEC?
- Seemingly sceptical about Russia entering the EU downstream/distribution energy market?
- And why is Gazprom able to develop normal business partnerships with EU energy majors?

2. The Empowerment of Russia's Current Energy Policy Adventurism: Changing Geo-political Power Shifts in Eurasia.

Key trends to note:

- Steady growth of OECD economies Vs consistently high growth of non-OECD economies (BRICS), commensurate rise in non-OECD GDP per capita
- Substantial increase in production and export of Russian oil exports since 1998
- Shift in power in global energy markets and the emergence of the new "Seven Sisters" (particularly Gazprom, Saudi Aramco and other National Champions)
- High oil price environment and oil stabilization funds reaching peak levels (Russia, Kazakhstan, GCC likely to "have enough for a rainy day")
- Energy nationalism (increasingly evident in Russia, Latin America, Algeria as well as an established practice in the Gulf)

- Russian efforts to re-assert its political influence in CIS space and employ energy policy for political gain in both "near and far abroad"

- Russia joining GCC as major source of outward capital flows into OECD

- Further integration of Russia into international economy but on the basis of a pragmatic, state-capitalist model (ie, investment and capital formation driven by state-led policy or state-controlled corporations)

Summary of Eurasian power shifts:

1. Russia energy policy behaviourism is part of a wider trend within the context of an emerging polarisation between energy producers and consumers

2. The state of international relations is now far more multi-vectoral than in the past with new partnerships between non-traditional allies

3. Far more active diplomacy and contact between Eurasian states (SCO, OIC, OPEC-Russia, Russia-GCC)

Main message and concern for the West:

- Eurasian states are NOT committed to market principles and OECD rules of the game and their power in current international relations is increasing

3. Russian Foreign Energy Policy: Key Objectives

(i) Domestic energy policy is crystal clear: centralisation and monopolisation

- Gradual liberalisation of domestic gas prices

(ii) Maintain and expand EU gas exports market

- Basis for Gazprom's profits

- De-facto subsidy for loss making domestic and CIS markets

(iii) Expansion of current export pipeline capacity to EU

- Transit-state avoidance

- De-facto counter EU sponsored export routes

(iv) Invite IOCs into equity projects on pragmatic basis

- Develop new fields in challenging, remote locations

- Develop established fields without IOC participation

- 1990s style PSAs unlikely in today's environment

- IOCs Vs NOCs

(v) Policy of containment and cordial competition with Central Asia hydrocarbons producers (Turkmenistan, Uzbekistan, Kazakhstan)

- Central-Asia-Centre Soviet era pipeline
- Russia to remain key buyer of Turkmen gas till 2028
- Challenging prospects for non-Russian pipeline projects

(vi) Improve nature of transit agreements with Ukraine and Belarus and circumvent these states where possible

- Political uncertainty in Kiev
- Reduce reliance on intermediary gas traders

(vii) Control the full energy value chain where possible: upstream, midstream, downstream

- Consumers advantage: diversification
- Producers advantage: consolidation

4. Russia's Energy (in)-Security: Despite the Political and Economic Revival under Putin

(i) Current Russian revenue levels heavily reliant on EU gas exports (security of demand)

(ii) How long can the gravy train last? Russia heavily reliant on IOC technology and experience to develop difficult new upstream assets (Shtockman, Yamal, offshore Pacific)

(iii) Unfounded near-term hopes of developing gas export trade with China (question mark over new fields in East Siberia coming on-stream)

(iv) No "teeth" in Gas OPEC argument. Gas markets remain regionalised and despite best efforts, global gas market comparable to oil market is still a long way off

(v) Negligent Russian share of global LNG market. Major hopes in Sakhalin-II project

(vi) Russian share of EU gas imports set to rise from approx. 25% to 31%. Revenues coming from EU gas exports unlikely to be offset by sales to domestic consumers or CIS market

(vii) Energy security debate set to continue

IMPORTANCE OF THE DIALOGUE BETWEEN PRODUCER AND CONSUMER COUNTRIES AND THE ROLE OF OIL AND GAS SPARE PRODUCTION CAPACITY

Giuseppe Maria SFLIGIOTTI*

Mr Chairman, ladies and gentlemen,

When in the night of the 16th-17th of January 1991 the First Gulf War (*Operation Desert Storm*) started, many oil experts predicted that oil prices on the international market would have skyrocketed (I did not share that prediction). As a matter of fact, oil prices at noon (European time) of the 17th of January were lower than those of the evening before and they remained low and stable during the Gulf war.

What were the reasons for that (by many) unexpected scenario?

In my opinion, two were the main reasons.

First, the existence of a reliable "*emergency plan*", prepared by the International Energy Agency, with the co-operation of international oil companies of IEA member countries, which was immediately activated in the early morning of the 17th of January. Second reason, the readiness of oil producing countries whose oil structures were not touched by the war, to increase their production.

The emergency plan and its immediate implementation gave a clear message to the market and to the potential speculators. Contrary to what happened in previous oil crises (particularly the 1979-80 oil crisis), the starting of the war did not push prices up, but rather - as I said before - pulled prices down because oil consuming countries, through the IEA, had committed themselves to "*share the scarcity*" via a co-ordinated action of oil stocks

* Formar Director, OME.

drawdown, rerouting of oil supply, etc. The "*beggar your neighbour*" attitude of previous crises and the action of speculators did not take place, thanks to a well prepared and binding *emergency plan* and its immediate activation.

The second factor for stability - viz. the attitude of oil producing counties not touched by the war – had a fundamental impact on the market, because these countries decided to increase their oil production, keeping the markets well supplied. Of course - and this has to be pointed out – the increased oil production, compensating the reduced output from areas touched by war operations, was possible because of the existence of spare oil production capacity in key producing countries.

The easy overcoming of the potential serious oil supply shortage and the important role played by the co-operation amongst consumer countries and between consumer and producer countries represented - once the war was over - a good reason for starting a formal "dialogue" between oil consuming and oil producing counties.

The first "dialogue" producer/consumer countries took place in Paris in 1991, the latest in Qatar in 2006, the next one (the 11th) shall tale place in Rome, in April 2008.

Although it would be interesting to have a thorough analysis of the content and evolution of these high level ministerial gatherings, that analysis is not possible within the time limitations of my intervention.

I would therefore confine myself to a few essential remarks.

First, at the beginning, these "dialogues" were not looked at favourably by a few oil consuming counties, which feared the beginning of something which could bring the international oil marked outside the "*free market system*". This attitude was gradually dropped and countries which at the beginning were very sceptical about the initiative have become strong supporters of the "dialogues". It must however be said that subject matters such as oil production quantities and prices have carefully been kept out for the agendas of the "dialogues" for "ideological" reasons (the free market credo) and for practical reasons. It must, in fact, be recognised that dealing with quantities and prices would have tantamount meant putting in place a sort of commodity agreement, with all its political, technical and practical difficulties. On the other side, leaving completely out of the agenda any reference to quantities and prices and concentrating on less difficult and controversial issues, has meant not addressing vital elements for an orderly development of the oil (and gas) market.

In my opinion, we should look at the subject of energy security – both security of supplies and security of outlets – with a lot of realism and

pragmatism. Regardless of our personal preferences on the role of the "free market", we must recognise that, in the latest decades, the international oil and gas markets have undergone a deep restructuring. In the new set-up, which in my opinion is going to stay, the role played in the past decades by the "free market forces" and, particularly, by the international oil companies is very much reduced and has been taken over by the governments of oil and gas producing countries, their national companies and OPEC.

This is the new situation, regardless of whether we like it or not. To be honest, I would add that if we look at the century and a half history of the oil industry, we do not come too frequently very close to a model of a classic "free market". In fact, although lip services were given to the "free market", the practical conduct of politicians and oil industry leaders was quite remote from being coherent with that credo: they decided their practical conduct according to what they considered the interests of their countries and companies, not bothered - as time went on - by some radical changes in their "philosophy", if these changes were "justified" by the pursuit of their self interests. The history of the oil industry is a remarkable collection of betrayals of the free market credo and of changing attitudes, depending on what was considered best for the countries and companies concerned.

This rather long digression on "ideology" and on the past history of the oil industry is instrumental for suggesting a pragmatic approach to the issue of today's energy security, putting realistically aside dogmas and past cherished scenarios regarding the structure of the oil industry.

We must keep in mind that oil and natural gas are and will be, for many decades to come, by far the most important energy sources. Regarding the reserves of these two energy sources, there is a big concentration in a few countries/areas and their control is no longer in the hands of international oil companies, but in the hands of producing countries and their national companies. The historical quasi exclusive role played in the past by certain consuming countries' governments and companies is over. Today, vis-à-vis the past, we have on the stage more "actors" and the role of "prima donnas" has further shifted from the international oil companies (of consuming countries), to the governments and companies of producing countries.

On this remarkable change is based the need for a closer collaboration and co-ordination amongst the new "cast of actors" involved. Hence, the need of fostering a "dialogue", dealing more and more with issues of vital interest for the future development of the oil (and gas) industry.

Amongst these issues, and going back to my initial remarks, I would see with interest the subject of oil production spare capacity in the Agendas of the producing/consuming countries meetings.

I am aware that the subject is far from being simple: politically and practically. As a matter of fact, dealing with this subject means tackling complex and "hot" issues such as:

Are oil (and gas) producing countries willing/available to create such spare capacity? Where to create it? Who should fund the investment? Producing countries? Consuming countries? Producing and consuming countries together? National companies? International companies? International consortia? And again, when and how spare capacity should be utilised? When available oil supplies go below a certain level and market prices go above a certain pre-determined (adjusted over time) level? How to allocate production coming from spare capacity and at what prices?

This is a list - not exhaustive - of very difficult question marks which have to be addressed in dealing with the subject of oil (and gas) spare production capacity. And spare capacity itself is only a piece of the more complex puzzle representing the subject of this Session: "*European Energy Security and Strategies*".

Mr Chairman, ladies and gentlemen,

When I am thinking of the political and technical difficulties of these issues, I am assailed by many doubts about the viability of my proposals. Moreover, looking at the development of the international oil and gas industry in recent years, it seems that both producers and consumers are more keen to exploit situations that are giving them temporary advantages, rather than trying to find reasonable solutions, with a medium-long term vision, beneficial to both parties.

If, however, I am insisting on my proposals, it is because the vital role of energy in our lives and in international relations is asking us to put aside our excessive cautiousness and be more daring in tackling complex and difficult problems. We need more courage and determination. If I may, I would like sharing with you a sentence by the Roman Philosopher Seneca, I am very fond of. Seneca says: "*Non quia difficilia sunt non audemus, sed quia non audemus sunt difficilia*", which can be translated as follows: the reason why we do not dare is not because the problems are difficult, but rather, problems are difficult because we do not dare.

Thank you for your attention.

ENERGY SECURITY IN EUROPE AND TURKEY - IMPACTS AND INTERDEPENDENCIES

Antje NÖTZOLD[*]

STARTING SITUATION

First of all, I will like to point the attention on the starting situation of the European Union before moving on to the role that Turkey as a possible energy corridor could play for ensuring Europe's energy supply. With regard to the regional distribution of world crude oil and natural gas the EU's situation is not a very comfortable one. While being the world's third largest consumer region for both oil (around 19 %) as well as natural gas (18 %) the European Union only holds a marginal reserve base with 1.4 % of world's crude oil and 3.1 % of world's natural gas reserves.[1] As a consequence the gap between the domestic production and the demand of both fossil fuels rises. So Europe is and will for the foreseeable future remain highly dependent on imported oil and natural gas. In 2004 the OECD Europe (which includes Norway as a main oil and gas producer) needed to import already 79 percent of oil and 40 percent of natural gas. Even with improvements regarding energy efficiency and consolidated efforts for renewable energy sources this percentage will increase up to 92 percent import dependency for oil and 63 percent for natural gas in 2030 according to estimations of the International Energy Agency (IEA) because of both rising demand and shrinking indigenous production capacity first and foremost in the North Sea. Especially the demand of natural gas, which will increase in huge amounts in the EU until 2030, will need to be supplied through additional imports. However the physical existence of both fossil fuels will not be the challenging aspect within the next decades as present reserves are enough

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[1] By definition reserves are these parts of raw material, which existence is proofed and which can be exploited profitably with the current technological capabilities. On contrary resources are these parts of raw material, which existence is proofed but which exploration is not profitable or not possible with the current technological capabilities respectively which existence is expected because of seismic analyses.

for another 40 years of production at current level for oil and 67 years for natural gas and additionally resources and non-conventional oil and natural gas might become economically useable. Therefore the problem lies in the regional distribution and transport possibilities.

The origins of the current European imports emphasize a still lasting concentration of EU's oil supply on the Middle East and natural gas supply on Russia. Such dependencies do not only include risks for the economy of the import country. Moreover they could negatively affect the political flexibility and number of political options within the foreign and security policy. Therefore the EU seeks to diversify the origins and transport routes of the imported fossil fuels. While oil is traded worldwide and a spot market exists, which makes counterbalancing of supply failures easier, natural gas is transported mainly by pipeline, which are inflexible and to costly over long distances. LNG (liquefied natural gas) might break up the established regional gas markets as it could lead to a small spot market and more flexibility in gas distribution as well. So especially Europe could get access to new suppliers for natural gas, but until now only a few LNG-Terminal exist and are planned to build in Europe. This means most of the natural gas will still be imported by pipeline within long term contracts. Nevertheless Europe is situated very comfortable, as it is located close to the huge natural gas reserves of Russia, the Caspian region as well as North Africa and the Middle East.

The Middle East, the Caspian basin and Western Russia together, which are called the „strategic ellipse", host round about two thirds of the conventional crude oil and natural gas reserves of the world. So the south-eastern EU neighbourhood country Turkey is not only located close to major reserves of oil and natural gas, too. Moreover the country is situated between the "strategic ellipse" and Europe. Even so this "strategic ellipse" is anything else than free of instabilities and problems, it will unavoidably be the most important import region in the future. Nevertheless it contains the reserves of Russia, which has an own complex system of pipeline to export its resources to Europe. Central Asia can also export its natural gas mostly through Russian pipelines at the moment. In addition to that Russian control the Middle East is not connected to Europe via pipeline yet, even it hosts around 40% of the worldwide natural gas reserves.

TURKEY AS ENERGY CORRIDOR

Especially with regard to the Caspian states and Middle Eastern countries, which will be crucial for Europe's diversification affords, Turkey is not only a large regional investor but also shares historical and economic ties with the countries of the region. Furthermore the country is aware of the today's challenge to guarantee an affordable, secure and uninterrupted flow of

hydrocarbons. Therefore Turkey promotes the efforts of EU member states to diversify and get more independent from Middle Eastern oil and Russian natural gas with the Caspian reserves as an alternative source for Europe. As a result it is one of the pillars of the Turkish energy strategy to develop an East-West-Energy-Corridor through Turkey. The oil pipeline Baku-Tbilisi-Ceyhan is a prominent example of the possible strategic role of Turkey as a transit country, because it is an alternative route for Caspian oil to the world market without touching Russia or Iran. Other parts of the East-West-Corridor are:

- A natural gas pipeline Baku-Tbilisi-Erzurum, with entails shipping Azeri gas from a main field in the Caspian Sea to Turkey. This passage is constituted to be the first element of a Trans-Caspian-Gas-Pipeline, which could carry Kazak and Turkmen natural gas to Turkey and further on to the Western markets.
- The Kirkuk-Ceyhan Pipeline exports northern Iraqi oil. Next to this oil pipeline from Iraq, Turkey is interested to develop the natural gas reserves in northern Iraq, too. This gas could be connected to the Turkish grid quiet easily by a pipeline parallel to the one for oil.

The purpose of the intended East-West-Energy-Corridor is to transport oil and natural gas form the landlocked Caucasian and Central Asian countries to Western markets. By establishing new alternative routes the dependency on a single route or specific transit country should be reduced. Considering its situation explained above Europe unsurprisingly seeks quiet urgent to diversify the routes and sources of its fossil fuel imports. The specific Turkish aims by fostering the East-West-Corridor through Turkey are of cause to diversify and secure its own energy supply; furthermore to strengthen the independency and economic prosperity of the Caspian states; to be an investor and having a growing role in the oil and natural gas sector of the Caspian region and therefore extend its regional influence. Last and not least Turkey seeks to be a major transit country for energy flows to Europe and so to be in the centre of European efforts to develop alternative ways of accessing Caspian and Middle Eastern natural gas supplies.

As important as the development of new sources for imports is the transfer of the oil and natural gas to the European market. Taking into consideration that oil could be transported by tanker from Ceyhan its transfer is not very problematic. But as most of the central and eastern European states do not have LNG-Terminal, natural gas has to be transported to the relevant European markets by pipelines. For this purpose Turkey is involved in different transport projects for Europe, which do not compete with each other as they aim at different parts of the European market – the Balkan states, south-eastern Europe, central Europe or south Europe. One well advanced project is the

expansion of the Greek-Turkish Inter-Connector into a Turkey-Greece-Italy Inter-Connector. This connection is strategic as it is envisaged, that it would be able to carry gas from Turkey to Italy and the other way around from Italy to Turkey, too. So it would serve as a link between two main supply systems – North Africa and Middle East plus Caspian – and increases supply flexibility for both South Europe and Turkey. Another planned connection to Europe is the Nabucco Pipeline, which should carry natural gas from Turkey through Bulgaria, Romania and Hungary to Austria and thus develop a new route of natural gas supply for the so far from Russian supply dependent central and eastern European states. Even Nabucco would stand for a significant improvement in central and eastern European supply alternatives with natural gas. There are still uncertainties, if this pipeline will be built, as Russia presses ahead with a competitive project passing nearly parallel until Hungary but will link Blue Stream – and thus once more Russian natural gas – with Europe.

Next to East-West approach, there are some pipelines and projects that establish also a North-South-Transport-Corridor in Turkey.

- The Blue Stream pipeline pass natural gas from Russia through the Black Sea to Samsun on the northern shore of Turkey and should be extended to Ceyhan, where the gas might by shipped as LNG or pass on in an even further extended pipeline to supply Israel.

- The south Russian and Central Asian oil transported by Russian pipelines mostly aim to the Black sea and is shipped on through the Bosporus to the world market. Especially the overload of this maritime channel hinders the capacity extension of the Caspian-Consortium-Pipeline, which is one route to export Caspian oil. In combination with the Turkish security and overload concerns at the Bosporus an alternative route is crucial to expand the flow of oil from this region to the world market. One possibility is the pipeline Samsun-Ceyhan, with would bypass the Bosporus, reduce the traffic of tankers and could lead Russian and Kazak oil through Turkey to processing facilities or to the world market.

An additional North-South-Corridor through Turkey would develop supplementary possibilities to export Caspian, Central Asian and Russian oil and natural gas to the world market and strengthen Turkey's role as key transit country.

CONCLUSION

Turkey is a natural transit corridor for energy resources as it is situated between the EU with its rising import demand on the one side and the strategic Caspian region as well as the Middle East with huge oil and natural gas reserves on the other side. Taking the capacities of the Baku-Ceyhan, the Kirkuk-Ceyhan

and the Samsun-Ceyhan pipeline – after it is established – as well as the oil transported by tanker through the Bosporus into account 6 till 7% of the global oil supply will transit Turkey in 2012. Even so oil pipelines through Turkey still do and will continue to play a major role in the global supply system. For the European Union their role is useful and important but not vital considering oil supply as this fossil fuel can be transported flexible. If you look at the European supply security with natural gas the picture is more complex and less flexible as explained before and Turkey's current and potential role is much more fundamental.

At the same time security of supply and especially diversification of import sources of Turkey and EU are linked and not just a one-way-street towards Europe. It is in the Turkish interest, too, to become the so called "4th Artery of EU's natural gas supply" after Russia, Algeria and Norway. For EU Turkey is essential to diversify their import sources and in this way raise their security of supply through spreading the risk of supply failures as expressed in an European Commission Working document: "Turkey is of strategic importance for the security of energy supplies to the EU, lying at the crossroad of various existing and future pipelines carrying both oil and gas from many core producer regions, namely Russia, the Caspian Sea, the Middle East and North Africa."

KÜRESEL ENERJİ POLİTİKALARINDA BORU HATLARININ ÖNEMİ VE TÜRKİYE

Cenk PALA[*]

GİRİŞ

Bu bölümde, petrol ve doğal gazın dünya enerji dengesindeki yeri ve önemi ele alınarak, Orta Asya ve Hazar Bölgesi enerji kaynaklarının rezerv, üretim ve ihracat potansiyeli ile Türkiye üzerinden Avrupa'ya aktarılması amacıyla geliştirilen boru hattı projelerinin gelişimi ve üç kritik bölge "Orta Asya-Balkanlar-Avrupa" enerji arz güvenliği bakımından önemi analiz edilecektir.

1. DÜNYA ENERJİ DENGESİ VE GELECEĞİNE GENEL BİR BAKIŞ

Hiç bir yenilenebilir enerji kaynağının ticari ölçekte petrol ve doğal gaz ile en azından önümüzdeki 60 ve hatta 100 yıl içinde gerçek anlamda rekabet edemeyeceği bugün genel kabul görmüş bir olgudur. Gelişmiş ülkeler ile dünya iktisadi ve finansal sisteminin teknolojik alt yapısı "fosil yakıt"lara dayanmaktan vazgeçmediği müddetçe, bu ülkelerin bunların üretildiği bölgelere bağımlılıkları da artarak sürecektir.

Bugün 6 milyarı çoktan aşmış olan dünya nüfusunun, 2020'ye kadar yılda % 1.4'lük bir artışla 8 milyarın üzerine çıkması ve 2050'ye kadar da 10 milyara

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[*] Dr., BOTAŞ Strateji ve İş Geliştirme Daire Başkanlığı, Ankara. Bu çalışma, "Orta Asya-Türkiye ve Balkanlar: Avrupa Yeni Boru Hattı Güzergahını Seçiyor", Gamze Kona (der.), **Uluslararası Çatışma Alanları ve Türkiye'nin Güvenliği**, İstanbul, IQ Yayıncılık, 2005, s. 473-537 ve 16 Haziran 2005'de TSK Harp Akademileri Stratejik Araştırmalar Enstitüsü (SAREN) tarafından düzenlenen "ABD'nin Irak'tan Çıkış Senaryoları" konulu konferansta sunduğumuz tebliğe referansla, Avrasya Dosyası "Türkiye-ABD İlişkileri" Özel Sayısı (Cilt 11, Sayı:2, 2005, ASAM, Ankara:184-211) için hazırlanan **"Enerji Perspektifinden Türkiye-ABD İlişkilerinin Yeni Boyutu: Irak'ın Geleceğine İlişkin Bir Senaryo Denemesi"** başlıklı iki makalenin gözden geçirilerek geliştirilmiş halidir. Burada zikredilen tüm görüşler sadece yazarına ait olup, BOTAŞ Genel Müdürlüğü ve/veya ETKB'yi hiç bir şekilde bağlamaz.

ulaşması beklenmektedir. Bu artışın ana kaynağı gelişmekte olan ülkelerdir. Söz konusu nüfus patlaması ve artan gelir düzeyinin etkisi, dünya toplam enerji tüketimine doğrudan yansıyacaktır: 2005 yılı sonu itibarıyla 10.5 milyar ton petrol eşdeğeri (TPE)'ne ulaşan dünya ticari enerji tüketiminin, 2003-2030 döneminde nüfus artışının üzerinde bir trend izleyerek yıllık % 1.6'lık artış kaydetmesi ve 2010'da 12.4 milyar TPE'ye, 2020'de 14.4 milyar TPE'ye, 2030'da ise 16.3 milyar TPE'ye ulaşması beklenmektedir. Bu talep artışının 2/3'sinden fazlası gelişmekte olan ülkelerden kaynaklanacaktır.[1]

Tablo 1. Dünya Birincil Enerji Tüketiminde Yakıt Payları, 1973-2020 (%)

	1973	2005	2010	2020
Petrol	53	36.4	39	38
Kömür	18	27.8	28	29
Doğal gaz	16	23.4	24	25
Fosil Yakıtlar	87	87.6	91	92
Nükleer	1	5.9	6	4
Hidroenerji	2	6.3	3	3
Diğer Yenilenebilirler*	10	0.2	1	1

* Hidrolik hariç, güneş, rüzgar, gel-git, jeotermal, geleneksel ve modern biyolojik yakıtlar.
Kaynak: IEA (1982:65), IEA (1998a), IEA (2001), BP (2006:41).

Tablo-1, özellikle gelişmiş ülkelerin petrol krizleri sonrasında uyguladıkları sanayileşme, enerji ve teknoloji politikalarının yansıması olarak, 1973'de % 53 ile dünya birincil enerji tüketiminde en üst düzeye ulaşan petrol payının, 2005 sonu itibarıyla % 36.4'e gerilediğini göstermektedir. Fosil yakıtlar arasındaki ikamede kömür ve doğal gaz paylarının önemli ölçüde artarak, global enerji tüketiminden yaklaşık aynı oranda pay aldıkları gözleniyor. Fosil yakıt dışı enerji kaynakları arasında ise en büyük katkının nükleer enerji tarafından yapıldığı görülmektedir. Bu süreçte değişmeyen tek şey fosil yakıt bağımlılığıdır: 1973'de global enerji tüketiminin yaklaşık % 87'sini sağlayan fosil yakıtların payı, 2005'de yani 32 yıl sonra bile, hala % 88'ler düzeyindedir.

Aynı tablodan, fosil yakıtların 2020 dünya enerji tüketiminin de en az % 92'sini karşılamasının beklendiği görülmektedir. Önümüzdeki 20 yıl dünya ülkelerinin ne fosil yakıt ne de kömür tüketiminden kolayca vazgeçemeyeceklerini söylemek mümkündür. Üstelik, diğer fosil yakıtların

[1] BOTAŞ (2003), Dış İlişkiler ve Strateji Geliştirme Daire Başkanlığı, **Avrupa'ya Açılım Stratejisi**, Ankara, BOTAŞ.

"düşme" eğilimine girip, giderek daha pahalı hale gelecekleri 2050'lerden sonra, tıpkı petrol krizlerinin ardından yaşanan gelişmeler gibi yine kömürün "dengeleyici kaynak" olarak stratejik önemini arttırması beklenebilir.

Uluslararası Enerji Ajansı'nın 2020'ye kadar dünya enerji dengelerini inceleyen kapsamlı raporuna göre[2], hem gelişmiş hem gelişen ülkelerde kömür, üretim alanlarının yakınında kullanılmasından kaynaklanan düşük maliyet nedeniyle, özellikle elektrik üretimindeki önemini koruyacaktır. Boru hattı sistemlerinin mevcut olduğu ya da kurulabileceği yerlerde ise yeni elektrik santralleri gibi pek çok uygulamada yakıt seçeneği olarak daha çok doğal gazın tercih edileceği anlaşılmaktadır. Bir anlamda doğal gaz, bugün bir duraklama dönemi geçiren nükleer enerji tekrar büyük oranda devreye girene kadar, yani 2050'ler sonrasına kadar, özellikle çevresel açıdan bir "geçiş yakıtı" görevi üstlenecektir.

Tablo'den, 20. Yüzyıla damgasını vuran petrolün, dünya enerji dengesinde en büyük paya sahip yakıt olma özelliğini önümüzdeki 20 yıllık dönemde de koruyacağı anlaşılmaktadır: Bugün global enerji tüketiminin % 36.4'ünden sorumlu olan petrolün toplamdaki payı, 2020'de % 38'e çıkacaktır.

Uluslararası Enerji Ajansı, petrolün 2020'ye kadar, özellikle kara ve hava taşımacılığı alt sektörlerinin hızla büyüyen enerji talebinin karşılanmasında artan oranda kullanılacağına işaret etmektedir.[3] Yapılan projeksiyonlara göre, 2020'ye kadar dünya petrol tüketiminde gerçekleşecek yaklaşık 2 milyar ton'luk (15 milyar varil) ilave artışın % 59'u "ulaştırma" sektöründen kaynaklanacaktır. Günümüzde, ulaştırma sektörünün dünya genel enerji tüketimindeki payının % 20 olduğu, bunun da 3/4'ünün karayolu taşımacılığına gittiği ve karayolu taşımacılığında temel yakıt olarak hala petrol kullandığı dikkate alındığında; hidrojen, elektrik ya da metanol/etanol gibi araçlarda petrolü ikame edecek ekonomik bir alternatif yakıt bulunamadığı veya bir teknolojik devrim yaşanmadığı sürece, bu yüzyılın en azından ilk yarısında petrolün öneminin azalacağını ileri sürmek mümkün değildir. Ayrıca, Asya ve özellikle Çin'in katlanarak artan enerji ihtiyacı devam ettiği sürece petrol dünya enerji dengesinin en önemli bileşenlerinden biri olmaya devam edecektir. Dünyanın "petrol açlığı", yeni bir kaynak olarak Hazar petrollerinin dünya pazarlarına sunulmasının arkasındaki en önemli motiflerden biridir.

Önümüzdeki yirmi yılda doğal gaz tüketiminde meydana gelecek artışın kilit sektörü bugün % 35 paya sahip olan elektrik sektörü olacaktır. Özellikle Kombine Çevrimli Doğal Gaz Türbinleri'nin ısıl verimliliğinde beklenen sürekli iyileştirmeler ve çevre dostu bir yakıt olması nedeniyle 2020'ye kadar yeni elektrik santrallerında daha çok doğal gazın tercih edileceği, buna bağlı

[2] Bkz. World Energy Outlook, OECO/IEA Puby Paris, (1998a), 19-20.
[3] **Ibid**.,

olarak santrallardan kaynaklanacak doğal gaz talebinin % 4'lük yıllık ortalama artış hızıyla büyüyeceği tahmin edilmektedir.[4]

Petrol ithal eden ülkelerin 2020'ye kadar temel arz kaynağı olarak Orta Doğu'ya bağımlılıklarını sürdürmeleri beklenmektedir. 2010'dan sonra ise konvansiyonel olmayan kaynaklardan sıvılaştırılmış yakıtın (petrollü şist, petrollü kum ile kömür, biokütle veya biyogazdan dönüştürülen kaynaklar vb) önem kazanmasıyla, 2010-2015 döneminde fiyatların daha da yükseleceği tahmin edilmektedir. Orta Doğu petrolüne bağımlılık ve konvansiyonel olmayan sıvı yakıtların kullanımına yönelim, bugün yaşanana benzer şekilde, söz konusu dönemde arz darboğazları ve petrol fiyat şoklarını gündeme getirebilecektir.

Tablo 2. Dünya Elektrik Üretiminde Yakıt Payları, 1973-2020 (%)

	1973	2003	2010	2020
Kömür	**38**	**39**	**38**	**38**
Petrol	**25**	**7**	**8**	**7**
Doğal gaz	**12**	**19**	**24**	**30**
Fosil Yakıtlar	**75**	**65**	**70**	**75**
Nükleer	**3**	**17**	**12**	**8**
Hidrolik	**21**	**17**	**17**	**15**
Diğer Yenilenebilirler	**1**	**1**	**1**	**1**

Kaynak: *IEA (1998a:64-Tablo 6.1), IEA (2003: 24) ve IEA (2004: 86).*

Elektrik üretiminde, 2020-2030 yıllarına kadar dünya çapında doğal gaza büyük bir yönelim beklenmekle birlikte; hidroliğin sınırlarına gelinmesi, nükleer durgunluk dönemine girilmesi ve ekonomikliği tartışmalı yenilenebilir kaynakların sınırlı katkısı nedeniyle, kömür başlıca kaynak olmayı sürdürecektir 1973-2003 döneminde özellikle nükleer enerjinin devreye girmesiyle beklenen sıçramayı yapamayan doğal gazın ise, nükleer duraklama sürecinin devam edeceği önümüzdeki yirmi yıl içinde payını sürekli arttıracağı ve 2020'de bu temiz, ucuz, verimi yüksek yakıtın dünya elektrik üretiminin % 30'u gibi bir oranını karşılayacağı anlaşılmaktadır. Doğal gazda tümüyle ithalata bağımlı olan Türkiye'de ise doğal gazın elektrik üretimindeki payı OECD bölgesinden çok önce, daha bugünden % 40'lar civarına çıkmıştır.

[4] **World Energy Outlook, Assessing Today's Supplies to Fuel Tomorrow's Growth, 2001 Insights**, OECD/IEA Pub., Paris, (2001), s.134-6.

2. HAZAR HİDROKARBON ÜRETİMİNİN DÜNYA PAZARLARINA ULAŞTIRILMASI

Bölge'nin boru hattı sistemi Sovyetler Birliği zamanında inşa edilmiş olup, çoğunlukla Rusya Federasyonu'na hizmet vermektedir. Bu sistem günümüz petrol üretimini günümüz ihracat merkezlerine taşıyacak şekilde tasarlanmamış, temelde iç piyasa ve komünist Doğu Avrupa'nın beslenmesi hedeflenmiştir. Ayrıca, mevcut haliyle Hazar Bölgesi'nde veya yakınında bulunan boru hatlarının özellikle bakımsızlık nedeniyle tümüyle eskidiği ve Hazar Dörtlüsü'nün ihraç gereksinimini karşılamaktan uzak olduğu da eklenmelidir. Bunun dışında, Rusya Federasyonu'nun 65 bin km uzunluğundaki petrol boru hattı sistemini kontrol eden *Transneft* şirketi, eski Sovyetler Birliği devletlerine kendi taşıma ağından daha fazla ihraç kotası ayırma konusunda istekli değildir. Benzer şekilde, 153 bin km'lik doğal gaz boru hattı ağının da Rus *Gazprom* şirketinin kontrolü altında olması nedeniyle, özellikle Türkmenistan kendi gazını Rusya üzerinden ihraç etme konusunda zorlanmaktadır. Üstelik, Gazprom, kendi gazını batı Avrupa'daki önemli piyasalara ihraç ederken, Türkmen gazını, Ukrayna ve Gürcistan'a yönlendirmekte; bu ise Türkmenistan'ın zaten ödenmemiş gaz faturaları nedeniyle borç batağına batmış ülkelere yapılan bu tip satışlar nedeniyle kazançlı çıkmasını engellemektedir.[5]

Özellikle Kazakistan ve Azerbaycan, yeni taşıma seçeneklerine şiddetle gereksinim duyacaklardır. Türkmenistan'dan yapılması planlanan ihracat, gelecekte Azerbaycan ve Kazakistan ihracatının bir parçası olacakmış gibi görünse de, çeşitli sorunlar ve yeni dengeler nedeniyle Türkmenistan'ın kendi petrolüne ayrı bir ihraç güzergahı bulmak için çabalayacağı anlaşılmaktadır. Mevcut durumda Türkmenistan, yaklaşık 20 bin varil/gün (1 Milyon ton/yıl) düzeyindeki ham petrol ihracatı için İran ile takas (*swap*) yöntemini kullanmaktadır. Fakat bu yöntem, ülkenin 2010'da ulaşılması beklenen 5 Milyon ton/yıl'lık ihraç kapasitesi için pratik bir seçenek değildir. Hazar Dörtlüsü içinde özellikle Türkmenistan, piyasalara açılma bakımından en kötü konumda bulunan ülkedir. Boru hattı güzergahlarının büyük bir kısmının muhtemel rakiplerin topraklarından geçmesi gerekmektedir. İran üzerinden geçecek güzergâhın ise günümüz koşullarında politik olarak savunulması imkansızdır.

Hazar'ın ihracat potansiyeline cevap verebilmek için, bölgede faaliyette bulunan uluslararası enerji şirketleri ve hükümetler çeşitli alternatif boru hattı güzergâhları araştırmakta ve önermektedirler. Bazı seçenekler politik açıdan tercih edilmelerine rağmen, ekonomikliği tartışmalıdır. Enerji şirketlerine daha

[5] Pala Cenk, Boru Hattı Oyununda Bitmeyen Senfoni; Hazar'ın Hukuki Statüsü, **Petro Gas**, Ankara, Sayı: 23, Mayıs-Haziran 2001, s.43-48.

cazip gelen bazı seçeneklerin ise politik yönden yapılabilirliği bulunmamaktadır.

Orta Asya ve Hazar Bölgesi enerji kaynakları ile ilgilenen pek çok Batılı ülke açısından en önemli faktörlerden birisi, denize kapalı sahalarda yer alan hidrokarbon kaynaklarını büyük piyasalara taşıyacak, makul fiyatlı ve güvenilir bir boru hattı sisteminin kurulabilirliğidir. Söz konusu sistemin inşa edilmesi hem büyük miktarda sermaye gerektirmesi, hem de Bölge'nin karmaşık jeopolitiği nedeniyle basit bir mesele değildir.

Hangi boru hattı inşa edilirse edilsin, bundan en büyük zararı, petrol fiyatlarının düşmemesi için mücadele eden OPEC görecektir. Hazar Bölgesi'nden gelecek ilave petrolün dünya petrol fiyatları üzerinde büyük bir baskı oluşturacağı aşikârdır. Bu nedenle, OPEC'in en güçlü ülkesi olan Suudi Arabistan'ın, çok uluslu şirketlerin bu ülkeye geri dönmelerini kolaylaştıracak birtakım adımlar atması kuvvetle muhtemel gözükmektedir. Bu yönde bir yaklaşım, kuşkusuz, Hazar Bölgesi'ne yönelik beklentilerin tamamıyla değişmesine neden olabilecektir.

Dünyadaki en önemli petrol oyuncusu olan ABD, Hazar petrolleri dünya piyasalarına ulaştığı zaman petrol ithal eden ülkelerle birlikte, bu durumdan avantaj sağlayacaktır. Burada tek istisna, ABD'nin politik nedenlerden ötürü karşı çıktığı İran boru hattıdır. Irak müdahalesine kadar geçen üç yıllık dönemde yumuşamaya başlayan ABD-İran ilişkileri, İran'ın nükleer silahlar konusundaki tutumu nedeniyle yeniden gerginleşmişse de; sahip olduğu enerji zenginliği ile İran-ABD ilişkilerinin sonsuza dek böyle sürmesini beklemek mantıklı gözükmemektedir.

Genel olarak, bölge doğal gaz ihracat olanaklarına bakıldığında ilk göze çarpan faktör, Hazar'ın temel uluslararası pazarlara olan uzaklığıdır. Esasen, ham petrol boru hattı güzergâhlarının karşı karşıya bulunduğu zorluklar, doğal gaz boru hatları için de geçerlidir. Mevcut tek çıkış yolu Rusya'nın kontrolündeki eski boru hattı sistemidir. Orta ve uzun dönemde artması muhtemel talep nedeniyle Avrupa, Pakistan, Hindistan ve Güneydoğu Asya'ya boru hatları yapılması gündeme gelebilecektir. Çeşitli güzergâh alternatifleri arasında tartışılan ihraç güzergâhı da Türkiye üzerinden Avrupa'ya uzanmaktadır.

Doğu-Batı Enerji Koridoru'nu geliştiren Türkiye ve ABD, tercihini Hazar geçişli bir hat kurulmasından yana kullanmaktadırlar. ABD'nin İran'a uyguladığı yaptırımlar ve Hazar'ın statüsünün belirlenmemiş olması, özellikle Türkmen doğal gazının İran üzerinden Türkiye'ye taşınması planları önündeki en önemli engeldir. Türkiye'nin tercihi olan Hazar geçişli alternatif ise, özellikle Türkmenistan'ın Türkiye ile imzalamış olduğu anlaşmadan kaynaklanan yükümlülükleri yerine getirmemesi ve boru hattını yapacak

konsorsiyumun yetkilendirme belgesini uzatmaması nedeniyle şimdilik askıdadır. Yine de, eğer Azerbaycan, Türkiye, Gürcistan ve Türkmenistan biraraya gelerek, Azeri gazını Türkiye üzerinden Avrupa'ya taşıyacak Şah Deniz Projesi'ni, Hazar Geçişli boru hattının ilk basamağı olarak görür ve ortak bir çözüm üretirlerse, bu türden tüm sorunlar rahatlıkla çözümlenir. Bu çerçevede, uzunca bir aradan sonra, Ekim 2001'de Azeri ve Türkmen yetkililerin boru hattının kapasitesi hakkındaki görüşmeleri yeniden başlatmış olmaları olumlu bir adımdır.

3. DOĞU-BATI ENERJİ KORİDORU'NUN İLK BASAMAĞI OLARAK BAKÜ-TİFLİS-CEYHAN HAM PETROL BORU HATTI PROJESİ (BTC HPBH)

Hazar Denizi'ndeki "zengin" hidrokarbon rezervlerinin uluslararası piyasalara ulaştırılması meselesi son 14 yıl boyunca Türk ve Dünya kamuoyunun yakından takip ettiği önemli bir gündem maddesi olmuştur. BTC HPBH Projesi'nin hayata geçirilmesinde Hazar Denizi'ndeki Azeri, Çırak ve Güneşli sahalarında petrol arama, üretim ve paylaşımı konusunda Azerbaycan Devlet Petrol Şirketi SOCAR ile yabancı petrol şirketleri arasında 20 Eylül 1994'de Bakü'de imzalanan "Azerbaycan Petrollerinin Üretim Paylaşım Anlaşması" ile *Azerbaijan International Operating Company* (AIOC)'nin kurulmasının kritik bir rolü vardır. Ana İhraç Boru Hattı inşasının uzun bir süre gerektireceğini dikkate alan AIOC Konsorsiyumu, Haziran 1995'de, ilk yıllarda üretilecek ham petrolün (*Erken Petrol*) mevcut altyapının kullanımı yoluyla ihraç edilmesine karar vermişti.

O dönemde petrol şirketlerinin hareketlerini iyi analiz edemeyen ve paniğe kapılan Türkiye, Ağustos 1995'de ham petrolün, "Batı güzergâhı" üzerinden, zamanla BTC'nin ana rakibi haline gelecek olan Supsa İhraç Terminali'ne (Gürcistan) ulaştırılmasını önerdi. Fakat Konsorsiyum, Ekim 1995'de, "Erken Petrol Üretimi"nin, Batı ve Kuzey (Rusya Federasyonu'nun Novorossisk limanı) güzergahları kullanılarak, iki hat halinde ihraç edilmesini kararlaştırıldı. Bu karar doğrultusunda, 1998 itibarıyla her iki güzergahtan 5 milyon ton/yıl düzeyinde ham petrol sevkiyatına başlandı. Fakat Kuzey Hattı'nın bir kaç kez kesintiye uğraması ve Temmuz 1999'da Çeçen savaşçılar tarafından patlatılması sonucunda bu hattan taşımacılık tamamen durdu. Bunun üzerine, hattın güvenliği meselesine öncelik veren tüm üreticilerin dikkati bir anda güvenli ve ekonomik bir alternatif sunan BTC Projesi'ne yöneldi.

BTC kapsamında, Bakü'den başlayıp Ceyhan'da son bulacak boru hattı ile başta Azeri petrolü olmak üzere bölgede üretilecek petrollerin Ceyhan'a taşınması ve buradan da tankerlerle dünya pazarlarına ulaştırılması planlanmıştı. Toplam uzunluğu 1776 km'yi (Azerbaycan 440, Gürcistan 260, Türkiye 1076

km) bulan ve 50 milyon ton/yıl (1 milyon varil/gün) maksimum taşıma kapasitesine sahip BTC boru hattı projesi, sadece Hazar petrolünün uluslararası piyasaya ihracı için emniyetli bir taşıma sistemi önermiyor, aynı zamanda hem ekonomik açıdan uygun hem de çevresel açıdan sürdürülebilir bir taşıma sistemi kurmayı planlıyordu.

Proje çerçevesinde, Dünya Bankası finansmanı ile müşavir PLE firmasına hazırlatılan fizibilite raporu 1997 sonunda tamamlanarak Ağustos 1998'de Banka tarafından onaylandı. Söz konusu fizibilite etüdünde, projenin teknik ve ekonomik yapılabilirliği irdelenmiş; bunun yanı sıra finansal ve hukuki yapılanmaya yönelik çeşitli model önerilerine de yer verilmişti. Ayrıca detaylı bir Çevresel Etki Değerlendirme Etüdü de hazırlanmıştı.

Projenin resmiyet kazanmasına yönelik çerçeve anlaşma niteliğindeki Hükümetlerarası Anlaşma-IGA 18 Kasım 1999'da İstanbul'da yapılan AGİT Zirvesi'ne paralel biraraya gelen Azerbaycan, Gürcistan ve Türkiye Cumhurbaşkanları tarafından, ABD Başkanı'nın da şahitliğinde imzalandı. Ayrıca, Ev Sahibi Ülke Anlaşması-HGA, Anahtar Teslim Müteahhitlik Anlaşması-TA ve Hükümet Garantisi Anlaşması-GG da burada parafe edildi.

3 Ekim 2000'de Azerbaycan, BTC Projesi'ni desteklemek üzere bir "Sponsor Grup" oluşturdu. 17 Ekim'de, AIOC üyesi 8 şirketten (SOCAR, BP, Unocal, Statoil, TPAO, Itochu, Ramco ve Delta-Hess) oluşan bu yeni grubun üyeleri "Sponsor Grup Finansman ve İşbirliği Anlaşması" imzalayarak, Ana İhraç Boru Hattı (Main Export Pipeline) Katılımcıları adını aldılar. MEP Katılımcıları, 17-18 Ekim 2000'de sırasıyla Azerbaycan ve Gürcistan ile "Ev Sahibi Ülke Anlaşmaları" 19 Ekim 2000'de ise Türkiye Cumhuriyeti ile "Ev Sahibi Ülke Anlaşması" ve "Hükümet Garantisi Anlaşması" ve BOTAŞ'la da "Anahtar Teslim Müteahhitlik Anlaşması" imzalandı.

Aralık 2000'de Ramco şirketinin AIOC konsorsiyumundaki tüm hissesi Devon Energy, Unocal ve Delta-Hess şirketleri tarafından satın alındı. Böylece değişen AIOC konsorsiyumundaki şirket payları, BTC Sponsor Grubu'na da yansıdı ve daha önce bu oluşuma katılmamış olan Devon Energy şirketi, Ramco'nun Sponsor Grup içindeki hisselerinin bir kısmını alarak gruba dâhil oldu. Ramco hisselerinin geriye kalanı Unocal ve Delta-Hess şirketlerine devredilmiştir. Devon Energy daha sonra Sponsor Grup'dan çekilmiştir. Gerek AIOC Konsorsiyumu gerekse Sponsor Grup liderliğini BP şirketi üstlenmektedir.

18 Ekim 2001'de Sponsor Gruba İtalyan petrol şirketi ENI'nin katılımı projenin geleceği açısından önemli bir dönüm noktası olmuştur. Böylece, ilk kez AIOC üyesi olmayan, yani taşınacak petrolün sahibi olmayan bir firma MEP Katılımcısı ünvanını aldı. ENI katılımının önemli bir diğer özelliği ise, BTC hattı ile Kazak petrollerinin de taşınmasının önünü açmış olmasıdır.

Çünkü ENI'nin alt kuruluşu olan Agip, Kazakistan'daki dev Kaşağan sahasının operatörü "Agip KCO Konsorsiyumu"nun lideri konumundadır.

Fransız Total, Japon Inpex, Amerikan ConocoPhillips firmalarının katılımı ve son olarak Nisan 2005'de sponsorlar arasındaki Unocal'ı satın alan ChevronTexaco'nun BTC Co.'ya katılımıyla Sponsor Grup içerisindeki şirketler ve payları zaman içerisinde değişmiş; 2006 yılı Ağustos ayı sonu itibarıyla hisse dağılımı Tablo 6'de verilmiştir.

Tablo 3: BTC Sponsorları (BTC Co. Hissedarları)

BP EXPLORATION (CASPIAN SEA) LTD.	***% 30.10***
SOCAR	***% 25.00***
CHEVRONTEXACO	***% 8.90***
STATOIL BTC CASPIAN AS	***% 8.71***
TPAO	***% 6.53***
ENI	***% 5.00***
TOTAL	***% 5.00***
ITOCHU OIL EXPLORATION (AZERBAIJAN) INC.	***% 3.40***
INPEX	***% 2.50***
CONOCOPHILLIPS	***% 2.50***
DELTA-HESS (BTC) LTD.	***% 2.36***

Kaynak: http://www.btc.com.tr/mep.html

MEP Katılımcıları, 1 Ağustos 2002'de, inşaat ve işletme faaliyetlerini yürütmek amacıyla BTC Co. ve finansman işlerinden sorumlu olmak üzere ise BTC Invest şirketlerini kurdu. BTC Co. üyelerince gerek Kazak petrolünün de BTC hattı ile taşınması, gerekse dış finansman sağlanması kapsamında yürütülen görüşmeler olumlu şekilde sonuçlanarak, 2004 başında Azeri-Çırak-Güneşli saha geliştirme işleri de dahil olmak üzere BTC'ye 2.6 milyar dolar tutarında kredi sağlanmıştır. BTC boru hattı inşaatının %30'u BTC Co.'daki hisseleri oranında şirketler tarafından ve geriye kalan %70'i ise uluslararası finansal kuruluşlarca karşılanmıştır.

Anahtar Teslim Anlaşması çerçevesinde müteahhit olarak görevlendirilen BOTAŞ, her biri projenin ana aşamalarını da temsil eden, "Temel Mühendislik" çalışmalarını 6 ay, "Detay Mühendislik" çalışmalarını 12 ay içinde tamamlamıştır. BOTAŞ, 10 Eylül 2002 itibarıyla resmi olarak başlatılan üçüncü ve son aşama "Arazi ve İnşaat" çalışmalarını tamamlamış ve 4 Haziran 2006'da

ilk tanker yüklemesi tamamlanan BTC boru hattı, resmi olarak 13 Temmuz 2006 tarihinde Ceyhan'da yapılan törenle faaliyete başlamıştır.

PLE Mühendislik firması tarafından yapılan fizibilite etüdünde projenin toplam sistem için yatırım maliyeti 2,4 milyar dolar olarak hesaplanmakla birlikte yüksek uluslararası çevre standartları nedeniyle toplam maliyet 2.9 milyar dolara çıkmıştır. Türkiye kesiminin tahmini maliyeti kamulaştırma dahil 1,4 milyar dolar olarak hesaplanmakla birlikte zor inşaat koşulları ve yüksek çevre standartları uygulanması nedeniyle 1.7 milyar dolarlık bir harcama söz konusu olmuştur. Türkiye kesiminin tüm finansmanı, Türkiye tarafından değil bizzat projeye iştirak eden şirketlerce karşılanmış olup, maliyet artışı konusunda BTC Co. ile yapılan görüşmeler neticesinde ilave harcamaların BTC Co. tarafından karşılanması kararlaştırılmıştır. Bu sayede, 1.4 milyar dolarlık Türkiye kesimi yatırım maliyetinin aşılması durumunda Türkiye'nin Hükümet Garantisi anlaşmasıyla taahhüt ettiği 300 milyon dolar'lık Hazine desteği devreye girmemiştir. Proje'nin anlaşılan işletme süresi 40 yıl olmakla birlikte, katılımcıların talep etmesi durumunda 10'ar yıllık dönemler halinde iki kez uzatılması mümkündür.

BTC Projesi'nden sağlanacak dolaylı kazançlar bir yana bırakılırsa, Türkiye'nin, bu Proje'den "geçiş vergisi ve işletmecilik hizmetleri" karşılığında, taşınacak kapasiteye bağlı olarak, 1-16. yıllar arasında 140 ile başlayıp 200 Milyon dolara ulaşan, 17-40. yıllar arasında ise 200 ile başlayıp 300 milyon dolar civarına çıkan bir yıllık gelir elde etmesi beklenmektedir. Özellikle 50 MT'luk maksimum yıllık kapasiteye ulaşıldığında BTC'den sağlanması beklenen gelirin, Irak hattından sağlanan gelirin üzerinde olacağı anlaşılmaktadır. Bu rakamlar, BTC'nin Türkiye açısından ekonomik önemini somutlaştırmaktadır. Hattın gerçekleşmesi ile geçiş ücreti ve sahalardaki payımızdan dolayı elde edilecek önemli ölçüde gelirin yanı sıra; taşıma maliyetlerinin minimuma indirilmesi, finansman ve navlun ücretlerinden sağlanacak tasarruf gibi nedenlerle daha ucuza ham petrol temin etmek de mümkün olacaktır. Böylece, BTC hattından alınacak petrol ile ithalata bağımlı Türkiye'nin enerji arz güvenliğine yapılacak katkı açısından ciddi bir avantaj tesis edilmiş olacaktır.

Ayrıca, inşaat aşamasında tüm hat boyunca yaratılan yaklaşık 21.000 kişilik toplam yeni istihdam ve iş olanakları sayesinde hem Türk özel sektörünün önü açılmış hem de hattın geçtiği bölgelerde ciddi anlamda ekonomik canlanma yaşanmıştır. İnşaat aşaması süresince kısa, orta ve uzun vadeli istihdam olanakları yaratılması açısından projenin, gerek boru hattı güzergâhı üzerinde gerekse deniz terminali mücavir alanlarındaki yerleşim birimleri için pek çok iş imkanı yarattığı görülmektedir. Ayrıca, devam etmekte olan sosyal ve çevresel yatırım programları ile de boru hattı ve deniz terminali

civarındaki genel çevre ve yerleşim alanlarına önemli bir takım dışsal faydalar sağlanmaktadır.

BTC hattı içinde ve Ceyhan terminalindeki ham petrol sayesinde, kriz zamanlarında arz esnekliği sağlamak üzere, Türkiye'nin stratejik petrol stok kapasitesi de artacaktır. Proje ile, Ceyhan terminali önemli bir uluslararası petrol piyasası merkezi ya da Akdeniz'in Rotterdam'ı haline gelirken, oluşturulan sinerji ile Mersin ve İskenderun limanları da canlanacaktır. Bugüne kadar siyasi, ekonomik, stratejik ve güvenlik bakımından en uygun çözüm olduğunu ispatlayan BTC, Türk Boğazları'ndaki aşırı trafik yükünden kaynaklanan geçiş risklerinin en aza indirilmesi sayesinde çevresel etkiler bakımından da açık ve önemli bir avantaj sağlayacaktır.

Ayrıca, Doğu-Batı Enerji Koridoru'nun en kritik ayağını oluşturan bu proje ile hem Türkiye'nin jeopolitik önemi artacak hem de Azerbaycan ve Gürcistan'ın siyasi ve iktisadi istikrarına katkı yapılacaktır. Proje ile Azerbaycan dünya genelinde sayılı üreticiler arasına girerken, Gürcistan kritik ve önemli bir geçiş ülkesi olarak ön plana çıkacaktır. Hattın geçeceği güzergâh Doğu ile Batı arasında bir enerji köprüsü oluşturacak ve önemlisi Avrasya bölgesinden dünya pazarlarına ham petrol ve doğal gaz nakledecek diğer boru hattı projelerine öncülük edecektir.

BTC, 13 Temmuz 2006'dan itibaren resmen faaliyete geçmiş bulunmaktadır. Kısa ve orta vadede, Batı enerji arz güvenliğinin en kritik parçalarından birisini teşkil edecek olan BTC'yi sırasıyla Azeri gazını Türkiye ve Avrupa'ya ulaştıracak Şah Deniz Doğal Gaz Boru Hattı Projesi ve Türkmen gazını Türkiye ve Avrupa piyasalarına taşıyacak Hazar Geçişli Türkmenistan-Türkiye-Avrupa Doğal Gaz Boru Hattı Projesi izleyecektir. Bu hatlar, bugün ikisi de hızla ilerleyen Türkiye-Yunanistan-İtalya ve Türkiye-Bulgaristan-Romanya-Macaristan-Avusturya (Nabucco) Doğal Gaz Boru Hattı projelerine bağlandığında koridor tamamlanacak ve Türkiye gerek petrol gerekse doğal gazın Batı piyasalarına aktarımı bakımından tam anlamıyla bir enerji terminaline dönüşecektir.

4. DOĞU-BATI ENERJİ KORİDORUNDA TÜRKİYE'NİN AVRUPA'YA AÇILMA STRATEJİSİ[6]

Genel olarak tüm dünyada ve özellikle de gelişmekte olan ülkelerde gözlendiği gibi, başta gaz olmak üzere enerji tüketiminde meydana gelen hızlı artışın ana nedeni ekonominin dinamik gelişimi, sanayileşme, nüfus artışı ve

[6] Emre Engür, "Doğu Batı Enerji Koridoru Doğal Gaz ile Tamamlanıyor: Botaş'ın Avrupa'ya Açılım Stratejisi", **Avrasya Dosyası Enerji Özel Sayısı**, Ankara, cilt:9, sayı.1, 2003, s.38-52, Botaş, Dış İlişkiler ve Strateji Geliştirme Daire Başkanlığı, **Avrupa'ya Açılım Stratejisi**, Ankara, 2003.

hızlı kentleşmedir. Bunlara ilaveten, çevresel faktörler ve enerji kaynaklarının çeşitlendirilmesi gibi hususlar da, özellikle doğal gaz kullanımının katlanarak artmasına yol açmaktadır. Bu çerçevede petrolün önemli bir ikamesi haline gelen doğal gaz, yenilenebilir kaynakların gelişim süreci boyunca kullanımı hızla artacak bir fosil yakıt olarak varlığını daha uzun süre devam ettireceğe benzemektedir.

21. yüzyılın enerji kaynağı olarak gösterilen doğal gaz, 1986'da Sovyetler Birliği ile imzalanan ilk gaz alım satım anlaşması ile Türkiye enerji portföyüne ve gündemine girmiş; 1987'de 500 milyon m^3 ile başlayan gaz tüketimi (yerli üretim dâhil) 2005 yılı sonu itibarıyla 27 milyar m^3'ü aşmıştır ulaşmıştır. Doğal gazın sektörel kullanımındaki yaklaşık % 58'lik pay (2005) ile de "elektrik üretimi", uzun süredir birinciliği kimseye kaptırmamaktadır.

Bugün Türkiye, 70 milyonu aşan dinamik nüfusu ile, yaşanan ekonomik krizlerin tüm olumsuz etkilerine rağmen güçlü bir sanayileşme süreci içindedir. Enerji talebindeki artışın doğrudan bir sonucu olarak, sektörde büyük ilave yatırımlar gerekmektedir. Enerji talebindeki önemli artışlar; sektör politikaları çerçevesinde yatırımların, kamu firmaları ile birlikte yabancı özel teşebbüsler ve yerli yatırımcılar tarafından gerçekleştirilmesi ihtiyacını doğurmuştur. Türkiye pazarının ihtiyaç duyduğu an gerekli enerjiye sahip olabilmesini sağlamanın yanı sıra, Batı'ya entegrasyonunda önemli bir katkısı olacak "Doğu-Batı Enerji Koridoru"nun tesis edilmesi sürecinde doğal gazın rolü kesinlikle gözardı edilemez. Bu çerçevede, Türkiye, bugüne kadar 6 ayrı ülke ile 8 adet uzun dönemli doğal gaz alım-satım anlaşması imzalamıştır. İçinde bulunulan dönem itibarıyla, Türkiye'nin doğal gaz talebi 6 ayrı anlaşma ile karşılanmaktadır; bunlar Rusya Federasyonu ile sırasıyla 6, 8 ve 16 milyar m^3/yıl için imzalanan üç ayrı anlaşma, İran ile yapılan 10 milyar m^3/yıllık anlaşma ve Cezayir ile 4 milyar m^3/yıl, Nijerya ile 1.2 milyar m^3/yıl olmak üzere doğal gaz eşdeğeri LNG (sıvılaştırılmış doğal gaz) anlaşmalarıdır.

Sanayi, elektrik, konut sektörlerinden kaynaklanan talebin karşılanması amacıyla, sözleşmeye bağlanmış doğal gaz alımlarının zamanında gerçekleştirilebilmesi için pek çok proje yatırım programına alınmıştır. Kuşkusuz, kontratı yapılan gaz miktarlarının tüm ülke çapında kullanımının sağlanabilmesi önemli yatırımlar gerektirmektedir. Türkiye mevcut doğal gaz sisteminin modifikasyonu ve geliştirilmesi ile yeraltı doğal gaz depolama projelerinin yanı sıra, Azerbaycan, Türkmenistan, Mısır ve Irak ile doğal gaz alımına yönelik çalışmalar program dahilinde yürütülmektedir. Mevcut projeler çerçevesinde tüm kaynaklardan gaz alımına başlanmasıyla birlikte, 2010'lu yıllarda önemli gaz miktarlarının Türkiye'ye giriş yapması, üstelik Avrupa'daki talep merkezlerinden gelecek olumlu sinyaller neticesinde bu alımların belki bir miktar da çeşitlenerek (orta vadede Mısır+Suriye hatta Irak ve Kazak gazlarının bu denkleme dahil olması gibi) daha da artması söz konusu olabilecektir.

Doğal gaz temini kapsamında yurtiçinde yürütülen tüm bu çalışmalar, arz güvenliği ve devamlılığının sağlanması ile kaynak çeşitlendirmesini hedefleyen anlaşmalar ve talep yoğun Avrupa ülkeleriyle yürütülen görüşmelerin daha büyük bir anlam kazanabilmesi için dikkatimizi Avrupa doğal gaz pazarına çevirmek faydalı olacaktır.

4.1. Avrupa Gaz Pazarı ve Türkiye'nin Stratejisi

Avrupa Birliği, günümüzde dünyanın en büyük enerji tüketicilerinden biri olmanın yanı sıra, 1990'dan beri sürekli kaydettiği yıllık ortalama % 1 büyüme oranı ile en büyük enerji ithalatçısı konumundadır. *Observatoire Méditerranéen de L'énergie* (OME) ve IEA gibi organizasyonların bağımsız olarak, ancak AB komisyon raporlarına girecek şekilde yürüttükleri çalışmalara göre, 2005'de 25 üye ülkede gerçekleşen 471 milyar m³'lük doğal gaz kullanımının, 2010'da 500 milyar m³'e ve 2020'de ise % 2.1'lik ortalama yıllık artış hızıyla 600 milyar m³'e çıkması beklenmektedir. AB üyesi olmayan ve Türkiye'nin de içinde yer aldığı 'genişleme programı' kapsamındaki ülkelerde (AB üyesi olmayan Norveç ve İsviçre dahil), 20 yıl içerisinde beklenen yıllık artış hızı ise % 4.2 oranındadır. Bu durumda, toplam Avrupa talebinin 2010'da 642 milyar m³'e ve 2020'de 777 milyar m³'e ulaşması söz konusudur.[7]

Doğal gazın birincil enerji tüketiminde hızla yükselen payı, özellikle kıta Avrupa'sında giderek azalan üretim ve buna karşılık talepte gözlenen yükseliş, Avrupa'nın doğal gaz ithalatına bağımlılığını sürekli arttırmaktadır. Genel olarak, AB üyesi ülkelerde kullanılan doğal gazın ortalama % 40'ı Rusya Federasyonu, Norveç, Kuzey Afrika ve Cezayir'den ithal edilmektedir. Avrupa Birliği'nin bugün % 45'ler mertebesinde seyreden ithalat bağımlılığı önümüzdeki yirmi yıllık dönemde yaklaşık % 70 civarına ulaşacaktır. IEA, 2030 yılı itibarıyla, AB doğal gaz tüketiminde ithalat bağımlılığının % 80'lere dayanacağını tahmin ediyor. 2020'de, Avrupa toplam doğal gaz üretiminin 236 milyar m^3/yıl'dan 158 milyar m^3/yıl'a düşeceği, toplam yıllık tüketimin ise 430 milyar m³'den 625 milyar m³'e çıkacağı tahmin edilmektedir. Pek çok araştırmaya göre, üretim tahminleri ve mevcut alım-satım sözleşmeleri kapsamında arz-talep dengesine bakıldığında, Avrupa Birliği'nin 2010'da 46, 2015'de 155 ve 2020'de ise 280 milyar m^3 düzeyinde giderek artan ciddi bir arz açığı ile karşılaşacağı anlaşılmaktadır.

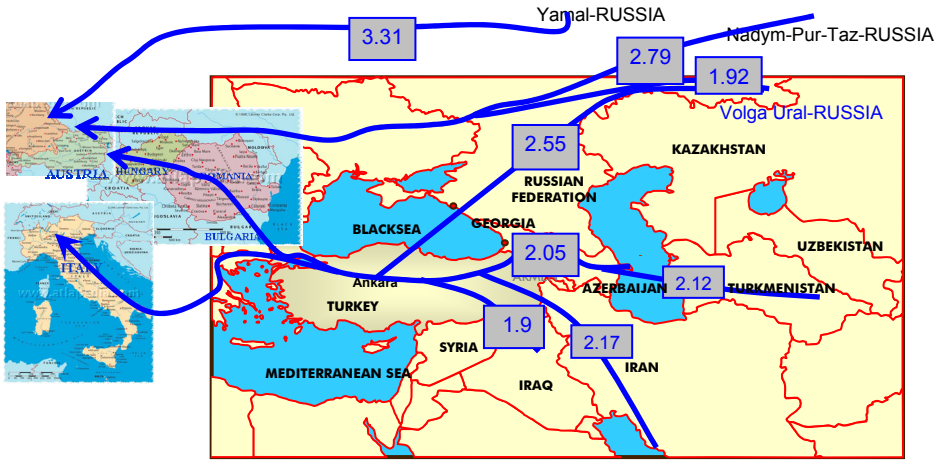
Avrupa gaz pazarının oluşumu ile birlikte talebin karşılanacağı kaynakların seçimi de, Avrupa enerji gündeminin öncelikli gündem maddeleri arasına

[7] OME-Observatoire Mediterraneen de l'Energie, **Assessment of Internal and External Gas Supply Options for the EU, Evaluation of the Supply Costs of New Natural Gas Supply Projects to the EU and Investigation of Related Financial Requirements and Tools,** Brussels, European Commission, 2001, s.34-5, BP (2006), s.27.

girmiştir. Türkiye'de olduğu gibi Avrupa gaz sektöründe de hızlı bir liberalleşme süreci yaşanmaktadır. Bu süreç, AB doğal gaz direktifleri doğrultusunda gerçekleşmektedir ki, bunun en önemli gerekliliklerinden birisi, "doğal gaz kaynakları ve güzergâhların çeşitlendirilmesidir". AB, bu politikalar doğrultusunda doğal gaz pazarına yeni oyuncuların girmesini teşvik etmektedir. Rusya'nın mevcut boru hatlarından ihraç edebileceği gaz ve Kuzey Afrika gazından sonra gerek kaynak zenginliği, gerekse coğrafi yakınlığı nedeniyle bu pazarın en önemli oyuncusu Hazar ve Orta Doğu gazı olacaktır.

AB'nin bu süreçte "kilit" bir rolde değerlendirdiği en önemli ülke ise Hazar ve Orta Doğu bölgeleri ile diğer Doğu ve Güney kaynaklarını Batı'ya taşıyacak güzergah üzerinde yer alan ilk ve en önemli "durak" konumundaki Türkiye'dir. OME'nin 2001'de hazırladığı raporu baz alınarak hazırlanan Harita 1'den de görüleceği üzere, AB gaz stratejisi kapsamında yürütülen çalışmaların sonuçları Türkiye için umut vaadeden bir tablo ortaya çıkarmaktadır.[8] Avrupa'ya olası yeni gaz güzergâhlarının taşıma maliyetleri karşılaştırıldığında, Türkiye üzerinden geçecek güzergâhlar diğerlerine oranla çok daha uygun koşullar sağlamaktadır.

Harita 1: EU-15 Ülkelerine Yeni Kaynaklardan Gaz Sağlama Maliyeti (2010-2020) ($/mmbtu)



* Üretici ülkeler ülke payları maliyete dahil edilmemiştir.

Kaynak: **OME, 2001**

[8] OME, age, s.47.

Kuşkusuz, Batı Avrupa pazarı önemli doğal gaz tüketim rakamlarıyla, gelecekte de en büyük talep merkezi olma özelliğini koruyacaktır. Almanya, İtalya, Fransa, Avusturya gibi büyük tüketicilerin yer aldığı bu pazarla birlikte, biraz daha farklı bir özellikle yakın gelecekte çok önemli bir doğal gaz talep merkezi olacak Orta ve Doğu Avrupa ile Balkanlar'ı da vurgulamak gerekir. Zira bu ülkeler, siyasi geçiş dönemini takiben kritik bir ekonomik geçiş süreci de yaşamaktadırlar ki, bu dönemde önemli doğal gaz talepleri ve buna bağlı olarak da kaynak çeşitlendirmesi ihtiyaçları söz konusu olacaktır.

Avrupa gaz pazarıyla ilgili bu tablonun kaçınılmaz olarak işaret ettiği ülke Türkiye'dir. Türkiye, doğu ile batı arasındaki coğrafi konumu nedeniyle büyük gaz miktarlarının Avrupa pazarlarına taşınması ile ilgili tüm çalışmalarda kilit geçiş ülkesi konumundadır. Bu nedenle çeşitli gaz alım anlaşmalarına giren BOTAŞ, bir yandan da talep merkezleriyle görüşmelerini sürdürmekte, öte yandan geleceğin enerji köprüsü olma yolunda gerekli olan temellerin atılabilmesi için uğraş vermektedir. Bu sayede Türkiye, belki de dünyada ilk örnek olarak, önce kendi doğal gaz pazarını oluşturmuş, ardından önemli geçiş ülkesi ve *re-exporter* olma yolunda adımlar atmıştır.

İspatlanmış toplam 82 trilyon m^3 civarında doğal gaz rezervine sahip Hazar Bölgesi ve Orta Doğu ülkelerinin Avrupa doğal gaz pazarına arz edebileceği gaz miktarının Türkiye-Yunanistan ve Nabucco projelerinin toplam kapasitelerinin çok daha üzerinde olduğu açıktır. Avrupa'nın 2020'li yıllarda kontrata bağlanmamış, ticari olarak yönlendirilebilir yaklaşık 300 milyar m^3'lük bir arz açığı ile karşılaşacağı gerçeği gözönüne alındığında, her iki transit proje ile taşınması öngörülen 37-43 milyar m^3/yıl'lık miktarların ötesine geçilmesi; uzun vadede (2020'lerden sonra) Türkiye üzerinden taşınarak uluslararası gaz ticaretine konu olabilecek doğal gaz miktarının toplamda 100 milyar m^3'lerle ifade edilmesi, ulaşılması çok güç bir hedef değildir.

4.2. Türkiye-Yunanistan ve İtalya-Adriyatik Bağlantıları

Avrupa gaz arz açığının doğu ve güneyimizde yer alan ülke kaynaklarından ve Türkiye üzerinden karşılanması amacıyla geliştirilen projeler ve yürütülen işler arasında ilk basamak, kuşkusuz, Türkiye-Yunanistan Doğal Gaz Boru Hattı Projesi'dir. Güney Avrupa Gaz Ringi'nin ilk basamağını oluşturan söz konusu proje kapsamında Türkiye ve Yunanistan doğal gaz şebekelerinin enterkoneksiyonu ile Avrupa Birliği INOGATE Programı dâhilinde Hazar ve Orta Doğu'dan sağlanacak doğal gazın Türkiye ve Yunanistan üzerinden Avrupa'ya taşınması amaçlanmaktadır.

Bu amaçla, Avrupa Birliği, Türkiye ve Yunanistan arasında 7 Temmuz 2000'de Brüksel'de üçlü bir toplantı gerçekleştirilmiş; Hazar, Orta Doğu ve Güney Akdeniz ülkelerinde üretilen doğal gazın Türkiye üzerinden Yunanistan ve daha sonra diğer Avrupa ülkelerine de iletilmesi hususu, toplantı sonuç

raporuna girmiştir. 18 Ocak 2001'de BOTAŞ ile Yunanistan gaz şirketi DEPA arasında bir "İşbirliği Zaptı" imzalanmış, Güney Avrupa Gaz Ringi'nin geliştirilmesi ve iki ülke gaz sistemlerinin birbirine bağlanması amacıyla oluşturulan teknik çalışma grubu çalışmalarına başlamıştır.

Bu projede ilk amaç, iki ülke iletim hatlarının enterkoneksiyonunun gerçekleştirilmesidir. Bu bağlantı, Güney Avrupa Gaz Ringi'nin de en önemli ayağını oluşturacaktır. Proje ile ilgili fizibilite raporunun, Avrupa Birliği *Trans-European Networks* (TEN) Programı kapsamında verilen hibe ile 25 Mart 2002'de tamamlanmasının takiben, 28 Mart 2002'de BOTAŞ ve DEPA şirketleri arasında bir 'Mutabakat Zaptı' imzalanmıştır. Ardından mühendislik ve ÇED çalışmaları için AB TEN fonundan hibe sağlanmıştır. Burada en önemli husus, AB'nin direkt olarak finansman desteği sağlaması ve projeyi 'öncelikli projeler' kapsamına almış olmasıdır. Ardından, 23 Şubat 2003'de Selanik'de iki ülke bakanları tarafından imzalanan Hükümetlerarası Anlaşma (IGA) projeye ivme kazandıran önemli aşamalardan biri olmuştur. BOTAŞ ve DEPA arasında konuyla ilgili sürdürülen görüşmelerin sonuçlandırılmasıyla, Türkiye-Yunanistan Doğal Gaz Boru Hattı Projesi kapsamında hazırlanan "Doğal Gaz Alım-Satım Anlaşması" ve "Protokol" 23 Aralık 2003'de Ankara'da imzalanmıştır.

Bu Anlaşma, Türkiye üzerinden Avrupa pazarlarına doğal gaz satışına yönelik olarak bir Avrupa ülkesi ile yapılan ilk ticari kontrattır. Anlaşma'ya göre, 2006'da 250 milyon m^3/yıl ile başlayacak taşıma miktarı Yunanistan'ın ihtiyacına göre ilk etapta 750 milyon m^3/yıl'a çıkacaktır. Bu yalnızca ilk adımdır ve Türkiye'nin Avrupa'ya gaz satış stratejisi kapsamında Avrupa kapısının açılması anlamına gelmektedir. Aşağıda kısaca değinilecek İtalya bağlantısı ile söz konusu hat üzerinden taşınacak gaz miktarının yaklaşık 12 milyar m^3/yıl seviyesine çıkarılması planlanmaktadır. Bu miktarın 3 milyar m^3'den biraz fazlası Yunanistan'a, 8 milyar m^3'ü ise İtalya'ya taşınacaktır.

Bursa-Karacabey'den başlayacak ve 17 km uzunluğunda bir deniz geçişi ile Marmara Denizi'ni geçecek 36 inch çapındaki bu boru hattının toplam uzunluğu, 209 km'si Türkiye sınırlarında olmak üzere yaklaşık 300 km olacaktır. Hattın fizibilite ve mühendislik çalışması 2004 başında tamamlanmıştır.

Harita 2: Avrupa'ya Gaz; Türkiye-Yunanistan-İtalya ve Yunanistan-Adriyatik Ülkeleri Açılımı

Türkiye-Yunanistan Doğal Gaz Boru Hattı Projesi Temel Atma Töreni, 3 Temmuz 2005 tarihinde, iki ülke Başbakanlarının ve ilgili Bakanların katılımıyla İpsala/Türkiye-Kipi/Yunanistan sınır kapılarında gerçekleştirilmiştir. İnşaat çalışmaları başlatılan hattın 2006 yılı sonunda tamamlanması planlanmaktadır.

Bir yandan Yunanistan'ın giderek artan enerji ihtiyacı, diğer yandan Güney Doğu Avrupa pazarında aktif olma isteği, Yunanistan'ı enerji sektöründe Türkiye için önemli bir ortak konumuna getirmektedir. Bu kapsamda Yunanistan, tıpkı Türkiye ile olduğu gibi, İran, Azerbaycan ve diğer kaynak ülkelerle doğal gaz ithalatına yönelik birtakım sözleşmeler imzalamaktadır. Böylece Yunanistan, nispeten küçük sayılabilecek 2.5 milyar m^3'lük (2002) toplam doğal gaz pazar hacmini, 2006'da 5 milyar m^3'e çıkarmayı planlamaktadır. Yunanistan ayrıca, ulusal boru hattı sistemini, İtalya'ya yapılacak doğal gaz sevkiyatı kapsamında geliştirmeyi ve gaz kullanımını yaygınlaştırmayı planlamaktadır.

Yunanistan'a gaz verilmeye başlanmasının ardından Avrupa'da diğer pazarlara ulaşma konusu gündeme gelecektir. Yunanistan sonrası muhtemel güzergâhlar, Adriyatik geçişli İtalya hattı ve Adriyatik boyunca ülkelerin geçilmesi neticesinde Batı Avrupa'ya açılım şeklinde olabilecektir.

Yunanistan DEPA şirketi ile yapılan toplantıda, Adriyatik boyunca uzanan ve güney Balkanlar'da yer alan ülkelerin gaz şirketleri ile gaz talepleri konularında görüşülmesi, gazın Yunanistan'ın devamında diğer Avrupa pazarlarına da taşınabilirliğinin araştırılması kapsamında güzergâhların çalışılması konusunda anlaşılmıştır. Bu amaçla, BOTAŞ ve DEPA ile Bosna-

Hersek, Arnavutluk, Makedonya, Slovenya, Hırvatistan ve Sırbistan-Karadağ ilgili gaz şirketleri arasında 8 Nisan 2003'de Selanik'de, sekiz şirket tarafından Adriyatik güzergâhının ortaklaşa çalışılması hususuna yönelik "Protokol" imzalanmıştır.

Hedeflerin belirlenmesiyle ilgili olarak çalışmalar sürerken, DEPA ve daha önce işbirliğinde potansiyel şirket olarak belirlenen İtalyan Edison şirketi arasında 31 Temmuz 2002'de imzalanan Mutabakat Zaptı, Avrupa'ya açılım konusunda bir diğer önemli gelişme olmuştur. Bu anlaşmada Adriyatik Denizi'ni geçecek bir hat yoluyla gazın İtalya'ya taşınabilirliği ile ilgili çalışmaların başlatılması konu edilmiş ve BOTAŞ'a ilgili çalışmalara katılması için bir davet mektubu gönderilmiştir. Konu ile ilgili Başlangıç Toplantısı DEPA, BOTAŞ ve EDISON arasında 12 Eylül 2002'de Atina'da gerçekleştirilmiştir. Atina toplantısına ayrıca Edison şirketinde pay sahibi olan Fransız EDF Group temsilcisi de katılmıştır. EDF'nin Avrupa'da önemli bir gaz ve elektrik dağıtım şirketi olması ve İtalya, Avusturya, Belçika-Hollanda-Lüksemburg, İsviçre, Macaristan, Çek Cumhuriyeti, Almanya, İngiltere, Fransa ve İspanya gibi Orta ve Batı Avrupa ülkelerinde şirketleri, ortaklıkları ve müşterileri olması yönüyle, Türkiye'nin Avrupa'ya açılım stratejisi açısından önemli getirileri olacağı düşünülmektedir.

Toplantıda Edison ve DEPA tarafından imzalanan Mutabakat Zaptı'nın bir örneği ile bu anlaşmaya ve yürütülecek çalışmalara BOTAŞ'ın da katılımını sağlayacak anlaşma taslağı BOTAŞ tarafına verilmiş, gerekli değişikliklerin ardından üç şirket tarafından 4 Ekim 2002'de imzalanmıştır. İlk iş olarak çalışma grupları kurularak ön-fizibilite çalışmaları başlatılmış, ön-fizibilite Raporu Nisan 2003'de, fizibilite çalışmasına finansman sağlanması amacıyla AB TEN Programı'na sunulmuş ve 15 Temmuz 2003'de TEN Programı İtalya bağlantısı için hibe vermeyi kararlaştırmıştır.

Yapılacak çalışmaların gidişatı gözönünde bulundurularak proje, Türkiye-Yunanistan-İtalya Enterkoneksiyonu halini alacak, bu şekilde yeni bir teknik tasarım ve maliyet ile daha somut taşıma miktarları ortaya konularak AB'nden yeni fonların kullanılması söz konusu olabilecektir.

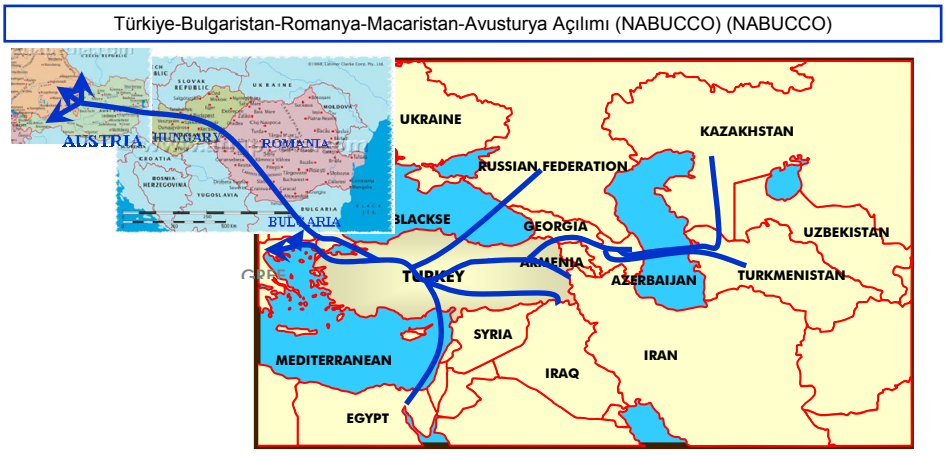
Fizibilite çalışması Aralık 2004'de sonuçlandırılan İtalya bağlantısı kapsamında, 2005 yılında yeni bir ortaklık anlayışının tesis edilmesiyle birlikte Mühendislik ve Çevre Etki Değerlendirmesi çalışmalarına geçilmiştir. 2007 Temmuz ayında üç ülke arasında imzalanan Hükümetlerarası Anlaşma, projeyi gerçekleşmeye yaklaştıran önemli bir adım olmuştur. Hattın Türkiye-Yunanistan bağlantısı 18 Ekim 2007'de tamamlanmış ve Yunanistan'a ilk gaz teslimatı başlatılmıştır. Yunanistan ve İtalya arasındaki inşaat çalışmalarının tamamlanmasını takiben 4 milyar m^3'lük ilk teslimatla İtalya bağlantısının da 2012'de devreye alınması hedeflenmektedir.

4.3. Türkiye-Bulgaristan-Romanya-Macaristan-Avusturya (NABUCCO) Projesi

Uluslararası önemli araştırma kuruluşları ve enerji şirketlerinin yaptığı projeksiyonlara göre Türkiye üzerinden Avrupa'ya artan miktarlarda taşınacak olan Hazar ve Orta Doğu gazı 2020'li yıllarda büyük miktarlara ulaşılacaktır. Bu olgu Avrupa'ya ulaşma stratejisi kapsamında birden fazla açılım üzerinde durulmasını gerekli kılmaktadır. Bu amaçla, BOTAŞ'ın teklifiyle Yunanistan Projesi'nin ardından, Bulgaristan'dan başlayıp Romanya, Macaristan güzergahını izleyerek Avusturya'ya ulaşması planlanan ikinci bir hat üzerinde çalışmalar başlatılmıştır.

Hazar Bölgesi ve Orta Doğu doğal gaz rezervlerini talebi yoğun Avrupa pazarlarına ulaştırmayı öngören Türkiye-Bulgaristan-Romanya-Macaristan-Avusturya (Nabucco) Doğal Gaz Boru Hattı Projesi ile ilk etapta güzergahı oluşturan ülkelerin gaz ihtiyacı karşılanıp, diğer ülkelerin gaz talep gelişimlerine göre takip eden yıllarda Avusturya'nın Avrupa'da önemli bir doğal gaz dağıtım noktası olma özelliğinden faydalanılarak Orta ve Batı Avrupa'ya ulaşılması amaçlanmaktadır. Avusturya'nın (Baumgarten) hâlihazırda Avrupa'ya ulaşan transit gazın dağıtım merkezi konumunda olması, stratejilerin belirlenmesinde yönlendirici rol oynamaktadır.

Harita 3: Avrupa'ya Gaz (NABUCCO)



BOTAŞ'ın Avusturya, Bulgaristan ve Romanya gaz şirketlerine 5-13 Şubat 2002'de gerçekleştirdikleri ziyaretler sırasında yapılan başlangıç niteliğindeki toplantılar neticesinde, Avrupa açılımı konusu bu şirketlerce olumlu karşılanmış ve çalışma gruplarının kurulması kararlaştırılmıştır. Avusturya OMV Erdgas

şirketi bu konuda bir adım daha atarak, projeyle ilgili olarak 18 Mart 2002'de Avrupa Birliği TEN Programı'na başvurmuş ve öncelikli projeler arasında değerlendirmeye alınmasını sağlamıştır. Sonraki en önemli aşama OMV Erdgas ve BOTAŞ arasında 24 Mayıs 2002'de Ankara'da, iki ülke gaz sistemlerinin uygun güzergâh alternatifleri ile bağlanması konusunda bir "İşbirliği Zaptı" imzalanmasıdır.

BOTAŞ'ın yönlendirmesiyle ilerleyen görüşmeler neticesinde Bulgargaz, Transgaz ve BOTAŞ arasında 25 Haziran 2002; yine Bulgargaz, Transgaz, MOL (Macaristan), OMV Erdgas ve BOTAŞ arasında ise 26 Haziran 2002'de İstanbul'da, Avrupa'ya gaz taşıma konusunda işbirliği anlaşması imzalanması ve çalışma gruplarının kurularak fizibilite aşamasına geçilmesi konularında iki ayrı Protokol imzalanmıştır. Gerçekleştirilen toplantılarda şirketler, kendi ülke gaz taleplerinin de bir kısmını Türkiye üzerinden karşılayıp kaynak çeşitlendirmesini amaçladıklarını ifade etmişlerdir. Bu kapsamda, Viyana'da gerçekleştirilen toplantı neticesinde beş şirket arasında 11 Ekim 2002'de bir "İşbirliği Anlaşması" imzalanmıştır. Toplantıda alınan kararlar doğrultusunda şirketler, taraf ülkelerle ilgili tüm doğal gaz altyapısı, arz-talep durumu ve pazar dinamikleri ile ilgili bilgileri derlemeye başlayacakları ve güzergâhın oluşturulması yönünde mevcut altyapı ile ihtiyaç duyulabilecek yeni yatırımların belirlenmesi yönünde veri altyapısı oluşturulması hususlarında mutabık kalmışlardır.

14 Mayıs 2003'de proje ortakları ve *Boston Consulting Group* (BCG) danışmanlık şirketinin katılımı ile Viyana'da gerçekleştirilen toplantı neticesinde fizibilite hazırlık çalışmaları başlatılmıştır. 1 Temmuz 2003'de Ceyhan'da gerçekleştirilen Yönlendirme Komitesi Toplantısı'nda BCG, projeye konu olacak muhtemel gaz talebi, iş planı, maliyetler ve ekonomik sonuçlarla ilgili, ön-fizibilite olarak nitelenebilecek çalışmasını sunmuştur. Bu arada, 15 Temmuz 2003'de AB TEN Finansman Komitesi proje fizibilite çalışması için talep edilen yaklaşık 3.5 milyon Euro tutarındaki toplam fizibilite maliyetinin % 50'sini hibe şeklinde karşılamayı kabul ettiğini açıklamıştır.

Bu gelişmelerle birlikte çok önemli bir aşamayı temsilen, Nabucco Projesi'nin finansman ve boru hattı taşıma kapasitesinin pazarlanması işlerinin tek bir organ eli ile yürütmek üzere *Nabucco Boru Hattı İş Geliştirme Şirketi'nin (Nabucco Company Pipeline Study GmbH)* kurulması için çalışmalar, gerekli dokümanlar Nabucco Konsorsiyum yetkilileri tarafından 26 Şubat 2004'de Viyana'da imzalanarak başlatılmış, 24 Haziran 2004 itibariyle sözkonusu şirketin resmi kuruluş işlemleri tamamlanmıştır. Bütün ortakların eşit hisseye sahip olduğu Nabucco Boru Hattı İş Geliştirme Şirketi'nin merkezi Viyana'dır.

Nabucco Boru Hattı İş Geliştirme Şirketi'nin kurulmasıyla birlikte Nabucco Projesi'nin fizibilite çalışmasına ilişkin önemli bir aşama kaydedilmiştir. Yürütülmekte olan fizibilite çalışmasının ara raporlarına göre Orta ve Batı Avrupa ile Hazar ve Orta Doğu'yu birbirine bağlayacak bu boru hattı projesi önemli bir ihtiyacı karşılayacak olup, ilerisi için ümit verici bir tablo çizmektedir.

Son gelişme olarak, 28 Haziran 2005 tarihinde, Proje kapsamındaki en önemli anlaşmalardan biri olan Ortak Girişim Anlaşması (Joint Venture Agreement) Ortaklar tarafından imzalanmıştır. Ortaklık Anlaşması'nın imzalanması ile Proje mühendislik, inşaat, finansman tedariki, işletme gibi daha geniş bir iş kapsamı ile tarif edilmiş olup, "Nabucco Uluslararası Şirketi"nin kurulması çalışmaları resmi olarak başlatılmış ve tamamlanmıştır.

2006 Ocak ayında yaşanan Ukrayna-RF gerginliği sonrasında AB diskurlarında gündeme gelen enerji arz güvenliği meselesinin yansıması olarak giderek öne çıkan Nabucco Projesi kapsamında 26 Haziran 2006'da biraraya gelen beş proje ortağı şirketin Devlet Enerji Bakanları, Nabucco Projesi'nin hızla bitirilmesine devlet olarak verilecek desteğe değinen ortak bir "Beyanat (Statement)" imzalamışlardır.

Gelecekte Avrupa'da, özellikle yeni kurulan elektrik santrallerinin de etkisiyle gaz talebinde artış olacağı düşünülmektedir. Talepteki bu artış yıllık % 2,5 olarak öngörülmekte ve talebin 2020'de 800 milyar m^3'lere ulaşacağı tahmin edilmektedir. Mevcut doğal gaz arzı ve altyapı ile 2020'de 300 milyar m^3'lük bir doğal gaz açığı olacaktır. Dikkat edilirse, bu rakamlar yukarıda değinilen genel talep ve gaz açığı beklentilerinin de üstünde tahmin edilmektedir *(çalışmalarda sadece hattın geçtiği ve Baumgarten'a fiziki olarak boru hattı ile bağlantısı olan ülkeler dikkate alınmıştır).*

Avrupa'da oluşacağı düşünülen bu açığın karşılanması için bir çok kaynak mevcuttur. Kuzey Afrika'daki kaynakların üyük bir kısmını ellerinde bulunduran Cezayir, Libya ve Mısır Güney Avrupa'ya daha fazla doğal gaz satmak amacıyla mevcut altyapılarında kapasite artırımına gitmeyi ve yeni projeler geliştirmeyi planlamaktadırlar. Kuzey'den Avrupa'ya doğal gaz sağlayan İngiltere ve Hollanda'daki rezervlerin azalmasıyla gelecekte bu bölgelerden yapılan doğal gaz ikmalinde düşüş gözlenecektir. Hatta bizzat İngiltere, 2010'larla birlikte gaz ithalatına başlayacağından söz etmektedir. Bu durumda Kuzey Avrupa arzında meydana gelecek düşüşün Norveç ve Rusya tarafından karşılanması beklenmektedir.

Akdeniz'den İtalya ve İspanya'ya, Rusya ve Norveç'ten Kuzeybatı Avrupa'ya yönelecek gaz akışı Orta Avrupa ve Balkanlar'a Hazar gazının girebilmesi için önemli bir fırsat sunacaktır. Bu kapsamda olmak üzere İran'da düzenlenen bir konferansa katılan Hollanda şirketi Gasunie Genel Müdürü

Verberg'in Nabucco hattını Hollanda'ya uzatma yönündeki önerisi de içerdiği mesaj açısından dikkat çekici bir gelişmedir. Ayrıca Avrupalı büyük gaz şirketlerinin hisse alarak Nabucco Projesi'ne katılımları hususunda görüşmeler devam etmektedir.

Tablo 4. Nabucco DGBH ile Taşınacak Gaz Miktarları (Milyar m^3)

	2010	**2020**
Kötümser Senaryo	3.5	18
Ana Senaryo	4.5	25.5
İyimser Senaryo	13	31

Kaynak: BOTAŞ

Coğrafi olarak Hazar Bölgesi civarında yer alan rezervler, Rusya'nın Sibirya bölgesinde keşfettiği yeni rezervler ile karşılaştırıldığında nispeten Avrupa'daki önemli tüketim noktalarına daha yakın konumdadır. Bu durum, düşük taşıma maliyetleriyle birlikte Avrupa pazarında Hazar gazının rekabet gücünü artıran en önemli faktörlerden biri olacaktır. Ayrıca, Avrupa'nın Rus doğal gazına bağımlılığının önlenmesi açısından da yani arz çeşitliliğinin sağlanması noktasında da Hazar gazı önemli bir alternatif sunacaktır.

Yukarıdaki miktarlar üzerinden ve toplam boru hattı uzunluğunun 3.300 km civarında olacağı varsayımı ile yapılan yaklaşık taşıma maliyeti hesaplamalarına göre, Hazar ve Orta Doğu gazını Avrupa'ya taşıyacak Nabucco Projesi, gelecekte oluşacak Avrupa gaz talebini karşılayarak pazardan pay almak amacıyla geliştirilen diğer projelerin çoğundan daha ekonomiktir. BCG tarafından katılımcı şirketlerden temin edilen yaklaşık boru hattı uzunluğu, birim maliyetleri ve her ülkenin finansman şartları göz önüne alınarak hesaplanan toplam tahmini yatırım maliyeti 4.6 Milyar Euro olarak hesaplanmıştır ki, teknik fizibilite çalışması tamamlandıktan sonra revize edilecek ekonomik değerlendirmenin projenin uygulanabilirliği yönünde daha iyi sonuçlar vereceği düşünülmektedir. Çalışmadaki işletme maliyetlerinin de hesaba katıldığı genel ekonomik değerlendirmelere göre, projenin yatırımcılarına işletme süresi sonunda yatırım amortismanı, vergi, işletme masrafları vs. gibi giderlerin ardından makul düzeyde kar sağlayacağı hesaplanmaktadır. 5 Şubat 2008'de Alman enerji devi RWE şirketini 6. ortak olarak alan Nabucco projesinde 2008 yılı itibarıyla mühendislik çalışmaları başlatılmış olup, hattın 2012 yılında devreye alınması beklenmektedir.

4.4. AVRUPA HEDEFLİ BORU HATTI PROJELERİNİN AVRASYA'NIN GELECEĞİ AÇISINDAN ÖNEMİ

Tarih boyunca Asya ve Avrupa arasında stratejik bir köprü işlevi gören ve İpek Yolu'nun önemli oktalarından biri durumundaki Türkiye, hidrokarbon kaynaklarının dünya pazarlarına ulaştırılması için yoğun çalışmalar yapıldığı günümüzde de bu özelliğini sürdürmektedir. Kaldı ki, petrol ve doğal gaz zengini Orta Asya, Hazar Bölgesi ve Orta Doğu ülkeleri açısından uzun süreli bir barış ortamının sağlanması ve ekonomik, siyasi istikrarın temini giderek artan bir ihtiyaç halini almaktadır.

Stratejik bir geçiş ülkesi olan Türkiye, aynı zamanda yukarıda değinilen bölgelerde geliştirilmeyi bekleyen enerji kaynakları açısından potansiyel ve büyük bir enerji pazarı olmaya da adaydır. Bu nedenle petrol ve doğal gaz ithalatında kaynak çeşitliliği, arz güvenliği ve arz sürekliliğinin sağlanabilmesi açısından geniş kapsamlı enerji taşıma projelerinin geliştirilmesi, Türkiye için büyük önem taşımaktadır. Aslında mevcut altyapının verimli kullanılması öncelikli olmalıdır; fakat eksik bağlantılar için yeni projelerin gerçekleştirilmesi de gerekmektedir. Üstelik rekabete katılım, üretim güvenliği ve çeşitliliği açısından da mutlaka gereklidir.

Türkiye, öncelikle Orta Asya ve Hazar'dan sağlamayı planladığı doğal gazı Balkanlar üzerinden Batı Avrupa'daki önemli talep merkezlerine ulaştırmayı planlanmaktadır. AB ülkelerinin sona erecek gaz kontratlarının yerini Türkiye üzerinden taşınacak gazla ilgili anlaşmaların alabileceği gibi, AB'nin hedeflemiş olduğu serbest gaz piyasası koşulları oluştuğunda Avusturya, Yunanistan, İtalya dahil söz konusu ülkelerin devam eden alım kontratları, rekabetçi fiyat koşulları dahilinde yine Hazar ve Orta Doğu'da üretilen gaz ile yer değiştirebilecektir. Türkiye burada hem çok önemli bir transit ülke konumuna kavuşarak büyük miktarlarda gazın toprakları üzerinden taşınmasını sağlayacak hem de *re-export* yoluyla kendi kontratları kapsamındaki gazı pazarlama imkânına sahip olabilecektir. Her şeyden önemlisi, özellikle enerji fakiri Avrupa ile enerji zengini doğunun Türkiye ve Balkanlar üzerinden geçen boru hatlarıyla birbirine bağlanması, Orta Asya'dan Balkanlara uzanan bu geniş coğrafyanın sosyo-ekonomik kalkınmasına ve politik istikrarına katkı sağlayacaktır.

Projelerin Türkiye ekonomisine katkısını Nabucco örneği ile aktarmak faydalı olabilir. Nabucco Projesi, Türkiye içinde 2.5-3.0 milyar Euro mertebesinde bir yatırım ve onbinlerce insana istihdam imkanı yaratarak gerçekleştirilecektir. Toplam tutarın % 70-80'nin yabancı yatırım olacağı ve boru hattı işletmesinin BOTAŞ tarafından yapılması yoluyla sağlanacak transit gelir düşünüldüğünde, Nabucco Projesi'nin BTC ham petrol boru hattı gibi dünya çapındaki diğer boru hattı projemizin getirileri ile kıyaslanabilecek makro ekonomik kazançları olacaktır.

Nabucco Proje'sinin, mevcut AB üyesi iki ülke (Avusturya ve Macaristan) ve 2007'de topluluğa dâhil olacak iki aday ülke (Bulgaristan ve Romanya) ile birlikte ve kuşkusuz AB'den sağlanan politik ve maddi destek ile yürütüleceği düşünüldüğünde, Türkiye'nin AB politikası açısından da önemli bir işlevi olacağı açıktır. Aynı değerlendirme, iki AB ülkesi Yunanistan ve İtalya ile yürütülen Türkiye-Yunanistan-İtalya DGBH Projesi için de geçerlidir. Her iki proje, Balkanlar'da yeni alt yapı yatırımlarının yolunu açacak, bu ise, çok yakın bir gelecekte bu hatların diğer bölge ülkelerine de uzanmasının önünü açacaktır.

Sonuç olarak, Türkiye'nin, Avrasya'nın doğusundan başlayan "boru hattı macerası" Avrupa'da sonuçlanacak ve bu sayede Türkiye üzerinden geçen Doğu-Batı Enerji Koridoru tamamlanmış olacaktır.

5- SONUÇ VE ÖNERİLER

11 Eylül sonrasında dünya enerji gündeminin en önemli maddesi "enerji arz güvenliğinin sağlanması" olunca, denize çıkışı bulunmayan veya sorunlu denizlere açılan hidrokarbon zengini ülkelere ait kaynakları boru hatlarıyla temel tüketici piyasalara ulaştırmak için sürdürülen mücadele de iyice su yüzüne çıkmıştır.

ABD, özellikle Batı'nın enerji arz kesintileri karşısındaki tek dengeleyici rezerv alanı konumunda olan, ancak fiziki ve ekonomik ömrünü 15-20 yıl içinde tamamlayacağı tahmin edilen Kuzey Denizi rezervlerine uzun zamandır aramakta olduğu ikame kaynaklarını, Orta Asya ve Hazar Bölgesi'nde bulmuştur.

Genel olarak, bölge doğal gaz ihracat olanaklarına bakıldığında ilk göze çarpan faktör, Hazar'ın temel uluslararası pazarlara olan uzaklığıdır. Türkiye'nin çeşitli güzergâh alternatifleri arasında yeri kuşkusuz önemli olup, bu alanda Türkiye'nin geliştirdiği projelere ABD önemli ölçüde destek vermiş, Amerikan sermayesinin bölgeye aktarılmasında ciddi katkılar yapmıştır.

Doğu-Batı Enerji Koridoru'nu geliştiren Türkiye ve ABD, tercihini BTC ile birlikte Hazar geçişli bir doğal gaz boru hattı yapılmasından yana kullanmıştır. 13 Temmuz 2007'de Türkiye ile İran'ın imzaladığı Mutabakat Zaptı, eğer içeriği iyi yönetilebilirse, Rusya'nın geliştirdiği alternatif boru hatlarına iyi bir cevap olabileceği gibi ABD'nin özellikle Irak gazı konusunda daha ciddi ve somut adımlar atmasına yol açabilir. Yine de, ABD'nin İran'a uyguladığı yaptırımlar ve Hazar'ın statüsünün henüz belirlenmemiş olması, özellikle Türkmen doğal gazının İran üzerinden Türkiye'ye taşınmasına yönelik planların önündeki en önemli engeldir. Türkiye'nin tercihi olan Hazar geçişli alternatif proje ise, Türkmenistan'ın Türkiye ile imzalamış olduğu anlaşmadan kaynaklanan yükümlülükleri yerine getirmemesi ve boru hattını yapacak

konsorsiyumun yetkilendirme belgesini uzatmaması nedeniyle şimdilik askıdadır. Ancak, Türkmen gazının başına gelenleri Rusya'nın stratejik başarısı olarak değerlendiren uzman sayısının küçümsenemeyecek düzeyde olduğunu da unutmamak gerekir. 12 Mayıs 2007'de RF, Türkmenistan ve Kazakistan arasında imzalanan Protokolu da bu kapsamda değerlendirmek gereklidir. RF, bana sormadan hiç kimse bir metreküp Hazar gazı alamaz demiştir. Bu açıdan, Türkiye'nin İran ile imzaladığı anlaşmayı, büyük satranç oyununda RF'e karşı geliştirilmiş yeni bir hamle olarak yorumlamak lazımdır.

Yine de, eğer Azerbaycan, Türkiye, Gürcistan ve Türkmenistan biraraya gelerek, Azeri gazını Türkiye üzerinden Avrupa'ya taşıyacak Şah Deniz Projesi'ni, Hazar Geçişli boru hattının ilk basamağı olarak ele alarak, ortak bir çözüme ulaşmak için samimiyetle çalışırlarsa bu meselenin rahatlıkla aşılabileceği düşünülmektedir.

Bu çerçevede, Ekim 2001'den itibaren Azeri ve Türkmen yetkililerin boru hattının kapasitesi hakkındaki görüşmeleri uzunca bir aradan sonra yeniden başlatmış olmaları çok olumlu bir adımdır. Bu adım ne yazık ki giderek kopan Türkmenistan-Azerbaycan ve Türkmenistan-Türkiye ilişkilerine de yeni bir ivme kazandırabilir.

Türkmen gazını Rusya'ya kaptırmaktan sıkıntı duyan ABD, bugün Hazar geçişli eski boru hattı projesini tekrar ısıtmakta, bunu gerçekleştirmek için uygun bir zemin aramaktadır. Niyazov'un ölümü, ABD'yi ciddi olarak umutlandırmaktadır. Hazar geçişli Türkmenistan-Türkiye boru hattı yoluyla Türkmen gazının da Azeri gazını taşıyacak boru hattı güzergâhını izlemesi halinde, bir yandan ülkemizin büyük önem verdiği arz güvenliği ve kaynak çeşitliliği açısından büyük bir adım atılmış olacak ve öte yandan Türkiye'nin, Rus doğal gazına alternatif arayan Avrupa'ya Hazar gazının ulaştırılması sürecinde en güvenli ve en önemli geçiş ülkesi olduğu hususu net bir şekilde anlaşılmış olacaktır.

Bugüne kadar, Türkiye Cumhuriyeti olarak üzerimize düşen tüm yükümlülüklerimizi yerine getirdiğimiz bu Proje'nin önünde Azerbaycan ve Türkmenistan arasındaki sorunların hızla giderilmesinden başka bir engel yoktur. Bu iki kardeş ülkenin, Afganistan ve Irak müdahaleleri sonrasında birbirlerine eskisinden daha çok ihtiyaç duyacaklarının farkına varmaları ve en güvenli geçiş ülkesi Türkiye üzerinden Avrupa piyasasına açılmak için bir an önce bu Proje'ye hayatiyet kazandırmaları gerekmektedir.[9]

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[9] Bu noktada önemli bir hatırlatma yapmak yerinde olacaktır. Doğu-Batı Enerji Koridoru'nun orjinal halinde iki proje yer almaktaydı: **Bakü-Tiflis-Ceyhan Ham Petrol Boru Hattı Projesi ve Hazar Geçişli Türkmenistan-Türkiye-Avrupa Doğal Gaz Boru Hattı Projesi**. Bugüne kadar hakkında pek çok makale yazdığımız için burada ayrıntısına girmeyeceğimiz BTC Projesi hızla ilerleyip, son hedefe kilitlendiğinde, Hazar geçişli Türkmenistan projesinde (TCP) ciddi bazı

Bugün, enerji gündeminin en üst sıralarında yer alan mesele, Kazakistan petrollerinin BTC boru hattı ile dünya pazarlarına taşınmasıdır. Bu kapsamda, Azerbaycan ile Kazakistan arasındaki temaslar devam etmektedir. Basına yansıyan son bilgilere göre, Kazak tarafının proje anlaşmalarını gözden geçirmesini takiben, 16 Haziran 2006 tarihinde, Bakü'de, Azerbaycan ile Kazakistan arasında bir Hükümetlerarası Anlaşma imzalanmıştır. Bu sürecin aktif yönlendiricisi yine ABD'dir.

Ancak, BTC'ye katılım ile ilgili sürecin olumlu veya olumsuz sonuçlanması, Kazakistan-Rusya, Kazakistan-İran ve hatta Kazakistan-Çin ilişkilerinin seyrine bağlı kalacaktır. Petrolün asli sahibi olan ve 2010'lardan itibaren dünya petrol üretiminde beşinciliği hedefleyen Kazakistan, hangi güzergâh ve/veya güzergâhlar yoluyla petrolünü pazarlayacağı konusunda, belki de ülke geleceğinde kırılma noktası sayılabilecek çok kritik bir seçim yapacaktır.

Petrol tarihini hatırlayarak, Kazakistan'ın her koşulda petrol sahibi ülkelerin ortak kaderini paylaşacağını, elde ettiği gelirle birlikte mutlaka bir bedel ödemek zorunda kalacağını peşinen söylemek gereklidir. Kazakistan tarafından 21. yüzyıl enerji ve savunma dengeleri ve bölgesel gerçekler gözardı edilerek yapılacak bir seçimin, Hazar ve Orta Asya'yı önce belirli bir süre için yönetilebilir kaos ortamına sürükleyeceği; ancak hemen ardından bu *"jeo-stratejik kurtlar vadisi"*nde hiç bitmeyecek bir kabusa dönüşebileceği kestirilebilir.

Hazar'da sadece 50 Milyon ton'luk bir petrol ihraç imkânı yoktur. Milyonlarca ton petrol rezervinin bir kısmı Rusya'nın Novorossisk limanına uzanan CPC yoluyla, bir kısmı ise Bakü-Tiflis-Ceyhan HPBH ile dünya pazarlarına akacaktır. Afganistan'da güven ortamı tesis edilip, yeni bir siyasal düzen sağlandıktan sonra Hazar petrolü veya doğal gazının Pakistan'a da

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sıkıntılar yaşanmaktaydı. Oysa, 1999 yılında Türkmenistan ile Türkiye arasında doğal gaz alım satım anlaşması imzalandığında büyük bir sevinç yaşanmış ve gelecek için işbirliği umutları giderek artmıştı. Projeyi *derin dondurucuya* kaldıran gelişmeleri kısaca hatırlayalım: Hattı inşa edecek PSG konsorsiyumunun görev süresi uzatılmamış, hala kanıtlanmamakla birlikte bu süreçte Amerikan şirketlerinden açıktan para istendiği basında yoğun biçimde iddia edilmiş, Azerbaycan'a ait Şah Deniz sahasından petrol yerine doğal gaz fışkırmış ve Azeriler boru hattı kapasitesinde tahsis önceliğini kendi gazına vermiş, Mavi Akım anlaşmasının imzalanması sonrasında Türk doğal gaz piyasasının iyice şiştiği ve Türkmen gazına artık ihtiyaç kalmadığı tartışılmaya başlanmış, Azerbaycan-Türkmenistan arasında Hazar'daki *Kepez/Serdar* sahası ve BTC'ye petrol sağlayacak Azeri-Çırak-Güneşli sahalarından Güneşli'nin aidiyeti konusunda tansiyonu giderek artan ciddi bir anlaşmazlık yaşanmıştı. Bu sürecin gerçek bir kabusa dönüşmesini sağlayan sevimsiz en son gelişme ise dünyaya bir türlü açılamayan, doğal gazını değerini bulacağı önemli piyasalara satamayarak ciddi gelir kaybına uğrayan Türkmenistan'ın, rahatlatan bir açılım yaratamayınca kürkçü dükkanına dönmesi, 2003 yılında imzalanan 25 yıl süreli bir anlaşmaya göre 2009-2028 yılları arasında yılda 80 milyar m^3 Türkmen doğal gazını (şimdilik 1000 metreküpünü 100 $'dan) Rusya Federasyonu'na satmak zorunda kalmasıdır.

yönlendirilmesi ise, bu anlamda projelerimize doğrudan veya dolaylı olarak olumsuz bir etki yapmayacaktır.

Türkiye ile ABD arasındaki mevcut işbirliği sürecinin devam ettirilmesiyle birlikte, önümüzdeki dönemde, ABD Hükümeti'nin, Kazakistan devleti ile burada faaliyet gösteren Amerikan petrol şirketlerini BTC boru hattına katılım yönünde teşvik etmesinde ve bu sürecin hızlandırılması için daha kararlı hareket etmesinde BTC'nin geleceği açısından büyük yarar olacağına inanılmaktadır. Benzeri bir desteğin Türk Boğazları'nı by-pass edecek Samsun-Ceyhan HPBH Projesi için de aranması, Ceyhan'ı Akdeniz'in Rotterdam'ına dönüştürme politikamızla uyumlu olacaktır.

Geçtiğimiz dönemde Türkiye ile ABD'yi zaman zaman karşı karşıya getiren iki proje vardır. ABD, Mavi Akım ve İran doğal gaz bağlantılarının gerçekleşmesini aşikâr dış politika sebepleriyle hiç bir zaman istememiş ve hala da içine sindirememiştir. Bu nedenle, ABD, her iki anlaşmayı da yakından takip etmekte, Doğu-Batı Enerji Koridoru'nun *dışındakiler* bölümünde değerlendirdiği bu hatların, kapasitelerinin arttırılması şöyle dursun, mevcut haliyle dahi global enerji sisteminin aktif parçası olmasını kesinlikle istememektedir.

SSCB'nin dağılmasından sonra, ABD'nin sürükleyici hamleleri ekseninde yürütülen Batı enerji diplomasisi, ilk önce Hazar'ın enerji kaynaklarını garanti altına alacak üretim-paylaşım anlaşmalarının tamamlanması üzerinde yoğunlaşmış; bu bölgedeki temel üreticilerle 20-30 yıllık uzun erimli işbirliği imkanları imza altına alındıktan, yani Batı'nın 15-20 yıllık bir plan dahilinde tedrici olarak Kuzey Denizi kaynakları yerine geçireceği Hazar rezervleri "son koz" olarak masaya sürüldükten sonra, ABD, bu kez Orta Doğu kaynaklarını yeni bir nizama kavuşturmak için kolları sıvamıştır.

Bu süreçte, ABD tarafından tıpkı petrol krizlerinde olduğu gibi enerji manivelası ile tekrar dizayn edilen dünya ekonomisinde 'gönüllü' olarak görev almak istemeyen enerji zengini ülkelere ise sadece "Büyük veya Genişletilmiş Orta Doğu Projesi"nin hiç de zengin sayılamayacak mönüsünden seçim yapma fırsatı tanınacağı anlaşılmaktadır.

Her seferinde demokrasi getirme söylemi ile pazarlanan bu pek de içaçıcı olmayan mönünün, Atlantik'ten Çin'e kadar uzanan geniş bir coğrafyaya yayılmış bulunan 20'den fazla ülkeyi 50 yıl sürecek çok ağır bir *diyete* zorlayacağı anlaşılmaktadır. Hazar Geçişli Türkmenistan-Türkiye-Avrupa Doğal Gaz Boru Hattı Projesi'nin Washington D.C. strateji binalarında yeniden büyük bir heves ve iştahla tartışılıyor olmasını da bu kapsamda değerlendirmek gereklidir.

Sonuç itibarıyla, bu tarihi kurguda oyunu yönlendirecek kapasite, tecrübe ve her türlü donanıma sahip olan Türkiye'nin, özellikle boru hattı

politikalarında bu gerçekleri gözönünde bulundurması, bölgesel kısır döngüleri kıracak iyi dizayn edilmiş stratejiler ve yeni açılımlar geliştirmesi bir gereklilik olarak karşımıza çıkmaktadır. Türkiye, her şeyden önce, enerji gibi uzun vadeli hedef ve planların senkronize işletilmesi gereken hassas bir alanda tepkilerini anlık olmaktan kurtarmalı, olup bitenlere makro düzeyde bakabilmeli ve böylece içinde yer aldığı süreci aktif olarak yönetebilmelidir.

Önümüzdeki dönemde, ABD ile masaya yatırılacak önemli bir konu, Irak gazının Türkiye üzerinden boru hatlarıyla Avrupa'ya veya Ceyhan'da kurulacak bir tesis ile LNG olarak ABD pazarına satılmasına yönelik girişimlerin yoğunlaştırılmasıdır.

ABD'nin ise, özellikle nükleer enerjinin barışçıl kullanımı konusunda ABD ile birlikte AB ülkelerini de tatmin edemeyen, hatta ikinci nükleer santral kurmayı planlayan, Rusya'nın arabuluculuğunu reddeden, özetle BM Güvenlik Konseyi ve muhtemel bir BM Ambargosu yolunda emin adımlarla ilerleyen İran'ın durumu ile Türkiye'nin enerji dâhil tüm ilişkilerinin seyrini gündeme getirmesi beklenebilir.

Yine, ABD'nin, son dönemde gerçekleşen Rusya-Türkiye yakınlaşmasından duyduğu rahatsızlığı bir şekilde belli etmesi, fakat bunu yaparken bizzat ABD tarafından dünya petrol piyasasında dengeleyici kaynak olması için her anlamda destek verilen Rusya'yı kesinlikle rencide etmemeye ve ABD-Türkiye ilişkilerini zedelememeye özen gösterecek alternatif çözümler önermesi de ihtimal dâhilindedir.

Her ne şart altında olursa olsun, tüm global stratejik güçlerin kesişme noktasındaki Türkiye, bu coğrafyada ABD, AB ve Rusya gibi tecrübeli oyuncularla *aşık atabilecek* bilgi, donanım, dinamizm ve insan gücüne sahiptir.

Bugün coğrafyamızda yaşanan oyun, enerji merkezli bir denge oyunudur; bu nedenle diğer oyuncunun sikletine bağlı olarak tahterevallinin sadece koltuğunu değil gerekirse çubuğunu da kullanarak ağırlığı, yani baskıyı sürekli dengelemek gereklidir. Petrolün her geçen gün daha da kayganlaştırdığı bu tehlikeli zeminde, bu karmakarışık coğrafyada, dünyanın aynı anda ve fazla sayıda stratejik açılım imkânlarına sahip belki de tek ülkesi olarak, terazinin kefelerini ayarlamak, bölgedeki basınç düzeyini dengelemek ülkemiz sorumluluğuna düşmektedir. Türkiye, böylesine hassas bir müzakere oyununa, oyun başlamadan hazır olmalıdır.

Bu mücadeleyi kazanmak için vazgeçilmez koşul, pek çok vesileyle sürekli tekrarlamaktan bıkmayacağımız üzere, enerji meselelerinde uzman kişileri bilimsel ve objektif bir yaklaşımla biraraya getiren, disiplinlerarası işbirliğine açık bir *"Enerji Stratejileri Kurulu"* oluşturmak ve bu üst düzey uzmanlar grubunu, ABD'de olduğu gibi, Dışişleri Bakanlığı koordinasyonunda çalışan, içinde ilgili tüm bakanlık ve devlet kurumlarımızdan temsilcilerin bulunduğu

'Inter-agency Group' benzeri veya Beyaz Saray'a bağlı *'Ulusal Güvenlik Konseyi'* şeklinde çalıştırmak; böylece ülkemizi müzakere masasında bir adım öne geçirecek hayati bir oluşumun önünü hızla açmaktır.

Bu noktada, 2006 yılı sonunda alınan bir kararla *National Strategic Council for Energy Affairs (Enerji İşleri Ulusal Strateji Konseyi)* adıyla önerdiğimize benzer bir danışmanlar kurulu oluşturan Yunanistan'ın bu konuda bizden önde olduğunu söylemek gerekir. Başkanlığı'na 5 yıl süre ile Yunanistan'ın enerji konusundaki en yetkin isimlerinden biri olan, Yunanistan devlet doğal gaz şirketi DEPA'nın eski Genel Müdürü *Raphael Moissis*'in atandığı bu kurul, enerji sektörünün en deneyimli isimlerini biraraya getiren özerk bir yapılanma ile Yunanistan Kalkınma Bakanlığı ile ilişkilendirilmiştir. Hükümetlerden ve siyasi fırtınalardan etkilenmeyecek şekilde kanunla korunan bu kurul, hazırlayacağı strateji raporlarıyla orta ve uzun vadede Yunanistan enerji geleceğini yönlendirmekle görevlendirilmiştir. Yunanistan örneğini, ders alınması gereken bir husus olarak sadece hatırlatmakla yetiniyoruz.

Yeni komşumuz ABD, Irak'tan ve daha geniş perspektifle Orta Doğu'dan, kısacası bu coğrafyadan uzun bir süre çıkmayacaktır. ABD, kamp malzemeleri ile birlikte bölgemize yatıya gelmiştir. Enerji rezervleri ve enerji taşıma yollarının kontrolünü ulusal güvenlik meselesi olarak gören ABD, bu coğrafyaya ilgisini en az 50 yıl boyunca hiç bir şekilde kaybetmeyecektir. İşte bu nedenle diğer sınırdaşlarımız da BOP/GOP girdabına kapılmak üzeredir. Şu bir gerçektir ki, bugün yaşanan sürecin komşularımıza dönük muhtemel olumsuz etkilerini minimize edecek tek bölge ülkesi Türkiye'dir. Bölge ile ilgili kısa, orta veya uzun vadeli stratejik plan yapanlar, bu önemli gerçeği mutlaka ama mutlaka iyi kavramak zorundadır.

TURKEY AS AN ENERGY TERMINAL AND ITS REPERCUSSIONS ON TURKEY'S RELATIONS WITH THE EUROPEAN UNION

Çağrı ERHAN[*]

Energy is turning into one of the main areas of Turkey's relations with the EU. In addition to the short and medium term priorities and responsibilities of Turkey, which were set forth by EU Commission's accession partnership documents, progress reports and other related documents under the titles of "energy" and "trans European networks", Turkey's emergence as an important transit country for Eurasian hydrocarbon supplies to European markets has also increasingly become one of the particular subjects of the Turkish-EU relations, as well as Turkey's bilateral relations with European countries.

I will not go into details of the European energy needs and demands, existing pipelines, energy transfer routes, ongoing projects and further plans to be considered for the near future. Since yesterday morning various participants have shared their valuable considerations and comments on this issue. In this session we also had the opportunity to listen to Antje and Cenk.

Instead, I would like to present a documentary analysis of how energy issue has gradually turned into an indispensable component of Turkey-EU affairs and its impacts on Turkey's EU process. In my presentation, I will use three sets of EU documents in this perspective: The EU Commission's progress reports, accession partnership documents prepared for Turkey and Commission's staff working document titled "Issues Arising from Turkey's Membership Perspective", in other means the "impact assessment report on Turkey's accession to the EU.

Before I start, a clarification is highly needed: When energy and energy networks are concerned, Turkey-EU relations cover two linked but separate subjects:

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The first one is the energy issue as a chapter title in Turkey-EU accession negotiations. In fact, there are not one but two overlapping chapters under the titles of "energy" and "trans European networks".

And the second one is the energy security or the important role played by Turkey for EU energy markets. My presentation will mainly focus on the second one and I will not present any remarks about the issues such as liberation of internal energy market, progress to adopt EU acquis on the energy efficiency or development of renewable energy sources etc.

Starting with the 2001 Progress Report, the EU Commission has increasingly underlined Turkey's importance for EU energy demands.

The report stressed that Turkey had continued to play a pivotal role as a transit country for oil and gas from the Caspian, Black Sea and Central Asian regions. And then ongoing projects such as Baku-Tbilisi Ceyhan Oil pipeline and Blue Stream gas pipeline were considered as clear instruments in terms of helping ensure the security of supply for the Union, particularly given it was quite difficult to envisage significant increases in volumes transiting by sea through the Turkish straits.

The Commission also welcomed in 2001 that other possibilities of energy transfer were being developed in the framework of co-operation activities between Greece and Turkey.

In contrary, we do not see any special reference to Turkey's role as an energy bridge in 2001 Accession Partnership document. It's true that the accession partnership documents extensively deal with the issues regarding the adoption the EU acquis by the candidate country and do not go too much far beyond this nature. However, unlike the 2001 accession partnership, the second accession partnership for Turkey, which was launched by the Commission in 2003, touched upon Turkey's role with a sentence and the Commission demanded Turkey to promote the implementation of projects in the country listed as projects of common interest in the European agenda. This reference was made to the projects listed in the TEN-E (Trans European Networks Energy) guidelines, launched in 1996 and updated several times, finally in 2006.

Progress Report of 2003 further intensified the emphasis on Turkey's role as a transit country reads as follows:

"As a further step to strengthen energy supply security, Turkey continued its efforts to diversify resources and routes. The Blue Stream pipeline, which connects Turkey with Russia via the Black Sea, was put into operation in December 2002. The engineering studies are under way as concerns the Caspian–Turkey gas interconnector. Turkey's role as a transit country is of

growing importance for the East-West transportation of both oil and gas. Turkey and Greece signed in February 2003 an agreement for the construction of a gas interconnector between the countries. In October 2002 a Memorandum of Understanding was signed by the gas transmission companies of Turkey, Bulgaria, Greece, Romania, Hungary and Austria with a view to further regional interconnections. Concerning oil, the construction of the Caspian-Mediterranean pipeline started in 2003, planned to be operational in 2005."

As the Union's concern to diversify its energy resources intensified during the mid-2000s, emphasis on Turkey's role as an energy bridge or as an energy hub also increased. However, this tendency does not necessary mean that the EU attachment of importance to Turkey's role would wide-open the Union's doors to Turkey. Instead, the EU pursued a rather diplomatic approach towards Turkey and balanced its harsh criticism on the non-fulfillment of the acquis communaitaire in the proposed timeline by highlighting Turkey's so called "key importance for European energy markets".

Frankly speaking, this emphasis was welcomed immediately by the Turkish side, and Turkish statesmen, media, business circles and diplomats started to use this phrase quite intensively in their statements. In fact, as underlined in some presentations during this conference, routes or projects presented by Turkey were just a few and not one of the most important energy supply alternatives of the EU.

Nevertheless, the EU continued to put emphasis to Turkey's role as an energy bridge in its documents. The most comprehensive analysis of the EU with respect to Turkey's accession came in 2004, just before the Council's decision to start negotiations with Turkey in October 2005. The Commission's staff working report titled Issues Arising from Turkey's Membership Perspective According to the report, "Turkey's accession would help to secure better energy supply routes for the EU. It would probably necessitate a development of EU policies for the management of water resources and the related infrastructure. Because of their sometimes considerable trans-boundary effects, good implementation by Turkey of other EU policies in the fields of environment, transport, energy and consumer protection would also have considerable positive effects for EU citizens elsewhere."

The report furthermore underlined the geopolitical importance of Turkey and elaborated that:

"Turkey is situated at a regional crossroads of strategic importance for Europe: the Balkans, Caucasus, Central Asia, Middle East and Eastern Mediterranean; its territory is a transit route for land and air transport with Asia, and for sea transport with Russia and the Ukraine. Its neighbours provide key energy supplies for Europe, and it has substantial water resources."

Moreover, the EU Commission highlighted the importance of Turkey's energy relations with Iran and Russia by saying, "There is extensive energy and gas cooperation between Iran and Turkey, with potential for the EU to become a significant gas market for Iran."

"Turkey's accession would increase the importance in EU-Russia relations of issues related to competing energy interests and developments in Caucasus and Central Asia."

As for the particular case of energy security of the EU the Commission emphasize that "Turkey would have a major role to play in the ***security of energy supply*** of the enlarged EU, since it would have on its borders the most energy-rich regions on the planet. Turkish accession could help secure access to these resources and their safe transportation into the EU single market. It would diversify possible EU supply lines offering alternative export outlets both for Russia, the Middle East and the countries around the Caspian. Turkey is expected to develop further as a major oil transit country as, in addition to the Bosporus and the northern Iraq-Ceyhan pipeline, the Baku-Ceyhan pipeline comes into operation. For gas, Turkey will become an increasingly important transit country between the enlarged EU and the Caspian producers as well as the Middle East."

In particular, a gas interconnector would start being constructed in 2004 and Turkey was supporting the planned "Nabucco" gas pipeline project (Turkey-Bulgaria-Romania-Hungary-Austria) for which the Caspian Basin, including Iran, could also be a supplier. Turkey was also collaborating with the Mashreq countries in the project to bring natural gas from Egypt and eventually Iraq and Iran to the EU. This should help to secure access to these resources and their safe transportation into the EU single market.

Oil pipelines crossing Turkey would contribute to reduce environmental risks of shipping on the Mediterranean Sea and in the Strait of Bosporus.

Turkey's strategic position and its role as key country for energy transit would necessitate a correct implementation of the internal market *acquis* on gas and electricity. Turkey's participation in the Regional Energy Market for South-East Europe (REMSEE), covering also Western Balkans, Romania and Bulgaria, should ensure that its legislation will be in line with the relevant *acquis* well in advance of its accession. The aim is to achieve an operational regional wholesale market by the end of 2007. This should bring Turkey very close to EU standards for gas and electricity.

In 2005 and 2006 progress reports, in a less comprehensive manner the same issues were highlighted with respect to Turkey's role as an energy bridge.

The recent progress report of the Commission which was presented on November 6th this year was more critical when compared to previous 3 progress reports particularly on Turkey's slow steps to ful fill the EU's energy acquis. However, as a tradition, the EU once more put emphasis on Turkey's role as an energy bridge, but with a rather smoother tone:

The Commission said:

"In the area of **energy networks,** the Community is supporting transmission infrastructure feasibility projects to increase competitiveness in the EU electricity and gas markets, whilst equally reinforcing security of supply. The construction of the Turkey-Greece gas interconnector is finalized. Development of the Nabucco natural gas pipeline project from the Caspian and Central Asian region to the EU via Turkey is among the TEN-Energy projects of European interest. The transit regime of the new pipeline requires attention. The construction of the Baku-Tbilisi-Erzurum BTE (South Caucasus pipeline (SCP)) gas pipeline has been completed. Preparations in this sector are well advanced."

CONCLUSION

-As the EU started to develop a more comprehensive energy strategy and have taken steps to create a common energy policy, as a result of growing energy demand within the Union, its sensitivity as regards to candidates' or neighboring countries' capacities and capabilities in the energy field had also grown.

-This tendency had created a direct impact on EU's perception of Turkey. Unlike the previous decade, Turkey was increasingly highlighted in EU's documents with respect to its "key importance for the Union's energy markets" in 2000s.

-On the other hand, Turkey also grabbed this opportunity with satisfaction and while giving impetus to more energy networking projects in its region, it started to bring the issue of "Turkey's key role as an energy bridge for the Western markets" to the international fora more often.

-However, importance of the current energy supply routes through Turkey is lower than it is underlined both by the EU and by Turkey. Turkish route is just one of the alternatives of the EU and unfortunately not the most important one. The EU as an organization and particular member countries continue develop strategies for diversification of European energy resources with or without Turkey's participation.

NUCLEAR IRAN: TECHNICAL ASSESSMENT AND OPTIONS[1]

Vitaly FEDCHENKO

The international community recognized at a very early stage that the development of nuclear energy for peaceful purposes inevitably entails acquiring the means for the production of nuclear weapons. Three types of proposal have been put forward since the early 1940s for control of the spread of sensitive nuclear technology and materials.[2] One approach is to promote multilateral arrangements for the joint use, development or ownership of sensitive nuclear fuel cycle facilities.[3] Under these arrangements no individual participant would have sole control over such facilities and thus could not covertly divert them to military purposes. Such multinational arrangements may prove to be both politically and commercially viable.

The second approach involves legal and regulatory barriers to the transfer of technology and materials of certain sensitive types. This approach shaped the non-proliferation regime that is in place today: although nuclear facilities are

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[1] This text is based on the publication: Fedchenko, V., 'Multilateral control of the nuclear fuel cycle', **SIPRI Yearbook 2006: Armaments, Disarmament and International Security**, Oxford University Press: Oxford, 2006, pp. 686–705.

[2] Scheinman, L., 'Control of proliferation and the challenge of sensitive nuclear technology', **Journal of Nuclear Materials Management**, vol. 33, no. 4 (summer 2005), pp. 34–35; and Rauf, T., 'Background & report of the Expert Group on Multilateral Approaches to the Nuclear Fuel Cycle', Address to the International Conference on Multilateral, Technical and Organizational Approaches for the Nuclear Fuel Cycle Aimed at Strengthening the Non-Proliferation Regime, Moscow, 13–15 July 2005, URL <http://www.iaea.org/NewsCenter/News/PDF/rauf_report 220605.pdf>.

[3] 'Nuclear fuel cycle' is defined by the IAEA as 'a system of nuclear installations and activities interconnected by streams of nuclear material'. It represents the totality of all nuclear installations and activities involved in the production of nuclear power or nuclear materials. International Atomic Energy Agency (IAEA), **IAEA Safeguards Glossary: 2001 Edition**, International Nuclear Verification Series no.3 (2001), URL <http://www-pub.iaea.org/MTCD/publications/ PDF/nvs-3-cd/PDF/NVS3_prn.pdf>, p. 37.

owned and operated nationally, most are subject to certain restrictions, regulations, and safeguards imposed by international treaties and agreements. The legal and political foundation of this regime was laid in the 1968 Treaty on the Non-Proliferation of Nuclear Weapons (Non-Proliferation Treaty, NPT), which constituted a bargain between five states officially recognized as possessing nuclear weapons (the nuclear weapon states, NWS) and the rest of the parties (the non-nuclear weapon states, NNWS). The NPT simultaneously provided the basis for the nuclear disarmament of the NWS, nuclear cooperation between states and nuclear non-proliferation.[4] The NPT relies on the International Atomic Energy Agency (IAEA) and its safeguards system for verification of the parties' fulfillment of their treaty obligations. The IAEA has improved its verification mechanisms over the years.[5] Additional controls on the transfer of sensitive materials and technologies between states have been agreed by various export control regimes, including the Nuclear Suppliers Group (NSG). The 2003 Proliferation Security Initiative (PSI) was launched by the United States and a group of other states to intercept illicit transfers of weapons of mass destruction (WMD), missiles and their components, including nuclear weapons and materials.[6] UN Security Council Resolution 1540 linked the nuclear non-proliferation regime and international criminal law in order to curb the access of non-state actors to sensitive materials and technologies.[7]

The third approach is a technical one. The known types of nuclear fuel cycle entail certain proliferation risks because they all involve the use of nuclear explosive isotopes: uranium-235, plutonium-239 or uranium-233. Many experts claim that new technologies can reduce those risks. Innovative processes that are claimed to be inherently resistant to proliferation, economically attractive and environmentally safe are being developed.

So far the international community has tried to ensure non-proliferation in Iran using mostly the second approach, introducing legal and regulatory barriers to proliferation. Proposals along the lines of the first approach has also been

[4] For the text of the treaty see URL <http://www.un.org/Depts/dda/WMD/treaty/>.

[5] For a discussion of the development of IAEA safeguards see Zarimpas, N., 'Nuclear verification: the IAEA strengthened safeguards system', **SIPRI Yearbook 2000: Armaments, Disarmament and International Security** (Oxford University Press: Oxford, 2000), pp. 496–508.

[6] On the PSI see Ahlström, C., 'The Proliferation Security Initiative: international law aspects of the Statement of Interdiction Principles', **SIPRI Yearbook 2005: Armaments, Disarmament and International Security** (Oxford University Press: Oxford, 2005), pp. 741–65; and the glossary in this volume.

[7] United Nations Security Council Resolution 1540, 28 Apr. 2005, available at URL <http://www.un.org/documents/scres.htm>; and Anthony, I., 'Arms control and non-proliferation: the role of international organizations', **SIPRI Yearbook 2005** (note 6), pp. 542–47.

introduced, for instance, by Russia and Germany. It may also be interesting to look into the third, technical approach, and assess options it may entail.

Planned nuclear programme of Iran

According to information published in open sources, Iran is planning to develop and build facilities for the full front-end of the nuclear fuel cycle at its territory. According to James Acton of the King's College London, the planned material flow in the Iranian fuel cycle should look like shown at the Fig. 1.[8] Should the efforts to introduce the multilateral nuclear arrangement into the Iranian fuel cycle succeed, the material flow in the Iranian fuel cycle may look like shown at the Fig.2. In the following sections of the text the attempt will be made to explain ideas behind two approaches to securing nuclear materials in Iranian context - multilateral nuclear arrangements and proliferation-resistant technologies.

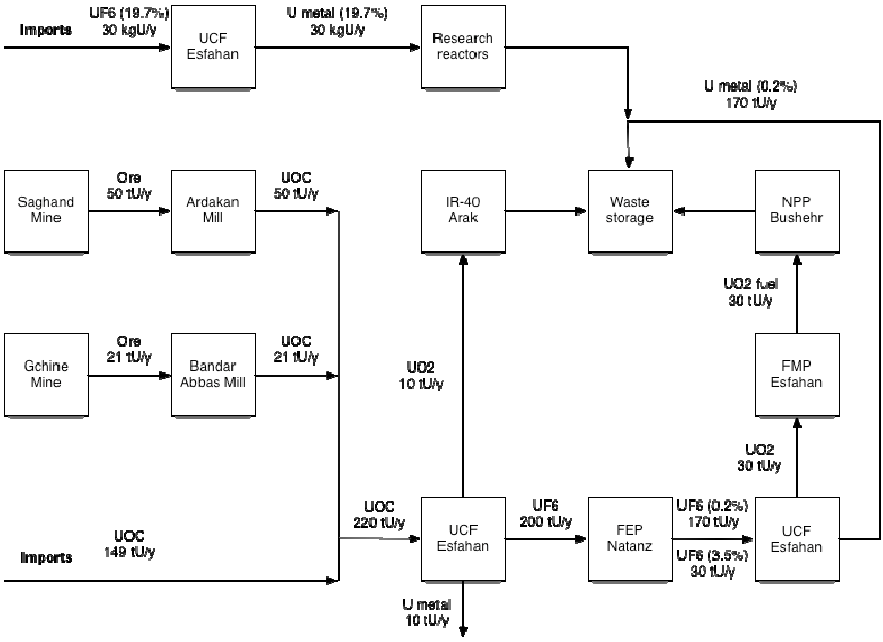

Figure 1. Planned nuclear material flow in the nuclear fuel cycle of Iran.

[8] Acton, J., Little, J, 'The use of voluntary safeguards to build trust in states' nuclear programmes: the case of Iran', *Verification Matters*, May 2007, URL <http://www.vertic.org/publications/VM8.pdf>.

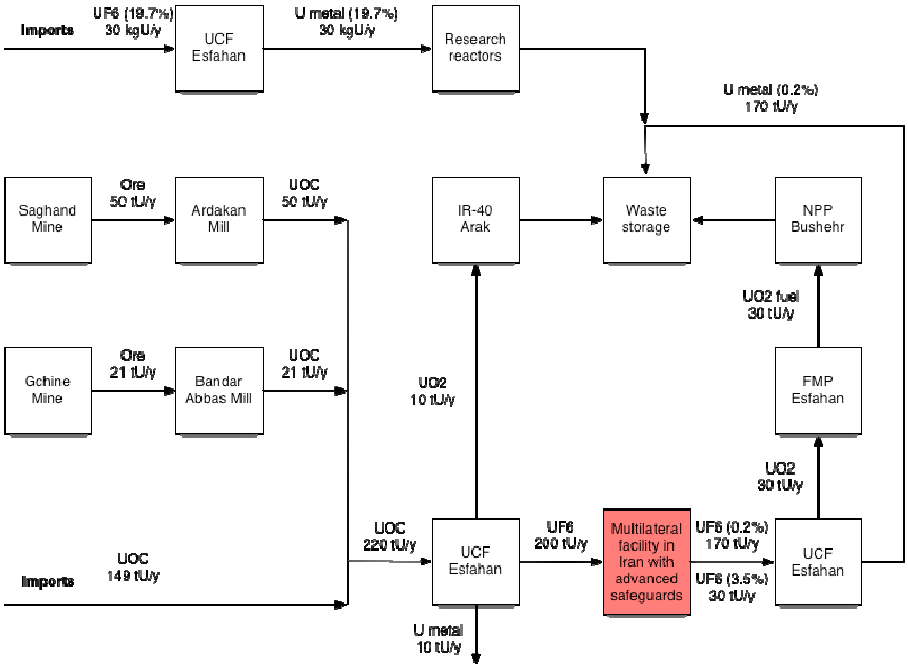

Figure 2. Possible nuclear material flow in the nuclear fuel cycle of Iran with an MNA facility.

Multilateral cooperative strategies

The idea of international control of nuclear power was first put forward in 1946, in a formal US proposal known as the Baruch Plan. The plan envisaged 'the creation of an International Atomic Development Authority, to which should be entrusted all phases of the development and use of atomic energy', including ownership or managerial control over nuclear fuel cycle activities judged to be potentially dangerous for world security, and the right to control, inspect and license all other nuclear activities.[9] This plan was dismissed as too extensive and intrusive, primarily by the Soviet Union.

The centrepiece of the Atoms for Peace plan, presented by US President Dwight D. Eisenhower at the UN General Assembly in 1953, was the creation of an international atomic energy agency 'to which the governments principally involved would make joint contributions' from their stockpiles of fissile

[9] 'The Baruch Plan, Presented to the United Nations Atomic Energy Commission, June 14, 1946', NuclearFiles.org, URL <http://www.nuclearfiles.org/menu/key-issues/nuclear-weapons/issues/arms-control-disarmament/baruch-plan_1946-06-14.htm>.

material and natural uranium.[10] The 1956 IAEA Statute provides for the creation of an international nuclear fuel bank that could guarantee the supply of fuel to those states that need it, thus relieving them of the need to have their own facilities.[11] Article XII.A.5 of the IAEA Statute gives the Agency the right to require temporary 'deposit with the Agency of any excess of any special fissionable materials' produced for peaceful uses 'in order to prevent stockpiling of these materials'. This clause provides for the creation of an IAEA bank of plutonium or spent fuel where it could be placed under international inspection and control until it was required for use in civil nuclear power applications. Variations of these two ideas have been discussed since then.

The Treaty establishing the European Atomic Energy Community (Euratom Treaty) was signed in 1957. A fundamental objective of Euratom is to encourage progress in the field of nuclear energy in the EU. To this end, the Euratom Treaty created the Euratom Supply Agency (ESA), operative since 1960, to ensure the supply of ores, source materials and special fissile materials by means of a common supply policy based on the principle of equal access to sources of supply. No contract in the EU on nuclear supply, including purchases, sales, exchanges and enrichment, can be concluded without the consent of the ESA. It also has 'a right of option' on those materials produced in the territories of EU member states. Another fundamental objective of Euratom is to prevent the diversion of nuclear materials from peaceful to military use on EU territory by applying the system of Euratom safeguards.[12]

In 1970 the Treaty of Almelo was signed by the Federal Republic of Germany, the Netherlands and the United Kingdom, creating the Uranium Enrichment Company (Urenco).[13] The treaty formed the basis for cooperation between these three countries for the development and industrial exploitation of centrifuge uranium enrichment technology. Until September 1993 each party had a national company operating its own enrichment plant, which were all then brought together into a centrally managed international group of companies. In 2004 Urenco covered 19 per cent of world enrichment needs and had a turnover of €707 million.[14] However, multilateral arrangements of this kind can be

[10] Fischer, D., 'History of the International Atomic Energy Agency: the first forty years', IAEA, Vienna, 1997, URL <http://www-pub.iaea.org/MTCD/publications/PDF/Pub1032_web.pdf>, p.9.
[11] IAEA, Statute of the IAEA, URL <http://www.iaea.org/About/statute_text.html>, Articles III.A.2 and B.3, IX, XI, XII, XIII, XIV.B.2 and E–G.
[12] The Treaty establishing the European Atomic Energy Community (Euratom Treaty) entered into force on 25 Mar. 1957; see URL <http://europa.eu.int/scadplus/treaties/euratom_en.htm>, Articles 1, 2, 52–76, 80, 86–91, 171, 195 and 197.
[13] Krass, A. S. et al., SIPRI, **Uranium Enrichment and Nuclear Weapon Proliferation** (Taylor & Francis: London, 1983, p.31.
[14] Urenco, **Urenco Annual Report and Accounts, 2004**, URL <http://www.urenco.com/im/uploaded/1125054354.pdf>.

misused: for example, A. Q. Khan diverted Urenco centrifuge technology to the Pakistani nuclear weapon programme.[15]

In 1973 France, Belgium, Spain and Sweden formed the joint stock company EURODIF. In 1974 EURODIF decided to build a large gaseous diffusion enrichment plant on the Tricastin nuclear site at Pierrelatte in France's Rhône valley. Sweden withdrew from the project in 1974. In 1975 Sweden's 10 per cent share in EURODIF went to Iran as a result of an arrangement between France and Iran. The French government subsidiary company Cogema and the Iranian Government established the Sofidif (Société franco–iranienne pour l'enrichissement de l'uranium par diffusion gazeuse) enterprise with 60 per cent and 40 per cent shares, respectively. In turn, Sofidif acquired a 25 per cent share in EURODIF, which gave Iran its 10 per cent share of EURODIF.[16] Iran's agreement with EURODIF was cancelled after the 1979 Islamic Revolution. Currently, EURODIF Production is a subsidiary of the Areva Group. In 2004 the uranium enrichment market share of EURODIF was about 25 per cent.[17]

The 1974 IAEA General Conference, prompted by India's explosion of a nuclear device in May of that year, discussed the possibility of establishing international facilities to handle spent nuclear fuel from nuclear power plants as an alternative to the development of plutonium reprocessing technologies in individual states.[18] Also in 1974, the IAEA started the Regional Nuclear Fuel Cycle Center (RNFC) study project to assess the feasibility and advantages of such facilities.[19] It led to the discussion of RNFCs at the 1975 NPT Review Conference, which encouraged the IAEA to continue the study and secured support for it from individual states.[20] The RNFC study, completed in 1977, provided a review of the regional cooperative projects covering the entire back-end of the fuel cycle. The study was based on the assumption that world nuclear power would soon become largely based on fast reactors, which did not happen.[21] Partially because of this, and also because of the general lack of political will, no follow-up action was taken.

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[15] Smith, C. and Bhatia, S., 'How Dr. Khan stole the bomb for Islam', **The Observer**, 9 Dec. 1979.
[16] Krass et al. (note 13), pp. 200, 215.
[17] Areva Group, **Annual Report 2004** (Areva: Paris, Apr. 2005), p. 44.
[18] Scheinman (note 2), p. 34.
[19] Lee, B. W., 'Viable scheme for regional fuel cycle center: issues and strategies', Nuclear Cooperation Meeting on Spent Fuel and High Level Waste Storage and Disposal, Las Vegas, Nev., 7–9 Mar. 2000, URL <http://eed.llnl.gov/ncm/session4/ Lee_Byong_Whi.pdf>.
[20] 'Final Declaration of NPT Review Conference', **SIPRI Yearbook 1976: World Armaments and Disarmament** (Taylor & Francis: London, 1976), p. 408.
[21] A fast reactor is one that operates mainly with neutrons in the energy range above 0.1 MeV (fast neutrons) and does not need a moderator. Fast reactors are generally designed to use plutonium fuel and can produce, through the transmutation of uranium-238, more plutonium than

On 7 April 1977 the USA proposed an International Nuclear Fuel Cycle Evaluation (INFCE) to investigate how to strengthen the technological base of the nuclear non-proliferation regime. The INFCE Conference opened on 19 October, with the participation of 40 state representatives. INFCE touched upon all three approaches to the problem of the dual-use nature of nuclear energy (see section I).[22] It was agreed that multinationalization has the potential to limit the number of sensitive facilities, which should have a positive impact on both non-proliferation and the economical operation of the plants. However, considerable drawbacks such as the risk of leak of sensitive know-how were highlighted. By the time of its conclusion in 1980, INFCE had failed to reach consensus on important questions, including the distribution of responsibilities between the host country and foreign shareholders and assurance of supply for foreign investors. No concrete steps stemmed from this comprehensive study, but its findings have considerably influenced the debate.

Among many other concepts discussed in the INFCE framework was one that envisaged an international plutonium storage facility. To continue the examination of the issue, in 1978 the IAEA established the Committee on International Plutonium Storage (IPS) to explore possibilities for implementing the INFCE concept under Article XII.A.5 of the IAEA Statute. This is different from the RNFC approach, in which control of materials and technologies was to remain with a group of states, not the IAEA. The Committee looked into the issue until 1982, when it outlined the basis for an IPS scheme in its Final Report, but disagreements over the definition of 'excess plutonium', the nature and location of storage facility, and the mechanisms determining the release of plutonium by the IAEA led to no outcome.[23] An Expert Group on Spent Fuel Storage was convened in parallel, also with no results.

The 1978 US Nuclear Non-Proliferation Act (NNPA) provided for negotiations on the establishment of an International Nuclear Fuel Authority (INFA) with responsibility for ensuring fuel supply on reasonable terms, which

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they consume. IAEA (note 3). On the back- and front-end of the nuclear fuel cycle, see section V of this appendix.

[22] 'Nuclear fuel cycle and nuclear proliferation', **SIPRI Yearbook 1978: World Armaments and Disarmament** (Taylor & Francis: London, 1978), p. 26; and Stein, M. et al., 'Multi- or internationalization of the nuclear fuel cycle: revisiting the issue', **Journal of Nuclear Materials Management**, vol. 32, no. 4 (summer 2004), p. 54.

[23] Rauf, T., 'Perspectives on multilateral approaches to the nuclear fuel cycle', Address to the 2004 Carnegie Nonproliferation Conference, Washington, DC, 2004, URL <http://www.ceip.org/files/projects/npp/resources/2004conference/speeches/rauf.ppt>.

could have led to the creation of the backup fuel bank, but this initiative was not pursued.[24]

In June 1980 the IAEA established the Committee on Assurances of Supply (CAS) to explore measures to ensure a guaranteed supply of nuclear material, equipment and technology to states committed to non-proliferation and to determine the IAEA's role in this context.[25] CAS discussed various emergency and backup supply mechanisms, including the idea of multinational fuel cycle centres, but was unable to reach consensus before it was disbanded in 1987.

On 5 December 1980 the UN General Assembly established the United Nations Conference for the Promotion of International Cooperation in the Peaceful Use of Nuclear Energy (UNCPICPUNE).[26] It discussed, in particular, the concerns of developing states related to nuclear safety issues, security measures to prevent diversion, and the link between non-proliferation and assurances of supply. UNPICPUNE reaffirmed the need for international cooperation on the peaceful uses of nuclear energy but failed to result in any substantive product.

The IAEA held the International Symposium on Nuclear Fuel Cycle and Reactor Strategies on 3–6 June 1997 as another follow-up to the 1980 INFCE study. IAEA Director General Hans Blix stated there that installed nuclear capacity in 2000 had turned out to be much lower than was predicted in 1980, that fast breeder technology was not commercialized and that the closed nuclear fuel cycle had not taken hold.[27] Nonetheless, the symposium concluded that the creation of a global nuclear system in which sensitive fuel cycle activities are centralized in a few locations is still feasible; that such multilateral centres can provide both economic and non-proliferation benefits; and that international cooperation in the back-end of the nuclear fuel cycle, including centralized disposal of the spent nuclear fuel, should be encouraged. In 2003 and 2005 the IAEA again confirmed that regional spent-fuel storage facilities are technically feasible, potentially viable economically, and advantageous in terms of non-proliferation and nuclear security, and that the real challenges to their

[24] The NNPA also sought to limit the transfer of reprocessing technology and to curb the reprocessing of US-origin fuel abroad. Nuclear Non-Proliferation Act of 1978, URL <http://www.nti.org/db/china/engdocs/nnpa1978.htm>.

[25] Bailey, E. et al., **PPNN Briefing Book**, vol. 1, **The Evolution of the Nuclear Non-Proliferation Regime**, 6th edn (Mountbatten Centre for International Studies, Program for Promoting Nuclear Non-Proliferation (PPNN): Southampton, 2000), chapter 8, 'The peaceful uses of nuclear energy', URL <http://www.mcis.soton.ac.uk/Bb1Chap8.pdf>, p. 48.

[26] Bailey et al. (note 25), p. 48.

[27] IAEA, 'Nuclear fuel cycle and reactor strategies: adjusting to new realities, Contributed papers, IAEA International Symposium, Vienna, 3–6 June 1997', IAEA-TECDOC-990, 18 Dec. 1997, URL <http://www-pub.iaea.org/MTCD/publications/ PDF/te_990_prn.pdf>.

development lay in the areas of political, social and public acceptance.[28] In 2001 and 2002 the IAEA broadened its focus on multilateralization of the fuel cycle beyond reprocessing and enrichment to include repositories for spent fuel and nuclear waste. In 2004 the Agency published its conclusions on developing multinational radioactive waste repositories.[29]

Multilateral nuclear approaches to the nuclear fuel cycle

In 2003 and 2004 IAEA Director General ElBaradei gave a new impetus to studies on the secure development of nuclear energy. This was first done in his statement to the IAEA General Conference in September 2003 and developed further in October 2003, when he proposed a new approach to the problem, consisting of three parts: (*a*) the restriction of operations with highly enriched uranium (HEU) and plutonium exclusively to facilities under multinational control; (*b*) a transition to new nuclear-energy systems that by design avoid the use of materials directly usable for weapons; and (*c*) the introduction of multinational approaches to the management and disposal of spent fuel and radioactive waste.[30]

The Expert Group established by ElBaradei in June 2004 had a threefold mandate: (*a*) to analyse issues and options relevant for multilateral nuclear approaches (MNAs) to the nuclear fuel cycle; (*b*) to provide an overview of incentives and disincentives for MNAs; and (*c*) to provide a brief review of the historical and current experiences and analyses relevant to the study. The group was to set out options for a solution, but not to choose or indicate any preference for one option. Any solution that was proposed was to be concrete, inclusive and without reference to the status of specific states under the NPT.

The Expert Group concluded that past initiatives for multilateral nuclear cooperation had not produced any tangible results, for several reasons. First, proliferation concerns were not strong enough in the past. Second, most of the past initiatives lacked sufficient economic incentives. Third, concerns about assurances of supply were paramount. Finally, factors such as national pride and expectations of technological and economic spin-offs played a role in negotiations on MNAs. The Expert Group agreed that 'the case to be made in favour of MNAs is not entirely straightforward', but it tried to contribute to the development of MNAs by identifying five specific options that would be

[28] Rauf (note 23); and IAEA, 'Technical, economic and institutional aspects of regional spent fuel storage facilities', IAEA-TECDOC-1482, Nov. 2005, URL <http://www-pub.iaea.org/MTCD/publications/PDF/te_1482_web.pdf>.

[29] IAEA, 'Developing multinational radioactive waste repositories: infrastructural framework and scenarios of cooperation', IAEA-TECDOC-1413, 15 Oct. 2004, URL <http://www-pub.iaea.org/MTCD/publications/PDF/te_1413_web.pdf>.

[30] ElBaradei, M., 'Towards a safer world', **The Economist**, 18 Oct. 2003, pp. 43–44.

possible to introduce gradually and noted a number of pros and cons for each. All these options aim at a simultaneous increase in non-proliferation assurances and assurances of supply and services relevant to the nuclear fuel cycle.[31]

1. The first option is to reinforce existing commercial market mechanisms using assurances provided by suppliers through long-term contracts and transparent arrangements, possibly with government backing. For the front-end of the fuel cycle this could mean, for example, that a state which decided not to pursue nuclear fuel production would be offered an arrangement whereby it could lease nuclear fuel and then give it back or one in which it would be guaranteed the provision of enrichment capacities. Commercial or intergovernmental 'fuel banks' could be envisaged. At the back-end of the fuel cycle, commercial offers to store and dispose of spent fuel are possible. The major advantages of this arrangement are that it is easy to implement, does not require new facilities or further dissemination of know-how and does not imply an extra financial burden on the IAEA. The disadvantages of this approach may come from its market nature, because the costs of required idle reserve capacities may be high. In addition, the credibility of assurances provided by private firms or even by consortia of states may not seem sufficient for some.

2. The second option is to introduce international supply guarantees with IAEA participation. This is a variation of the previous option, with the IAEA acting as a guarantor of the supply. For the front-end of the fuel cycle, for example, the IAEA either could hold title to the stock of nuclear material or may have in place the mechanism to ensure that one supplier would replace another should the first fail to perform. For the back-end of the fuel cycle this could mean essentially the revival of the old idea of International Plutonium Storage (IPS), exploiting the provisions of Article XII.A.5 of the IAEA Statute. The Expert Group noted that the failure of previous ideas of this kind was due to the reluctance of states to renounce national sovereignty over separated plutonium. The international storage of spent fuel, however, could generate more interest because it is less immediately valuable, more difficult to store and less sensitive than separated plutonium. International storage of mixed oxide (MOX) fuel is also conceivable in this framework. The advantages and disadvantages of this option are similar to those of the previous option; in addition, the participation of the IAEA gives more credibility and flexibility to the whole exercise. In the case of IPS, other difficulties apply, related to the complex setup and demanding management requirements, with attending financial implications.

[31] IAEA, **Multilateral Approaches to the Nuclear Fuel Cycle: Expert Group Report to the Director General of the International Atomic Energy Agency** (IAEA: Vienna, 2005), URL <http://wwwpub.iaea.org/MTCD/publications/PDF/mna-2005_web.pdf>.

3. In this MNA option, national facilities would be put under multinational control, with the participation of all states, regardless of their relationship to the NPT. This would mean the creation of new players on the market. For the front-end of the fuel cycle, EURODIF would be the most likely model for such conversion. For the back-end there are the existing examples of Eurochemic and the reprocessing of Japanese nuclear fuel in the UK. The advantages of such an arrangement include the fact that no new construction of facilities or dissemination of know-how are required, additional safeguards may be introduced where they do not exist, and the expertise of various states may be pooled. The disadvantages, especially regarding the back-end of the fuel cycle, include the difficulties of international management, low political and public acceptance, increased transportation requirements and the fact that several multinational facilities would have to be built, in more than one country, in order to provide credible assurance of supply. However, arguments for internationalization of the efforts of the nuclear industry are visible in the adjacent area of nuclear science, with its trend to consolidate future research in a few 'centres of excellence'.[32]

4. A fourth option is to create, through voluntary agreements and contracts, multinational or regional MNAs for new facilities based on joint ownership, drawing rights or co-management. Different models have been used to operate a multinational enrichment facility at the front-end of the nuclear fuel cycle. The original arrangement of Urenco entailed the sharing of technology between the partners involved. Later, Urenco evolved into the complex 'black-box' model, in which design and assembly of centrifuges are done in the Netherlands and completed centrifuges are exported to enrichment plants in partner states. Another model is used by EURODIF: the level of investment of each partner corresponds to its percentage share of the product, but the enrichment facility is operated by only one partner—France. Joint construction of a new facility for the back-end of the fuel cycle was investigated in the IAEA's RNFC study. The example of a multinational reprocessing facility is Eurochemic. There is also the conceivable option of 'fuel cycle centres', combining in one location several segments of the fuel cycle. It is believed that regional fuel cycle centres offer most of the benefits of other MNAs, in particular with regard to material security and transport. The existence of precedents and the results of studies suggest that this fourth option is feasible, although the creation of a new facility from scratch would require large human and financial resources, and additional non-proliferation and commercial issues would have to be addressed. Issues of political and public acceptance would also arise under this approach.

[32] IAEA, 'New life for research reactors? Bright future but far fewer projected', IAEA Staff Report, 8 Mar. 2004, URL <http://www.iaea.org/NewsCenter/Features/ResearchReactors/reactors20040308.html>.

5. The fifth option is more remote. In the case of a further expansion of nuclear energy around the world, there may be scope for the development of a nuclear fuel cycle with stronger multilateral arrangements and broader cooperation, involving the IAEA and the international community. For example, a worldwide network of regional fuel cycle centres would minimize transport and give customers a degree of flexibility.

The Expert Group's report prompted palpable debate and official action. At the September 2005 IAEA General Conference, the USA officially declared that the US Department of Energy (DOE) will reserve up to 17 metric tons of HEU from materials previously declared excess to US national security needs for 'an IAEA verifiable assured supply arrangement' for states renouncing enrichment.[33] Russia has also put forward this idea.[34] In October 2005 the Nuclear Threat Initiative (NTI) endorsed the idea of a uranium stockpile being used as 'a backstop guarantee of nuclear fuel supply' under IAEA control and assessed that a fully developed stockpile should be optimally sized at 10 per cent of annual civilian demand. The NTI announced its intention to contribute to such a stockpile low-enriched uranium (LEU) of sufficient volume to yield fuel for one standard 1000-MWe power reactor for three years. The NTI offered to grant $50 million to the IAEA to cover the cost of buying the HEU declared excessive for military purposes, its downblending to LEU, transport and storage.

The idea of multilateral supply guarantees is thus beginning to materialize under the umbrella of the IAEA, although many practical arrangements remain to be settled. Some states are less than eager to embrace it, however, because in their view such guarantees can be successful only if all parties are absolutely confident in the availability of fuel and services, regardless of political developments. An IAEA fuel bank is not acceptable to some to a large extent because they do not see sufficiently credible assurances that the IAEA would not stop supplies for reasons other than those related to the compliance of individual states with the NPT, for example, for fear that the necessary export licenses would not be granted for political reasons. Various models for providing such assurances were put forward in 2005.[35]

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[33] IAEA, 'Communication dated 28 September 2005 from the Permanent Mission of the United States of America to the Agency', IAEA Information Circular INFCIRC/659, 29 Sep. 2005, URL <http://www.iaea.org/Publications/Documents/Infcircs/ 2005/infcirc659.pdf>.

[34] 'Russia proposes creating reserve stock of nuclear fuel under IAEA control', *RIA Novosti*, 13 July 2005.

[35] Goldschmidt, P., 'Mechanisms to increase nuclear fuel supply guarantees', Carnegie International Non-Proliferation Conference, Washington, DC, 7–8 Nov. 2005, URL <http://www.carnegieendowment.org/static/npp/2005conference/ presentations/Goldschmidt_fuel_supply.pdf>; Gottemoeller, R., 'One model for a fuel supply

Proliferation-resistant nuclear fuel cycle technologies

The nuclear fuel cycle consists of two distinctive parts. The first part, or 'front-end', is a set of stages that lead to the preparation of fuel for reactor operation. Although enrichment is not needed for some reactors and it is conceivable to use thorium instead of uranium, in most cases the front-end consists of uranium ore exploration, mining, milling, uranium conversion, enrichment and fuel fabrication.[36] After fuel has been irradiated and unloaded from the reactor, the second part of the nuclear fuel cycle, the 'back-end', begins. It may consist of three stages: intermediate fuel storage; fuel reprocessing in order to separate useful isotopes such as plutonium-239 and uranium-235 from waste; and nuclear waste disposal.[37] Fuel reprocessing may be omitted, in which case all the spent fuel is ultimately disposed as waste. It is widely recognized that two steps of the nuclear fuel cycle—enrichment and reprocessing—are especially proliferation-prone. The construction of a crude nuclear explosive device is relatively easy once a sufficient amount of direct-use material is obtained. Enrichment and reprocessing can lead to the production of such material in the eminently suitable form of HEU or plutonium.

Uranium enrichment facilities under IAEA safeguards currently exist in Argentina, Brazil, China, Germany, Iran, Japan, the Netherlands and the UK. Furthermore, enrichment facilities that are not under safeguards exist in France, India, Pakistan, Russia and the USA. Australia, Israel and South Africa have developed technologies and processes to the point where they can be said to have a working understanding of uranium enrichment.[38]

Reprocessing of spent nuclear fuel for military purposes was stopped in all the NWS but may still be under way in India, Israel, North Korea and Pakistan. Large commercial plutonium separation plants are operated in France, Russia and the UK. India operates three smaller plutonium separation facilities and one for thorium separation. Japan operates one such facility and is planning to begin commercial operation of another in the near future.[39] A significant number of

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agreement', Presentation at the Workshop on International Fuel Services, Nuclear Power and Nonproliferation, Stockholm, 12 Dec. 2005.

[36] 'Enrichment' is 'an isotope separation process by which the abundance of a specified isotope in an element is increased', e.g., production of HEU or heavy water. IAEA (note 3), pp. 33, 41.

[37] Nuclear fuel 'reprocessing' is 'a chemical separation of nuclear material from fission products'. IAEA (note 3), pp. 33, 41.

[38] IAEA, **Multilateral Approaches to the Nuclear Fuel Cycle** (note 31), pp. 133–36; and Makhijani, A., Chalmers, L. and Smith, B., 'Uranium enrichment', Institute for Energy and Environmental Research, Takoma Park, Md., 15 Oct. 2004, URL <http://www.ieer.org/reports/uranium/enrichment.pdf>.

[39] 'Summary table: production and status of military stocks of fissile material, end of 2003', URL <http://www.isis-online.org/mapproject/supplements.html>; World Nuclear Association,

other countries that pursued but subsequently abandoned military nuclear programmes have also conducted research on or developed reprocessing technologies and processes.

Many technologies employed in a contemporary nuclear fuel cycle were originally developed for use in military applications. For instance, gaseous diffusion technology for uranium enrichment 'was developed in an atmosphere of intense urgency and with virtually none of the normal constraints on costs, efficiency and profitability', let alone environmental, non-proliferation or sustainability considerations.[40] This has resulted in a highly distorted subsequent development of the enrichment industry and nuclear fuel cycle technologies in general. With huge investments already made in military applications, governments around the world were more inclined to adapt developed technologies and processes than to search for new ones, perhaps more suitable for the healthy development of civil nuclear power. A separate approach to dealing with the dual nature of nuclear energy is based on the idea of introducing new proliferation-resistant technologies. New technologies could not make nuclear facilities absolutely proliferation-proof, but they can make their illicit use very difficult.[41] This approach may be applied on two levels.

At the first level, proposals have been made to replace individual sensitive technologies in order to make them proliferation-resistant. The most successful proposal today is to replace the HEU fuel of research and isotope-producing reactors with high-density LEU fuel. The Reduced Enrichment for Research and Test Reactors (RERTR) Program was initiated by the US DOE in 1978 and is still operating successfully, with a twin programme in Russia. Proposals along these lines exist for other types of reactor using HEU, in particular for naval propulsion.[42]

Another suggestion was to introduce the proliferation-resistant technology of chemical enrichment of uranium, which would be economically competitive with other processes while producing LEU, but would make it technically infeasible to reach a level of enrichment that is suitable for a nuclear explosive

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'Processing of used nuclear fuel' Information and Issue Brief, London, Mar. 2005, URL <http://www.world-nuclear.org/info/inf69.htm>; and IAEA, **Multilateral Approaches to the Nuclear Fuel Cycle** (note 31), pp. 79–81.

[40] Krass et al. (note 13), pp. 14–16.

[41] A good review of the notion of 'proliferation resistance' is given in Feiveson, H. A., 'Proliferation resistant nuclear fuel cycles', **Annual Review of Energy**, vol. 3 (Nov. 1978), pp. 357–94.

[42] von Hippel, F., 'A comprehensive approach to elimination of highly-enriched-uranium from all nuclear-reactor fuel cycles', **Science and Global Security**, no. 12 (2004), p. 147. Russia also proposed building floating nuclear power plants that would use an LEU-based fuel and would be available for leasing. Samoilov, O. B., 'Russian reactor development: ploughing the waves', **Nuclear Engineering International**, Jan. 2006.

device. Variations of such technologies have been developed independently by France and Japan. On the one hand, slow kinetics and criticality limitations are the two main intrinsic features of both processes, which do not allow the attainment of high uranium-235 assays and thus make them proliferation-resistant.[43] On the other hand, French chemical enrichment technology was pursued in the Iraqi clandestine nuclear programme and might have produced LEU for further enrichment in another process if more effort had been put into it.[44] The chemical enrichment process is reportedly economically competitive, relatively simple and fairly similar to processes in the petrochemistry industry, adaptable to small- or medium-scale applications, and it involves a low level of energy consumption.[45] The technology for gaseous diffusion enrichment, although originally developed to produce HEU for weapons, can also be proliferation-resistant if the plant using this technology was designed specifically to produce LEU.[46]

Proposals to introduce proliferation-resistant technologies to the back-end of the fuel cycle have also been put forward. The idea of such proposals is to develop processes of spent fuel reprocessing that would operate with mixtures of plutonium and other selected elements for preparing proliferation-resistant fuel. For example, in November 2005 the US Secretary of Energy, Samuel W. Bodman, set the goal to develop 'recycling technologies that do not produce separated plutonium'.[47] Some experts question the value of such technologies in terms of resistance to proliferation.[48]

At the second level, several more ambitious proposals have been put forward for the development of new, innovative nuclear energy systems that would be safe, sustainable, economically attractive and proliferation-resistant.

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[43] Krass et al. (note 13), pp. 17–21. 'Assay' refers to the level of enrichment; see, e.g., IAEA, 'Management of high enriched uranium for peaceful purposes: status and trends', IAEA-TECDOC-1452, June 2005, p. 1.

[44] Cordesman, A. H., **Iraq and the War of Sanctions: Conventional Threats and Weapons of Mass Destruction** (Praeger: Westport, Conn., 1999), p. 614.

[45] Coates, J. H. and Barré, B., 'Practical suggestions for the improvement of proliferation resistance within the enriched uranium fuel cycle', eds F. Barnaby et al., SIPRI, **Nuclear Energy and Nuclear Weapon Proliferation** (Taylor & Francis: London, 1979), pp. 49–53; and Kokoski, R., SIPRI, **Technology and the Proliferation of Nuclear Weapons** (Oxford University Press: Oxford, 1995), p. 64.

[46] Kokoski (note 45), pp. 65–66.

[47] '2005 Carnegie Non-proliferation Conference: Remarks prepared for Energy Secretary Sam Bodman', Washington, DC, 7 Nov. 2005, URL <http://www.doe.gov/engine/content.do?PUBLIC_ID=19141&TT_CODE=PRESSSPEECH>.

[48] Kang, J. and von Hippel, F., 'Limited proliferation-resistance benefits from recycling unseparated transuranics and lanthanides from light-water reactor spent fuel', **Science and Global Security**, no. 13 (2005), pp. 169–81.

Some studies claim that it may be conceivable to develop a sustainable and proliferation-resistant (because of the specific qualities of the isotopes involved) thorium fuel cycle, although significant technical problems need to be resolved.[49] The thorium fuel cycle concept is not expected to be absolutely proliferation-proof, but its realization would employ technologies that would make the diversion of fissile material extremely difficult.[50] Development of the thorium nuclear fuel cycle is led by India, with some studies in Canada, Germany, Russia, the USA and other states. Indian uranium reserves are modest but India's thorium reserves are the world's second largest.[51] In 1958 the Indian Government formally adopted a long-term plan which should lead India to a closed thorium fuel cycle in the future and provide it with an unlimited supply of thorium–uranium-233 fuel.[52] This plan stipulated that India would build three distinct types of nuclear reactor in consecutive stages. Currently, India is entering the second stage of that plan and is continuing to implement it. The degree of proliferation resistance of the thorium fuel cycle that is under development in India is still uncertain.

In January 2000 the US DOE began discussions with other states on international cooperative development of so-called 'Generation IV' nuclear energy systems that comprise the entire nuclear power plant as well as facilities for the entire fuel cycle. This group, representing states with significant nuclear expertise, was formally chartered into the Generation IV International Forum (GIF) in 2001. The goal of the GIF is the research and development of innovative reactor and fuel cycle technologies that represent advances in sustainability, economics, safety, reliability and proliferation-resistance; and they should become commercially viable before 2030. To this end, GIF members selected the six most promising reactor technologies.[53] In February

[49] Thorium is assessed to be about 3 times more abundant than uranium and about as common as lead. The only natural isotope of thorium, thorium-232, is fertile (it can be converted into a special fissionable material) like uranium-238 and can absorb slow neutrons in the reactor to produce uranium-233, which is fissile (capable of undergoing fission by neutrons of all energies) like uranium-235. Uranium-233 can be separated from the spent fuel and fed back into the reactor as part of a closed fuel cycle. Los Alamos National Laboratory, Chemical Division, 'Thorium', 15 Dec. 2003, URL <http://periodic.lanl.gov/elements/90.html>.

[50] Galperin, A., Reichert, P. and Radkowsky, A., 'Thorium fuel for light water reactors: reducing proliferation potential of nuclear power fuel cycle', **Science and Global Security**, vol. 6 (1997), pp. 265–90.

[51] World Nuclear Association, 'Thorium', Information and Issue Brief, Nov. 2004, URL <http://www.world-nuclear.org/info/ inf62.htm>; and 'Thorium: statistics and information', US Department of the Interior, US Geological Survey, Minerals Information, June 2005, URL <http://minerals.usgs.gov/minerals/pubs/commodity/thorium/index.html>.

[52] Perkovich, G., **India's Nuclear Bomb: The Impact on Global Proliferation**, University of California Press: Berkeley, Calif., 1999, pp. 26–27.

[53] The members of the GIF are Argentina, Brazil, Canada, France, Japan, South Korea, South Africa, Switzerland, the UK, the USA and the EU. US DOE Nuclear Energy Research Advisory

2005 the USA, Canada, France, Japan and the UK signed an agreement on the joint development of such technologies,[54] with Switzerland and South Korea joining later in the year. The DOE also runs the Advanced Fuel Cycle Initiative, in particular 'to develop reactor fuel and fuel cycle technologies to support Generation IV nuclear energy systems'.[55]

In 2001 the IAEA launched the International Project on Innovative Nuclear Reactors and Fuel Cycles (INPRO). The aim of the project is for IAEA member states to jointly develop innovative nuclear reactor and fuel cycle technology with certain basic features, including effectively unlimited fuel resources, nuclear and environmental safety, proliferation resistance and economic competitiveness.[56] As of the end of 2005 INPRO had developed and validated the methodology for the assessment of innovative nuclear energy systems and is conducting assessments of individual systems under development in IAEA member states in order to pursue their construction in the future. INPRO assessments include a review of the options for multilateral nuclear fuel cycles.[57] In particular, Russia's proposal for a closed nuclear fuel cycle with fast reactors is being evaluated.[58] In September 2005, at the IAEA General Conference, the USA announced that it will join INPRO. This step improved cooperation between INPRO and GIF, which do very similar work.

Committee and the Generation IV International Forum, 'A technology roadmap for Generation IV nuclear energy systems', Dec. 2002, URL <http://gif.inel.gov/roadmap/pdfs/gen_iv_ roadmap.pdf>; and World Nuclear Association, 'Generation IV nuclear reactors', Information and Issue Brief, Apr. 2005, URL <http://www.world-nuclear.org/info/inf77.htm>.

[54] The Framework Agreement for International Collaboration on Research and Development of Generation IV Nuclear Energy Systems is available on the Generation IV International Forum website at URL <http://www.gen-4.org/PDFs/ Framework-agreement.pdf>.

[55] US Department of Energy, Office of Nuclear Energy, Science and Technology, 'Advanced Fuel Cycle Initiative', Washington, DC, Nov. 2005, URL <http://www.ne.doe.gov/infosheets/ afci.pdf>; and 'Advanced Fuel Cycle Program: addressing national priorities and needs', Advanced Fuel Cycle Initiative website, URL <http://afci.lanl.gov/aboutaaa.html>.

[56] International Project on Innovative Nuclear Reactors and Fuel Cycles, INPRO Brochure, Sep. 2004, IAEA website, URL <http://www.iaea.org/img/assets/3836/inpro_2004.pdf>, pp. 1–2.

[57] IAEA, 'Draft terms of reference for Phase-1B (second part) and Phase II International Project on Innovative Nuclear Reactors and Fuel Cycles (INPRO)', URL <http://www.iaea.org/OurWork/ST/NE/NENP/NPTDS/Downloads/ INPRO/tor_phase_1b_2_rev_ys_final.pdf>.

[58] Perrera, J., 'Innovation for tomorrow', *Nuclear Engineering International*, 29 Sep. 2005, URL <http://www.neimagazine.com/ story.asp?sectioncode=76&storyCode=2031487>.

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