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### The geopolitical dimensions of the TurkStream pipeline

Kinga Smoleń<sup>a</sup>

<sup>a</sup> Uniwersytet Marii Curie-Skłodowskiej w Lublinie (Polska)

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Kinga Smoleń\*

## The geopolitical dimensions of the TurkStream pipeline

**Abstract:** The empirical goal of this paper is to conduct an analysis of the geopolitical dimensions of the TurkStream pipeline, with special consideration given to its determinants as well as a diagnosis of the geopolitical implications of its geographical extent. To explore this problem, the following hypotheses are offered. First, the inauguration of the second branch of the TurkStream pipeline in the beginning of 2020 will strengthen the monopolistic position of Russia as a supplier of natural gas to the countries of the European Union. This will increase the dependency of the EU on Russia and severely hamper its ability to formulate a unified, cohesive energy policy. Second, two factors that underlie the geopolitical importance of the TurkStream pipeline are Turkey's and Southern Europe's natural gas needs on the one hand and the political and economic interests of Russia, Turkey, and Ukraine on the other. Third, the TurkStream project should be seen as an instrument that serves to build a tactical partnership between Turkey and Russia – a partnership underpinned by the strategic interests of both countries in the Middle East. Fourth and finally, Russia's gradual withdrawal from directing its natural gas through Ukraine will generate serious economic problems and potential energy shortages in that country. In the long term, this pressure is geared toward forcing Ukraine to re-evaluate the pro-Western trajectory of its foreign policy.

**Keywords:** Turkey, geopolitics, Russia, energy security, natural gas, TurkStream

### 1 Introduction

The construction of the TurkStream pipeline rekindled an international debate on energy solidarity in Europe and on Russia's monopolistic position as a supplier of natural gas to the European Union (EU). The project puts into question the energy security of Ukraine, the country's continued economic development, and its political and energy sovereignty vis-à-vis the Russian Federation. From the vantage

\* Kinga Smoleń – PhD, is an assistant professor at the Faculty of Political Science and Journalism, Maria Curie-Skłodowska University in Lublin, Poland. ORCID: <https://orcid.org/0000-0003-2564-5190>. E-mail: [kinga.smolen@poczta.umcs.lublin.pl](mailto:kinga.smolen@poczta.umcs.lublin.pl).

point of the West, particularly the North Atlantic Treaty Organization (NATO), the Republic of Turkey's ever-closer collaboration with Russia is a cause for concern, as it manifests itself both on the international energy market and in other domains. The TurkStream pipeline confirms the onset of something of a crisis in Western structures. Energy solidarity in Europe, and particularly the EU, is steadily being eroded. On the other hand, the growing symbiosis between Turkey and Russia is primarily pragmatic in nature. Their cornerstone is found in mutual economic interests, the individual policies of each country toward the EU, and the emergence of spheres of influence in the Middle East after the so-called Arab Spring.

The empirical goal of this paper is to conduct an analysis of the geopolitical dimensions of the TurkStream pipeline, with special consideration given to its determinants as well as a diagnosis of the geopolitical implications of its geographical extent. To explore this problem, I present the following hypotheses. First, the inauguration of the second branch of the TurkStream pipeline in the beginning of 2020 will strengthen the monopolistic position of Russia as a supplier of natural gas to the countries of the EU. This will increase the dependency of the Union on Russia and severely hamper its ability to formulate a unified, cohesive energy policy. Second, two factors that underlie the geopolitical importance of the TurkStream pipeline are Turkey's and Southern Europe's natural gas needs on the one hand and the political and economic interests of Russian, Turkey, and Ukraine on the other. Third, the TurkStream project should be seen as an instrument that serves to build a tactical partnership between Turkey and Russia, a partnership underpinned by the strategic interests of both countries in the Middle East. Fourth and finally, Russia's gradual withdrawal from directing its natural gas through Ukraine will generate serious economic problems and potential energy shortages in that country. In the long term, this pressure is geared toward forcing Ukraine to re-evaluate the pro-Western trajectory of its foreign policy.

## **2** Determinants of the geopolitical dimensions of the TurkStream pipeline

The geopolitical nature of the TurkStream pipeline is underpinned by several factors. The most important ones include natural gas short-

ages, the interests of the states involved in the project, and the interests of Ukraine and the EU. All of these factors are interlinked and mutually dependent.

## 2.1. Natural gas shortages

Global consumption of energy resources has been growing systematically since the end of World War II. This trend is especially notable in oil and natural gas. It is estimated that, by 2030, humanity will require 45 percent more energy than it does today<sup>1</sup>. The demand for 'geofuels', or non-renewable fossil fuels that provide a source of primary energy, is conditioned by the following factors:<sup>2</sup> high birth rates in countries that are the primary consumers of energy resources (the population of the world grows by 80-100 million people per year, which entails annual increases of about 2 percent in the total amount of energy used<sup>3</sup>); technological advancements; and economic development in highly developed and newly industrialised countries.

The ever-increasing consumption of energy resources and their persistent exploitation has compelled the international community to face the finite nature of global resource deposits and the prospect of their exhaustion<sup>4</sup>. Access to resources is inhibited by such factors as their uneven distribution and concentration in politically unstable areas, including those marked by long-burning conflict. Such circumstances increase the risk of disruptions to the supply chain, exemplified by direct attacks on the components of energy infrastructure. On the macro level, these conditions also fuel international competition on global resource markets. Militarisation and instrumental approaches to energy policy by the largest producers and suppliers of energy re-

1 *World Economic Outlook*, MFE 2008, *International Energy Outlook*, EIA 2006.

2 J. Potulski, *Surowce energetyczne i linie przesyłowe jako przedmiot geopolityki Morza Kaspijskiego*, [in:] B. Bojarczyk, T. Kapuśniak (eds), *Region czarnomorsko-kaspijski w stosunkach międzynarodowych*, Lublin 2011, p. 22.

3 M. Bartosik, *Ziemia w pułapce energetycznej*, „Biuletyn Techniczno-Informacyjny” 2010, no. 2, p. 5; T. Młynarski, *Bezpieczeństwo energetyczne w pierwszej dekadzie XXI wieku. Mozaika interesów i geostrategii*, Kraków 2011, p. 23.

4 See M. Pietraś, *Autonomiczność bezpieczeństwa energetycznego w stosunkach międzynarodowych*, [in:] M. Pietraś, J. Misiągiewicz (eds), *Bezpieczeństwo energetyczne we współczesnych stosunkach międzynarodowych. Wyzwania, zagrożenia, perspektywy*, Lublin 2017, pp. 23-40.

sources are two other processes that partially derive from the attributes outlined above<sup>5</sup>.

The known natural gas reserves in individual regions are not sufficient to satisfy the needs of the world. The bottom of the Caspian Sea contains confirmed deposits that total 59.2 billion m<sup>3</sup> (bcm)<sup>6</sup>. According to the 'BP Statistical Review of World Energy', this comprises 30.6 percent of the world's reserves of the blue fuel<sup>7</sup>. By comparison, the Middle East accounts for 40.9 percent<sup>8</sup>. Despite the Persian Gulf's relatively large confirmed reserves of the hydrocarbon (Iran possesses the second-largest known reserves of natural gas<sup>9</sup>), this region does little to exploit the resource, with only Iran, Qatar, and the United Arab Emirates engaging on this front. Poor infrastructure and political instability hamper efforts to export gas to external markets – the result of the American intervention in Iraq, the hybrid war in Syria, the unpredictable political strategies of Iran, the activities of the so-called Islamic State, and the sanctions imposed on Iran by the United States. In other regions of the world, natural gas deposits are relatively scant, ranging from 10 percent in Asia-Pacific to merely 1.5 percent in Europe<sup>10</sup>. The country with the largest reserves of the blue hydrocarbon is Russia. In 2017, the cumulative volume of these deposits was 35 bcm (18.1 percent of the world total)<sup>11</sup>.

## 2.2. Interests of countries engaged in the TurkStream pipeline

The state-level stakeholders in the TurkStream project balance a host of divergent interests that stem directly from their varying geopolitical positions, access to energy resources, and the role they play on the international hydrocarbon market.

5 K. Pronińska, *Zagrożenia i wyzwania dla globalnego bezpieczeństwa energetycznego*, [in:] K. Książkowski (ed.), *Problemy bezpieczeństwa wewnętrznego i bezpieczeństwa międzynarodowego*, Warszawa 2009, pp. 59-60.

6 Including Russia, Ukraine, Uzbekistan and Turkmenistan. See *BP Statistical Review of World Energy*, June 2018, <https://www.bp.com/content/dam/bp/business-sites/en/global/corporate/pdfs/energy-economics/statistical-review/bp-stats-review-2018-full-report.pdf> [14.09.2019], p. 26.

7 *Ibidem*.

8 *Ibidem*.

9 *Ibidem*.

10 *Ibidem*.

11 *Ibidem*.

Russia, which initiated the construction of the TurkStream pipeline, has monopolised the delivery of natural gas to EU member states. It is categorically opposed to any and all initiatives that aim to curtail its contribution to the bloc's energy market<sup>12</sup>. As a result, Russia has developed a strategy comprising a number of political and economic measures that mainly amount to<sup>13</sup> distinct policies in relation to selected countries<sup>14</sup> (cementing dependencies, pricing policies, takeovers of businesses in the energy sector and transit networks, temporary suspension of deliveries) and support for competing resource transportation projects that do not weaken its position as a monopolist on the energy market.

Russia also opposes the concept of a 'Caucasian-Turkish corridor' and proposes the so-called northern route as an alternative; this route would transport gas from the Caspian region through its own territory. The pipeline connecting the oil fields of Kazakhstan with the port of Novorossiysk in Russia is a critical conduit for hydrocarbons<sup>15</sup>. Russia supports the idea of extending the Blue Stream pipeline, which could enable the transportation of gas to not only Turkey but also the EU and Israel. It also dedicated itself to expanding the South Stream natural gas pipeline from the Black Sea to Bulgaria and further to Southern Europe (once it reached Bulgaria, the pipeline was expected to branch off to the southwest through Greece and the Adriatic Sea and to southern Italy and to the northwest through Serbia, Hungary, and Austria)<sup>16</sup>. As a result of its Western partners' withdrawal from the project, the Russian authorities proposed the construction of the TurkStream pipeline as an alternative.

In 2019, Russia announced its new energy security doctrine. It identified the primary external challenges to its energy security as the rise in global production of liquefied petroleum gas (LPG) and the formation of a global market for the hydrocarbon mixture, the shift of the

12 See T. Młynarski, *Unijno-rosyjskie „gry gazowe”. Unia Europejska – Rosja: energetyczna współzależność czy nowa „wielka gra”?*, „Gentes&Nations” 2010, vol. 1, pp. 85-112.

13 See K. Liuhto, *Energy in Russia's Foreign Policy*, „Publications of Pan-European Institute” 2010, no. 10.

14 E. Wyciszkievicz (ed.), *Geopolityka rurociągów. Współzależność energetyczna a stosunki między państwami na obszarze postsowieckim*, Warszawa 2008, pp. 157-158.

15 J. Potulski, op. cit., pp. 29-30.

16 See V. Socor, *South Stream: Gazprom's New Mega Project*, „Eurasia Daily Monitor” 2007, vol. 4, no. 123, [http://www.jamestown.org/single/?no\\_cache=1&tx\\_ttnews%5Btt\\_news%5D=32826](http://www.jamestown.org/single/?no_cache=1&tx_ttnews%5Btt_news%5D=32826) [02.11.2012].

central axis of economic growth to the Asia-Pacific region, and the generalised decrease in demand for energy conduits. It also criticized all steps that aim to limit Russia's activity on the energy market under the pretext of diversifying supply resources and routes<sup>17</sup>. The new doctrine covers the years 2025-2030.

In Turkey, the Ministry of Energy and Natural Resources (ETKB) presented the following priorities for the country's energy policy for 2010-2014:

- ensuring an adequate, reliable, and affordable energy supply for Turkey's own purposes;
- guaranteeing the security of energy deliveries;
- stimulating investment that would satisfy the existing demand for energy;
- taking into consideration the impact of the energy sector on the environment<sup>18</sup>.

Turkey was not expecting to play the role of a transit country whose primary objective would be to ensure the uninterrupted and economical flow of energy resources from the Caspian region, the Middle East, and North Africa to the member states of the EU. Instead, the government planned for Turkey to become an integral part of the European energy system and participate as an equal partner in the shaping of energy relations. The realisation of this vision was to facilitate four key objectives<sup>19</sup>. First, it was to enable Turkey to play an active part in the allocation and sale of hydrocarbons. Second, it would establish the transportation and sale of natural resources as an important source of revenue as well as a vehicle for increasing the status of the country in the region and in Europe. Third, it would ensure energy security. Fourth and finally, it would reframe Turkey as a meaningful state actor working to co-design the energy security policy of the EU.

17 PAP, *Rosja ma nową doktrynę bezpieczeństwa energetycznego kraju*, Biznes Alert, 14.05.2019, <http://biznesalert.pl/rosja-doktryna-bezpieczenstwa-energetycznego/> [14.09.2019].

18 See The Republic of Turkey, *Ministry of Energy and Natural Resources Strategic Plan (2010-2014)*, [http://www.enerji.gov.tr/yayinlar\\_raporlar\\_EN/ETKB\\_2010\\_2014\\_Stratejik\\_Plani\\_EN.pdf](http://www.enerji.gov.tr/yayinlar_raporlar_EN/ETKB_2010_2014_Stratejik_Plani_EN.pdf) [02.11.2012].

19 See O. Lesser, *Changes on the Turkish Domestic Scene and Their Foreign Policy Implications*, [in:] Z. Khalilzad, I.O. Lesser, F.S. Larrabee (eds), *The Future of Turkish-Western Relations: Toward A Strategic Plan*, Santa Monica 2000.

This energy policy was expected to be brought to fruition via infrastructure that enables the transit of energy resources from the east to Europe, particularly the EU member states. The 'east' was understood as (1) the post-Soviet region, where the projects taking place in the Caspian region were to play a critical role given Turkey's extensive engagement; and (2) the Middle East, especially Iran, Egypt (gas), and Iraq (oil), from where the resources would travel through the territory of Turkey while truncating and ultimately terminating the transit of oil through the Bosphorus Strait and the Dardanelles.

While most of Turkey's goals in energy policy remain in place, a major shift has taken place in the primary objective, which is currently to transform Turkey into a 'natural gas hub' connecting Russia and the Middle East with Europe<sup>20</sup>. The development strategy of the gas sector comprises several stages. The first – developing a national gas network – has already been accomplished. The second involves diversifying supply sources while the third is the expansion of the transit network<sup>21</sup>. Turkey aims to increase its relevance in the Middle East and expand its ability to influence events in the South Caucasus through large investments in transportation infrastructure. The EU's demand for natural gas is also important in this context. Establishing a new reliance on supplies from Turkey is also likely to compel EU member states to temper their criticism of authoritarian rule in that country<sup>22</sup>.

Russia and Turkey treat other countries involved in the Turk-Stream pipeline – Bulgaria, Serbia, Hungary, Greece, and (according to some sources) Austria – in a perfunctory, instrumental way. Russia leverages their need for reliable delivery of natural gas to increase their dependence on its own energy arteries, strengthen its position as a monopolist in the delivery of gas, and undermine the EU's ability to formulate a common energy policy. Turkey, on the other hand, aims to expand its collaboration with the EU on the energy market and move beyond its status as a transit country by coercing a growing number of concessions, mainly in the context of its continuing violations of the rule of law.

20 M. Zaniewicz, *Turcja buduje potęgę regionalną w oparciu o gaz*, *Energetyka24*, 05.07.2019, <https://www.energetyka24.com/turcja-buduje-potege-regionalna-w-oparciu-o-gaz-analiza> [30.08.2019].

21 *Ibidem*.

22 *Ibidem*.

For Bulgaria, Serbia, Hungary, and Greece, the primary value of participating in the TurkStream pipeline is commercial and pragmatic. They do not perceive the initiative as a threat to the energy security of Europe and the EU or a challenge to its internal cohesion, but rather as a vehicle for their economic and energy-related interests. All four countries are dependent on external deliveries of natural gas.

At 96.5 percent, Bulgaria's indicator of dependency on external sources of natural gas in 2016 was extremely high<sup>23</sup>. Its own reserves were estimated at 68,000 m3 of gas, while the country's domestic consumption reaches 2.17 bcm<sup>24</sup>. By diversifying its gas supply, securing unlimited access to the resource, negotiating its purchase for a reasonable price, and observing environmental standards, Bulgaria aims not only to secure its own energy security. It also has the potential and aspirations to play the role of a transit country for energy resources.

The transportation system for energy resources in Bulgaria should be viewed as one of the most important challenges of building a stable energy security system on a larger scale<sup>25</sup>. The key drivers of this challenge are its geopolitical location and historical ties. Situated on the western shores of the Black Sea, Bulgaria is naturally reliant on resources from the Caspian basin and Russia. Bulgaria's previous membership in the Council for Mutual Economic Assistance (Com-econ) was a critical factor in the decision to procure natural gas from Russia. More than 90 percent of the blue hydrocarbon is delivered to Bulgaria by Gazprom. The most important transit route is a pipeline that runs from Russia through Ukraine. However, the political crisis between the latter two countries has made gas deliveries to Bulgaria contingent on the fluctuating tensions between them<sup>26</sup>. With regard to the purchase price of gas, in recent years, Bulgaria has negotiated preferential treatment with Russia, notably in the most recent 10-year contract between the two states, which guarantees a 20-percent discount on the original market price and translates to USD 420 per

23 Statistical Books, *Energy, transport and environment indicators. 2018 edition*, Eurostat, p. 40.

24 M. Borkowski, *Bezpieczeństwo energetyczne w odniesieniu do Republiki Bułgarii*, „TEKA Komisji Politologii i Stosunków Międzynarodowych” 2014, no. 9, p. 91.

25 Ibidem.

26 Ibidem, p. 92.

1,000 m3 of gas. In exchange, Bulgaria approved the construction of the South Stream pipeline<sup>27</sup>.

Bulgaria's entry into the TurkStream project as a stakeholder offers several benefits for the country. First, it will allow Bulgaria to assume the role of a transit country for natural gas supply streams, which in turn will buttress its geopolitical position and ability to influence the parameters of the energy market in Europe. Second, it will ensure a consistent supply of gas. Third, it will satisfy domestic consumption needs and allow Bulgaria to set aside important strategic reserves of the hydrocarbon.

In Serbia, natural gas constitutes less than 1 percent of the country's overall reserves of energy resources. This makes Serbia heavily dependent on Russia, which supplies about 85 percent of its gas. Domestic resources satisfy only about 15 percent of the country's domestic consumption needs<sup>28</sup>. Serbia's engagement in the TurkStream pipeline is part and parcel of the long-term priorities highlighted in the 'Energy Sector Development Strategy of the Republic of Serbia until 2015' (2006). This strategy prioritises the construction of new energy infrastructure in the country that would facilitate collaboration with its neighbours as well as the creation of a legal framework for linking the existing energy infrastructure on both the regional and European levels with the domestic system that operates in Serbia<sup>29</sup>.

The goals outlined above are the only meaningful change that Serbia's energy policy has seen in recent years. For a long time, the cornerstone of its approach was collaboration with Russia, underpinned by history, political and economic ties, and several other factors. At the same time, the reversal confirms Serbia's readiness to forge closer relations with the European Union. Like Bulgaria, the Serbian government also aims to secure its own national energy security and assume the role of a transit country, which would significantly bolster its geopolitical and geoeconomic position in the Balkans. While par-

27 T. Dąborowski, *Bulgaria: tańszy gaz z Rosji w zamian za zgodę na South Stream*, Analizy OSW, 21.11.2012, <https://www.osw.waw.pl/pl/publikacje/analizy/2012-11-21/bulgaria-tanszy-gaz-z-rosji-w-zamian-za-zgode-na-south-stream> [15.09.2019].

28 B. Ćurčić, *Serbian gas sector in 2010*, 21th Session of UNECE Working Party on Gas, Geneva, 18-19 January 2011.

29 W. Hebda, *Strategia energetyczna Republiki Serbii do 2015 roku*, „Energetyka” 2012, no. 9, p. 7.

ticipation in the TurkStream project will not diversify the supply of the blue hydrocarbon in Serbia, it is an important political development in the context of the country's rapprochement with the EU and the solidification of its alliance with Russia.

Hungary received about 5.3 bcm of natural gas per year from Russia, with a concurrent domestic consumption of 8.4 bcm as of 2014. Hungary's energy dependence rate with regard to natural gas in 2016 was 78.9 percent<sup>30</sup>. The country's energy strategy strongly relied on pragmatic approaches, accentuated by three pillars. The first was achieving independence from Western energy providers. The second was rebuilding and reinforcing state-owned gas and liquid fuel companies. The third was lowering the costs of electric energy and gas, especially for the households. Hungary deemed it a priority to achieve independence from Western (and particularly German and French) energy companies. Lowering gas prices for households requires more affordable supply chains for natural gas, which Russia is able to provide. The latter country is also engaged in the development of energy infrastructure in Hungary. The Russian government provided an infrastructure loan that covered 80 percent of the costs of expanding the Paks Nuclear Power Plant, which a couple of years ago furnished around 40 percent of the energy consumed annually by Hungarian users<sup>31</sup>. All of these factors motivated Hungary to support the South Stream pipeline.

Hungary's entry into the TurkStream initiative should be viewed as a pragmatic move that aimed at forging closer ties with Russia – the foremost investor in the country's energy sector and a provider of natural gas at prices that are favourable to the Hungarians. It is also notable that Hungary's participation in the endeavour will bring the country further revenue from the transportation of natural gas.

### 2.3. Ukraine's interests

The energy strategy adopted by the Ukrainian government in 2017 involves withdrawing from the use of coal (anthracite) as a primary

30 Statistical Books, *Energy, transport and environment indicators. 2018 edition*, Eurostat.

31 M. Kędzierski, *Kędzierski: Czy polityka energetyczna Orbána to rozczarowanie?*, CIRE.PL, Centrum Informacji o Rynku Energii, 21.03.2014, <https://www.cire.pl/item,90908,13,0,0,0,0,0,kedzierski-czy-polityka-energetyczna-orbna-to-rozczarowanie.html> [15.09.2019].

energy resource, continued use of atomic energy, linking Ukraine's energy system with the EU market, shifting the entry and exit points for transit gas from the country's eastern border to its western border, and stimulating the development of the sector through attractive rates geared toward energy companies. This new approach to Ukraine's energy policy is an effort to adjust the country to changes in its national and international environment, most notably its new and precarious political situation. Key planned steps to be taken in response to these circumstances include terminating the delivery of gas from Russia and adopting a Western-friendly direction in the integration of Ukraine's transit systems. In the years 2006 and 2007, Ukraine was the primary state client of Gazprom, with a volume of imports that reached 56-57 bcm per year<sup>32</sup>. Russia's increasingly instrumental approach to its energy policy and its intention to tether the supply of the hydrocarbon to Ukraine's foreign policy orientation ultimately made it necessary for the Ukrainian government to seek other sources of gas supply. Ukraine halted its purchases of natural gas from Russia in November 2015.

Ukraine vocally opposes all initiatives by Russia that aim to weaken its status as a transit country and negatively affect its economy. The Ukrainian authorities consider the South Stream pipeline and, more recently, the Nord Stream 2 and TurkStream pipelines as especially pernicious to its interests and view them as primarily political projects.

#### 2.4. Interests of the European Union

The EU suffers from a shortage of energy resources. The need to import hydrocarbons from non-member states<sup>33</sup> (62 percent of its natural gas and 82 percent of its oil supply) and its deeply embedded dependence on Russian deliveries<sup>34</sup> (which account for 41 percent of the EU's total volume of natural gas imports and 27 percent of its petroleum imports) compel the bloc to seek ways to diversify its supply and build a common energy market. The European Commission's prognoses, which indicate that energy imports to member states are likely to in-

32 I. Trusewicz, *Rewolucja w energetyce Ukrainy*, energianews rp.pl, 27.05.2017, <https://energia.rp.pl/energetyka-zawodowa/elektroenergetyka/4911-rewolucja-w-energetyce-ukrainy> [15.09.2019].

33 T. Młynarski, op. cit., p. 134.

34 Ibidem.

crease to 84 percent for gas and 95 percent for petroleum by 2030, also demonstrate the pressing need for change in the EU's energy policy<sup>35</sup>.

In response to emerging threats to the energy security of the member states, the European institutions are systematically revising their conceptualisation of energy security to encompass the dynamic transformations occurring in the international system and on the energy market<sup>36</sup>. In the past several years, this conceptualisation has focused primarily on the following problems: ensuring the security of supplies via diversification; competitiveness, i.e., creating a common energy market within the EU; expanding the role of alternative sources of energy in order to fight the greenhouse effect and climate change; and articulating an integrated, joint vision of the member states' energy policy within the framework of the EU's Common Foreign and Security Policy (CFSP)<sup>37</sup>.

In a February 2015 Communication published under the title 'A Framework for a Resilient Energy Union with a Forward-Looking Climate Change Policy', the Commission argued that the Energy Union's strategic initiatives should be based on five mutually dependent and strongly interlinked dimensions geared toward enhancing energy security, stability, and competitiveness. These include energy security, solidarity, and trust; an integrated European energy market; energy efficiency as a contribution to the moderation of energy demand; decarbonisation of the economy; and research, innovation, and competitiveness<sup>38</sup>. To achieve these goals, the Commission created a roadmap that outlined the most important steps to be taken. This roadmap high-

35 Ibidem.

36 S. Langsdorf, *EU Energy Policy: From the ECSC to the Energy Roadmap 2050, Energy Roadmap 2050 – A History of EU Energy Policy*, Green European Foundation, December 2011.

37 T. Młynarski, op. cit., pp. 140-141; Commission of the European Communities, *Green Paper. Towards a European Strategy for the Security of Supply*, November 2000 (COM2000) 769 final, <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52000DC0769:EN:HTML> [02.11.2012]; Commission of the European Communities, *Green Paper. A European Strategy for Sustainable, Competitive and Secure Energy*, March 2006 (COM2006) 105 final, [http://europa.eu/documents/comm/green\\_papers/pdf/com2006\\_105\\_en.pdf](http://europa.eu/documents/comm/green_papers/pdf/com2006_105_en.pdf) [02.11.2012]; Commission of the European Communities, *Second Strategic Energy Review. An EU Energy Solidarity and Security Action Plan*, November 2008, COM (2008) 781 final, <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2008:0781:FIN:EN:PDF> [02.11.2012].

38 K. Tomaszewski, *Polityka energetyczna Unii Europejskiej w kontekście problematyki bezpieczeństwa gospodarczego*, „Przegląd Politologiczny” 2018, no. 1, <http://przeglad.amu.edu.pl/wp-content/uploads/2018/03/pp-2018-1-09.pdf> [26.08.2019], p. 136.

lighted the importance of diversifying natural gas supply routes and sources as well as limiting the EU economy's sensitivity to potential shocks in the energy sector. The framework strategy proposed by the Commission was accepted by the European Council in March 2015<sup>39</sup>.

Alternative routes that may be tapped to diversify the EU's energy resources and shift away from Russian reserves include deposits found in various parts of Africa, the former Soviet Union (particularly the region surrounding the Caspian Sea), and the Middle East. For years, the European Union has supported two distinct transit route options. The first involves transporting natural gas along the NG.3 axis (Caspian region–Middle East–EU), which encompasses priority projects such as the construction of new gas pipelines delivering resources to the EU from the Middle East and Central Asia through Turkey while circumventing Russia and Iran<sup>40</sup>. The second involves using the NG.6 axis to build the so-called East Mediterranean Gas Ring, whose goal would be to increase the capacity of pipelines that run between member states in the Mediterranean region and Libya, Egypt, Jordan, and Turkey<sup>41</sup>.

### **3. Geopolitical diagnosis of the TurkStream pipeline**

A geopolitical evaluation of the TurkStream pipeline requires a separate analysis of two aspects of the initiative: its geopolitical location and geopolitical significance.

#### **3.1. Diagnosis of the geopolitical location of the TurkStream pipeline**

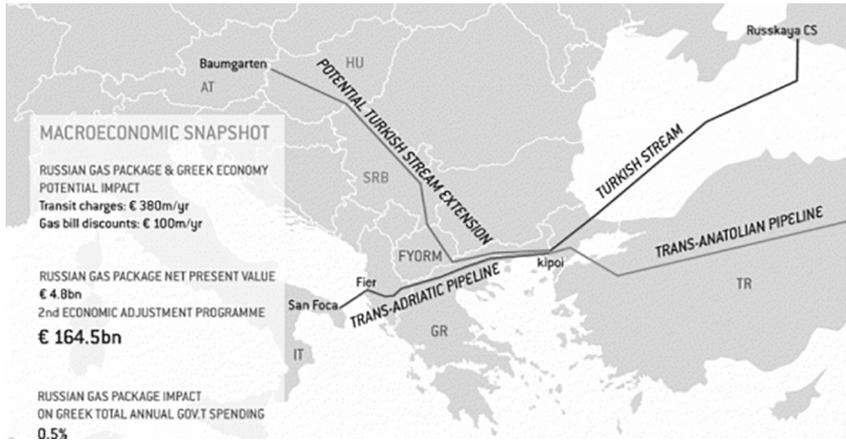
The core goal of the TurkStream project is to construct two branches of a single pipeline measuring 930 km in length, with a capacity of 15.75 bcm each. Natural gas that is transported along the first branch from Russia to Turkey through the Black Sea (specifically from the Russian port of Anapa to the Turkish village of Kiyıköy on the European coast of the Black Sea) is intended exclusively for Turkey<sup>42</sup>. Once

<sup>39</sup> Ibidem, p. 137.

<sup>40</sup> T. Stępniewski, *Geopolityka regionu Morza Czarnego w pozimnowojennym świecie*, Lublin – Warszawa 2011, p. 52.

<sup>41</sup> Ibidem.

<sup>42</sup> RIA Novosti/P. Stępiński, *Gazprom ułożył 300 km gazociągu Turkish Stream*, *Biznes Alert*, 29.09.2017, <http://biznesalert.pl/gazprom-ulozyl-300-km-gazociagu-turkish-stream/1> [16.09.2019]; S. Kardaś, *Rosyjski sukces gazociągowy: zakończenie budowy morskiej części TurkStreamu*, *Analizy OSW*,

**Map 1. Course of the TurkStream pipeline**

Source: *Rosja na razie sama buduje Turecki Potok*, Biznes Alert, 21.05.2015, <http://biznesalert.pl/rosja-na-razie-sama-buduje-turecki-potok/> [16.09.2019].

completed, the terrestrial segment of the pipeline (often called TurkStream 2) is destined for the EU energy market. Its most likely course will be from the Turkish border to Hungary through Bulgaria and Serbia (but avoiding Greece). Unconfirmed reports state that its endpoint would be the Baumgarten gas interconnection point in Austria<sup>43</sup>. According to the agreement currently in force, the second branch will transport 4 bcm of gas to Bulgaria and 11.75 bcm to Serbia, of which around 3.7 bcm will be for the latter country's own purposes. The remaining 9 bcm will be sent through Hungary, which will be able to claim 8 bcm for its own purposes. Finally, 1 bcm will be reserved for Croatia as part of an agreement in which Gazprom committed to delivering natural gas to the country for 10 years. To date, Austria's potential participation in the project has not been defined or confirmed<sup>44</sup>.

The first, preliminary memorandum of understanding between Gazprom and BOTAS, Turkey's state-owned gas company, on the

23.11.2018, <https://www.osw.waw.pl/pl/publikacje/analizy/2018-11-23/rosyjski-sukces-gazoci-agowy-zakonczenie-budowy-morskiej-czesci> [16.09.2019].

43 T. Wójcik, *Turkish Stream, czyli gra o ostatni bastion Rosji na Bałkanach*, Biznes Alert, 17.01.2019, <http://biznesalert.pl/turkish-stream-serbia/> [16.09.2019].

44 T. Wójcik, *Wójcik: Turkish Stream do Bułgarii, ale z konkurencją w Grecji*, Biznes Alert, 05.02.2019, <http://biznesalert.pl/turkish-stream-bulgaria-lng-grecja/> [16.09.2019].

topic of the TurkStream project was signed in Istanbul on December 1, 2014. On October 10, 2016, Turkey and Russia finalised and signed an international agreement on the construction of the pipeline. Construction on the maritime segment of the pipeline began on May 7, 2017, with Gazprom as its owner and operator. The terrestrial section of the pipeline that is intended for Turkey's internal market is administered by BOTAS. The Turkish portion of the second land-based section, which will serve international markets, belongs to TurkAkim Gaz Tasima A.S., a joint venture established on equal terms by BOTAS and Gazprom, both of which hold 50 percent of its shares<sup>45</sup>.

The investments that stem from the TurkStream project will invariably require serious financial expenditures. Official reports released by Russia estimate the cost of the pipeline at around EUR 7 billion. Experts believe that its real figure could be up to three times as high. All the costs involved in building the maritime infrastructure is covered by Russia. Furthermore, in exchange for participation in the project, Gazprom has committed to offering reduced rates for gas deliveries to BOTAS and private clients in Turkey<sup>46</sup>.

### 3.2. Diagnosis of the geopolitical significance of the TurkStream pipeline

The TurkStream pipeline is, first and foremost, a geopolitical endeavour<sup>47</sup>. Turkey and Russia's engagement in the project intensifies the existing collaboration between these two parties and strengthens their tactical partnership. The strategic interests of both countries in the Middle East are a clear expression and justification for this rapprochement, as are the complementary roles they play on the global energy market. Turkey has approved the construction of the second branch of the TurkStream pipeline in its Exclusive Economic Zone in the Black Sea in return for Russia's tacit support for Turkey's military intervention (*Operation Olive Branch*) against the Kurds of Afrin Province in northern Syria<sup>48</sup>. In light of criticism by Western states, the countries of the region are leveraging cooperation to create an alternative to their

45 S. Kardaś, *Rosyjski sukces gazociagowy...*

46 *Ibidem*.

47 See C.R. Mohan, *Geo-politics and energy security*, „Strategic Analysis” 1996, vol. 19, no. 9.

48 See K. Smoleń, *Operation Olive Branch*, „Facta Simonidis” 2019, no. 1 (12), pp. 61-83.

dealings with them. In the Middle East, their common goals primarily revolve around pushing the US out of the region and then dividing it into spheres of influence after the termination of conflict operations in Syria, creating a regional axis comprising Turkey, Russia, and Iran.

As a transit country for energy resources, Turkey aims to facilitate the transportation of the largest possible volume of hydrocarbons through its territory and expand their transit routes. It aspires to choose the recipients of the hydrocarbons and determine transit fees. Russia, on the other hand, aims to maintain its primacy as a monopolist in the delivery of natural gas, reap benefits from the sale of its energy resources, and especially create energy dependencies among an ever-greater set of countries in order to exert pressure on their political orientation. Taking all of the above into consideration, it is apparent that by collaborating on the TurkStream initiative, Turkey and Russia and deepening their mutual energy linkages. The project allows Russia to reinforce its position as the primary provider of gas to Turkey. Turkey, in turn, gains a new transit route and obtains discounts for its resource purchases. The joint investments made by Turkey and Russia on the international energy market, including the Trans-Balkan and Blue Stream pipelines, corroborate the strategic co-dependency of the two countries.

Nevertheless, TurkStream's geopolitical significance is contingent on the project's second branch, which runs to the countries of Southern Europe. Analysts believe that this branch is Russia's response to the ill-fated South Stream pipeline, whose construction was halted by the European Commission<sup>49</sup>. It should be perceived as a strategic investment to protect Russia's interests in Europe, enabling the country to exert influence on the economic development and energy sovereignty of Ukraine, severely undermine the diversification of natural gas routes and sources by the European Union, erode the foundations of political solidarity in the EU, and inhibit the realisation of a common energy strategy.

In 2015, around 67 bcm of natural gas flowed through the territory of Ukraine. Two years later, the figure was up to 93.5 bcm. According to experts, choking off part of this volume will contribute to the grad-

49 S. Kardaś, *Rosyjski sukces gazociągowy...*

ual withering of the country's transit infrastructure, whose viability requires the transportation of 35 to 40 bcm of gas per year<sup>50</sup>. By re-directing a portion of its supply through the first branch of the pipeline, Russia will decrease the export of gas through Ukraine by about 14 percent. If it engages both branches, the current figure will fall by 30 percent<sup>51</sup>. In the long run, limiting the delivery of the resource to Ukraine in this way will exacerbate its economic and energy dependence on Russia<sup>52</sup>. These options are part of Russia's aggressive policies toward Ukraine whose ultimate objective is to strong-arm the country into changing course from a pro-Western foreign policy to one that favours Russia via multi-pronged pressure on the economy and energy sector.

The TurkStream project should also be viewed in light of the challenges and threats it presents to the political solidarity and unified energy policy of the EU. The initiative specifically targets the countries of Southern Europe, which are highly dependent on external supply routes due to a long-standing resource deficit. Moreover, the infrastructure and energy sector in some of these countries requires significant investment to remain operational. In exchange for participation in the project, Russia offers stable and advantageous pricing for the delivery of the blue hydrocarbon as well as assistance in the development of the national energy sector in each country. Two clear illustrations of this are found in Bulgaria and Serbia. Russia has announced that it would contribute to the expansion and modernisation of the Iron Gate Hydroelectric Power Station in Bulgaria. It will also help with the construction of high-voltage power lines in Serbia. In the longer term, Russian companies have announced their engagement in a series of projects to expand Serbia's rail infrastructure while Serbian businesses will contribute to the innovation sector and

50 PAP, *Eksperci o Turkish Stream: To tworzenie infrastruktury, która będzie wzmocnić monopolistyczną pozycję Rosji*, *dziennik.pl*, 28.07.2016, <https://wiadomosci.dziennik.pl/opinie/artykuly/527411,ekspert-o-turkish-stream-to-tworzenie-infrastruktury-ktora-bedzie-wzmacniac-monopolistyczna-pozycje-rosji.html> [16.09.2019].

51 S. Kardaś, *Rosyjski sukces gazociągowy...*

52 See M. Makhnonos, *Ukraine and Russia. Gas consortium: National deputies of opposition protest deal*, „The Ukrainian Weekly” 2002, vol. 70, no. 41.

space research that is being conducted in Russia<sup>53</sup>. In this way, Russia is creating complex linkages with several countries, with the promise of an alternative to the EU's diversification projects such as the LNG terminal in Croatia, the plan to expand the 'southern corridor', the EastMed pipeline (which aims to tap into reserves found in the Mediterranean), and the LNG project in Greece<sup>54</sup>. The triumph of national interests will prevent the EU from realising its common energy policy and contribute to the erosion of its political unity. The significant interest that the project has generated in the region only confirms this<sup>55</sup>.

If the Nord Stream 2 project is finalised, Russia will have successfully established two political-energy axes in Europe: one in Northern Europe with its partners through the Nord Stream 2 consortium and another with the countries of Southern Europe congregated around TurkStream<sup>56</sup>. The realisation of this scenario will precipitate the total dominance of Russia in the European energy sector<sup>57</sup>. If this occurs, Russia will gain an extremely potent instrument of pressure on the political decisions made by individual member states of the European Union<sup>58</sup>.

## 4. Conclusion

In conclusion, the considerations outlined above confirm the hypotheses identified at the beginning of this article. The TurkStream pipeline should be viewed as a strategic investment that significantly strengthens the geopolitical position of Russia. Its main advantage lies in cementing the country's position as a monopolist in supplying natural gas to EU member states. This increases the bloc's energy dependence on Russia, erodes its political unity, and severely hampers the realisation of a common energy policy as well as the formulation of

53 T. Wójcik, *Turkish Stream, czyli gra o ostatni bastion Rosji na Bałkanach*, Biznes Alert, 17.01.2019, <http://biznesalert.pl/turkish-stream-serbia/> [16.09.2019].

54 W. Jakóbk, *Jakóbk: Turkish Stream 2, czyli pomysł Gazpromu na bezkrólowie w Europie (Analiza)*, Biznes Alert, 14.03.2019, <http://biznesalert.pl/turkish-stream-2-analiza/> [17.09.2019].

55 T. Wójcik, *Wójcik: Gaz z Turkish Stream trafi do Serbii, ale czy do Unii też?*, Biznes Alert, 18.01.2019, <http://biznesalert.pl/turkish-stream-odnoga-serbia-ue/> [17.09.2019].

56 PAP, *Eksperci o Turkish Stream...*

57 Ibidem.

58 See J. Misiągiewicz, *Bezpieczeństwo energetyczne Unii Europejskiej. Implikacje nowych projektów infrastruktury gazociągowej w Europie*, Lublin 2019.

a unified foreign policy. It also allows Russia to gain an important tool of economic and political pressure on the bloc while emerging from the international isolation that resulted from its aggression against Ukraine and annexation of Crimea. The activation of the pipeline will likely further weaken Ukraine's status as a transit country. This has been a long-standing strategic goal for Russia, as it may degrade Ukraine's economy and deepen its dysfunctionalities. The TurkStream pipeline also serves to further bolster the tactical partnership between Turkey and Russia, which is dictated by the strategic interests of both countries in the Middle East. These pertain primarily to the division of spheres of influence after the conclusion of the hybrid war in Syria. The variables described above form the underpinning of the geopolitical significance of the TurkStream project.

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