

BETWEEN ENERGY AND SOFT PAN-TURKISM: TURKEY AND THE TURKIC REPUBLICS

After the dissolution of the Soviet Union, Central Asia and Azerbaijan became a key arena of competition between global and regional powers in Eurasia. Though Turkey is one of the most important players in the region, it remains second rank. Due to its economic and demographic rise, however, Turkey could gain the potential necessary to become a key player in the coming years. Whether Turkey will be able to use this potential to its full extent will depend on the way it copes with several serious internal challenges, as well as its ability to play a role of a key transit route for gas and oil exported from the region.

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fter the dissolution of the Soviet Union, Central Asia and Azerbaijan became a key arena of competition between global and regional powers in Eurasia. Turkey stands as one of the most important, yet lower-tiered, players in the region. Ankara has the potential, however, to move up its position – especially if it gains the status of a key transit route for gas and oil exported from the region.

Russia held a monopolistic position in Central Asia for almost 150 years, up until the early 1990s.¹ Now, several more players have entered the “the Great Game”. Active in the region are the four giants: Russia, China, and to a lesser degree the internally-divided EU and the U.S. Turkey, and to some extent Iran, are two regional powers with increasing influence. India, Japan, and South Korea are also playing a considerably important role.

A geopolitical factor of key significance for Turkey’s engagement in natural-resource rich Central Asia is the region’s role as the main transit route between Europe and China. The region constitutes Russia’s “underbelly” and Iran’s “backyard”. Central Asia is also the “gate” to Afghanistan, where Turkey has strong military and economic engagement and where, along with Pakistan, it has a substantial impact on regional and global security. The region is also important for Turkey in terms of culture and identity: it is home to millions of Muslims and Turkic peoples. Public opinion polls have shown that Turks display very warm feelings for their Turkic kinsmen.

The Former Soviet republics are vital for Turkey as an arena of rivalry and/or cooperation with the aforementioned players, while the Caspian Sea region is particularly important for the diversification of Turkey’s energy import for domestic consumption and its aspirations to become a key energy transit hub in Eurasia.

Politics and Culture

Turkey’s policy towards countries in Central Asia is related to the shared cultural legacy of Sunni Islam of the Hanafi school of jurisprudence, with the exception of Azerbaijan, and Turkic languages, with the exception of Tajikistan, which forms the foundation for the development of educational relations between Turkey and these countries.² Turkish is the most similar language to the Azerbaijani and Turkmen languages, which together form the Oghuz branch of the Turkic language family. Tajiks are a Persian-speaking nation. However, Uzbeks and Kyrgyz account for almost 20 percent of the residents of Tajikistan.

¹ For the purpose of this article, Azerbaijan will be considered a part of Central Asia.

² At present, around 65 % of Muslims in Azerbaijan are Shiites and around 35 % are Sunnis. “International Religious Freedom Report for 2011”, U.S. Department of State, 30 July 2012, <http://www.state.gov/j/drl/rls/irf/2011/eur/192785.htm>

Turkey maintains a generally neutral stance on the political character of post-Soviet regimes, with the exception of the most severe forms of repression (i.e., the massacre in Andijian in Uzbekistan in 2005). However, Ankara sometimes takes a supportive approach to pro-democratic revolutions (i.e., Kyrgyzstan).

Cultural and identity factors are especially important in the relations between Azerbaijan and Turkey. In fact, no other post-Soviet country has such close relations with Turkey as Azerbaijan. Both countries officially declare that they are “one nation, two states”. A key element of Turkish-Azerbaijani relations is their very close cooperation on matters re-

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lating to energy. Turkey is the main transit country for the oil from Azerbaijan to European markets and is set to be the main transit country for natural gas as well. Additionally, Baku figures among the major energy suppliers of Ankara. Another indication of the exceptional Turkish-Azerbaijani bond may be seen in the field of military collaboration (joint exercises, sales of equipment, scholarships, training and financial aid).

On the other hand, an attempt to normalize Turkish-Armenian relations between 2008 and 2010 gave rise to the most serious crisis in Turkish-Azerbaijani relations in history. Although this crisis was overcome, it reduced Baku’s confidence in Ankara for some time. Azerbaijan has the capacity to influence Turkish foreign policy, which it proved in 2009-10 by lobbying successfully against the normalization of relations between Ankara and Yerevan.

Turkish-Azerbaijani relations are not perfect. They are not free of such “practical” problems; as high Azerbaijani custom duty rates, lengthy controls at the border crossing points, visa requirements for Turkish citizens and other problems that Turkish citizens face with regard to obtaining work or residence permits in Azerbaijan. As far as the energy sector is concerned, Turkey is interested in launching the transit of Turkmen gas through Azerbaijan and Anatolia into Europe as soon as possible. However, it seems that Baku prefers that this development take place in the longer term perspective, because it perceives the Turkmen gas as a challenge to its short-term economic interests, namely the sale of Azeri gas to the European markets.

Turkey has managed to build good relations with all of the republics in the Central Asia region, except Uzbekistan. This is certainly a challenge, given Turkish

ambitions to enhance Turkic cooperation and the fact that Uzbekistan is the second-most populous Turkic country after Turkey. Uzbeks have the largest population in the Caspian Sea region and constitute over half of the region's inhabitants. Moreover, they form significant minority groups in the neighboring countries, especially in Kyrgyzstan, Tajikistan and Afghanistan. Regarding the size of its economy and natural resources, Uzbekistan also has the second largest economic potential in the region after Kazakhstan.

"Azerbaijan has the capacity to influence Turkish foreign policy, which it proved in 2009-10"

Turkish-Uzbek relations started deteriorating in the 1990s, when Uzbek opposition activists found shelter in Turkey and began establishing contact there with students from Uzbekistan. However, the real crisis occurred in 2005, when Turkey strongly condemned the

Uzbek regime for the massacre of the demonstrators in Andijan. Over the past few years, relations have become somewhat warmer, but they are still not good.

Another challenge for Turkish policy toward Turkic countries arises from Turkmenistan's strong insistence on maintaining "permanent neutrality" (having no membership in any military or political alliances). However, since the death of Turkmenbashi in 2006, Turkish-Turkmen relations have taken a positive turn. On the other hand, Turkey may boast that its stable and close relations with Kazakhstan are a success. Kazakhstan is definitely the most important country in the region in terms of economic potential and raw materials, including oil, uranium and coal.

Turkey is the main promoter of the idea of cooperation between Turkic states and peoples. In the early 1990s, Turkey initiated summits of Turkic states and founded a cultural institution, the Joint Administration of Turkic Arts and Culture (TURK-SOY). In the early 1990s, Turkey hoped to institutionalize cooperation between Turkic countries through the creation of a common organization, but attempts made at that time, ended with limited success. Twelve summits of Turkic states have been held within the 21 years since the collapse of the USSR. Between 2001 and 2009, only one summit was held, in 2006. The key reason for this break was the fact that Turkey focused primarily on the process of its EU integration and on Middle Eastern issues.

Cooperation between Turkic states became more institutionalized in recent years, thanks mainly to Turkey's initiative. The Parliamentary Assembly of Turkic-speaking Countries (TURKPA) was established at the end of 2008. The Cooperation Council

of Turkic Speaking States was created at the Nakhchivan summit in Autumn 2009. The Council is foreseen to meet each year in a different member state. Since 2009, three summits of the Cooperation Council have taken place. The last one was organized in Bishkek in August 2012.

Other institutions including The Turkic Academy, the Permanent Secretariat in Istanbul, the Council of Foreign Ministers, the Council of Senior Officials, the Business Council and the Council of Wisemen were also established. With regards to culture, education and science, the Cooperation Council intends to create a union of Turkic universities, a fund for supporting scientific research and a special foundation to support culture. With regards to economic cooperation, the Council is also considering the establishment of a bank and an insurance company to support the Business Council.

An idea of institutionalization of cooperation between Turkic states has not been accepted by all Central Asian countries. Its formal members are Azerbaijan, Kazakhstan, Kyrgyzstan and Turkey. Due to Turkish efforts, Turkmenistan participated in the summit of the Co-operation Council in Istanbul in Autumn 2010 and supported the idea of the Council, but did not join it. Turkmenistan claims that this stance results from a requirement to remain neutral, which it sees as the foundation of its foreign policy. The mere presence of the president of Turkmenistan at the Istanbul summit should be seen as a success, because Ashgabat had previously delegated lower-ranking officials to attend previous summits of Turkic states. In turn, Uzbekistan is boycotting Turkic states' summits due to the aforementioned crisis in Turkish-Uzbek relations. On the other hand, Turkey managed to convince all Central Asian countries and Azerbaijan to join the Economic Cooperation Organization (ECO), which was established in 1985 by Iran, Turkey, and Pakistan.

Turkey's growing engagement with Turkic-speaking nations is linked to the increasing influence of China in Central Asia over the past few years. Turkey hopes that the decreasing influence of Russia –the hard power player– and the reinforcement of the position of China –the economic superpower– will open up new fields of co-operation for Ankara, since the countries of this region seem to be interested in balancing the influence of China and Russia. As a growing but not a dominant middle power, Turkey may become more attractive to them, but Ankara cannot be an alternative to Beijing or Moscow. Moreover, Moscow perceives the rise of Turkey's engagement as “a lesser evil” in comparison to Beijing's increasing influence in the region. On the other hand, the dynamic rise of China's economic leverage in the region sometimes has a negative impact on Turkey's position in the economies of the Central Asian countries (e.g. Turkmenistan).

Turkey also plays a particular role in the area of Central Asian security. It is the main partner of countries in this region within the framework of NATO's Partnership for Peace. Many military officers from Kazakhstan or Kyrgyzstan have attended training courses in Turkey. However, the key structures in the energy sector for the countries in this region –excluding Turkmenistan– are the Shanghai Cooperation Organization, which is dominated by China, to a lesser extent by Russia, and the Collective Security Treaty Organization, established under the tutelage of Moscow.

Social dimension

Turkey also plays a vital role as a donor of development aid to Central Asian countries. In 2009-10, Ankara was the top donor of development aid for Kyrgyzstan and Turkmenistan, number two for Kazakhstan and number four for Azerbaijan. The development aid offered by Turkey has an especially strong impact on Kyrgyzstan, which, along with Tajikistan, is the poorest country in the region (its GDP per capita is as low as 2,000 dollars). Development aid accounts for over eight percent of this country's GDP. Turkey gave around 450 million dollars to Kyrgyzstan from 2005-10. Turkish aid constitutes approximately 20 percent of the development aid received every year by Bishkek.³ In the case of other countries, international development aid accounts for less than one percent of their GDP.

In the academic year of 2011-12, Turkey has been a popular destination for more than 8,000 students from Turkic states. Almost 3,000 students from Turkmenistan and 3,500 from Azerbaijan were enrolled in Turkish universities.⁴ Moreover, the number of Azerbaijani students at Turkish universities increased by 50 percent, and Turkmen students by 70 percent in 2010. In the 1990s, 2,000 Uzbeks were studying at Turkish universities, which made Turkey the most popular place for Uzbeks to study abroad. However, the number of Uzbek students in Turkey today has been reduced to dozens.

In turn, many Turks are studying in Azerbaijan. In 2009, over 4,000 students from Turkey were studying at Azerbaijani universities. They accounted for several percent of all students. Turkey has also opened six universities: two in Kyrgyzstan, two in Kazakhstan, one in Turkmenistan and one in Azerbaijan, and numerous secondary schools in Turkic countries. The Kyrgyzstan-Turkey Manas University, according to international rankings, is the best higher-education institution in Central

3 From 2009-10, the share of Turkish development aid in total aid received by Azerbaijan, Kazakhstan and Turkmenistan was 13 %, 22 % and 36 %, respectively. "Aid Statistics, Recipient Aid Charts", *The OECD Development Co-operation Directorate (DCD-DAC)*, 25 July 2012, <http://www.oecd.org/>

4 Foreign students studying in Turkish universities number 26,000, *Today's Zaman*, 5 October 2011, <http://www.todayszaman.com/news-258983-26000-foreign--students-study-in--turkish-universities.html>

Asia. The Turkish universities in Turkmenistan and Azerbaijan are also considered to be the best in these countries. Many students from other Central Asian states, especially from Uzbekistan, are studying at the Turkish universities in Kyrgyzstan. A characteristic feature of these Turkish universities is an emphasis on studies in English and Turkish. This education policy contributes to reducing the significance of Russian as the *lingua franca* among Turkic elites.

Turkish religious organizations have also created close institutional bonds with their counterparts in post-Soviet countries. The Eurasia Islamic Council, which unites communities from the entire region, operates under the patronage of Ankara.

Turkey has also become a popular destination for middle-class tourists from Turkic countries. Approximately 600,000 residents of Central Asia visited Turkey in 2011.⁵ Half of them came from Kazakhstan, where the Turkish Riviera has become the most popular tourist destination among the middle class. Azerbaijanis go on holidays to Turkey much more frequently than the Central Asians. Almost 600,000 Azerbaijanis visited Turkey in 2011.

"(...)Ankara cannot be an alternative to Beijing or Moscow."

Economy

Turkey, after China and Russia, is the most important economic partner for countries in the Caspian Sea region. Obviously its rank on the scale of the region overall is significantly weaker than that of China or Russia. However, its economic bonds with some countries, notably Azerbaijan and Turkmenistan, are stronger or comparable to those of China or Russia. Turkey's strong economic position in Central Asia is illustrated by its share in the trade balances of Kyrgyzstan, Turkmenistan, Uzbekistan and Tajikistan, which is only slightly smaller than that of the entire EU or the U.S. Moreover, trade between Turkey and some countries in this region has rapidly grown over the past few years. For example, trade between Turkey and Turkmenistan grew more than three times during 2006-10, and doubled between Turkey and Tajikistan in 2007-10. Turkey's two most important trade partners in the region in absolute numbers are Kazakhstan and Azerbaijan. Turkey is also an important trade partner for Tajikistan and Turkmenistan, its share in their trade balance being around 12-15 percent, and eight percent in

⁵ "Number of Arriving-Departing Foreigners and Citizens", *Republic of Turkey, Ministry of Culture and Tourism*, 20 July 2012, <http://www.kultur.gov.tr/EN/belge/2-27503/number-of-arriving-departing-foreigners-and-citizens.html>

Azerbaijan. Turkey's share of Uzbekistan's trade balance is approximately five percent. In the case of Kyrgyzstan and Kazakhstan, its share is the lowest at approximately four percent.⁶ Kazakhstan and Turkmenistan are of key significance for Turkish construction firms, which have simultaneously gained a dominant position in the construction sectors of these two countries. Turkish investments in the construction sector of Turkmenistan reached almost 20 billion dollars as of early 2011. Meanwhile, Turkmen GDP (PPP) is less than 40 billion dollars. Turkey's total construction investments in these two countries are worth almost the same amount as Turkish construction investments in Russia, which of course has a higher population and a significantly larger economy. Turkey is also playing a major role in the construction sector of Azerbaijan, where Turkish construction firms implemented contracts worth 4.6 billion dollars. Turkish construction investments in the other countries of this region are also substantial. Until 2011, Turkish companies undertook construction contracts worth almost 2 billion dollars in Uzbekistan, over 0.5 billion dollars in Kyrgyzstan and almost 0.5 billion dollars in Tajikistan, which constitutes a significant share for Turkey in the construction sectors of Kyrgyzstan and Tajikistan.⁷

Turkey is a relatively important investor in all Turkic countries. A great majority of Turkish foreign direct investments have gone to Azerbaijan and Kazakhstan.⁸ According to Kazakh data, Turkey invested 1.6 billion dollars in Kazakhstan until Autumn 2010 (1.5 percent of all FDI). In turn, Turkey is playing quite an important role in Kazakh investments abroad, which amounts approximately 0.5 billion dollars. Given the fact that 60 percent of Kazakh investments went to the Netherlands, which is simultaneously a key investor in Kazakhstan (partially reinvested Kazakh capital), the real significance of Turkey for Kazakh investments and Turkish investment in Kazakhstan is much more greater than the official statistics indicate. For Azerbaijan, Turkey is the most important foreign investor with approximately 15 percent of investments. Azerbaijan –if the merely formal investments by the Netherlands are disregarded– is ranked number one on the list of Turkish foreign investments. Turkey is also the most important market for Azerbaijani foreign investments, which account for several percent of all foreign direct investment in Turkey. In the near future, owing to the implementation of planned investments in the Turkish energy sector, Azerbaijan will gain the status of one of the largest foreign investors in Turkey. Also according to Turkish data, Turkey is the fifth investor regarding FDI stock in Kyrgyzstan.

6 Turkish statistical data on Turkey's trade exchange with some post-Soviet countries differs strongly from the data presented by these countries. Given the high degree of similarity between the Turkish statistics and the highly professional EU statistical data, the Turkish data seems more reliable than those quoted by the statistical offices of the post-Soviet countries.

7 *Türkiye Mütcaahhitler Birliđi, Türk Yurtdışı Mütcaahhitlik Hizmetleri*, [Turkish Contractors Association, Turkish Contracting in the International Market], 18 July 2012, <http://www.tmb.org.tr/genel.php?ID=10>

8 "Investment Climate Statements", *U.S. Department of State*, 22 July 2012, <http://www.state.gov/e/eb/rls/othr/ics/2011/index.htm>

Energy

Turkey's existing and potential energy links with the Caspian region are very important. The countries of key significance are Kazakhstan, which possesses three percent of global oil deposits, Turkmenistan with almost 4.5 percent of global gas deposits and Azerbaijan with 0.7 percent of global gas deposits and almost one percent of global oil deposits. However, it can be assumed that new deposits will still be found. Azerbaijan, in addition, will increase its importance as a transit country.

"The stronger Turkey is, the more attractive it will be as a partner to the Central Asian countries."

Azerbaijani fuels are transported by the Baku-Tbilisi-Ceyhan (BTC) oil pipeline and the Baku-Tbilisi-Erzurum (BTE) gas pipeline, both of which were put into operation in 2006. Azerbaijani oil accounts for approximately 85 percent of the oil transported by BTC. The shares of Kazakh and Turkmen supplies of the oil currently transported by BTC are ten percent and five percent respectively. A vast majority of Turkmen oil is transported by BTC. However, it should be noted that oil deposits in Turkmenistan are limited. On the other hand, the volume of Kazakh oil in BTC pipeline could increase. In October 2009, Azerbaijan and Kazakhstan struck a deal on increasing the volume of Kazakh oil transported by BTC five times in the near future. If this deal is in fact implemented, Kazakhstan will become the most important oil supplier for the BTC with half of its capacity, and around one third of the oil exported by Astana would flow through this pipeline. Today, a large part of Kazakh oil is transported by tanker ships through the Turkish Straits. Turkey also plays quite an important role for Turkmen gas as a destination market because in fact Turkmenistan accounts for a significant share of the gas purchased by Ankara from Iran.

The construction of the Trans-Anatolian Pipeline, TANAP (including Azerbaijani gas and potentially Turkmen gas) and the Samsun/Uniyе-Ceyhan pipeline (Kazakh oil) together with a clear increase in the volume of transit of oil from Kazakhstan through the BTC oil pipeline could further increase the role of Turkey as a transit state. The Samsun/Uniyе-Ceyhan pipeline is a planned crude oil pipeline that would cross Turkey from the Black Sea to the Mediterranean Sea. The aim of this project is to ease the traffic burden in the Bosphorus. However, Russia's negative approach to the Samsun/Uniyе-Ceyhan project and the BTC could constitute a serious challenge for Kazakhstan's engagement in the project and the increase in the volume of the Kazakh oil transported through the BTC.

"Time has come for the EU to really take action by reaching a new deal with Turkey on migration."

Currently, the most promising project is the Trans-Anatolian natural gas pipeline project (TANAP), a gas pipeline that would run between Azerbaijan and Turkey. In June 2012 Ankara and Baku signed an inter-governmental agreement on TANAP, which could cost 7 billion dollars, and would be completed in six years. It would pipe 16 billion cubic

meters of gas per year from Azerbaijan. Part of the deal is also that Turkey will keep six billion cubic meters from this amount. The line is designed in such a way that its capacity can increase depending on gas inflow: 23 bcm per year by 2023, 31 bcm by 2026, and ultimately 60 bcm, –by adding pipeline strings through the same corridor– mainly contingent on the transport of gas across the Caspian Sea from Turkmenistan. Gas is supposed to flow from the Turkish border to the EU via new gas pipelines (Nabucco West and/or Trans-Adriatic Pipeline). It is worth recalling that in 2008 the Azerbaijani oil corporation SOCAR bought PETKIM, Turkey's largest petrochemical company for 2 billion dollars. They designated 1.75 billion dollars for the development of the Turkish complex. SOCAR is also set to commence the construction of a large refinery worth 5.5 billion dollars in Izmir in 2012. It plans also to invest 800 million dollars in a new power station. Last but not least, SOCAR holds 80 percent stake in TANAP whose construction is estimated at 7 billion dollars.

The key obstacles to the implementation of this project are the Turkmen-Azerbaijani dispute over the division of the sea shelf and their commercial rivalry concerning gas exports to Europe. The negative stance adopted by Russia and Iran towards this project also makes it difficult for Turkmenistan to participate in it. Equally of note is China's strengthening grip on the energy sector of the region, which is gradually emerging as a challenge to Turkey's ambition to become an energy hub for commodities exported from Central Asia.

Conclusions and Prognosis

In the coming decades, Turkey could gain the potential, necessary to become one of the most important players in the region because of its own economic and demographic rise and the decline of Russia. However, whether Turkey will be able to use this potential to its full extent will depend on the way it copes with several serious internal challenges (e.g. the Kurdish issue). The EU accession process would certainly facilitate this, and at the same time would considerably strengthen Ankara's influence and assertiveness in the region.

Turkey's position in the region will also be influenced by political developments in Iran. Turkey and Iran could spiral into geopolitical rivalry, as can be seen now especially in the Arab world, or reach a compromise and cooperate in surrounding regions, including Central Asia. In the case of political liberalization in Iran, and improvement of Iranian-Western relations, Tehran and Ankara may establish close cooperation based on energy, that is, transit of Iranian raw materials *via* Anatolia into Europe and transit of energy from the region through Iran and Turkey into Europe.

If Turkey's EU integration process finds itself in a permanent stalemate, the growth of its potential, activism and influence in the region is likely to be more limited. In return, this scenario will be beneficial for China, Russia and Iran, powers aiming at tactical cooperation with Turkey at the expense of Western interests. However, the establishment of tangible anti-Western strategic partnerships between these players and Turkey is highly unlikely because of insufficient convergence of their interests.

The EU accession process could firmly establish liberal democracy in Turkey, and it could be expected that at some point Turkey would be able to support democratization of Central Asia as a strategic priority. Such an involvement would necessarily strain relations between Turkey and the satraps in the Turkic states. Social unrest on a massive scale (e.g. massacres, brutal repressions) in the region could in particular elevate the importance of democratization in the Turkish agenda. On the other hand, if political changes take place in these countries in the long term, –since after the Arab spring, anything is possible– Turkey will benefit the most.

A religious revival has been taking place in Central Asia since the collapse of Communism. Though secular regimes may perceive Turkey as a threat because it is ruled by post-Islamists, alternatively it is possible that they would attempt to integrate non-radical, mainstream Islam into the public life, which would give Ankara the opportunity to become a source of inspiration for such efforts.

The stronger Turkey is, the more attractive it will be as a partner to the Central Asian countries, which want to balance their relations with China and Russia. However, the region's importance in Turkish foreign policy will depend on developments in other regions. For instance, the Arab spring region, arguably more significant for Turkey's national interests than the Caspian Sea region, overshadows other vectors and issues. On the other hand, factors which may contribute to the strengthening of Turkish influence in the region are de-Russification (a decline in Russian population and the decreasing importance of the Russian language), and

the diminishing asymmetry in terms of economy and population between Central Asia and Russia. According to UN forecasts, between 2010 and 2050, the population of Central Asia will grow from approximately 60 million to over 80 million. Kazakhstan is the country with the greatest potential. In ten to 20 years, it is likely to become the post-Soviet country with the highest GDP per capita (even higher than Russia's), with the second largest economy after Russia's. Thus Turkey's position in the Caspian Sea region will depend on the intensification of economic and political relations with Kazakhstan and the improvement of Turkish-Uzbek relations. The significance of Turkey as a trade partner for Central Asia is likely to increase considerably in the next few decades as railway infrastructure develops in the region, including Iran and Turkey.

A country which is strongly interested in its development is China, which wishes to gain additional transport routes to Europe as an alternative to Russia. In Summer and Autumn 2010, China concluded numerous contracts with Turkey, Iran and Central Asian countries, which provided for vast Chinese investments in the construction of their railway infrastructures. However, the issue of greatest impact on the position of Turkey in the Caspian Sea region will be the direction of oil and gas exports, or, in other words, the question of whether Turkey will become a key transit country for Kazakhstan and Turkmenistan.