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## **Turkey-KRG Energy Relations: Internal and External Dynamics** By **Remziye Yılmaz\***

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### **Abstract**

This paper aims at exploring internal and external dynamics of Turkey-KRG energy relations. It argues that Turkey's fight against the PKK, its increasing energy need, the target of Turkish energy decision-makers to decrease the high reliance of the country on Russian and Iranian gas, Turkey's goal of emerging as an energy hub, the economic interests of Turkish business groups, the strained relations between Ankara and Baghdad, and Erbil-Baghdad conflict have been the major determinants of Turkey's energy strategy towards the KRG. The paper concludes that the independence referendum held by the KRG in September 2017 has serious implications for the future of the Ankara-Erbil energy partnership, depending on measures to be taken by Kurdish and Iraqi leaders.

**Keywords:** Energy Security, (Inter)Dependence, Energy Collaboration, Energy Hub, National Interest, Security

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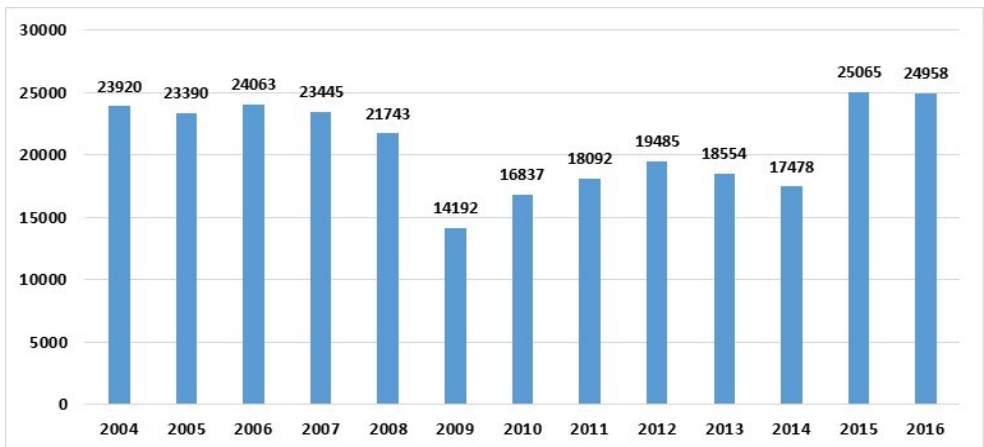
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# Turkey-KRG Energy Relations: Internal and External Dynamics

## Introduction

Turkey has one of the largest energy markets in Europe. The significant growth in its economy, population, urbanization and industrialization has recently caused a rapid increase in the energy demand of the country. The average annual increase rate in its energy need since 1990 is 4,6 per cent.<sup>1</sup> The annual energy need of the country is envisaged to double in 10 years and grow annually 4,5 per cent until 2030.<sup>2</sup> However, since the country does not have sufficient domestic energy resources to meet its energy demand, it has to import around 75 per cent of its energy demand. More particularly, the country needs to import around 98 per cent and 90 per cent of its gas and oil supplies, respectively. While some volatility has been observed in the oil and gas imports (see Figure 1 and Table 1) parallel to the economic growth of the country, Turkey's oil and gas imports have generally been augmenting.

Figure 1. Turkey's Crude Oil Imports (Thousand Tonnes) (2004-2016)



Source: The figure is based on the data compiled from EMRA annual oil reports and "Energy Policies of IEA Countries Turkey 2016 Review", 2016, <https://www.iea.org/publications/freepublications/publication/EnergyPoliciesofIEACountriesTurkey.pdf> (Accessed 15 November 2017).

Turkey's total gas imports in 2016 were 46.352 million cubic meters (Mcm), originating mainly from Russia (52,94 per cent), Iran (16,62 per cent), Azerbaijan (13,98 per cent) and other countries (16,46 per cent).<sup>3</sup> The country imported 40,064 million tons of petroleum in the same year, mainly from Iraq (23,09 per cent), Russia (19,38 per cent), Iran (17,32 per cent) and other suppliers (40,21 per cent).<sup>4</sup> These figures clearly indicate that Turkey is highly reliant on Russia and Iran to meet its energy need.

**Table 1: Turkey's Natural Gas Imports (Mcm) (2005-2016)**

Year	Russia	Iran	Azerbaijan	Algeria	Nigeria	Others*	Total
2005	17.524	4.248	0	3.786	1.013	0	26.571
2006	19.316	5.594	0	4.132	1.100	79	30.221
2007	22.762	6.054	1.258	4.205	1.396	167	35.842
2008	23.159	4.113	4.580	4.148	1.017	333	37.350
2009	19.473	5.252	4.960	4.487	903	781	35.856
2010	17.576	7.765	4.521	3.906	1.189	3.079	38.036
2011	25.406	8.190	3.806	4.156	1.248	1.069	43.874
2012	26.491	8.215	3.354	4.076	1.322	2.464	45.922
2013	26.212	8.730	4.245	3.917	1.274	892	45.269
2014	26.975	8.932	6.074	4.179	1.414	1.689	49.262
2015	26.783	7.826	6.169	3.916	1.240	2.493	48.427
2016	24.540	7.705	6.480	4.284	1.220	2.124	46.352

\* Others represent the countries of imported spot LNG.

Source: "Turkish Natural Gas Market Report 2016", <http://www.emra.org.tr/EN/Documents/NaturalGasMarket/PublishmentsReports> (Accessed 2 June 2017).

Turkish leaders are not worried that much about the security of oil supplies due to the existence of global oil markets and thereby various possibilities and routes to import oil. Nonetheless, they are greatly concerned about the security of gas supplies due to several causes. First, the country needs to import almost all its gas demand. Second, gas has the high share in its electricity generation and is growingly utilized in the industrial sector. Thus, any disruption of natural gas flows might importantly jeopardize the Turkish economy. Third, natural gas exporters have more inclination of utilizing their gas exports as weapon in bilateral contacts because of the inflexible manner of gas transit, which includes permanent infrastructure and long-term gas deals. Hence, Turkey's high dependence on external natural gas suppliers can limit its foreign policy maneuvers.

Thus, Turkey's external oil and natural gas strategy aims at meeting the increasing energy demand of the country, reducing its high reliance on Russian and Iranian gas and turning the country into an energy hub between energy producing countries in the Middle East, Caspian Sea and East Mediterranean and European markets. Becoming such a hub will enable Turkey to enhance its economy, boost its energy security, strengthen its leverage towards the EU, Russia and energy exporting countries, and bolster its regional power. The KRG can play an important role in terms of succeeding the targets of Turkey's foreign oil and natural gas strategy, taking into account its large oil and gas reserves and its geographical closeness to Turkey. Thus, this paper intends to discover internal and external dynamics of Turkey's energy partnership with the KRG.

The existing studies on Turkey-KRG energy relations acknowledge that the energy resources of the north Iraq have key significance for meeting Turkey's energy demand, and for helping the country to emerge as an energy hub.<sup>6</sup> Besides, the studies emphasize that Ankara's close energy relations with Erbil have been

especially improved due to the importance of the KRG's support in Turkey's struggle against the PKK.<sup>7</sup> By building on the existing academic literature, this paper attempts to contribute to further understanding of the energy partnership between Ankara and Erbil by comprehensively analyzing the internal and external dynamics of the partnership. In this respect, it will cover several important issues such as which elements determine the partnership, what kind of dependence Turkey and the KRG have established in the field of energy and how this dependence shapes Turkey's maneuvers in the foreign policy. More importantly, considering potential serious implications of the referendum organized by the KRG on 25 September 2017 for the future of Ankara-Erbil relations, this paper will also attempt to explore the potential impact of the referendum on Turkey-KRG energy cooperation.

The paper is organized in four sections. First, it looks at the KRG's energy profile in order to see to what extent the north Iraq can contribute to Turkey's energy security and to the achievement of the goals of its foreign oil and natural gas strategy. Second, it examines Turkey's bilateral political and economic relations with the KRG. Third, the paper scrutinizes in details the energy partnership between Turkey and the KRG. In this regard, it analyzes internal and external issues that have considerably influenced their partnership. In this section, it also explains some obstacles to the partnership, including the KRG's independence referendum. Finally, based on all this information, the paper ends with its assessment and main findings.

### **The KRG's Energy Outlook**

According to the International Energy Agency (IEA), the KRG region holds 4 billion barrels (Bbl) of proved reserves.<sup>8</sup> But, the KRG's anticipation is much higher since it includes unproven resources. The Kurdish Administration envisages to have 45 billion Bbl<sup>9</sup> even though this figure has not been independently confirmed and likely contains at least certain resources in disputed areas - particularly Kirkuk.<sup>10</sup> Except from the super-giant Kirkuk field, oilfields in the north are smaller (even though still large by international standards), frequently holding 0.5 to 1.0 billion Bbl of recoverable oil. Nevertheless, the region's favorable geology is generating wells with high initial oil production rates, in many cases higher than that are informed elsewhere in Iraq.<sup>11</sup>

According to the Kurdish Administration, its potential gas reserves are over the present federal estimate stating 165 trillion cubic feet (Tcf) gas is in place, including 38 Tcf that is recoverable.<sup>12</sup> The KRG anticipates that reserves could be as much as ten times the initial figures estimated by the Ministry of Oil of Iraq.<sup>13</sup> In the north Iraq, recently there have been a number of discoveries of natural gas of enough size to demonstrate the probability of commercial production there.<sup>14</sup> Meanwhile, the leading impetus to develop Iraq's non-associated gas resources has come from companies with an eye on the higher value proposed by international markets. This has exactly been the case in the KRG area, where the region's gas resources have been offered as a way to meet Turkey's gas demand and fill pipelines onwards to southeast Europe.<sup>15</sup>

### **Baghdad-Erbil Energy Dispute**

The strained relations between Baghdad and Kurds over hydrocarbon explorations

date back to 1950s. The nationalization of the majority of Iraq Petroleum Company (IPC)'s concession area after the July 1958 revolution ended the exploration in the country, and its assets were completely nationalized by the end of 1975. Before 2004, exploration in the areas which are now part of the Kurdistan Region of Iraq (KRI) was very limited due to several explanations including opposition of the Baathist government<sup>16</sup> to developing the region and, conversely, the Kurdish opposition to central government activities.<sup>17</sup>

Legal framework of the Iraqi energy sector works within the general boundaries initiated by the 2005 constitution. The constitution states that oil and gas resources are "owned by all the people of Iraq in all the regions and governorates."<sup>18</sup> The federal government, with the producing governorates and regions, oversees the management of oil and gas extracted from present fields and the necessary strategic policies to develop Iraq's oil and gas assets in a manner that succeeds the highest interest of Iraqis. However, the constitution does not clearly address the question of jurisdiction over hydrocarbon exploration and development, and has been subject to different interpretations.<sup>19</sup>

Baghdad and the KRG dispute over which entity has the right to develop the resources in the KRG region. The constitution involves unclear language on this issue, proposing that Baghdad will have the main authority over "existing" fields. Kurds argue that "new fields" fall into the purview of the regions and can be developed according to Kurdish decisions without input or approval from the federal government.<sup>20</sup> Baghdad and Kurds have also differed over what are appropriate contracting mechanisms for the development of Iraq's resources. Baghdad has stuck to technical service contracts (TSCs), while the KRG has awarded profitable production-sharing contracts (PSC) to international oil companies (IOCs). Other related issues have put additional annoyances to the Baghdad-Erbil relationship, including who has the authority to market and sell production, and how earnings are allocated.<sup>21</sup> Besides, there have been disputes between Baghdad and Erbil regarding the use of the Iraq-Turkey pipeline (ITP) since oil production began in Kurdish region in 2009. As the KRG provides oil companies with exploration contracts independently of the central government, the Iraqi government increased the pressure on the KRG by declaring that it would not allow the KRG oil to be exported using the pipeline to Ceyhan.<sup>22</sup>

With the aim of overcoming disputes on these issues and allowing Kurdish oil to be exported with approval of Baghdad, over the past years, the Iraqi government and the Kurdish Administration concluded a series of agreements, through which export revenues would accumulate to the federal budget and Baghdad would recompense producing companies in the region.<sup>23</sup> However, the implementation of the agreements was marred by disputes over Baghdad's partial and postponed payments to the companies and the KRG's non-obedience with agreed-upon export volumes.<sup>24</sup>

Baghdad's control of oil and gas exports is considered as a significant manner of keeping oversight on the north as Baghdad can also control the region's economic development through managing its hydrocarbon exports. Baghdad's will of managing the awarding of exploration licenses is also a way to keep economic dominance over Kurds.<sup>25</sup> The oversight of Kurds' hydrocarbon exports is also considered as a manner

of limiting the Kurdish links with other countries. If Kurds were to develop independent trade connections with near neighbors such as Turkey, Iran, and Syria; it may start to see itself as having an international role distinct from that of Baghdad.<sup>26</sup>

### Ankara-Erbil Bilateral Relations

The KRG was established in 1991, after the Iraqi military and state apparatus pulled out of the three Kurdish provinces of Erbil, Sulaymaniyah and Dohuk, following Iraq's defeat in the First Gulf War. At that time, the KRG had de facto autonomy. But, it acquired a greater level of autonomy after 2003 [following the US' invasion of Iraq]. While during the 1990s its legitimization endeavors were mainly dependent on its successful democratic transition, in the post-2003 era its legitimization has been extended to involve other aspects, such as the KRG's victorious state-building process and its economic capacity.<sup>27</sup> The KRG's wealth and grown independence amid the complete collapse of the Iraqi state were the embodiment of Ankara's concerns before the US invasion in 2003.<sup>28</sup> Thus, Ankara was swift to condemn any indication of the Kurdish separatism and in some cases, took a proactive approach, either undercover or openly, to restrict the Kurdish independence.<sup>29</sup> Thus, throughout the 1990s and the early 2000s, the principal strategic target of Ankara's policy towards Iraq was to impede the emergence of a Kurdish state in the north. Even after the federal government in Baghdad acknowledged the KRG's right to administer the northern Iraq in 2005, Ankara still rejected to have any official contacts with Erbil.<sup>30</sup> However, later Turkish leaders came to the conclusion that Ankara's policy towards Iraq would have challenges, particularly in eliminating the threat from the PKK, without the contribution of Kurdish groups in Iraq. As a result, in order to solve the security problems stemmed from the northern Iraq, Turkish policymakers and politicians contacted Kurdish authorities.<sup>31</sup> The shift in Turkey-KRG relations might also be a function of the decreased extent enjoyed by Turkey's once hardline general staff to proclaim on foreign policy matters. Besides, the Turkish government started to be more active in the region since Ankara sought for preventing the Iranian influence in the KRG region after withdrawal of the US army. Moreover, the importance attached to trade by Turkey's current government has been as a catalyst of the Turkish soft power [towards the KRG].<sup>32</sup> The Kurdish region emerged as an important market for Turkish business groups. Last but not least, increasing closer ties with the KRG has become part of Turkey's strategic calculations in Syria.<sup>33</sup> Although Turkey's links with Iraqi Kurds have ameliorated in recent years, its relations with Syrian Kurds have continued to be quite bitter. This is due to the fact that unlike in the KRG where Iraqi Kurdish groups hold more sway than the PKK, the PKK is very popular among the Syrian Kurds.<sup>34</sup> Since Syrian Kurds are cautious about Ankara's close links to the Syrian opposition, Turkey has little leverage on them.<sup>35</sup> Thus, being unaware of Barzani's little impact on Syrian Kurds, Turkey aimed at using its leverage over Barzani to marginalize the Partiya Yekîtiya Demokrat (Democratic Union Party-PYD) [a Syrian opposition group that promotes Kurdish autonomy and federalism] in the Syrian opposition and among Syrian Kurds.<sup>36</sup>

On the other hand, from the KRG's point of view, ameliorating relations with Ankara was an evident policy option. Despite its history with Kurds, Turkey continued to be

the best-positioned state to provide the landlocked Kurds with a crucial lifeline to the outside, particularly to the West.<sup>37</sup> Above all, Turkey, which has the most developed economy among all of the KRG's neighbors, is a member of NATO, an EU candidate, and, most importantly, a close partner of the US.<sup>38</sup> In addition, the increasing power of a Shia-dominated central government in Baghdad and the fading impact of the US only added to the Iraqi Kurdish persuasion that their best choice is to improve relations with Turkey.<sup>39</sup>

In October 2009, then Foreign Minister Davutoğlu visited the region with a delegation of officials and businessmen and declared the opening of a consulate in Erbil. In March 2011, Erdoğan paid a visit to the Kurdish Region – for the first time by a Turkish Prime Minister. KRG leaders also repeatedly visit Ankara.<sup>40</sup> In just five years, Ankara has utilized its soft power to transform a once conflicted relationship with the KRG into an economically and politically beneficial one.<sup>41</sup>

### Turkey-KRG Energy Partnership

Ankara has recently established a strong energy partnership with Erbil. According to the Kurdish newspaper Rudaw, the share of Turkish oil companies is 25 per cent of the total Kurdish fields in the KRG region.<sup>42</sup> Genel Energy [independent Turkish Anglo company], in partnership with other international energy companies, has acquired rights in several fields in the region. Powertrans is another Turkey-based company which is active in the KRG region. The company acts as the intermediary for the KRG's oil exports via tankers. It has been sending Kurdish oil to the world markets through Turkey since 2012.<sup>43</sup> Ankara has preferred to keep the state-owned energy companies Turkish Petroleum Corporation (TPAO) and Turkish Petroleum International Company (TPIC) out of the KRG contracts. Initially, this action was political, supposedly having to do with Turkish worries to legitimize the KRG and boost its autonomy against Baghdad. Besides, it was commercially driven, with Turkey refraining from taking sides in the tug-of-war between Baghdad and Erbil on the Natural Resources Law in order not to give Baghdad any excuse to ban TPAO and TPIC from Iraqi oil contracts.<sup>44</sup>

In March 2013, Erdoğan and KRG Prime Minister Nechirvan Barzani discussed a framework agreement including several multi-billion-dollar oil and gas deals. According to these deals, two oil and one gas pipelines would be constructed.<sup>45</sup> Besides, the parties agreed to govern export pipelines, sale of gas, oil trade, the revenue sharing mechanism and acquisition of oil fields by the state-backed Turkish Energy Company (TEC).<sup>46</sup> According to a source close to the negotiations, "this is the most comprehensive energy deal in Turkey's history."<sup>47</sup>

In an effort to prevent political tension with Baghdad, the KRG and Ankara did not sign an intergovernmental agreement; instead, they left the KRG energy portfolio to public and private energy companies. In November 2013, the TEC signed a multi-billion-dollar energy package that includes exporting 2 million barrels (MMbbl) of oil and 10 Bcm of gas per year to Turkey.<sup>48</sup> Additionally, it was agreed that the TEC will participate in six blocks of the ExxonMobil's 13 exploration blocks in the Kurdish region.

In compliance with this deal, with Turkey's political and financial assistance, the KRG finished constructing its independent pipeline, called the KRI-Turkey Pipeline, inside the Iraqi territory that could export crude oil beyond Baghdad's control.<sup>49</sup> The commencement of oil exports through the pipeline in 2014 was historical for the Kurdish oil industry, and helped production to increase from 75,000 Bbl/d in 2011 to over 600,000 Bbl/d in the second quarter of 2015.<sup>50</sup> In addition, the DNO-KRG connection to Turkey pipeline transports oil produced at the Tawke field, operated by DNO, to Fishkhabur. From there, it links to the pipeline in Turkey for export at the Ceyhan port.<sup>51</sup> The new pipelines provide the KRG with the opportunity of exporting its oil resources to world markets independently of Baghdad.

Turkish and Kurdish leaders have often asserted that any export agreement between Ankara and Erbil would respect the current revenue-sharing scheme, under which the KRG is authorized to get 17 per cent of the total hydrocarbon gains.<sup>52</sup> However, the Iraqi government refused the suggestion by Ankara to act as an independent mediator by having oil revenues deposited into an escrow account at a Turkish state bank and dispensed between Erbil and Baghdad from there.<sup>53</sup>

Turkey's energy cooperation with Erbil in spite of Baghdad has been a controversial issue in Turkey. While Turkish officials claim that the agreement reached with Erbil is in the boundaries of international law, some critics argue that such a deal is against the Iraqi constitution and international law and will damage Turkey's international prestige. Furthermore, some observers state that Turkey should not jeopardize its relations with Baghdad given that the south Iraq has much larger energy reserves than the north Iraq does, thereby good relations with Baghdad are in the interest of Turkey. Meanwhile, the official position of Turkey is that its energy partnership with Erbil is beneficial for all Iraqis and this partnership is not alternative to Turkey's energy cooperation with Baghdad.<sup>54</sup>

### Drivers of the KRG-Ankara Energy Partnership

There are several important political, economic and geopolitical factors pushing for strong energy cooperation between Ankara and Erbil despite the continuous opposition by Baghdad.

#### *Internal Drivers*

Ankara's desire to permit natural-resource exports from the KRG territory without Baghdad's approval signifies that fears of boosted KRG autonomy causing more unrest among Turkish Kurds has broadly abated in Turkey's calculations. On the one hand, Kurdish areas in the south of Turkey would handsomely profit from more extensive economic links with the KRG, which in turn should decrease Turkey's Kurdish population's desire to support armed struggle against the Turkish state. On the other hand, the growing economic and political dependence of the KRG on Turkey will probably enhance Ankara's leverage in the relationship, thus guaranteeing that Erbil will adhere to approaches on the PKK and the Kurdish issue which are to Ankara's liking.<sup>56</sup> In other words, the Turkish government expects that closer economic, energy, and trade relations with the KRG will result in closer cooperation over security issues and end incursions by the PKK across the border.<sup>57</sup> In addition, Turkey should guarantee sufficient energy supply in order to deal with its

fast-growing economy and rising demand for energy. Its power generation has largely been dependent on Russian and Iranian imports. But, the Syria crisis caused a rift between Turkey and these suppliers, making the Turkish economy vulnerable to regional dynamics and price shocks.<sup>58</sup> Therefore, the energy collaboration with the KRG provides Turkey with the opportunity of diversifying its energy suppliers, reducing its dependence on Russian and Iranian resources and thereby enhancing its energy security. Besides, Turkish leaders seek for turning the country into an energy hub between European markets and energy producers, including the KRG. Kurdish oil and gas resources can boost the potential of Turkey to emerge as an energy hub. In this regard, the TANAP pipeline provides an exceptional opening for exports of natural gas from Iraq. The connection of gas fields in the northern Iraq to the Southern Gas Corridor (SGC) necessitates comparatively small investments and offers cheapest mean of transportation.<sup>59</sup> Iraq – after Azerbaijan – is the solely natural gas producing country that might turn in the medium term its availability of natural gas resources into deliverance<sup>60</sup> to European markets. Thus, Ankara seeks for elevating Turkey's geopolitical importance by attracting natural gas from the Kurdish region into the SGC, and increasing Turkey's strategic significance as an energy transit hub for Europe, the Caspian, and the Middle East.<sup>61</sup> Hence, the access to the Kurdish resources serves Ankara's aim of becoming a major energy hub, gathering both geopolitical advantages and economic advantages in the form of transit fees.<sup>62</sup> Moreover, to fuel its growing economy and decrease its account deficit driven by high prices of oil and gas, Turkey has been struggling to find alternative and low-cost energy resources. The value of imported energy constitutes large percentage of the total imports and of the total trade deficit of the country.<sup>63</sup> The KRG's oil and gas resources have lower-cost compared to energy resources of other suppliers. Some argue that the KRG's supplies could be three times cheaper than Russian and Iranian resources. Therefore, Turkey's trade deficit will decline with cheap natural gas and oil production in the north Iraq.<sup>64</sup>

Last but not least, the business and trade partnership between the Kurdish region and Turkey has considerably contributed to their energy cooperation and vice versa. In addition to the Turkish state, Turkish business groups have a key role in bolstering Turkey's bilateral (energy) relations with Erbil. Several Turkish business groups lobby in the Turkish state to encourage it to develop a strong (energy) relationship with the Kurdish administration as it provides these firms with considerable economic interests. Hence, material interests of these firms have, to a certain degree, determined Turkey's energy and economic relations with Erbil.

### *External Drivers*

Both Ankara and Erbil are close allies of the US. For long time, the US encouraged Ankara to have good relations with the KRG, trying to convince Turkish leaders that the administrative gains of Iraqi Kurds would not cause the disintegration of Iraq.<sup>65</sup> Such push of the US encouraged Ankara to have direct and close contacts with Kurdish leaders, which in turn has contributed to the development of strong energy relations between Ankara and Erbil.

In addition, the KRG's domestic market for oil and gas is small and is probably to stay so in relation to future levels of production. Thus, it needs to find export outlets for

its energy resources. Turkey is obviously a natural market for both its oil and gas, as a large and swiftly increasing economy with a few energy resources of its own.<sup>66</sup> The economic survival of the region is dependent on accessing consumers via the Turkish territory, given that more than 90 per cent of its budget before the breakdown in negotiations with Baghdad was reliant on oil revenues.<sup>67</sup> In addition, Turkey provides the region with refined products that the region lacks, which has helped the KRG decrease its dependence on the products from southern Iraq.<sup>68</sup> Thus, these drivers push the KRG to further bilateral and energy relations with Ankara.

### **(Potential) Problems in the Turkey-KRG Energy Partnership**

While Turkey's energy cooperation with the KRG provides both sides with significant advantages and several elements even push for furthering the cooperation, there are a set of issues which may seriously challenge this cooperation in the future. First of all, the achievement of the Turkey-KRG energy collaboration hinges on the peaceful solution to Turkey's Kurdish problem. The PKK has used pipeline attacks as a way of attacking Turkey's strategic assets. Until very recently, PKK assaults on pipelines knocked out oil and gas flows, propelling Ankara to buy Russian and Azeri gas at higher prices and keeping the Iraq-Turkey route mostly inactive.<sup>69</sup> Furthermore, the KRG was confronted by significant interruptions in oil flows via the pipeline in Turkey because of sabotage and theft, resulting in decreased export levels and the loss of revenue to the KRG of \$501 million.<sup>70</sup> Additionally, the PKK issue continues to be an important obstacle to Turkey's bilateral relations with the KRG. Due to the outbreak of the PKK conflict, Turkey has conducted cross-border operations against the PKK camps in the north Iraq. This has serious potential of harming Turkey's relations with both Baghdad and Erbil.<sup>71</sup>

Secondly, Baghdad has vehemently objected to the Turkey-KRG rapprochement, being worried that it would increase the Kurds' leverage in Iraq's domestic politics and might represent a springboard for the Kurdish autonomy.<sup>72</sup> Baghdad blamed Ankara of interfering in Iraqi affairs by "backing radical Sunni elements" in the country and signing "illegal" energy agreements with the Iraqi Kurds.<sup>73</sup> Consequently, Baghdad attempted to prevent Turkey from benefitting from Iraq's rich energy opportunities. For example, in November 2012, Baghdad suddenly cancelled TPAO's permission for operating in a field in the southern Iraq.<sup>74</sup> Shortly after that, Baghdad rejected to grant its consent for a natural gas project in the north [in the Block 9 concession].<sup>75</sup> Moreover, Baghdad has utilized any number of creative tactics to upset Ankara, threatening to close its airspace to Turkish planes<sup>76</sup> and refusing the permission of Turkey's Energy Minister to land in Erbil in an attempt to prevent Turkish discussions on energy cooperation with the KRG.<sup>77</sup> Additionally, Iraqi authorities tried to impede the export of the Kurdish oil via Turkey to world markets. For instance, in 2014, several oil tankers carrying cargos of the Kurdish oil that had been transported via the new Kurdish pipeline left Ceyhan port to be sold on the world markets. However, for long time tankers sat at several ports around the world since countries and companies hesitated to buy the Kurdish oil because of Baghdad's rejections. Then Oil Minister of Iraq Abdul Karim Luabi told that "The Iraqi government is going to file a lawsuit against the Turkish government ... which

resulted from the violation of the signed agreement between the two countries.”<sup>78</sup> The Iraqi government filed for arbitration against Turkey at the International Chamber of Commerce in Paris, seeking damages of \$250 million—more than double the value of the tanker’s cargo.<sup>79</sup> Hence, Baghdad has played an “inhibitor” role in Turkey-KRG Energy cooperation.

Thirdly, the US is against to a strong energy partnership between Ankara and Erbil as it is worried that Turkey’s firm energy cooperation in particular and bilateral relations with the KRG in general will push Baghdad’s Shia government closer toward Tehran. Besides, US policymakers have been concerned that Turkey-KRG energy cooperation could really destabilize Iraq, starting a chain reaction that could result in the violent breakdown of the country.<sup>80</sup> The divergence between Washington and Ankara regarding the intensified Turkey-KRG energy relations has negatively affected Turkey’s close energy cooperation with Erbil. Baghdad has already been able to secure Washington’s support against the Kurdish oil contracts.<sup>81</sup> Behind the scenes, Washington attempted to prevent sales of the Kurdish oil, which was sent to world oil markets through Turkey in 2014.<sup>82</sup>

Last but not least, Iran has the tendency of competing with Turkey for being an energy transit country in the region. This approach is in fact a part of Tehran’s policy of lessening Ankara’s regional influence. In this respect, Iran has been trying to convince the KRG for becoming a transit country for the Kurdish gas and oil exports. Thus, in 2014, Tehran started negotiations with Erbil. On 4 April 2016, Kurdish and Iranian officials concluded an understanding on the technical details of the energy export project, but the KRG has yet to express “its readiness” to Iran with regards to a date to sign the agreement.<sup>83</sup> Such a transit option would provide the KRG with an alternative transport option and less dependence on Turkey for energy exports.<sup>84</sup>

### **The KRG’s Referendum and the Future of the Ankara-Erbil Energy Partnership**

Over the years, Barzani has frequently referred to his desire for a sovereign Kurdish state.<sup>85</sup> According to Barzani, Baghdad’s “undemocratic, sectarian, centralizing and unconstitutional” behavior was emboldening for a reconsideration of the Kurdish loyalty to Iraq’s territorial integrity and federative system.<sup>86</sup> Furthermore, the issues about the national budget, a territorial dispute over Kirkuk and the exploitation of Kurdish oil reserves exacerbated the KRG’s dissatisfaction with Baghdad. Iraqi Kurds consider Baghdad as an obstacle to their progress.<sup>87</sup> That is why the KRG held a referendum on the independence on 25 September 2017. Around 93 per cent of voters voted for independence. But, the Iraqi government and the international community, including Iran, Turkey, the US and EU, did not recognize the result of the referendum, as it could cause Iraq’s breakup. Instead of boosting the Kurds’ political leverage and independence, the referendum has misspent international goodwill toward Kurds, angered Baghdad and its neighbors, and increased economic risks and societal fractures. It has also prompted the loss of the KRG’s command over significant territories and resources. Iraqi security forces have reasserted control over Kirkuk and its oil assets, other “disputed territories,” and Iraqi border crossings after a discussed withdrawal of Peshmerga forces.<sup>88</sup> Iraq’s occupation of the disputed territories in Kirkuk, Nineveh, and Diyala provinces has brought about the KRG losing

almost half of its oil production and income. While the KRG had produced 610,000 barrels a day (bbl/d) and exported around 560,000 bbl/d via Turkey, it is now left with approximately 327,000 bbl/d of production, of which around 280,000 bbl/d are exported.<sup>89</sup> The federal government now appears firm about controlling the oil sources, particularly in Kirkuk and the disputed areas. Iraq's Oil Minister warned all states and international petroleum firms against signing agreements with any Iraqi side without first discussing with Baghdad.<sup>90</sup> In addition, the Minister instructed immediate repairs to Iraq-Turkey pipeline (ITP), a measure that may abolish Baghdad's necessity to export crude via the Kurdish region and further isolate the independence-seeking Kurds.<sup>91</sup> Moreover, the repercussions from the referendum also indicate reordering in the KRG's internal politics; President Masoud Barzani has resigned from his post.<sup>92</sup> Barzani's Kurdistan Democratic Party (KDP) has now been in a difficult position and the power struggles between the KDP and the Patriotic Union of Kurdistan (PUK) have deepened following the referendum.

Turkey rejected the referendum since it is against to the establishment of an independent Kurdish state in its region as this may negatively affect Turkey's territorial integrity and national security, considering the fact that the country also has a large Kurdish population. Turkish leaders have been also concerned about the territorial integrity and stability of Iraq. Furthermore, their objections were intensified after the KRG determined to include Kirkuk in the referendum (it is a multi-ethnic city and inhabited by Turkmens).<sup>93</sup> Erdoğan stated that "Regardless of the results, the referendum, which is not in conformity with the current law in Iraq, is null and void for us, and we call it illegitimate."<sup>94</sup>

The referendum caused a serious dilemma for Turkish politicians. When determining their position on the vote, they needed to take into account their close relationship with the KRG on the one hand and the referendum's potential results on the other.<sup>95</sup> Imposing sanctions against the KRG would not only damage the Turkish economy, but also debilitate one of its very few partners in the region, which could have extensive effects on Turkey's regional strategy. It would also strengthen Barzani's domestic opponents which have close ties to Iran, affording Tehran more power in northern Iraq at the expense of Ankara.<sup>96</sup>

While Erbil considered that the energy trade generated some interdependence, expecting this would cause a more measured reaction to the referendum from Turkey<sup>97</sup>, Ankara imposed some economic and political sanctions on the KRG. The direct Turkish sanctions were stopping flights by all Turkish airlines to Erbil and Sulaymaniyah; prohibiting Rudaw, an Iraqi Kurdish television channel, from Turkish airwaves; and terminating Turkish military training for the KRG armed forces (peshmerga).<sup>98</sup> Besides, the Turkish National Security Council passed a resolution with regards to the transfer of the Ibrahim Khalil border gate, which is situated across from Habur, to Baghdad.<sup>99</sup> In addition, Turkish Prime Minister Binali Yıldırım said Ankara consented to open another border gate with Iraq as part of a route which would lead to the city of Tal Afar, some 40 km (25 miles) west of Mosul.<sup>100</sup>

On the other hand, while Erdoğan articulated that "The [oil] valve is ours. If we shut off the valve, it will be over"<sup>101</sup>, Turkey did not stop oil flows from the north Iraq. Cutting-off the oil pipeline would impact Turkey as well - the KRG pays transit fees to

Turkey and the country is heavily dependent on imports to meet its fast-increasing energy demand. Such a move would also harm Turkey's aim of becoming a reliable transit route for energy exports from the Middle East and Russia to Europe.<sup>102</sup> Another reason is that Russia and Turkey are in the need of the pipeline conveying Kurdish oil to Turkey. Russia has invested \$4 billion in KRG's oil and natural gas industries in 2016. Rosneft considers to transport large amounts of crude from Ceyhan terminal to Germany. Any tightening of the valves on the Kirkuk-Ceyhan pipeline would prevent that trade<sup>103</sup> and might cause problems between Ankara and Moscow. Furthermore, Turkey is restricted by its own economic interests: according to the Turkish Statistics Institute the country vended \$7.6 billion worth of food, consumer goods, construction materials and other goods to Iraq in 2016, and the Turkish Economy Minister has articulated that non-oil trade with the KRG was worth \$2.5 billion.<sup>104</sup>

Following the referendum, the basic characteristics of the Kurdish region will stay unaltered. It will still be landlocked, economically reliant, bound to Baghdad, Turkey and Iran, and politically divided. The financial repercussions have terminated any expectation the Kurds had of creating an autonomous and self-sustaining economy separate from Baghdad.<sup>105</sup> Under these circumstances, the KRG has little option but to discuss with Baghdad and regional countries to survive, just as it has done for decades. Nonetheless, the KRG now has to deal with Baghdad from a position of weakness.<sup>106</sup>

Without doubt, the referendum will have significant implications for Ankara's relations with the KRG in the future. Turkish leaders may increasingly prefer to improve their relations with Baghdad. After the referendum, the two states approached each other with the common interest to preserve Iraq's territorial integrity. They extended their collaboration and even held joint military drills. Baghdad also showed its support for Turkey's anxieties over the PKK presence in Kirkuk.<sup>107</sup> Besides, as Erdoğan attaches great importance to the 2019 elections in the country, he may limit Turkey's ties with the KRG in order to increase the AKP's votes coming from Turkey's nationalists.

In the field of energy, it seems that Turkish leaders will favor to cooperate more and directly with Baghdad, instead of Erbil. In this regard, Erdogan already said that Turkey is "ready to give all support to Baghdad as it seeks to reopen a crude oil pipeline from the Kirkuk oilfields to Turkey, through which Iraq stopped sending oil in 2014."<sup>108</sup>

On the other hand, Ankara still needs the KDP and improved ties between Erbil and Baghdad due to three main reasons. First of all, the political instability in Iraq in general and in the Kurdish region in particular might enable the PKK to increase its influence in the region. Secondly, after the referendum, Tehran already has boosted its role in Iraqi affairs, which is of course against the Turkish interests. Thirdly, Turkey needs to collaborate with Erbil to import Kurdish oil and gas with the view of meeting its energy demand and becoming an energy hub. Hence, it is in the interest of Turkey to maintain firm economic and political ties with Erbil.

Turkey has disproportionate economic weight, allowing it to determine the KRG's behavior via diplomatic and economic force more than the other way around.<sup>109</sup>

Turkey is considered to have been maneuvering behind the scenes to get Nechirvan Barzani, the Prime Minister of the KRG and the elder Barzani's nephew, to take charge of the Kurdish region in a plan said to be supported by the US.<sup>110</sup> Nechirvan had helped arrange a mega energy agreement between Ankara and Erbil in 2013 and "has long enjoyed close personal ties with Turkish President Recep Tayyip Erdogan."<sup>111</sup> But, in order to normalize the relations with Ankara, Erbil has to go back to the status quo – that is, to cancel the referendum results.<sup>112</sup> Ankara has already been calling on the KRG to annul the referendum.

In the post-referendum era, Turkish leaders need to encourage Baghdad and Erbil to improve their ties because political and economic stability of Iraq has key importance for Turkey. Besides, instead of developing good relations with only either Baghdad or Erbil, it is in the interest of Ankara to have firm and balanced relations with both the federal government and the KRG as such relations will provide Turkey with investment opportunities in both sides of Iraq, including the energy sectors of south and north Iraq. Moreover, positive relations with the Kurdish Administration and the Iraqi government may enable Turkey to fight more effectively against the PKK in the region. Last but not least, strong relations with Baghdad and Erbil will help Turkey to increase its influence in Iraq and in the region, at the expense of Iran.

### Assessment and Conclusion

Ankara's energy collaboration with Erbil provides Turkey with a number of benefits. As Turkey does not have considerable oil and gas resources to satisfy its growing energy demand and its energy security has vital importance for the economy, which directly or indirectly affects its national security, regional power and military capabilities; Turkey has endeavored to cooperate with the KRG in order to benefit from the energy resources of the north Iraq, particularly considering that they are geographically close to Turkey. Ankara-Erbil energy cooperation enables Turkey to meet its increasing energy need and decrease its high reliance on Russian and Iranian energy resources. This boosts Turkey's bargaining power in its (energy) contacts with Tehran and Moscow and helps Ankara to adopt a more independent foreign policy. Turkey-KRG energy collaboration also allows Turkish oil companies to carry out energy operations in the north Iraq, which provide them with the opportunity of "internationalizing" their energy activities and supporting the efforts of the Turkish government towards the enhancement of the energy security of the country. Moreover, since the KRG gas resources are cheaper in comparison with gas resources of other exporting states, importing the Kurdish gas will help Turkey reduce its energy bill and trade deficit. In addition, the Kurdish oil (and probably gas in the upcoming years) exports to Turkey will bolster Turkey's potential of becoming an energy hub, which will, in turn, increase its regional power and global standing. Finally, Turkey receives economic gains in the forms of transit fees by delivering the Kurdish oil to world markets.

While there is a mutually beneficial energy interdependence between Turkey and the KRG, this is an asymmetric interdependence since Erbil is more dependent on Turkey than the reverse. The Kurdish region is highly in need of the Turkish market and the Turkish corridor for its energy exports. Because the economy of the region

dramatically depends on energy revenues, Turkey's roles as an importer and a transit country for the Kurdish oil (and gas) resources are crucial for Erbil. As Turkey is the less dependent side in the energy ties with the KRG, it holds more power. Possessing more power, of course, allows Ankara, from time to time, to use the high dependence of the KRG as leverage against it with the view of maximizing Turkey's national interests.

Despite significant advantages, Ankara-Erbil energy relations have resulted in some costs for Turkey. For instance, the close energy cooperation between Turkey and the KRG has caused strains in Ankara's relations with the US and Baghdad. Both Washington and Baghdad reacted negatively to the increasing energy cooperation between Turkey and the KRG and warned Ankara not to cooperate with Erbil without the authorization of Baghdad. Moreover, Turkey's military operations against the PKK in the north Iraq sometimes cause problems in its relations with Baghdad and Erbil, which might have important implications for their energy collaboration in the future.

The referendum held in the north Iraq in September 2017 may negatively affect the energy cooperation between Ankara and Erbil. It is likely that Turkish leaders will growingly favor to increase their energy cooperation with Baghdad, instead of the KRG. To what extent Turkey may limit its energy collaboration with Erbil will depend on the steps to be taken by the Kurdish Administration and the Iraqi government in the post-referendum era.

The energy collaboration between Ankara and Erbil goes beyond energy issues and has been influenced by several non-energy matters. Turkey's energy ties with Erbil include complex and interlinked politics, economy, energy and security-related issues. For instance, the business and trade partnership between the Kurdish region and Turkey has considerably contributed to their energy cooperation and vice versa. Moreover, the strong political relationship between Ankara and Erbil, especially due to their joint efforts towards fighting against the PKK, has encouraged them to extend their partnership into new fields, including energy and trade.

Against this background it can be concluded that Turkey's campaign against the PKK, its growing energy demand, the will of Turkish policy makers to reduce the high dependence of the country on Russian and Iranian gas, Turkey's target of becoming an energy hub, Ankara-Baghdad and Erbil-Baghdad disputes and the economic interests of Turkish business groups have so far been the main determinants of Turkey's energy policy towards the Kurdish administration in the north Iraq. In the future, the developments following the referendum will also importantly shape the energy cooperation between Turkey and the KRG.

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