

Internal and External Determinants of Turkey-Kazakhstan Energy Collaboration

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A number of academic studies have covered Turkey's energy relations with Kazakhstan, overwhelmingly in the context of Turkey's energy cooperation with Caspian Sea or Central Asian countries. But, since there is a great potential of energy collaboration between Ankara and Astana, this collaboration deserves to be analysed exclusively. Hence, by covering the energy partnership between Turkey and Kazakhstan, this study attempts to fill in this significant gap in the academic literature on Turkish-Kazakh energy ties. In addition, the existing studies have rarely applied IR theories to describe these ties. Through explaining Ankara's energy cooperation with Astana in the framework of Realism and Liberalism, this paper seeks to fill in this gap. The analysis made in this context shows that Turkey's energy security concerns; its aspiration of becoming an energy hub; the economic and business partnerships established between Turkey and Kazakhstan; the close political, historical and cultural links between the two countries; and regional issues such as the aspiration of the EU to reduce its dependence on Russian gas and the competition among Russia, Turkey, Iran, China and the EU control over the Caspian energy resources, including those of Kazakhstan, are the main determinants of Turkey-Kazakhstan energy cooperation.

Keywords: energy security; (inter)dependence; energy collaboration; complex interdependence; national interests

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%

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(Çalikoğlu, 2012). The annual energy need of the country is envisaged to double in 10 years and to grow annually 4.5% until 2030 (BOTAŞ, 2013). Since the country does not have sufficient domestic energy resources to meet its energy demand, it has to import around 75% of its energy demand. To be more specific, the country needs to import around 98% and 90% of its gas and oil supplies, respectively. While, some volatility has been observed in the oil and gas imports parallel to the economic growth of the country, Turkey's oil and gas imports have been augmenting.

Turkey's total gas imports in 2016 were 46.352 million cubic meters (Mcm), originating mainly from Russia (52,94%), Iran (16,62%), Azerbaijan (13,98%) and other countries (16,45%) (EMRA, 2017a). On the other hand, the country imported 40,064 million tons of petroleum in the same year, mainly from Iraq (23,09%), Russia (19,38%), Iran (17,32%) and other suppliers (40,21%) (EMRA, 2017b). These figures indicate that Turkey is highly reliant on Russia and Iran to meet its energy need.

Turkish leaders are not worried that much about the security of the 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 manoeuvres.

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 and European markets. Considering that Kazakhstan holds large oil and gas reserves, it might significantly help Turkey to achieve the targets of its foreign oil and natural strategy. The country has the ranking of 13th in the world in terms of proven

recoverable oil reserves and gas condensate, 15th in natural gas and 26th in the production of hydrocarbons (Energy Charter, 2013). According to BP figures (2017), Kazakhstan's proved oil reserves are around 30 thousand million barrels, or 3.9 thousand million tonnes. Natural gas has become a growingly significant energy resource for Kazakhstan. Proven reserves of gas are around 1.0 trillion cubic meters (Tcm), or 34.0 trillion cubic feet (Tcf) (BP, 2017), and possible reserves increase to 6–8 Tcm (Energy Charter, 2013). The country seeks to export its oil and gas resources to European and world markets. Therefore, energy goals of Turkey and Kazakhstan seem to overlap and complete each other. This paper seeks to examine the determinative elements of and the state of affairs in the Turkish-Kazakh energy collaboration.

The collaboration has received an important attention from academia (for example see Abbasov 2015; Aslan and Bozyiğit, 2014; Babalı, 2010; Misiagiewicz, 2014; Balcer, 2012; Hardin, 2012; Mutlu, 2012; Nurgaliyeva, 2016; Öğütçü, 2006; and Shaffer, 2006) and four main arguments are highlighted in the existing studies. First of all, most of the academic studies underline the fact that Ankara has been trying to develop a strong energy cooperation with Astana. For instance, Shaffer (2006) argues that Turkey is exploring the importation of natural gas from Kazakhstan and Turkish Petroleum Corporation (TPAO) has already invested in this country. Secondly, the academic studies on Turkey-Kazakhstan energy relations acknowledge that both Turkey and Kazakhstan can importantly benefit from their energy collaboration. For example, Nurgaliyeva (2016) claims that “The BTC [Baku-Tbilisi-Ceyhan Crude Oil Pipeline] pipeline, which bypasses Russian territory, has been vital to Kazakhstan improving its bargaining position with Russia ... Moreover, by diversifying its routes, Kazakhstan can strengthen its energy security.” In addition, Misiagiewicz (2014) argues that as Turkey's energy need has been increasing and it lacks necessary resources, Kazakhstan is one of the most important exporters of energy resources for Turkey, in addition to Azerbaijan and Turkmenistan. Thirdly, the academic studies assert that while there is a great potential of developing firm energy collaboration between the two countries, they have managed to achieve only limited collaboration so far and the majority of investments by Turkish businessmen in Kazakhstan is in non-energy sectors. For instance, Kanbolat (2011) draws attention to the fact that Turkey has the highest number of foreign-owned firms in Kazakhstan and is the fourth biggest investor in terms of the amount of capital, but

these are mostly in non-energy sectors. Finally, the existing academic works generally emphasize that Russia has until now played a restrictive role in the extension of the energy cooperation between the two countries. For example, Cohen (2009) states that Russia presses for maintaining control over energy transportation routes and objects to any projects that could give Europe alternative energy supplies.

Still, there are two important gaps in the existing academic literature on Ankara-Astana energy cooperation. First of all, the majority of the academic studies have covered Ankara's energy relations with Astana *in the context of Turkey's energy relations with Caspian Sea or Central Asian states*. However, considering the importance and the potential of the energy relations between Kazakhstan and Turkey, it is necessary to cover these relations separately in order to be able to understand the relations comprehensively. Thus, as an attempt to fill in this important gap, this paper focuses exclusively on Turkey-Kazakhstan energy relations. Secondly, the existing studies on the energy relations are overwhelmingly policy-based. That is, they have seldom explained the Ankara-Kazakh energy cooperation in the framework of international relations theories. Through describing this cooperation in the context of Realism and Liberalism, this paper attempts to contribute to filling in this significant gap. This theoretical analysis is the original dimension and the difference of this study as to the existing academic studies on Turkey-Kazakhstan energy relations.

The paper uses the qualitative method. This method aims to understand some aspect of social life and generally generates words, rather than numbers, as data for analysis (Patton and Cochran, 2002). Thus, the method refers to "the meanings, concepts, definitions, characteristics, metaphors, symbols, and descriptions of things" (Berg, 2001). This method was chosen due to its capacity enabling to explain Turkey-Kazakhstan energy relations by describing, analyzing and interpreting concepts and characteristics of the relations.

The analysis is based on extensive literature studies and official sources. The author uses a number of databases such as Google Scholar, Elsevier ScienceDirect, Ebscohost, JSTOR, Taylor & Francis Online, ProQuest Political Science and Social Science Research Network in order to obtain relevant and key information on Turkey-Kazakhstan relations. The author also benefits from some websites of official Turkish and Kazakh

institutions including the Ministry of Foreign Affairs of Turkey, the Ministry of Foreign Affairs of Kazakhstan and the EdgeKZ magazine of Kazakhstan. Besides, several (annual) reports of key organizations like British Petroleum (BP), Petroleum Pipeline Company (BOTAŞ) of Turkey and the Energy Market Regulatory Authority (EMRA) of Turkey are used in this paper. During the research, a number of key words such as “Turkey Kazakhstan energy relations”, “Turkey Kazakhstan energy cooperation” “Turkey energy profile”, “Kazakhstan energy profile”, “Turkey-Kazakhstan relations”, “TPAO Kazakhstan” and “BTC pipeline” are used.

The research has an inductive and bottom-up approach. In this approach, main argument is to be built at the end of study after analysing data and looking for considerable patterns. By using this approach, the author’s goal is to firstly provide important relevant data on Kazakhstan-Turkey energy relations, then analyse this data and finally to arrive a general argument on the relations. This paper is the author’s first study on Turkey-Kazakhstan energy partnership.

The paper is organized in five sections. First, it covers the theoretical framework based on which Turkey-Kazakhstan energy partnership will be described. The second section gives an overview of Kazakhstan’s energy outlook. The third section looks at Ankara’s bilateral relations with Astana. The fourth section explores the areas and challenges of Turkey-Kazakhstan energy cooperation and the state of affairs in their energy interdependence. Moreover, this section attempts to explore how the bilateral relations between the two countries shape their energy partnership. Finally, the paper concludes with an overview and assessment of the findings by explaining Turkey’s energy relations with Kazakhstan in the context of Realism and Liberalism.

1. Theoretical Framework

This paper chose the realist and liberal paradigms to analyse Turkey’s energy relations with Kazakhstan due to their strength in explaining under which conditions countries collaborate or confront in the field of energy and how power and bilateral relations of countries affect their energy collaboration and vice versa.

1.1 Energy in the Context of the Realist Paradigm

Theoretical principles of Realism “draw from deeper historical traditions of thinking about international politics” (Dannreuther, 2010). It includes the tradition of *realpolitik* developed from Machiavelli onwards, which attaches priority to the interests of the sovereign, and where the main target of statesmen aiming to maintain international steadiness is to contain the inevitable drive for power by states, and the disputes which this inescapably creates, by maintaining a lasting balance of power (Dannreuther, 2010).

From the point of view of Realism, adequate energy resources translate into economic and political power in the international arena. Thus, their lack (especially oil and gas) brings about an existential menace for the survival of the actors in terms of their economy, transport and military requirements (Özcan, 2013). Besides, according to realists, since energy resources are becoming more insufficient and more insecure, states will growingly contest for access and control over these resources (Dannreuther, 2010). As a result, dispute and war over the resources are growingly possible, if not unavoidable (Dannreuther, 2010).

Realists consider that due to augmenting conflicts within energy regions, limited sources of supply, and the wide degree of state interference in energy markets, the issue of energy has become gradually linked to security concerns and regarded as an existential menace to the state sovereignty (Özcan, 2013). Thus, energy security is a part of national security and must be preserved by all available means (Alsaad, 2014).

In a realist world, since energy is one of the main elements of power, countries concentrate on how much energy power they hold relative to each other. It is significant not only to possess a considerable amount of power in the energy relations, but also to make sure that energy partners do not change the balance of power in their favour.

Because of the importance of energy for the power and growth of the country, states are not eager to give control over energy resources to international energy firms, free market mechanisms or supranational organizations (Česnakas, 2010). For realists, states – via strategic thinking and competition in order to control resources – can best guarantee energy

security (Alsaad, 2014). Thus, the state and the state-owned companies need to possess the exclusive control on this field (Iozzi, 2014).

The unequal supply of energy and demand for energy products generates a situation of dependency among 'producers', 'consumers', and 'transit' states. However, any type of dependence is a defect which menaces sovereignty of state's policies and national interests (Özcan, 2013). The goal of energy security is to provide self-sufficiency, which would make bilateral ties less required to the survival of each individual state, as a result reduce their interdependence and the probability of external menaces, and result in greater national security (Özcan, 2013). Thus, it is good to have alternatives for refraining from that one of energy suppliers' endeavours to take advantage of that dependence and utilizing it for political goals or for economic benefits from its position of relative monopoly (Chifu, 2014).

In the context of the realist paradigm, energy geopolitics, which is defined as the study of the supply of oil and natural gas from a geopolitical approach (Mitchell cited in Dimitrov, 2015), helps to analyse the interaction between geographical location, energy and power of states. In energy geopolitics, political actors participate in cross-border activity to gain access to energy resources in order to meet energy demand of their countries and keep their economies functioning, which is vital for their regional and global standing, military capability, security, territorial integrity and independence.

Considering that states are inclined to increase their power and energy is vital for economy, military and sovereignty of countries; energy security is considered as a zero-sum game: more energy security of a state means less energy security of the other state.

Transit countries, due to the importance of their geographic location, play a key role in the energy transportation from energy producing states to importing ones. Transit states use their geographic positions as leverage in order to promote their national interests. Similarly, energy exporting states favour to utilize their energy resources as a tool in order to promote their external policy targets. The increasing contest between importers over energy resources enables exporting state to enhance its relative power (Česnakas, 2010).

1.2 Energy in the Context of the Liberal Paradigm

Liberalism is a theoretical approach which stresses international norms, interdependence among states, and international collaboration (Korab-Karpowicz, 2010). It has focused on tackling with issues of international relations, on the significance of justice, equality and freedom of the press, civil rights, freedom of religion, free trade and investment, and a right to life, liberty, and property, as principal ways of succeeding a society ruled by international peace and international morality and justice (Kant cited in Alsaad, 2014).

According to Liberalism, energy is another commodity traded in the market (Sulejmanovic, 2014). Besides, from the point of view of Liberalism, energy firms act in accordance with the rules of the market and make their business decisions for increasing their gains (Iozzi, 2014).

From the point of view of liberalists, energy policies of states are influenced by the underlying identities, interests, and power of individuals and groups who encourage policy makers to work towards policies in compliance with their preferences. In this regard, for instance, international behaviour of states in field of energy can be shaped by domestic companies as their material interests may encourage states to conduct energy partnerships with some supplying states instead of others. Similarly, energy policies of states can be affected by ideas - including worldviews, threat perceptions and norms - of energy decision-makers. These ideas may, to a certain extent, determine attitude of policy makers towards energy relations with other countries.

2. Kazakhstan's Energy Outlook

Kazakhstan has an open door policy in the hydrocarbon production sector. A great number of multinational and national energy companies from around the World participate in the exploration, production, service and other activities of the Kazakh energy sector (Energy Charter, 2013). Following years of foreign investments into the oil and natural gas sectors in Kazakhstan, the landlocked country has recently started to realize its vast output capacity (Ministry of Foreign Affairs, MFA, of Kazakhstan, n.d.) The country views multiple pipelines as key to its efforts to ensure that no regional power can exercise strategic control over its energy routes and its broader economic and political ties to Western, Mediterranean,

and Asian partners. Kazakhstan's expanding cross-border energy linkages to Russia, China, other Central Asian countries, and possibly westward to Europe via Turkey will likely enhance its independence, economic development/diversification and geopolitical standing (Öğütçü, 2006).

2.1 Oil Reserves

Kazakhstan has large oil fields including Tengiz, Karachaganak and Kashagan. Tengiz and Kashagan are among the biggest oil fields in the world. Furthermore, Kazakhstan possesses the largest confirmed oil deposits in the Caspian Sea (39,8 billion Bbl) (Ismailova, 2011). The development of the oil sector in the future is reliant on developing the Kazakh sector of the Caspian Sea, where anticipated resources are expected to last for over 50-60 years (Kazenergy cited in Karatayev and Clarke, 2016).

Total oil output of the country was around 79.3 million tonnes in 2016 (BP, 2017) (See Figure 1). The Kazakh oil resources are exported to the world markets by pipelines to the Black Sea via Russia; by barge and pipeline to the Mediterranean through Azerbaijan and Turkey; by barge and rail to Batumi, Georgia on the Black Sea; and by pipeline to China. The main importers of Kazakh oil comprise China, Italy, the Netherlands, France, and Austria (Aitzhanova et al., 2015).

Figure 1: Kazakhstan's Gas and Oil Production (2006-2016)

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Gas*	13.4	13.8	16.1	16.5	17.6	17.3	17.2	18.4	18.7	19.0	19.9
Oil**	65.1	67.2	70.7	76.5	79.7	80.1	79.3	82.3	81.1	80.2	79.3

*Bcm, ** million tonnes

Source: The figure is based on data provided in BP, 2017.

2.2 Natural Gas Reserves

Natural gas consumption of the country has been stagnant because the infrastructure and cost necessary to link Kazakhstan's largely dispersed population to production centres in the country's northwest have

prevented development (EIA, 2015). As Figure 1 shows, Kazakhstan's gas production has been increasing. In 2016, the country produced 19.9 Bcm of gas (BP, 2017).

Kazakhstan became a net gas exporter in 2003. The country has two principal export pipelines for natural gas. They are the Central Asia-Center (CAC) pipeline, which crosses the western edge of Kazakhstan on its way to Russia and points further west, and the Turkmenistan-China pipeline, which passes through the southern edge of the country on its way to China (IBP, 2015). Kazakhstan's export markets are traditional and do not importantly affect the global commodity markets of natural gas (Energy Charter, 2013). 10-22 Bcm of natural gas per year might be available for export by 2020 (Smeenk, 2010). Kazakh natural gas is exported to European countries via Russia. But, the country desires to send its rich oil and natural gas resources to the world market through non-Russian corridors too (Avcu, 2013). In 2016, the country exported 16.6 Bcm of gas to Russia and China. It also imported 3.6 Bcm, 1.1 Bcm and 1.5 Bcm of gas from Russia, Turkmenistan and Uzbekistan, respectively (BP, 2017).

3. Turkey-Kazakhstan Relations

Turkey was the first country that set up complete diplomatic ties with Kazakhstan after it gained the independence (Sieff, 2015). In March 1991, the two countries signed "the Agreement on Cooperation" in which they demonstrated their desire for further strengthening of their bilateral collaboration in political, trade-economic, scientific-technological, environmental, cultural, humanitarian, informational and other spheres in the long-term (Ametbek and Amirbek, 2014). Moreover, in September 1991, the Turkish and Kazakh Presidents signed the declaration including the principles and goals of bilateral ties (Aslan and Bozyigit, 2014). With the signing of a deal on strategic cooperation in October 2009, the Kazakh-Turkish relations have been evolving in a dynamic manner. Also, during the formal visit of the President of Kazakhstan to Turkey in 2012, the two countries established the High-Level Strategic Cooperation Council (Sieff, 2015). In the first meeting of this Council, Nazarbayev called Turkey "one of the closest strategic partners" and stated that "There are no unresolved issues between Kazakhstan and Turkey" (Astana Calling quoted in Weitz, 2012). Mutual high and top-level exchanges have been instrumental in furthering development of the partnership

between the two states (MFA of Kazakhstan, n.d.) During the visit of President of Turkey Recep Tayyip Erdoğan to Kazakhstan on 8-10 September 2017, several protocol and memoranda of understanding were signed, including the Turkey-Kazakhstan Intergovernmental Joint Economic Commission 10th Term Meeting Protocol, the New Synergy-Joint Economic Program, which was established under the auspices of the Turkish and Kazakh presidencies, and the 2017-2020 Action Plan Protocol (Daily Sabah, 2017). These agreements are expected to boost the bilateral relations between the two countries.

Turkey and Kazakhstan have developed strong political relations and support each other at national, regional and international levels. For instance, President of Kazakhstan mediated between Russia and Turkey during their tense relations after Turkey's downing of the Russian jet in 2015. In this regard, Turkish Prime Minister Binali Yıldırım said that "The ice in relations of the two countries has melt, thanks to the contribution of our fraternal countries - Kazakhstan and Azerbaijan - who exerted every effort to normalize the relations between Turkey and Russia. We express our gratitude to these countries" (quoted in Kazinform, 2016). Additionally, Nazarbayev was the first leader who visited Turkey after the coup attempt of 15 July 2016 in the country.

In addition, Kazakhstan and Turkey, along with Azerbaijan and Kyrgyzstan, are members of regional institutions that promote the idea of generating a unity via historical, linguistic, and ideological relations like International Organization of Turkic Culture (TURKSOY, founded in 1993), the Parliamentary Assembly of Turkic-Speaking Countries (TURKPA, founded in 2008), the Turkic Culture and Heritage Foundation, and the Turkic Business Council (Öğütçü, 2017).

Even though economic and cultural relations dominate in the bilateral relationship, recent years have seen a grown stress on foreign policy coordination and security collaboration (Weitz, 2012). In the field of security, the two states concluded "Agreement on Cooperation in the field of military education" in 1993, "agreement on cooperation in the field of military education, science and technology" in 1994, and "agreement on cooperation in the field of technology and defence industry" in 1996 (Öğütçü, 2017). Turkey also provides technical assistance and trainings to Kazakh security and law enforcement forces. The collaboration among private and semi-private firms is also developing. The two countries

established Kazakhstan Aselsan Engineering in Kazakhstan in 2011, with the total amount of the investment approximately \$44 million, half of which covered by the Kazakh government and the other half by the Turkish government (Öğütçü, 2017).

The economic relations between the two countries constitute an important part of their bilateral relations. Even whenever the endeavours of Turkish state were not sufficient, the Turkish investors had the great influence on the ties between the two nations (Yılmaz, 2014). Turkish businessmen have been instrumental in Kazakhstan's development since the beginning of the independence of the country, with around 600 Turkish firms registered in Kazakhstan (MFA of Turkey, 2016a). As of June 2015, there are 482 Kazakh-capitalized firms in Turkey (MFA of Turkey, 2016b). Turkey is the 17th biggest investor in Kazakhstan, in terms of capitalization and the 4th biggest country regarding the investments excluding energy (MFA of Turkey, 2016b). According to Turkish Minister of Economy Nihat Zeybekçi, the worth of the Turkish business world in Kazakhstan and that of Kazakhstan in Turkey is about \$2 billion and \$1 billion, respectively (the Foreign Economic Relations Board of Turkey (DEİK), 2017). The total trade volume between the two countries is around \$1.7 billion (DEİK, 2017). According to the Turkish Ministry of Foreign Affairs of Turkey, the goal of the two countries is to augment their bilateral trade volume to \$10 billion (MFA of Turkey, 2016b).

The convergence of the ancient historical issues and contemporary shared economic interests make the partnership a greatly significant one (Goto cited in Sieff, 2015). According to Ministry of Foreign Affairs of Turkey, Kazakhstan has become one of the most important political and economic partners of Turkey in the region (MFA of Turkey, 2016b). Considering the political and economic development of Kazakhstan, it can be argued that Ankara sees this country as a gateway to Central Asia (Hafizoğlu, 2015). In this regard, the outcome of Turkey's role and existence in Kazakhstan might be instrumental in Ankara's increasing collaboration with other states in the region (Almen, 2013). On the other side, from the perspective of Kazakhstan, Turkey is a central pillar of its multi-vector foreign policy, alongside the Russia-centred Eurasian integration, important relationships with China and the West, and opening moves to new frontiers such as the Persian Gulf and Southeast Asia (Voloshin, 2015). From the very initial of Kazakhstan's developing bilateral ties with Turkey, Astana saw Turkey as a counter-balancing power to Russia.

Several of the subsequent external soft balancing endeavours regarding Russia's overpowering impact, for instance involvement of Kazakhstan in the BTC project and turning to Turkey as a possible partner and ally in the Customs and Eurasian Unions², appear to have already reaped more useful benefits in preventing Russia from obtaining dominance in the Central Asian and Caspian regions (Nurgaliyeva, 2016). However, overall, bilateral ties are yet to reach a satisfying level and still need to be further increased, considering the ostensibly prospective potential of social and political affairs between the two countries (Mutlu, 2012).

4. Turkey-Kazakhstan Energy Cooperation

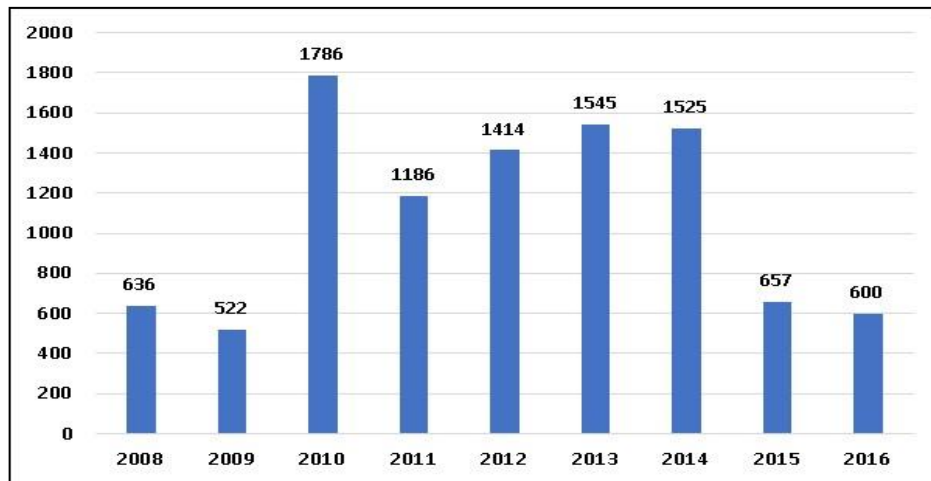
Turkey's increasing energy demand, target of diversifying its energy suppliers, and ambition of becoming an energy hub and Kazakhstan's desire to export its gas and oil via multiple routes – including Turkey – seem overlapping and complementary goals. Turkey invested \$263 million in the development of oil and gas fields in Kazakhstan (Chebotarev cited in Nurgaliyeva, 2016). Turkish energy companies have conducted energy operations in the country. Similarly, Kazakhstan has been investing in the Turkish energy market. In this regard, Erdoğan stated that he was glad due to the growing Kazakh investments in the Turkish oil sector (Hurriyet Daily News, 2012).

4.1 Oil Collaboration

Turkey imports both crude oil and oil products from Kazakhstan. Crude oil imports from the country help Turkey meet its oil needs. In 2016, the country imported around 600 thousand tonnes of crude oil from Kazakhstan, which signified 1,5% of its imported petroleum (see Figure 2 and Figure 3). Turkey's share in oil exports of Kazakhstan was around 1.7% in 2015 (the Observatory of Economic Complexity, n.d.).

² The Customs Union was created by Russia, Belarus and Kazakhstan in 1995. The Eurasian Economic Union is an international organization for regional economic integration. Its members are Armenia; Belarus, Kazakhstan, Kyrgyzstan and Russia. For further details on the Unions see Nurgaliyeva, 2016.

Figure 2: Turkey's Crude Oil Imports from Kazakhstan 2008-2016 (thousand tonnes)



Source: The figure is based on data compiled from EMRA's annual oil market reports. The reports are accessible at <http://www.epdk.org.tr/TR/Dokumanlar/Petrol/YayinlarRaporlar/Yillik>

Besides, Turkey is a transit country for the Kazakh oil resources given that they are exported to global oil markets via the BTC pipeline. The pipeline is a great domain in the Turkish-Kazakh energy cooperation. It was 1995 when the Turkish authorities for the first time attempted to acquire the consent of Kazakh leaders for attendance in the project (Almen, 2013). In November 2002, the Kazakhstan's oil company, "Kazmunaigaz", and Azerbaijan's SOCAR launched negotiations on Kazakhstan's possible involvement in the project. In 2006, Baku and Astana signed the deal on the promotion and support of oil transportation from Kazakhstan to international markets through the Caspian Sea and Azerbaijan via the BTC pipeline. This agreement not only opened up a new way to export Kazakhstan's energy, but also encouraged for a close relationship with Turkey (Nurgaliyeva, 2016). In 2008, Kazakhstan began to send its first oil through the BTC to the world markets. Kazakhstan's attendance was vital for the pipeline to work with the complete capacity (Almen, 2013). The share of Kazakh oil deliveries through the BTC is 10%. In addition to the BTC, a large part of Kazakh oil is also shipped by tankers via the Turkish Straits (Balcer, 2012).

Figure 3. Share of Kazakhstan in Turkey's Crude Oil Imports

Year	Percentage (%)
2008	3
2009	4
2010	11
2011	7
2012	7
2013	8
2014	9
2015	3
2016	3

Source: The figure is based on data compiled from EMRA's annual oil market reports.

There are a set of reasons of Kazakhstan's participation in the BTC. First of all, this participation can be justified by Turkey's geopolitical position (Chebotarev cited in Nurgaliyeva, 2016), which enables Kazakhstan to export its oil to world markets via the Turkish territory. Secondly, Turkey limited the numbers of oil tankers passing through the Turkish Straits with its regulation of 1994, which forced Kazakhstan to export its oil resources via the BTC pipeline. Thirdly, Turkey has been one of largest investors in Kazakhstan, which motivates the two countries to extend their strong partnership into new areas, including energy. Fourthly, Kazakhstan and Turkey have similar approaches to many international and regional matters, in addition to the common roots in language, history and culture (Hardin, 2012) and this stimulates the both states to enhance their cooperation in various fields, including energy. Fifthly, the BTC pipeline has been crucial for Kazakhstan to ameliorate its bargaining power with Russia (Nurgaliyeva, 2016). Sixthly, for Kazakhstan, rail and pipeline routes economically can be more attractive compared to the Transneft routes (Hardin, 2012). Last but not least, Kazakhstan can guarantee its energy security through diversifying its export routes (Nurgaliyeva, 2016).

Both Realism and Liberalism enable to describe and analyse Kazakhstan's motivation and role in the BTC. From the realist perspective, Astana desires to counterbalance Russian power and enhance its bargaining power with Moscow by diversifying its oil exports options and reducing its reliance on Russia to export its oil resources. From the

liberal point of view, Kazakh leaders have supported the project as it allows Kazakhstan to export its oil resources to European and world markets via Turkey, which, of course, provides significant economic benefits.

Turkey has also great advantages of transiting the Kazakh oil through the BTC pipeline. In addition to providing Turkey with oil supplies, the Kazakh oil exports via the BTC enable Turkey to receive transit fees. Moreover, throughout this pipeline, Turkey forms a direct link with the region and this assists with the problem of region's geographical farawayness. The passage of the pipeline through Turkey also strengthens Turkey's importance for European energy security, as a result contributes to Turkey's EU accession process. Astana is already pleased with the alternative of further evolvement of the dialogue with Brussels, with the active involvement of Turkey, including the development and execution of joint projects for the shipment of oil and gas to Europe (Aslan and Bozyigit, 2014). In this regard, Nazarbayev asserted that "We may invest more as Turkey wants to be a transit point between Asia and Europe. It will be beneficial to transit Kazakh oil and gas via Turkey" (Hurriyet Daily News, 2009).

Both realist and liberal paradigms are useful in explaining Turkey's desire to conduct oil cooperation with Kazakhstan in the context of the BTC pipeline project. From the realist point of view, Turkey considers its energy security as an existential issue as the lack of necessary energy resources menaces its economy, military power, security and national power. Thus, it tries to ensure its energy security by importing oil resources via the BTC from Kazakhstan. In addition, Ankara seeks to reduce its high energy dependence on Russia and Iran, the two countries with which Turkey has clashing policies on regional matters. In fact, Turkey and Iran are already regional rivals. Therefore, Turkish leaders perceive the high energy reliance of the country on Russia and Iran as an existential threat. In this regard, diversifying energy suppliers is vital for Turkey. Thus, oil imports from Kazakhstan enable Ankara to diversify its oil suppliers, thereby reduce its dependence on Russia and Iran. Furthermore, Turkish policy-makers aim at turning the country into an energy hub in order to increase the importance and power of the country in the region. In this regard, the transit of Kazakh oil resources through the BTC enables Turkey to strengthen its position as an energy hub. On the other hand, from the liberal perspective, Turkey has important

economic motivations in the context of the BTC. The country receives transit fees, investment opportunities and economic benefits by transporting the Kazakh oil via the BTC pipeline. Additionally, the BTC project provides economic benefits to the countries it passes through, including Turkey and Georgia, as well as to oil supplying countries. This, of course, contributes to the economy of the region, thereby increase peace and stability there. Hence, the BTC provides economic and political interdependence among supplying, importing and transit countries.

4.2 Natural Gas Cooperation

At the moment, Turkey does not import natural gas from Kazakhstan. However, Turkey is highly interested in the construction of the Trans-Caspian pipeline and the shipment of the Kazakh and Turkmen gas to Turkey and to Europe via this pipeline. The formation of such links would contribute to the vision of Turkey serving as an energy hub for the wider region, hence strengthening its global importance (Wheeler, 2013). It would also importantly contribute to Turkey's energy security.

The Trans-Caspian pipeline provides a promising outlet for the Kazakh gas. It would enable Kazakhstan to diversify its downstream markets beyond its dependence on Moscow (Cason, 2015). In this respect, during Nazarbayev's visit in October 2009 to Turkey, Ankara and Astana concluded a "Strategic Partnership Agreement" demonstrating Kazakhstan's intention of participating in the South Caucasus pipeline (Reuters cited in Babalı, 2010), which is also known as the Baku-Tbilisi-Erzurum pipeline and transports gas from Azerbaijan sector of the Caspian Sea through Georgia to Turkey.

Both Realism and Liberalism allow to scrutinize and explain reasons of Kazakhstan's desire to carry out gas cooperation with Turkey. From the realist perspective, the county works towards reducing its reliance on Russia and China and diversify its gas export markets. From the liberal perspective, exporting gas to European markets via Turkey would enable the country to monetize its gas resources and strengthen its economy.

Similarly, both realist and liberal paradigms are useful in describing Turkey's willingness to collaborate with Kazakhstan in the context of transporting Kazakh gas to European markets. From the realist point of view, Turkish decision-makers consider that transporting Kazakh gas to

European consumers via Turkey would increase the potential of the country to become an energy hub. As said before, emerging such a hub would importantly foster Turkey's power in energy geopolitics, which, in turn, would contribute to its national power. Besides, in the future Kazakh gas could also be imported by Turkey and increase its energy security by diversifying its gas suppliers and reducing its dependence on Russian and Iranian gas. On the other hand, from the liberal perspective, similar to oil transportation, gas transit via Turkey would provide Turkey with economic benefits and boost the Turkish economy. Furthermore, gas exports from Kazakhstan to European markets via Turkey would provide economic and political advantages for all involved countries, augment interdependence between them and contribute to stability and peace in the region.

4.3 Challenges in Turkish-Kazakh Energy Cooperation

4.3.1 Lack of the Involvement of Turkish Firms in the Kazakh Energy Sector

In Kazakhstan, Turkey is not participating in important projects of hydrocarbon. Until very recently, the biggest Turkish investor in Kazakhstan was TPAO. The company carried out its activities with the majority share in the KazAktürkmunay (KTM) Company, which was set up as a joint-venture between TPAO and KazakhOil in 1993. TPAO possessed 49% share in the KTM, which held seven exploration and operation licenses for four oil fields in Kazakhstan (Yılmaz, 2014). However, in 2002 the KTM was fined \$9.5 million by the Kazakh Finance Ministry (Unlu, 2002). According to a TPAO official (cited in Unlu, 2002), this fine was against the bilateral agreement between Turkey and Kazakhstan. With the intervention of the Ministry of Foreign Affairs of Turkey, the problem was resolved. However, with the new tax law entered into force in Kazakhstan in 2009, the KTM was once again charged with the same amount in 2011. The Turkish company rejected to pay this fine. Afterwards, TPAO applied to the International Centre for Settlement of Investment Disputes (ICSID), bringing its claims in under the Energy Charter Treaty and the Turkey-Kazakhstan bilateral investment treaty. On 30 June 2014, a share agreement was reached between TPAO and KazakhOil. The Turkish company received \$204,5 million as a compensation of its share in the KTM. With the ICSID decision and the

share deal between the two companies, TPAO's all rights and liabilities related to KTM activities were ended as of 1 January 2014 (TPAO, n.d.).

4.3.2 Russia's High Influence in the Kazakh Energy Sector

Throughout the last two decades, Russia and Kazakhstan have developed close, multi-faceted relations. It has enabled their political and economic elites to enjoy close ties dating back to the Soviet era (Kusznir, 2015). Kazakhstan's economy maintains to be reliant on Russia for the transportation of its oil and gas (Zabortseva, 2016). At the present, natural gas from Kazakhstan is delivered to European customers via Russia through the CAC pipeline network. Besides, over 75% of Kazakh crude exports still pass through Russia (including via the CPC pipeline, rail, and Transneft supplies). Yet, unlike during the Soviet period, Russia is no longer the final destination for most of these exports (Hardin, 2012). The country is also a transit state for Russian gas imports from Turkmenistan via the CAC gas pipeline, which is controlled by Gazprom (Kusznir, 2015). Russia will long stay Kazakhstan's major export route for access to both Russian and international markets (Öğütçü, 2006). Additionally, Russian energy firms participate in the exploration of many of Kazakhstan's oil and gas fields and collaborate in refining (Kusznir, 2015). Thus, Moscow is an important energy partner of Kazakhstan.

Russia's firm dominance in the Kazakh energy sector has the important potential of impeding good energy collaboration between Turkey and Kazakhstan. It is not likely that Ankara and Astana will ostensibly confront their northern neighbour (Almen, 2013). Russia objects to development of the Trans-Caspian Pipeline. Any corridor under or across the Caspian would deprive Moscow's control over Turkmenistan's gas exports, along with the important impact over the country's domestic and foreign policies that such control provides (Center for Energy Economics, n.d.). Therefore, it is not surprising that Russia has made obvious its resoluteness to prevent a Trans-Caspian pipeline (Blank, 2012). Similarly, the Russian president pressured Kazakhstan for the impediment of the probable extension of the BTC project, menacing it with economic and military measures, which became more influential particularly following the Georgian crisis in 2008 (Almen, 2013). Consequently, Kazakhstan did not construct a pipeline from Aktau to Baku and instead transports its oil to the BTC pipeline by tankers across the Caspian Sea. This, of course, has limited Kazakhstan's participation in the pipeline. Therefore,

Astana's strong relationship with Moscow has prevented Turkey and Kazakhstan from fully benefiting from their bilateral energy cooperation.

The realist paradigm is useful for describing the roles and motivations of Kazakhstan, Turkey and Russia and the competition between them. As highlighted above, Ankara seeks to turn Turkey into an energy hub in order to enhance the power of the country in the region. For this, the country needs diverse suppliers which are eager to export their oil and gas resources via Turkey. In this regard, Kazakh oil and gas resources are of course vital for Turks. Thus, Turkish leaders try to convince their Kazakh counterparts to make Turkey an important transit country for Kazakh oil and gas resources. Similarly, Kazakh policy-makers are working towards decreasing the dependence of the country on Russian energy transportation systems in order to increase the bargaining power of Kazakhstan against Russia. In this context, Turkey is one of key transit countries which could help Kazakhstan to achieve this goal. On the other hand, Russia seeks to keep its control and access to energy resources of Central Asian countries, including Kazakhstan, in order not to lose its dominance in European markets, which provides it with strong power against European states.

5. Assessment and Conclusion

Based on the empirical data presented in this study, it can be concluded that the paradigms of Realism and Liberalism can enable to describe Turkey's energy strategy towards Kazakhstan. On the one hand, Liberalism is helpful in explaining some behaviours of Turkey in its energy collaboration with Kazakhstan. First of all, Ankara has a cooperative strategy towards this country because Turkish leaders prioritize cooperation over conflict and focus on win-win energy projects with Kazakhstan. Besides, in addition to the Turkish state, Turkish business groups play a key role in strengthening Turkey's bilateral (energy) relations with Kazakhstan. In addition, social issues such as similar culture, religion and identity have enabled Turkey and Kazakhstan to develop strong bilateral relations, which have positively affected their energy relations. Additionally, ideational issues such as beliefs, visions and norms of Turkish leaders have positively contributed to the establishment of energy cooperation with Kazakhstan. Turkey sees its historical responsibility to develop relations with Caspian Sea / Central Asian countries, including Kazakhstan. Moreover, Ankara seeks for

developing strong economic interdependence with Astana since it will not only provide economic benefits for the two countries, but also increase stability and prosperity in the region. Furthermore, for Turkey, even though the Turkish-Kazakh energy cooperation causes some challenges, it still maintains this cooperation since Ankara concentrates on absolute gains instead of relative ones in the cooperation.

On the other hand, Realism can be instrumental in scrutinizing certain policies of Turkey in its energy relations Kazakhstan. For instance, the Turkish state is the key player in these relations. Mostly Turkish bureaucrats negotiate and conclude energy contracts with Kazakhstan. Additionally, with the encouragement and guidance of the Turkish state, Turkey's state-owned energy companies have carried out their energy operations in Kazakhstan in order to help the country to achieve its major energy targets, namely meeting its increasing energy need and making the country an energy hub. Besides, as Turkey does not have enough domestic energy resources to meet its increasing energy need, it has to import increasingly large volumes of oil and gas. The majority of these imports comes from Russia and Iran. Consequently, Turkey highly depends on the two countries, which are mainly seen as its regional rivals and have clashing policies with Ankara on several regional issues. This high reliance, to a certain extent, restricts Turkey's foreign policy choices in its relations with Moscow and Tehran. Turkey is concerned over its high dependence on Russia and Iran and over its energy security, which has vital importance for the Turkish economy, security and national power. Therefore, Turkey seeks for diversifying its oil and gas supplying states. In this respect, substantial oil and gas resources of Kazakhstan are significant for the country. Importing its energy resources does not only enable Turkey to meet its growing energy need but also to obtain leverage against Russia and Iran when discussing the terms of its energy contracts. It also allows Turkey to implement a more independent foreign policy since the Kazakh oil (and maybe gas in the future) resources relieve Turkey's reliance on Russian and Iranian energy resources. Additionally, Turkey's role in the transit of energy resources of Kazakhstan to world markets increases the significance of the country in energy geopolitics, thereby contributes to its regional power and global standing.

Still, for Ankara, the energy collaboration with Kazakhstan is not cost-free. First, there is a strong competition among Turkey, Iran, the EU, China and Russia for access to and control over the Kazakh energy

resources. This has resulted in conflicts in Turkey's bilateral relations with some of these players given that they and Turkey have divergent interests. For instance, Russia, the key player in the region, seeks for keeping its access to and control over energy resources of Kazakhstan and its dominance over European energy markets. But, Turkey aims to further its energy cooperation with Astana not only to reduce its reliance on Russia and but also to deliver the Kazakh oil and gas resources to European markets. Thus, substantial energy collaboration with Kazakhstan might damage Turkey's energy partnership with Moscow. Due to the Russian pressure, Turkey has so far managed to develop only limited energy collaboration with Kazakhstan. Kazakhstan exports its oil to world markets via Turkey. However, this amount is not substantial given that the current share of Kazakh oil deliveries through the BTC is only 10%. Turkey's share in Kazakhstan's crude petroleum exports is around 1.7%. Today, there are no natural gas exports from Kazakhstan to Turkey. But, Kazakh crude oil and oil products are exported to Turkish market. Nevertheless, the share of Kazakhstan in Turkey's oil supply is low. Still, increasing their energy collaboration will be in the interest of both countries given that such collaboration will enable Turkey to diversify its oil and gas suppliers and thereby increase its energy security and augment its potential to become an energy hub, while the collaboration will help Kazakhstan decrease its high reliance on Russian transport routes. Especially with the materialization of the Trans-Caspian pipeline, energy partnership between the two countries may considerably augment.

Due to its significant location between the Kazakh gas reserves and European markets, Turkey's importance and power vis-à-vis Astana might increase in the future with the export of Kazakh gas resources to Europe. Similarly, if these gas resources are exported to Turkey, the significance of Kazakhstan for Turkey will even further augment.

Kazakhstan's oil and gas resources will continue to be important for Turkey, especially for it to emerge as an energy hub. Becoming such a hub will allow the country to enhance its energy security, boost its economy, increase its regional power and augment its leverage towards the EU, Russia and energy exporting states in the region.

Even if Turkey could not manage to establish strong energy partnership with Kazakhstan, their close political, economic and cultural relations

motivate them to strengthen their energy collaboration. That is, Turkey's strong partnerships with Kazakhstan in non-energy areas positively influence its energy relations with this country.

To sum up, Turkey's energy security concerns; its aspiration of becoming an energy hub; the economic and business partnerships established between Turkey and Kazakhstan; the close political, historical and cultural links between the two countries; and regional issues such as the aspiration of the EU to reduce its dependence on Russian gas and the competition among Russia, Turkey, Iran, China and the EU for access to and control on the energy resources of Caspian Sea states, including those of Kazakhstan, are the main determinants of Ankara's oil and gas strategy towards Astana.

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