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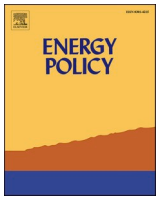

When one door closes, another opens: How the failure of the Turkey - Austria natural gas pipeline project has led to recovery, resilience and scalability of successor projects

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A B S T R A C T

There are numerous examples of energy policy failures (Heffron et al., 2018) which are now being systematically studied to provide for much-needed policy-relevant perspectives into key definitions, contexts, and theoretical frameworks for analysis (Sokołowski and Heffron, 2022). This paper will focus on one of the prominent examples of an energy policy failure; the case of the Turkey – Austria natural gas pipeline project,[1] also known as Nabucco gas pipeline project (NGPP), and more broadly the Southern Gas Corridor (SGC) strategy that dominated much of EU energy import diversification strategy in the late 2000s and early 2010s. Drawing on the NGPP case study, this paper analyses the EU's external policy, identifying its key failures and arguing that, paradoxically, the drawbacks of the NGPP that were attributed to political factors have led to recovery, improved resilience and, ultimately, appropriate scalability in successor projects. The Trans-Anatolian Pipeline (TANAP) as well as the Trans-Adriatic Pipeline (TAP) projects enabled the spirit of the failed energy policy to outlive the mega-scale Nabucco project by engaging and emancipating key regional energy stakeholders, particularly Turkey and Azerbaijan, thereby revitalizing their westward-oriented gas transit and supply strategies. With the door of the EU's external energy policy closing, the door of regional stakeholders opens, redefining our understanding of project risk and the associated economic, social and environmental aspects of it.

1. Introduction

Energy supply security is paramount for energy consuming regions, and the implications of failing to secure long-term supply are enormous. As a key energy-importing region, the European Union (EU) has sought to craft its internal and external energy policy to reflect its need for diversity of sources and routes of supply. The European Community's internal market liberalisation and associated regulatory regime has sought to empower the bloc in balancing its diplomatic and regulatory relations, most notably with its key natural gas exporter to the East. Its external policy has been aimed at the diffusion of its internally-achieved, compliance-oriented norms to facilitate diversification of supply. This external policy has been less successful, and its application has highlighted weaknesses leading to policy failure, chiefly due to political reasons.

1.1. Importance of natural gas in the EU context

Natural gas continues to play a significant and important role in energy security, as well as in the energy transition towards a more carbon-neutral economy within the European Union (Morningstar et al., 2020; Stern, 2019). In 2019, the EU energy mix comprised of petroleum products (including crude oil 36%), natural gas (22%), renewable energy (15%), nuclear energy (13%), and solid fossil fuels (13%) (European Union, 2021). The EU is a net-importer of energy, with 61% of its energy needs coming from third countries. Standing as the focus of this paper, natural gas import dependency in EU stood at 83.5% in 2020, down from 89.5% a year earlier (EuroStat, 2021a). While natural gas imports enter the EU territory from a number of countries, either by pipeline or in liquefied form, a high proportion of imported energy is, in fact, supplied by a handful of external producers. By origin Russia, Norway, and Algeria are the largest suppliers of natural gas to the EU. In 2019, prior to the construction of the Nord Stream 2 natural gas pipeline, natural gas came from Russia (41%), Norway (16%), Algeria (8%), and Qatar (5%) (EuroStat, 2021b). There are differing patterns of import dependence among the EU Member States, with the Central and South-Eastern European Member states disproportionately dependent on pipeline-supplied natural gas by Russia's Gazprom (Loskot-Strachota and Lasocki, 2013). Supply trends evolve due to the changing energy and climate policy objectives of EU Member States, including due to decarbonisation trends, as well as the growing export capacity of the EU's main energy trade partner (Vatansever, 2017). Enjoying close

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[1] Seminal research discussing the Turkey – Austria natural gas pipeline project, in the context of East – West gas transportation infrastructure, includes Winrow (2004).

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proximity to major producing regions, for well over a decade, the European Union had sought to establish rule-based energy relations with its key natural gas suppliers and transit countries in its neighbourhood (Yafimava, 2011). The pursuit of the external energy policy, steered by the Community's executive body, the European Commission, had been premised on a two-fold objective: projecting and exporting the EU's *acquis communautaire* to its neighbourhood through legal and institutional frameworks, and encouraging diversification of energy supplies and routes through institutional support for infrastructural projects.[2] The pursuit of an external energy policy had been prescribed by the demands of supply security and underpinned by the nature of the EU bloc in its relations with its key energy suppliers as a rule-based community (Goldthau and Sitter, 2014).

1.2. External energy policy of the EU

Since its inception in 1990s, the origins of the EU's external energy policy had been premised on the fact that the Community is predominantly an energy net-consuming bloc of nations, the notion of growing energy import dependence along with the need to address sustainability of the bloc's energy supply security have been rising on the policy agenda (European Commission, 1995, 2010, 2014, 2015). The policy's 'three pillar approach' – comprising competitiveness, security of supply, and environmental protection – became the signposts of the EU's involvement with external partners in the field of international energy relations. By far, at the centre of the external energy policy of the EU was natural gas and the relationship with its main supplier, the Russian Federation (Raszewski, 2016). The success of the EU's eastward enlargement of 2004 and 2007 brought about a challenge of new Member States with their distinct perceptions of energy supply insecurity concerning imports from Russia (Belyi, 2003; Raszewski, 2012a,b). Energy relations between the EU and Russia, their policy objectives, and underpinning issues constructed around political ideologies of markets and governance, on the one hand, and, on the other hand, sovereign rights and government produced sub-optimal outcomes led to a deterioration within energy diplomacy efforts (Romanova, 2009; 2009; Kuzemko, 2014). The demise of EU-Russia energy relations incentivised the EU to embrace new opportunities in the Black Sea and the Caspian region, 'defined by oil and gas' as argued by Aydın (2004, p. 3). The two eastward EU enlargement periods into Central and Eastern Europe (CEE) in 2004, followed by the 2007 accession of Bulgaria and Romania, provided political incentive to engage with the wider neighbourhood, whilst refocusing on attempts to extend the EU institutional frameworks to encourage diversification of energy supplies from the Caspian region and, therefore, enhance the energy-import-dependent EU bloc's energy security. Most commonly understood in terms of energy supply security, and defined as the '*continuous availability of energy at a reasonable cost*', energy 'import security' constitutes the value for consuming nations and regions (Heffron et al., 2018 [3]). The imperative of energy import security is achieved by a short list of 'must have' policy objectives that are geared towards diversification by source and route, as well as investments in import infrastructure (Heffron et al., 2018). Since its formulation, the Community's energy policy focus on the Caspian region was premised on energy transit – ensuring diversification of imports by source and route – and the role this transit plays in natural gas trade as an intersection between the supply and demand centres guaranteeing energy security (Haghighi, 2007). The EU sought to facilitate the transit of natural gas, and thus its diversification by source and route, by using its internally-achieved, compliance-oriented norms. Application of the energy security policy turned out to be less successful, highlighting instead the weaknesses of the policy chiefly due to political reasons. It should be noted, however, that economic factors, as argued by Baev and Baev and Øverland (2010) and highlighted in the literature review below, had a somewhat frizzy fixture in the process.

1.3. Internal and external factors

Internally, in the words of the Former High Representative of the European Union for Foreign Affairs and Security Policy, EU energy policy making has been stretched between '*individual Member States to pursue their own external relations for ensuring security of energy supplies and to choose their internal energy*' and '*the development of a coherent and focused external EU energy policy, drawing on the full range of EU internal and external policies*' in order to enhance the collective external energy security of the Union' (Solana, 2006, p. 1). The need for an external policy became a focal point of EU policy-making. Internally, by means of neo-liberal market liberalisation of network industries, in particular electricity and natural gas, aimed at creation of single market, and more broadly, institutional coordination and regulation of the key industries at the level of the Community. Facilitation of a single-market by means of adopting the so-called Third Energy Package – aimed at segregating the energy value chain into three independent segments comprising of energy production, transmission and supply operations – cemented the regulatory power of the EU in the period 2004–2013. Simultaneously, completion of the legal reform of the energy sector had a profound effect on the Community's external energy policy aimed at the diffusion of internally-achieved, compliance-oriented norms to facilitate the diversification of energy imports by source and route. The uneasy EU-Russia energy relations became a major factor in the creation of the Southern Gas Corridor (SGC) and in the support for the NGPP.

1.4. Research question

The underlying question and subject of this paper, therefore, is what makes the failure of an energy policy? Drawing on the case study of the abandoned infrastructural project, the Nabucco natural gas pipeline, this paper seeks to establish what were the causes that led to the abandoning of the project, and how could Nabucco's successor projects, the Trans-Anatolian Pipeline (TANAP) and Trans-Adriatic Pipeline (TAP), be interpreted?

The NGPP, which had come to epitomize the centrepiece of the SGC, was an energy policy initiative that was created by the natural gas industry, and embraced by the EU for its natural gas supplies from the Caspian and the Middle East to Europe (Bocse, 2019, p. 1). With the transit of natural gas in focus, the failed energy policy sought to operationalise the SGC concept through the endorsement of projects aimed at westwards trade of natural gas via Turkey to Europe (Morrison, 2018). The fact of the matter is that Turkey happened to be the largest SGC country along the route of the planned NGPP and, coincidently, one of the largest natural gas consumers in Europe, all of which provided for a difficult start to the policy implementation. Despite its already existing institutional links to the EU, Turkey had sought to seize opportunities offered by the SGC concept and the Nabucco project in particular, and introduce its own vision of policy implementation (Winrow, 2013).

2. Research method, analytical framework, data analysis

Comparing and contrasting where energy policy failure vs. recovery, resilience and scalability of successor projects has taken place may be a tricky task due to a number of above and below ground factors that could be considered. This paper takes into account above ground factors

[2] While acknowledging a gap between EU's external energy policy goals and individual Member States' aspirations.as a measure to address energy policy failure, this paper paper only looks into the external dimension of the policy and, hence, does not address the internal dimension of the policy-making within the Community's structure and institutions.

[3] The other flipside of the term is security of energy demand, which is the interest domain of the producing countries, is defined by Heffron et al. as a '*continuous demand for energy products produced within the country in question*' (Heffron et al., 2018).

into consideration, in the context of the proposed case study, to describe and explain '*when, where, why, and how*' (Sokołowski and Heffron, 2022) energy policy failure occurs. This paper draws on case study research typology proposed by Thomas (2011). Examination of the research question – what makes the failure of an energy policy? – posed in this paper is carried out through an illustrative case study providing descriptive analysis of the Nabucco Pipeline Gas Project. Drawing on Thomas' (2011) definition of a case study refers to one or more ranges of examples within the same category of failed projects in a specific '*time period, place, institution 'or 'any of a range of singular phenomena*' which '*can be studied in their complexity*' (Thomas, 2011, p. 516).

Keeping the aforementioned in mind, the subject of this paper's case study is the failure of the EU's external energy policy. The illustrative case study and the descriptive analysis of the case study have been supplemented by primary data collected using semi-structured interviews. The data has been collected as part of the author's research project using a selection of interviewees drawn from senior energy policy and industry representatives. Hence, drawing on primary and secondary data, this paper aims to examine what has made the energy policy a failure. The paper's analytical frame to illustrate the subject is through the very object of the study, the NGPP, focusing on the period 2004–2013. The former date marks the largest EU enlargement to the CEE, and an increase in the perceptions of energy supply insecurity from Russia. The latter date marks the final investment decision by the Shah Deniz Consortium to forgo the NGPP and, instead, opt for the scalable TAP project, a part of SGC (Loskot-Strachota and Lasocki, 2013), and reconfiguring the Southern Gas Corridor to include TANAP (BP, 2013). The purpose of this paper is exploratory and, as such, seeks to explore multiple perspectives, complexity, and uniqueness of the failed external energy policy of the EU through an illustrative approach. The illustrative approach does not seek to contribute to theory and is there to describe and explain the object of the study. The illustrative approach involves the collection of data related to the subject of the study and, owing to the scope of the paper and its editorial limitations, does not seek to grasp the full spectrum of issues, both theoretical and empirical, in data collection, contextualisation, and analysis of the problem presented in this paper.

3. Literature review

Literature on energy policy failures is emerging as a novel analytical framework. The framework aims to establish key definitions, contexts, and theoretical perspectives to support research into this policy-relevant, but still, largely empirical area of academic enquiry (Sokołowski and Heffron, 2022). As part of the novel framework, what we understand by the energy policy failure concept is that it '*does not meet local, national, and international energy and climate goals across the activities of the energy life-cycle and where just outcomes are not delivered*' (Sokołowski and Heffron, 2022). Put simply, energy policy failure occurs when it '*does not reach its goals*' (Sokołowski and Heffron, 2022).

There has been sizable literature on natural gas pipeline projects, energy megaprojects, and the potential role for, and limitations of, the EU as an international energy actor. For the purpose of this literature review, selected bibliographical sources have been considered along with author's take of each source's utility in discussing energy policy failure.

Take number one: there are limitations of neo-liberal institutionalism in the domain of energy policy-making which limits the ability of the EU as an international energy player. EU energy policy has often been mired in misunderstandings within international relations due to underlying differences in the process of decision-making, policy goal-communication, and its implementation. Drawing on regulatory power Europe concept, the realism of sovereign nation-states with their foreign economic policies, is contrasted with the EU bloc's neo-liberal, external energy dimension which has been prescribed by the demands of energy supply security, yet underpinned by a rule-based system. Consequently, the EU has sought to spell out its policy's objectives and means for achieving them through a rule-based, neo-liberal institutionalist approach (Goldthau and Sitter2014).

Take number two: the proposed energy policy relied on alternative supply options in disregard of the existing (albeit, mature) interconnecting infrastructure via Ukraine. Fatigue of the EU-Russian natural gas relations led to Russia developing a major surplus capacity in its oil and gas export pipelines (Vatansever, 2017). The Nabucco natural gas project's main competitor, the South Stream project, had been stalled as non-compliant with the EU's energy legislation. This led to the suspension of the South Stream project and its replacement with the Turkish Stream, a natural gas pipeline connecting Russia with Turkey, '*while also making onward shipments to Eastern Europe possible*' (Vatansever, 2017, p. 9).

Take number three: in external energy policy the EU has become a state-like polity. In one of his two theses, Prontera (2019) argues that the EU has taken a form of a 'catalytic state' in the energy security domain, having transformed away from merely a regulatory or, for that matter, a normative power, to become a more state-like polity. As a result of the changing nature of the EU, the transformation has wide-ranging implications both '*inside and outside of the EU's borders*' (Prontera, 2019, p. 4).

Take number four: EU energy policy outcomes are dependent on internal and external actors due to the nature of energy policy making within the bloc. Bocse (2019) reminds us that the EU energy policy making is underpinned by public-private interactions. Results of the polity's policies are attributed to interactions between EU institutions, the Member States of the Community, and non-state actors, including but not limited to the industry, lobby groups, and civil society, all based inside and outside of the EU. Hence, the policy outcome of an energy policy tends to be the result of the pulling and hauling of a network formed to advocate for specific energy policy options (Bocse, 2019).

Take number five: Energy policy failure is premised by a multitude of challenges, including a geopolitical approach undertaken by the policy's SGC concept, which triggers response by Gazprom. Siddi (2019) argues that the EU's policy of energy diversification by means of the Southern Gas Corridor concept '*exemplifies a geopolitical approach to energy*' while underplaying a host of '*important economic, technical and security challenges hindering the project*' (Siddi, 2019, p. 124). As a result, Russia's Gazprom sought to enhance its competitiveness over the SGC by means of projects that are competitive to the EU-led Nabucco model. To this end, Gazprom completed the Turkish Stream pipeline connecting Russia with its key export market (and the key transit country as far as Nabucco goes), Turkey. Geopolitics becomes off-limits to the EU, which is known to have a proven-track record in the implementation of market-focused policies so as to achieve energy security, rather than those of geopolitical provenance (Siddi, 2019)

Take number six: Russia's Gazprom enhances its natural gas export strategy by indirectly undermining claimed commercial rationales of the NGPP. The SGC in general, and the NGPP, in particular, were envisaged to provide diversity of sources and routes of supply. Conceptually, the diversification objective of the NGPP produced two distinct challenges to the main regional gas supplier, Russia, as the NGPP sought to weaken '*both Russia's monopoly in Europe and its monopsony in Central Asia*' (Fernandez, 2011, p. 69). The energy policy objectives underpinning NGPP incentivised the state-owned Gazprom and the Russian government to initiate a number of measures to strengthen the company's export strategy – including by means of '*strengthening their position in Central Asia, proposing construction of* [the] *South Stream* [natural gas pipeline] *and taking control of the Central European Gas Hub (CEGH) in Baumgarten (Austria)*', which turned out to be effective in countering the objectives of the NGPP (Fernandez, 2011, p. 69).

Take number seven: Intangible motivations, such as prestige and credibility, rather than geopolitics, may explain as to why megaprojects without '*sound business proposition*', such as the Nabucco or South Stream, become centrepieces of energy policies (Baev and Øverland, 2010, p. 1083). Rationality is distorted within the EU decision-making by '*the usual handicap of consensus-building on the basis of the lowest*

common denominator'. In the presence of diminished capacity for joint action, '*one of the few available means to preserve unity and to mobilize public opinion towards a visible goal is to focus on large-scale projects*' (Baev and Øverland, 2010, p. 1086–1087). On the other hand, Russia, by means of mega-scale ventures such as the South Stream project, engages in the construction of a 'national project', '*designed as material representations of the proposition that petro-prosperity was fairly distributed*' (Baev and Øverland, 2010, p. 1086–1087). Energy policy is premised on a strong declarative support for the megaprojects, yet, it is '*done on the cheap, without putting real money behind the declarations, except for PR budgets*' (Baev and Øverland, 2010, p. 1088). The European Commission lacks 'necessary expertise' to define and implement the NGPP, the Nabucco Consortium being unrealistic about its status as a importing bloc '*not producing any gas*' and, therefore, being unable to foresee any profits (Baev and Øverland 2010, p. 1083).

4. Economic and strategic rationale of EU external energy policy in the Black Sea/Caspian region

Realisation in Europe of the strategic and economic cost of interdependence between the EU and Russia came to the fore with the first gas pricing dispute between Moscow and Kiev in 2006 (Koranyi, 2014). In the advent of the next eastward EU enlargement, the Community recognised some of the underlying issues of the interdependence; quantified by over 25% of natural gas demand of its EU-25 community supplied by Russia and as much as 80% of natural gas transiting through the territory of Ukraine. These underlying strategic and economic rationales led to increased interest in alternative supply options, thus reviving interest in the NGPP (Kardaş, 2011).

The strategic rationale of the SGC was that of energy diversification into extensive new sources of supply from the Caspian and the Middle East and, at the same time, addressing '*Russian* [energy] *dominance in Central and South-Eastern Europe* […] *disproportionately dependent on Gazprom*' (Loskot-Strachota and Lasocki, 2013). The strategic dimension of the external energy policy was evident with strong US support for the policy of diversification by source and route, in general, and, more specifically, the construction of alternative supply infrastructure, such as Nabucco and TAP pipelines, as starters of the SGC policy. It was seen as a matter of competitiveness for European gas markets hoping for a generation of multiple pipeline projects to be commissioned from the Caspian to Europe. The Nabucco pipeline had been seen as the centrepiece of this new 'East-West' transportation system, serving as an '*energy bridge linking Caspian energy resources with Europe*' adding volumes to the '*EU* sponsored *Nabucco pipeline*' (Larrabee, 2009, p. 304).

Calibration of the EU external energy policy towards one of diversification away from existing supply regions brought the Black Sea/Caspian region into focus (Triantaphyllou, 2007). Using Turkey as the conduit linking the energy-producers in the Caspian with energy consumers in Europe, energy transit became an issue of key focus.

4.1. Inception of the nabucco gas pipeline project

Inception of the NGPP dates back to February 2002 when the managers of Austria's OMV Gas & Power GmbH and Turkey's BOTAŞ met for discussions in Vienna. Further discussions with regional energy companies; Hungary's MOL, Romania's Medias and Bulgaria's BulgarGaz, followed. The name of the project was suggested after listening to Verdi's Nabucco Opera at the Vienna State Opera (Interviewee 2, 2010; Hromadko et al., 2012). In March that year, a study company, Nabucco Company Pipeline Study GmbH, was founded as a unit part of Austria's OMV Aktiengesellschaft, and was tasked with researching the feasibility of building the Nabucco pipeline. A consortium of companies was established in October 2002 consisting of Turkey's Boru Hatları İle Petrol Taşıma Anonim Şirketi (BOTAŞ), Bulgaria's Bulgargaz EAD, Romania's National Company for Natural Gas Transmission (SNTGN Transgaz SA), Hungary's MOL Natural Gas Transmission Company Ltd, and OMV Gas GmbH, a 100% subsidiary of Austria's OMV Aktiengesellschaft (Oil and Gas Journal, 2004). The Nabucco Company Pipeline Study GmbH engaged Amsterdam-based ABN Amro Bank NV as the project's financial advisor. Originally envisaged with a 5 billion euro price tag, sponsors of the NGPP sought to build a 4000 km long natural gas pipeline with a capacity to deliver 25 billion cubic metres (bcm) of natural gas from sources such as Iran, the Middle East, and the Caspian region (Oil and Gas Journal, 2004). Routing of the pipeline project reflected the business ambitions of the companies' bosses, who sought to contain sources of gas available immediately, or in a short-term timeline, with the Iraqi gas that was hoped for during the period following the constitutionalising of the Northern Kurdish Authority. Considering the technical specifications of this long, expensive and gas-hungry pipeline of 56″ diameter, the business concept sounded like a recipe for future expansion, should resources in Central Asia become available and the political and legal status of the Caspian be decided (Raszewski, 2012a,b, 2013).

The bigger picture of the EU's energy policy has long been the role of Russia. Through the demise of EU-Russia energy relations, new policy initiatives were undertaken to '*wean Europe from the Russian gas stranglehold*' (Skalamera, 2016, p. 1). The policy objective, the SGC concept, which since was also known as the 'fourth corridor' where the other three are gas arteries linking the EU with Algeria, Russia and Norway, refers to the idea of building new gas infrastructure that would interconnect the Caspian energy producers with the energy markets in the EU. The Nabucco project, which was officially part of the Fourth Corridor, or the 'N4' route, was meant to serve to reduce dependence on the existing Central Asia – Centre corridor also known as the N2 route, running from the Caspian/Central Asia via Uzbekistan, Kazakhstan and Russia to Europe and serving as the main supply artery that most European countries rely on. In addition to the two mentioned routes, the N1 route (Trans-Asian) from the Caspian to China across Uzbekistan and Kazakhstan was inaugurated in 2009 and began operations in late 2011 (Konoplyanik, 2010).

4.2. EU support for the Southern Gas Corridor

Enjoying the 'EU Status', the two Southern Gas Corridor pipeline projects, Nabucco and TAP, received financial support from the TEN-E facility. As for the NGPP, it was designated as a Project of 'European Interest' on the TEN-E 2006 list and as, European Energy Programme for Recovery (EEPR). The NGPP project had been included in the EU's Projects of Common Interest (PCIs), a format designed to accommodate '*key cross border infrastructure projects that link the energy systems of EU countries*' (European Commission, 2010). PCI projects are those that help the Community in achieving objectives of its energy and climate policy, more specifically energy security and long-term goals of decarbonising economy in line with the Paris Agreement (European Commission, 2010). For an undertaking to become a PCI it has to have '*significant impact on energy markets and market integration in at least two EU countries*', as well as helping to boost energy market competition and ensure security of energy supply by means of diversification by source, in addition to its contribution to the EU's climate and renewable energy objectives (European Commission, 2010). Priority corridors – such as the Southern Gas Corridor with its diversification of supply source and market competition in CEE – are normally given preference in the PCI selection process '*as identified in the Trans-European Networks for Energy (TEN-E) policy.*' (European Commission, 2010). As part of the TEN-E scheme, the Southern Gas Corridor was granted 'EU status', with the Nabucco and, later, TAP projects, granted third-party access exemptions and financial support by the EU (Prontera, 2020: 354).

Out of the two SGC projects, Nabucco was given priority, with significant support received from the EU. The EU offered substantial financial support, both in grants and loans, amounting to 2.6% of the estimated value of the project which amounted to circa 7.9 billion EUR in 2009 (Prontera, 2020, p. 354–355). The NGPP was inaugurated in

July 2009 with the signing of an intergovernmental agreement on the Nabucco pipeline. Overseen by the EC's President and Energy Commissioner, the Nabucco intergovernmental agreement was signed and ratified by all five partner countries. In addition, in 2010, additional support was envisaged by the European Investment Bank and by the European Bank of Reconstruction and Development of up to 3.2 billion EUR for the Nabucco consortium (Prontera, 2020). Nabucco enjoyed diplomatic support from the European Commission, including high-level, momentum-keeping international summits in Budapest, Sofia, and Prague. That the EU's Southern Gas Corridor policy was far-reaching is evidenced by the fact that the EU proposed incorporation of a public-private initiative, the Caspian Development Corporation (CDC), which aimed at pooling '*political, legal and commercial resources to aggregate European gas demand, assist European gas companies with purchases from Central Asia, and convince Caspian producers to commit gas volume to the Nabucco*' (Prontera, 2020: 355).

5. EU policy objectives irreconcilable with key actors in the Black Sea/Caspian region

Problems with implementation of the NGPP had been perceived as beneficial to Russia and Turkey, who had by then devised their own alternative (to NGPP) projects, namely the South Stream and TANAP, respectively. Despite Ankara's awareness of the benefits that the NGPP was able to deliver, Turkey has been viewed as the second biggest beneficiary of the failing of the project as it was able to enhance its capabilities and come up with its own alternative (Sönmez, 2017). Most importantly, the demise of the NGPP opened the way for Turkey to become part of an alternative project, in absence of the EU-led counterpart, which helped Ankara to enhance its strategic calculations concerning its energy trade role – not least Turkey's own energy needs as a fast-growing economy (Raszewski, 2018) – at the crossroads between the producing regions in the East, and the consumer countries of the EU in the West. Turkey, paradoxically, has taken energy relations to the next level while aiming to retain healthy relations both with the EU and Russia and, at the same time, raising Ankara's profile in the energy field (Sönmez, 2017).

5.1. Explaining the abandonment of the nabucco pipeline and the policy failure

The NGPP was inaugurated in July 2009 with the signing of an intergovernmental agreement on the Nabucco pipeline (Republic of Turkey, 2009). Overseen by the EC's President and Energy Commissioner, the Nabucco intergovernmental agreement, which was signed and ratified by all five partner countries, 'grants *transit rights to all signatories, even in the event that one of the partners would withdraw from the project*', according to the EC (Socor, 2012). The intergovernmental agreement regarding the Nabucco pipeline, however, only refers to the pipeline. As a result of the long process of agreeing on signing the agreement, the final wording is too technical and detailed, something unusual for projects of this type (Interviewee 6, 2010). What was troublesome is that the agreement does not create a legal benchmark for alternative pipeline options that may be conceived in the future. Nor does it guarantee that the actual Nabucco pipeline was to be built.

With the NGPP business concept resting on future expansion, efforts were made to try and secure commitment from suppliers in the Caspian region, in particular, Turkmenistan. Yet, from its outset, the NGPP was plagued by the very issue of a lack of commitment from Turkmenistan. Moreover, questions about the amount of resources available to finance and sustain the project caused repeated hesitation among investors. Issues with the security of future gas supplies meant that the EU partners failed to bring about enough determination and consensus to push the project forward. The lack of enough gas supplies and waning commitment to the project's external obstacles - Russia's indirect influence - contributed to the project's demise. From a major supplier's point of view, it was vital to ensure continuity of the East - West (N2) transit monopoly, pushing Moscow to exercise political pressure on Turkmenistan (Yılmaz and Kilavuz, 2012). Ankara's foreign and diplomacy-based energy policy dynamism coincided with Moscow's omnipresence in regional energy security affairs, posing a number of challenges for the implementation of EU external energy policy in the region (Raszewski, 2012a,b).

5.2. Diffusion of norms and facilitation of natural gas supply diversification

The extent to which internally-achieved norms and rules of the EU could be diffused in a form of external energy policy into wider neighbourhoods - including accession candidate countries - depended on the internal natural gas market dynamics within the EU (Maltby, 2013). The long-standing efforts of the EU to ensure the Community's energy security depended on the extent to which integration and convergence of key legal instruments produce a convergent society, a Union with a functioning internal energy market (Aalto and Korkmaz Temel, 2013: 770). At the time of pursuing the external energy policy, the EU was going through a process of liberalising its natural gas market through a series of gas directives including the Third Energy Package (TEP).[4] The interconnectivity within the EU included legal issues pertaining to ownership over the natural monopolies – the gas pipelines' – and transmission rights which concerned energy companies involved in the natural gas business. Thus, the internal dimension of the 'energy market in making' the EU was best described by the key issue underpinning the integration and convergence of its member states' natural gas markets on top of five others in the EU's internal-external calculations.[5]

Liberalisation of the Turkish gas market turned out to be a slow process. Despite Law no. 4628 designating the country's Energy Market Regulatory Authority as 'the sole authority' for regulating Turkey's energy market, a vertical separation in the gas market did not occur in the period under this study (Çetin and Oguz, 2007, p. 3859). While liberalisation has been underway at the lowest level of the utility's function, gas distribution; BOTAŞ's key energy supply and transit functions, which are linked to the external energy field, continued to be bundled under the company's management. Although the provisions of the legal framework envisaged an unbundling of the trading and storage functions that would be operated by individual BOTAŞ companies while allowing competition to unfold, these have yet to materialise (Interviewee 4, 2010). Thus, the law remained largely non-operational in developing a fair, transparent and competitive natural gas market. While the 2000–2005 period had seen the main objective of Turkey as aligning itself with the EU in order to create a strong market, the post-2006 period differed (Raszewski, 2012a,b).

5.3. Key failures of the Community's external energy policy in the Black Sea/Caspian region

The NGPP may have been too ambitious a project to be constructed due to its market viability and changes to natural gas demand, particularly in south-western Europe. Moreover, the overall cost of the construction and operation of large-scale projects, such as the NGPP or, indeed, the Russian-championed South Stream Project, were seen as prohibitive, and only as an addition to 'unnecessary competition' between companies involved with such large scale projects and with a

[4] TEP was aimed at segregating the energy value chain into three independent segments comprising energy production, transmission and supply operations.

[5] Including (i) building an interconnectivity of European gas and electricity networks, (ii) building gas storage, (iii) enhancing LNG capabilities, (iv) unbundling distribution and supply functions of energy firms and (v) building a single market for energy (Morningstar, 2009).

heavy load of '*geopolitical and economic consequences of such competition*' (Baev and Øverland, 2010). Projection of large-scale projects such as Nabucco led to the realisation that smaller, more scalable projects may be more appropriate to achieve tentative objectives of energy policy externally.

The lack of prioritisation and sufficient political support, despite all the diplomatic effort on the part of the European Commission to attain the project, meant that the NGPP '*had faced setbacks and delays*' leading to it being challenged (Kardaş, 2011).

Additionally, the EU role played in the region was rather limited. Through a series of indirect incentives Russia, rather than the EU, managed to advance its policy objectives towards the Black Sea/Caspian region. Russia's security and policy posture in the region meant that the EU's energy policy activism had limited outreach in the region (Freire, 2014).

Pursuing a quintessentially political project, the EU did not fully reckon with the bigger picture of its external energy policy. It is noteworthy that, conceptually, the SGC posed a double challenge to Russia - by weakening its monopoly in Europe, and its monopsony in Central Asia - and hence required a set of policy responses. In response to the NGPP, 'Russia *has developed an export strategy that has 'indirectly' given an effective response*' to the project, leaving it in a considerably weakened position' (Fernandez, 2011). Seeking to undermine the NGPP, Russia strengthened its position in Central Asia, proposed the construction of the South Stream pipeline, and took control of the Central European Gas Hub in Baumgarten (Fernandez, 2011).

Sources of supply remained an acute challenge for the NGPP. The pipeline remained largely a project of gas consumers with little or no clear strategy concerning future supplies. Neither Azerbaijani natural gas alone nor Northern Iraqi resources were enough to justify viability of the project. The fact of the matter is that some European officials demanded that Nabucco needs Iranian gas to be economically viable, a proposition which, in itself, was not viable due to both the U.S. and the EU remaining locked in a stand-off against Iran's nuclear program, making this option redundant (Larrabee, 2009).

In 2013, the EU abandoned its support for Nabucco and set itself in favour of the TAP project which was selected in June that year (Prontera, 2020). The choice of TAP was dictated by it being more commercial a project than Nabucco, whilst serving the interests of Azerbaijan's natural gas export strategy. While the EU remained committed to the SGC, as a principle, the fact that Nabucco was a non-starter meant that the Corridor could not deliver the volumes that the EU had hoped for to make a difference in the policy of diversification by route and source.

5.4. External energy policy and the EU-Turkey accession negotiations

Formulation and implementation of the EU external policy coincided with Turkey's accession negotiations which, in itself, produce a dilemma for both parties. Being NGPP's key transit country, Turkey's position in accession talks, and in particular on the Energy Chapter of the accession talks, was important to break the impasse over the future of energy trade relationship. At the same time, however, the success of EU-Turkey negotiations was dependent on unanimous agreement among all EU member states, meaning that the opening of the Energy Chapter with Turkey became impossible. Being a new EU member state since 2004, Cyprus was seen as the main obstacle for Turkey's aspiration to conclude the Energy Chapter, or indeed, eighteen chapters in total (Interviewee 3, 2010). A set of issues, including Cyprus's reconciliation, and energy-related issues concerning offshore hydrocarbon exploration, an issue which flared up at the time, have been too large to ignore at the point of EU negotiation talks, which ultimately negatively influenced the prospects of the SGC strategy (Koranyi and Vatansever, 2012).

It was seen as an energy community that was set to accommodate energy security between the EU and the Black Sea/Caspian region through a harmonisation of energy policies, which could be viewed as a way to substitute for Ankara's EU membership bid in the security community of Europe. Nevertheless, the Energy Community Treaty was understood in Ankara as '*not a very honest offer*'. If it was truly honest, as one of the policy advisers argued, the EU would have opened the EU–Turkey energy charter negotiations (Interviewee 3, 2010). Since commencing EU membership negotiations in October 2005 and January 2009, Turkey fulfilled ten out of the thirty-five policy areas required to complete the negotiation process. Ankara's refusal to open its ports to Greek Cypriot vessels resulted in Cyprus freezing eight chapters in 2006, as well as the energy section of the negotiations (Barber, 2009).

Although the new energetic Minister for European Integration, Egemen Bağış, tried to keep the momentum going and convinced the international community of his country's EU membership aspirations, Ankara thought that the relationship had run out of steam and that such a non-conclusive 'status quo' is useful for both sides (Interviewee 1 2010).

6. Reception of the EU energy policy in the region

The period of EU-Turkey energy relations coincided with the growing role of geopolitics. In the manner in which Turkey's energy policy narrative was constructed, key energy policy objectives, including project choices, strategic direction of energy policy, and the cost-benefit discussions, tended to be decided at the highest political level. Decisions on the country's energy policy tended to have been subject to increased disengagement from bureaucratic rules. Despite having an established bureaucratic process responsible for energy policy, the reality of making key decisions were relegated to the Turkish Prime Minister who has dealt with energy policy on a practical basis (Interviewee 4, 2010; Raszewski, 2012a,b). The reasons for such measures in the policy-making process were due to the promotion of the country's energy policy, and the key companies responsible for the implementation of the policy's priorities. Hence, the government's support for a strong national energy company, BOTAŞ, resulted in it assuming an impartial role in the policy process. The relegating of the strategic energy decision-making made it difficult to for the norm-based EU energy policy to be read and analysed in the manner it was hoped for in Brussels. The Prime Minister, together with his advisors and business interest groups linked to the ruling clan, effectively remained the key policy stakeholders (Interviewee 4, 2010; Raszewski, 2012a,b). As such, reception of the EU energy policy had been muted, and liberalisation of the utility's transit and energy supply functions decelerated. The fact that, at least formally, Turkey pioneered energy liberalisation before actually being attributed as a transit state for energy from the Caspian region put Ankara in a very specific situation. The structural weakness of the energy liberalisation narrative promoted by the EU in the region, and vis-à-vis Turkey in particular, made the energy relations between Brussels and Ankara a particularly challenging issue area in the period under study. It also made energy the most important part of the dialogue between Turkey and the EU. As for Ankara, it predisposes it towards using the energy card in relations with the EU, which may create a spiral of politicisation and a blame-game as to who is actually responsible for the stagnation of the policy (Interviewee 5, 2010; Raszewski, 2012a,b).

6.1. Misconception of intentions

Socio-political and economic dynamics in Turkey, and in particular Ankara's foreign policy shift, had an effect on the wider region to the East and to the West. Marginalised in the EU enlargement process, Turkey has shifted away from the direction of the EU accession process, and in the mid-2000s restored confidence through its ambitious regional foreign policy objectives. Turkey's foreign policy of 'zero problems with

neighbours' launched at the time by the country's charismatic Foreign Minister, Professor Ahmet Davutoğlu, which uses geography as a reference point in deciding the goals of Ankara's foreign policy, had been at the core of this shift (Walker, 2011, p. 6). Turkey's foreign policy objectives increased its distance with the EU negotiations.[6] Having the Turkish Prime Minister reserving the right to *review* the Turkish position on the SGC (Erdoğan as quoted in BBC, 2009), the energy chapter negotiations underpinning the EU–Turkey accession bid have been explicitly linked to Ankara's expectations of being able to influence the West with its position as a gateway to the East.

Measures taken by the Ankara government have suggested that Turkey views the EU's soft power coercion with suspicion. The suspicion pre-empts a constructive discussion about the expectations and needs of both the EU and Ankara. Instead, the Erdoğan government employed geopolitical logic positing Turkey as the key partner to solve the EU's energy security concerns. The more *bureaucratic* the output by the European Commission, the more the Turkish energy policy community has become disillusioned and resentful towards the real objectives of the EU. Brussels' soft power and energy policy frameworks aimed at the region and addressing energy security were viewed in Ankara as attempts to 'water down' Turkey's key role, and as a pretence that the role of the country is to listen rather than negotiate. The resentment of being a 'foster-sister' in the energy security relationship was shared by most energy policy-makers in Turkey, and even by those that could have, in fact, benefited from the EU-centric course of the policies (Interviewee 5 2011). The EU's involvement has either been about producing unproductive soft law at best or, at worst, has aimed to seize control over the most important and geopolitically strategic energy and transport corridor in order to balance energy dependence on Russia, purely on geopolitical rather than institutional terms (Interviewee 5, 2010). This unfavourable treatment of Ankara as a partner in the EU policy strategy added to a perception that the soft-power coercion was, in fact, indistinguishable from crude power politics exercised by Brussels.

6.2. Refutation of the external policy

In the period under study, the perceived application of geopolitics by the EU, as viewed in Turkey, to the realm of energy resulted in Ankara's foreign and economic policies distancing themselves from those of the EU. Ankara's proactive diplomacy, with regards to securing access to energy markets in the Middle East and in the South Caucasus, has been credited as a positive development that has served to strengthen Europe's energy security. Nevertheless, in the absence of energy policy and law harmonisation, or at least approximation, and given Turkey's propensity to play the energy card, the EU–Turkey accession negotiation process has stalled (Uslu, 2009; Raszewski, 2012a,b).

Turkey, and its contribution in the energy policy of the region, plays a significant role. Its refuted reception of the projected objectives of the EU energy policy may arguably be the tipping point in operationalising the policy. Turkey has ambitions of becoming more than just a transit country en route from the Caspian and the Middle East to South-Eastern Europe and, instead, seeks to become a regional power to be reckoned with. Thus Ankara's energy hub concept aimed at expanding its role regionally, and vis-à-vis the EU, has been viewed as being in stark contrast to the EU's policy expectations (Barysch, 2007: 7; Raszewski, 2015). These expectations envisage Turkey as a transit state with little or no influence over the flows of energy within an EU-envisaged political and legal framework (Interviewee 1, 2011). However, similar to that in the EU, the transitional nature of Turkish policy on energy positions itself between state regulation and market orientation, and may have negative impacts upon the Turkish reception of the EU energy policy (Raszewski, 2012a,b).

The matter of energy policy is seen as intersected between security and geopolitics, with the decision-making process reaching the highest ranks. The Turkish Prime Minister's repeated emphasis of Ankara's commitment and desire to become *the* transit corridor to Europe was based on the conviction that the country could serve as energy security guarantor to the EU.

The EU is more capable to achieve its objectives through its traditional, market-led policy instruments rather than through geopolitics. The SGC - with the object of this case study, the NGPP - has been a failure due to the geopolitical approach taken by the EU, which was different to its traditional policy instrument toolbox comprising market liberalisation, competition, and climate change (Siddi, 2019).

7. Conclusion

The NGPP saga emboldened regional stakeholders, allowing for improved resilience in the face of the demise of the EU external energy policy. The signing of the Nabucco Intergovernmental Agreement in July 2009 (Republic of Turkey, 2009) elevated the role of gas transit in negotiations between Turkey and the EU, as well as Turkey and Azerbaijan. Upon the backdrop of inconclusive NGPP negotiations, Turkey-Azerbaijan relations improved markedly, gaining new momentum since late 2011 (Yılmaz and Kilavuz, 2012). Although the original energy policy has proven to be a failure following the cancellation of the Nabucco project in 2013, what followed was a greater engagement of regional actors in managing and taking ownership of key infrastructural projects, the TANAP and TAP. Due to the non-selection of the NGPP as the preferred choice of the Shah Deniz Consortium, Nabucco was abridged to Nabucco West, a leftover project after the Governments of Azerbaijan and Turkey decided to construct their own project, the TANAP, across Turkey (Loskot-Strachota and Lasocki, 2013).

Despite political will and offer for financial support on part of the EU to ensure that the SGC and Nabucco become the Community's flagship external energy projects, the NGPP became politically off-limits to the Community. The political will waned as developments external to the EU (Turkey, Azerbaijan) meant that the EU has to be realistic about the degree of its ability to and preparedness for the enforcement of private-public deals such as this one. Distancing itself from making a stronger political case for the project, the EU may have been perceived as losing momentum and, possibly, lacking consistency in what has been its preferred project (Loskot-Strachota and Lasocki, 2013). This is in line with Sokołowski and Heffron's assertion that '*the priorities of decision-makers' shift over time in such a way that what is favoured at one time is incompatible with what is preferred at another time*' (Sokołowski and Heffron, 2022).

A spillover effect has taken place, with Azerbaijani downstream energy and petrochemical sector investments in Turkey building greater interdependence between the two countries. While the subject of this study - the NGPP - did not materialise, the SGC concept remains resolute, providing the EU with new tools of energy diplomacy in the Caspian region (Bocse, 2019, 2021). Engaging with key regional energy stakeholders, both Turkey and Azerbaijan, reinforced the westward-oriented gas transit and supply strategy of the EU, following broadly the SGC concept.

In the end, the NGPP turned out to be a policy failure due to internal and external factors, and the limited, or lacklustre reception of the policy objectives in the region, meant that diffusion of EU norms on energy trade was not successful. Turkey, the key transit country, did not fully engage with the process of energy (natural gas) market liberalisation, and instead sought to promote its own economic interests through successor projects such as TANAP and TAP. Additionally, Turkey also engaged with Russia on its energy policy, through the TürkStream project, paving the way for its policy of becoming a regional gas trading hub. While the NGPP policy turned out to be a failure, the overall

[6] In bitter words of the then Prime Minister Erdoğan, Turkey does not ask for privileges but for 'equal and fair treatment' in its negotiations with the EU (BBC, 2009).

concept of the SGC remained with the national stakeholders leading westward-oriented energy policy initiatives.

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Slawomir Raszewski: Conceptualization, Data curation, Formal analysis, Investigation, Project administration, I am the sole author of the concept/conceptualisation, data curation, formal analysis. There is no funding involved in the project. I am the sole investigator and project administrator. There has been no software use involved except the use of Microsoft Word.

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The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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