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Russian Energy Map Changes under the Background of 2022: Take Turkish Stream as an Example

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Abstract. *In 2021, Russia was the world's largest natural gas exporter, with 74% of its natural gas exports going to Europe, and the European region's average dependence on Russian gas reached 41%. With the escalating war with Ukraine and the destruction of the Nord Stream gas pipeline, Germany is no longer suited to its role as Europe's energy gateway. In 2022, European Union demand for Russian gas has plummeted and Russia has had to change its energy landscape to find new buyers and transport routes. Turkey is an important consideration for Russia's new energy hub because of its geographical location and the existing Turkish Stream gas pipeline. Under the current international situation, this project has many favorable factors, such as relative security and stability, the corresponding technical level and the support of relevant member states, but it also has to face unfavorable factors such as the sanctions of the United States and the threat of war. At the same time, Russia should also pay more attention to the geopolitical game between Europe, Russia, America and Turkey behind the energy pipeline.*

Keywords: Conflict; Eurasian Pipelines; Energy hub; Geopolitics; Turkey

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Изменения энергетической карты России в контексте событий 2022 г.: «Турецкий поток»

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Аннотация. Россия является крупнейшим в мире экспортером природного газа, в 2021 г. экспортировала 74% своего газа в Европу, при этом зависимость региона от российского газа достигла 41%. С эскалацией войны между Россией и Украиной, разрушением газопровода Nord Stream установлено, что Германия больше не является энергетическим иллюзом Европы, и России пришлось изменить свой энергетический ландшафт, чтобы найти новых покупателей и транспортные маршруты. Турция является важным участником проекта нового энергетического центра России в силу своего географического положения и существующего газопровода «Турецкий поток». В современной международной ситуации этот проект имеет много благоприятных факторов, таких как относительная безопасность и стабильность, соответствующий технический уровень и поддержка соответствующих государств. Этот шаг позволит Турции заменить Германию в качестве нового энергетического центра Европы, резко увеличив свою стратегическую роль в международных отношениях. Но и новой ситуации приходится сталкиваться с такими неблагоприятными факторами, как санкции Соединенных Штатов Америки и расширение конфликта. России следует уделять больше внимания геополитической игре между Европой, Россией, Америкой и Турцией.

Ключевые слова: конфликт; Евразийские трубопроводы; энергетический центр; геополитика; Турция

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Introduction and Materials

According to 2022 statistics, Russia has the world's largest natural gas reserves and the world's second-largest natural gas production, only second to the United States [1]. Russia's energy export has always adopted the layout of

"looking around". However, due to the perfect infrastructure in Europe, which has formed a relatively comprehensive natural gas transportation and consumption system, Europe has always been an indispensable part of Russia's energy map. Russia exported 74% of its natural gas to Europe in 2021, and the region's average dependence on Russian gas reached 41%. But Russia's gas imports fell sharply in the third quarter of 2022 due to the Russia-Ukraine conflict, according to European Commission statistics. Russian pipeline gas imports fell 74 percent.

Before the war with Ukraine, Russia had Nord Stream gas pipeline, Yamal-Europe pipeline, Brotherhood pipeline, Turkish Stream and Blue Stream gas pipeline to supply gas to Europe, which had initially completed the natural gas energy map of Europe [2]. But since the outbreak of the war, as the situation has deteriorated, Nord Stream has been sabotaged, transit pipelines through Ukraine and Poland have been restricted, and only Turkish pipelines have been allowed relatively stable access, Russia's energy landscape in Europe has been largely shattered. In the future, on the one hand, Russia should attach importance to energy exports to East Asia and South Asia. On the other hand, Russia should build Turkey's energy hub based on the existing Turkish Stream pipeline and re-plan the European market.

1.1. Turkish Stream Pipeline Project and Adverse Factors for its Development

The Turkish Stream pipeline is a pipeline that would carry natural gas from Anapa, Russia, to Turkey and southern European countries through the Black Sea. The pipeline, with a total length of 1,170 kilometers, including about 910 kilometers of subsea pipeline and 260 kilometers of land pipeline, was officially commissioned in 2020. The Turkish Stream pipeline is divided into two branches under the sea near the northwestern Turkish city of Kiikoy. One branch will supply the Turkish market directly, and the other will supply Eastern and Southern European countries through the Bulgarian National gas Transmission system, with a total capacity of 31.5 billion cubic meters [3]. In the current volatile international landscape, Russia would face the same difficulties as Nord Stream if it wanted to build a new energy hub through Turkish Stream.

1.2. Sanctions by the United States

The U.S. has been obstructing the construction and application of NS2 and TurkStream in various ways through the Countering America's Enemies

with Sanctions Act (CAATSA) and the European Energy Security Protection Act (PEESA). In the context of the current Russia-Ukraine conflict, the Nord Stream pipeline was destroyed, and the Turkish Stream pipeline is bound to be subject to even more severe sanctions due to its strategic importance. The first is the European Union. With the worsening war situation, the coming of winter, and the high energy prices, there are strikes and demonstrations in various EU member states. In addition, some EU countries are gradually realizing the self-interested strategic intention of the United States, and some EU countries are already thinking of easing relations with Russia. After the destruction of the Nord Stream gas pipeline, the United States will not allow Russia and Europe to re-establish energy cooperation through other pipelines. The second is the economic factor of the United States itself. The United States has made a lot of money by exporting energy to Europe and undertaking enterprises fleeing from the European Union. To further its interests, the United States is bound to continue to suppress Russia's energy exports to Europe [4].

1.3. The Threat of War

After the destruction of the Nord Stream gas pipeline and the Polish Friendship oil pipeline, Russia prevented Ukraine from blowing up the Turkish Stream gas pipeline [5,6]. To further undermine Russia's economy and stabilize the battlefield, Ukraine and its Allies will inevitably continue to develop plans to disrupt Russian infrastructure. The Turkish Stream is the only reliable energy channel between Russia and Europe. Russia should strengthen cooperation with Turkey to ensure the security of the Turkish stream and related infrastructure.

1.4. Opposition within the EU

Although all European countries are more or less dependent on Russian gas exports, the creation of a new energy hub based on the Turkish Stream is bound to lead to opposition in some European countries. The first is Poland, which has repeatedly blocked the construction of the Nord Stream pipeline on the grounds that it would cause political instability in Eastern Europe. If the Turkish energy hub is developed, it will also weaken Poland's geopolitical and economic position in Europe, and reduce the objective benefits such as transit taxes, which will surely be opposed by Poland [7]. The second is Germany, which regards Turkey as the energy hub of Russia. On the one hand, this will lead to a further rise in energy prices for Germany, increase the cost of domestic

manufacturing, lose the opportunity to earn the price difference of natural gas and weaken Germany's discourse power in Europe. On the other hand, Germany has been opposed to Turkey's accession to the EU due to Kurdish human rights issues and religious issues. If Turkey becomes an energy hub, it may increase the possibility of Turkey's accession to the EU, which is unacceptable to Germany and even some EU countries [8].

Results of Research

2.1. The Pipeline has Relative Safety and Stability

Despite recent threats to the Turkish Stream pipeline and its infrastructure, the Turkish Stream project is relatively safe and stable compared to other pipeline lines. The first is that the Turkish Stream pipeline will be laid under the Black Sea, flanked by the exclusive economic zones of Turkey and Russia, which will facilitate the construction and operational management of the new pipeline. Second, although Turkey is a member of NATO, the steady development of Russia-Turkey relations since Turkey's military coup in 2016 is conducive to bilateral energy cooperation. Finally, according to the Montreux Convention, Turkey can control naval vessels entering the waters of the Black Sea. If Turkey is not a party to the war, it has the right to deny the ships of belligerent countries from passing through its strait, which makes it possible to protect the gas pipeline and related projects from the war in the context of the conflict between Russia and Ukraine. All of these factors reduce the security risks of the Turkish Stream [9].

2.2. High Energy Prices, Supported by Some European Members

With the worsening war situation and the urgent need for heating in winter, gas prices in Europe are soaring, and various measures to reduce prices have had little effect. Southeast Europe and southern European countries dependence on Russian gas is extremely high, Slovenia, Serbia, Romania, Bulgaria, Estonia, Latvia, Slovakia, Hungary and other countries, north Macedonia's dependence on Russian gas is close to 100%, Hungary is at the outset opposed to western sanctions against Russia's energy, maintain and Russia energy cooperation, Hungary recently sent a representative to Russia's Energy Week, indicating that some European countries want to import Russian gas [10]. So, the creation of a new Turkish hub, which would bring cheaper and

more abundant gas to south-eastern and southern Europe, would certainly have the support of the relevant countries.

2.3. The Project Technology is Feasible

First, Allseas, the world's largest contractor for installing and laying pipelines for offshore oil and gas fields, was unable to help during the construction of Nord Stream 2, despite sanctions. However, with the technical support of China, Russia has been able to complete the pipeline laying with its pipelaying vessels Akademik Cherskiy and Fortuna, which provide the technical support for the construction of the new pipeline based on the Turkish Stream.

Secondly, the Turkish Stream pipeline has been put into operation normally. Relying on the existing pipeline, the expansion can reduce the difficulty and cost of project investigation, planning and laying, so that the new pipeline project can be completed faster and more conveniently.

2.4. Turkey's "Oil and Gas Hub Dream"

Turkey has a special position in the regional energy landscape. It is bordered by the European Union, the world's main oil and gas consumption market, Russia to the north, Azerbaijan, Iran and other oil-rich countries to the east, but due to the lack of oil and gas power Russia's support has been not enough stable gas source, only the oil and gas trade transit countries [11]. Nowadays, as the war escalated to Ukraine, the Nord stream gas pipeline and pipeline damaged friendship, Russia intends to build the hinge of Turkey's energy, change the pattern of gas supply in Europe, it is for Turkey to achieve its oil and gas hub dream of hard-won opportunity, the Turkish government will actively cooperate with Russia, energy cooperation, promote the project implementation of the ground.

Discussion

3.1. Turkey's Status as a Major Country in the Middle East has been Consolidated

Turkey is located at the crossroads of Asia and Europe, guarding the Mediterranean Sea and the Black Sea gateway, and has a unique strategic position. Turkey has always pursued a policy of playing both sides, moving between alliances with traditional Western powers and non-western powers. However, since the Arab Spring, the relationship between Turkey and the

United States has deteriorated sharply. Coupled with the fact that the European Union has been favoring its rival Greece, Turkey began to gradually adjust its traditional pro-American and European route, actively intervening in the Middle East affairs and pursue a dominant position in the Middle East to seek the status of a major power [12]. Since the conflict between Russia and Ukraine, Turkey has not only eased its relations with Saudi Arabia, but also solved problems left over from history. The leaders of Israel and Iran also visited Turkey one after another, seeking Turkey's political position and weapons support, which made Turkey become the leading player of peace in the Middle East. If Turkey becomes Russia's energy hub in Europe, it will further expand Turkey's international status and influence. It may even cause pan-Turkic ideas in Central Asia to spread and Turkic alliance to expand further, thus affecting the layout of China and Russia in Central Asia.

3.2. The Strategic Need of the United States to "Resist Russia in the Process"

After the Biden's administration took office, it took "anti-Russia strategy" as the focus of its foreign policy, and different from the Trump administration, the Biden administration attaches more importance to the relationship with Allies. However, in recent years, Europe and the United States are getting further and further away, and Germany and France are even more determined to make their own decisions, which makes the US-EU alliance no longer strong. Europe's energy crisis and the expansion of the conflict between Russia and Ukraine, to make the hands of Joe Biden, the government can borrow energy sanctions, cut off the link between Russia, confuses the EU economy, strengthen the members of the European Union countries dependent on America, Nord stream gas pipeline damage, Biden government would never allow Russia to Turkey creek to realize to the gas, In this way, Russia will get a say in European energy, which will not allow the United States to achieve the purpose of "curbing Russia" and "generating revenue". In addition, if Europe and Russia re-establish an energy-dependence relationship, it will inevitably lead to the failure of the U.S. strategy in Ukraine, and make the United States pay for the failure.

3.3. Russia Upholds its Security Interests

The explosion of Nord Stream 2 aggravated the already tense relations between Russia, the United States and Europe. In order to quickly find a

replacement pipeline system for Nord Stream 2 in the face of crisis and rapid changes in the international situation, Russia proposed to cooperate with Turkey to make Turkey a new energy hub. For Russia, continuing to gas on the other hand is for the sake of the country's energy exports to Europe, to maintain its economic development, and at the same time provide the necessary funds, the situation in Ukraine [13]. On the other hand, in winter and the internal differences of the critical moment, through Turkey to continue the output of natural gas to Europe countries, Russia may wish to continue to look for his Allies in Europe within countries, Preventing the eastward expansion of NATO and disrupting the plan of the United States and the European Union to sanction Russia together is to dissolve the "multilateral cooperation" of the European Union through "small border cooperation" so as to seek more political interests, and help Russia to reduce the pressure brought by the Ukraine crisis and maintain national security [14].

Conclusion

Turkish Stream is a key pipeline system that supplies gas to Europe after Russia conflicts with Ukraine and the explosion of the Nord Stream 2. Building a new energy hub based on Turkish Stream is not only a key step for Russia to resume energy exports to Europe and continue to open up the European market, but also will have a profound impact on the world energy landscape. The move would allow Turkey to replace Germany as Europe's new energy hub, dramatically increasing its strategic role in international relations. For Europe, it is a mixed joy. For the Pro-Russian countries in southern Europe, they can gain more benefits from the EU, while for the opposition countries such as Poland, the establishment of the Turkish hub will reduce the fees they charge as a transit country and reduce their strategic position in international relations. The United States, on the other hand, from the perspective of its energy exports and its policy of "detering Russia", will severely crack down on and sanction the Turkish-Turkish hub project. However, due to the high price of energy in the United States, winter is coming, the energy demand in Europe will only increase, and Russia and Turkey have reached a profound cooperative relationship and are determined to jointly promote the development of the Turkish hub project. In the future, the Turkish hub will still struggle to develop in the complex international environment.

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