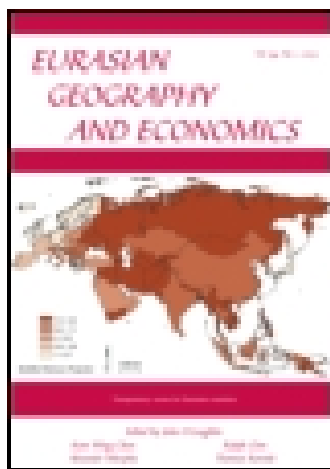


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Kurdistan Regional Government–Turkish energy relations: a complex partnership

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We analyze the Kurdish Regional Government's (KRG's) fast developing energy relationship with Turkey, its implications for Turkey's energy security and, ultimately, regional security in general. Being landlocked, commentators tend to picture the KRG as a highly dependent entity, desperate to export its oil and gas through Turkey. While it is true that currently the KRG has no real alternative export routes other than Turkey, we argue that the energy relationship between the two is more complex than Turkey simply agreeing to this proposal as part of its energy diversification project. For Turkey, the dealings with the KRG present the next best thing to having its own oil and gas fields; high levels of control, partial ownership, and close proximity are all required by the country that is increasingly eking out its position as a regional patron. A further strong incentive for Turkey to develop this energy relationship is new opportunities to approach some of the country's oldest and newest threats, the conflict with the Kurdistan Workers' Party (PKK) and the developing PKK-influenced Kurdish movement in a fragmenting Syria.

Keywords: Kurdistan Region; Iraq; Turkey; energy security; geopolitics; PKK

1. Introduction

This paper analyzes the energy-strategic relationship between the increasingly autonomous Kurdistan Region governed by the Kurdistan Regional Government (KRG) in the north of Iraq and Turkey. As has been demonstrated by previous research, Turkey's fast-developing economy and the country's geopolitical ambitions are characterized by a rising need for energy (Altınay 2007; Balat 2008; Çetin and Oguz 2007). While the Kurdistan Region is not only one of the few spaces of relative peace and calm in a region in turmoil, with its recent discoveries of vast oil and natural gas fields and a developing modern recovery and export infrastructure, it has the ideal preconditions to team up with Turkey. Moreover, being situated between Europe, the world's largest energy market, and the Middle East, the most important energy supplier, Turkey has the ambition to establish itself as an important energy hub. Again, given its relative political stability and large quantities of natural resources, the Kurdistan Region presents itself as a viable partner. Especially when watching the developing tension between Russia and the EU around the Ukrainian crisis in early 2014, those aspirations become progressively more topical as a Kurdistan Region–Turkey–Europe transit route for oil and gas presents an interesting diversification for the EU's energy supply (Bilgin and Bilgiç 2011; Cohen

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2004; Dahlman 2004; Hacısalihoglu 2008; Kiliç 2006). The recent attacks by radical Islamists of the Islamic State in Iraq and al-Shams (ISIS), and their cooperation with Baathists and Sunni tribes (Hamza 2014; McElroy 2014) seem to confirm the argument made in this paper. With Baghdad's crude oil exports on hold, the only oil that is leaving Iraq is Kurdish using the new pipeline infrastructure (Today's Zaman 2014). While the outcome of the events that transpired in June 2014 cannot be foreseen, they suggest that the Kirkuk–Ceyhan pipeline will not be a reliable oil source for Turkey for a long time.

However, the Kurdistan Region is still officially part of the Republic of Iraq, which is caught in an increasingly sectarian geopolitical struggle in the region spreading from Iran to Lebanon. Negotiating new alliances within this tense environment is thus no easy endeavor and requires sensible consideration. Nonetheless, given the Kurdistan Region's autonomous motivations and the interlinked need to export its resources, and Turkey's demand for a stable long-term energy partnership to pursue its geopolitical ambitions, we argue that right now we are witnessing the beginning of a long-term partnership.

Given the developing ties, Turkey's approach toward the KRG has become one of acceptance and respect. By treating the KRG as a *de facto* nation-state, Turkey legitimizes the KRG internationally and increases its sovereignty, knowing that this can eventually result in Kurdish independence (Stansfield 2013). We extend this by arguing that Turkey is not only economically interested in Kurdistan, but that it needs a strong quasi-independent KRG in order to consolidate its own regional power. We suggest that the Turkish–KRG relationship is increasingly solidifying. Gaining high levels of control over oil and gas fields for the first time since the end of the Ottoman Empire can only work with a strong and increasingly autonomous KRG that can act outside Baghdad's influence. By actively supporting a KRG acting as a *de facto* state, Ankara can approach some of its main security threats. These threats include the conflict with the Kurdistan Workers' Party (Partiya Karkerên Kurdistan, better known by its acronym PKK) and the growing threat of a PYD-led autonomy along the Turkish–Syrian border (the Partiya Yekîtiya Demokrat – Democratic Union Party, is an organization with close ties to the PKK). Turkey's energy dealings with the KRG have enabled it to consolidate its status as a regional power and to address its main security challenges.

With the discovery of significant oil and gas reserves, the Kurdistan Region in Iraq (Bonine 2002; Dahlman 2002; Natali 2010), has been catapulted into position as a key player within this resource-rich region. Nonetheless, despite this potential wealth, it is not yet clear what role the Kurdistan Region will play in the oil and gas landscape. Looking at the map reveals the conundrum in which the Kurdistan Region is caught (see Figure 1): sitting on vast quantities of natural resources, its challenge is how to export them out of the region to international markets. To the east, the Kurdistan Region borders with Iran, currently under sanctions by the international community. To the west lies Syria, a country torn apart by a civil war whose outcome or ending cannot be foreseen. To the south and south-west is the area of Iraq controlled by the central government in Baghdad. Erbil, the capital of the Kurdish autonomous region, not only has a long history of tensions with the government in Baghdad, but it is currently in the midst of a dispute over territory, degrees of autonomy, its budget, and power as well as control over oil and gas reserves (Rudaw 2014a, 2014b). These disputes make reaching a satisfactory agreement for the Kurds over transport routes difficult. This geopolitical constellation leaves only Turkey to the north as a viable partner for the export of the KRG's natural resources. While this is true, it is not the full picture; the Kurdistan

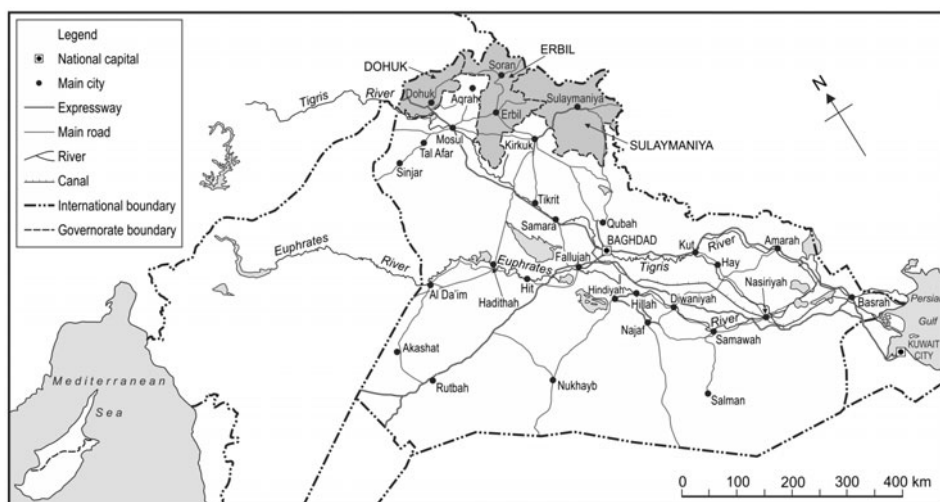


Figure 1. Map of Kurdistan Region, Iraq.

Region offers something Turkey is in desperate need of: it offers the possibility for a close, long-term partnership that ties the oil and gas fields within the Kurdistan Region close to Turkey's sphere of influence. Thus, the relationship is on an equal footing, rather than a simple and straightforward patron–client system. Referring to its history – in particular the Ottoman legacy, its booming economy, and its geographic location between two continents, the current Turkish government has the vision of turning the country into an influential regional power and motor for regional peace and stability with global ambitions (Davutoğlu 2012; Erdogan 2010; Larrabee 2010; Walker 2009; Yanık 2011). However, right now Turkey's economy, geopolitical ambitions, and army are fueled by its main regional competitors – a situation the country's strategists would like to change.

In the first section of this paper, we discuss the resource-based relationships Turkey currently maintains with countries other than the Kurdistan Region. Drawing on literature and news reports, we show that those partnerships are either characterized by mentioned dependencies that pose a threat to the country's economy, energy security, and geopolitical ambitions, or by practical problems of reliability relating to the state of mid-stream infrastructure and its security (Altınay 2007; Balat 2008; Çetin and Oguz 2007; Han 2011). Quite rightly many have therefore argued that Turkey needs to diversify its energy sources and thus decrease dependency on any one source (Altınay 2007; Bilgin 2011; Çetin and Oguz 2007; Ediger and Berk 2011; Hacisalihoglu 2008; Han 2011; Kiliç 2006; Shaffer 2013). A diversification of its oil and gas imports will indeed distribute dependency by lowering the amount of imported oil and gas, particularly from Russia and Iran, by several percentages. However, it does not solve the problem as such, nor does it provide a satisfying long-term solution for Turkey's energy security. We argue that to be able to establish sustainable energy security and to catch up with its geopolitical visions, Turkey needs direct (co-)control of the upstream, midstream, and downstream sectors.

In the second part of the paper, we argue that, despite the tense history between Turks and Kurds, the Kurdistan Region presents the only possibility for Turkey to build

such a close partnership and to gain control of all three sectors of the oil and gas industry. However, this only works with a sovereign KRG acting outside Baghdad's sphere of influence. Indeed others have written about the developing KRG–Turkish relationship, referring to oil and gas deals and growing trade volume as an indicator for this (Barkey 2011; Gunter 2011a). Besides Stansfield (2013), who indicates some mutual interests, the specific nature of the relationship between KRG and Turkey has yet to be formed. We argue that it is not just the well-documented lack of Turkey's energy security and need to diversify and the Kurdistan's region desperate need for export routes that create a win–win situation, but that there is more to the relationship than securing strong ties beyond trade numbers.

1.1. Kurdistan Region energy profile

Since the 1991 Gulf War and the Kurdish uprising against the regime in Baghdad, the Kurds in the north of Iraq have enjoyed increasing autonomy. With the settlement of the Kurdish civil war and the fall of the Baath party in the wake of the US-led invasion in 2003, this autonomy increased, leading to developed and autonomous institutions, including a parliament, and fast-developing trade and diplomatic relationships with other countries. This led several scholars to conclude that the Kurdistan Region governed by the Kurdistan Regional Government manifests itself as a “state-like entity” (Stansfield 2013, 259–260), de facto state (Gunter 1992, 2011b), or a quasi-state (Natali 2010). In addition, the KRG has control over its own security forces including a 100,000 strong Kurdish army.

However, the Kurdistan Region's budget still comes from the government in Baghdad. During verbal disputes, especially around oil dealings, Baghdad repeatedly withheld the region's budget as part of its sovereign power-games.¹ Although formally Kurdish parties have been part of the federal government since its implementation in 2005, the federal government is commonly perceived as a Shia-controlled entity following its own interests. Presently, the Kurdistan Region is entitled to 17 percent of Iraq's total oil revenues, and this constitutes the vast majority of the region's budget (in reality, according to Johnson [2014], the revenue share is closer to around 12 percent). This reliance on Iraq's oil revenues leaves the region vulnerable to the government in Baghdad.

If Kurdistan developed their own export routes, then 83 percent of the revenues would still go to the central government. However, the vision of the KRG is to include a Turkish bank or company in the process. Right now 100 percent of all revenues go to Baghdad from where, in theory, 17 percent flow back to the Kurdistan Region. With a Turkish mediator, 17 percent would go straight to the KRG without the detour via Baghdad. With the development of oil and gas export routes through Turkey, the Kurdistan Region would become less vulnerable to the crippling halts of payments from the central government in Baghdad that were witnessed in early 2014, as some of the revenues would bypass the central government. Thus, starting to self-govern oil exports is yet another step toward increased independence and the solidification of the de facto state discourse as Baghdad loses its main pressure point on the Kurdistan Region.

Geographically, the Kurdistan Region refers to the three governorates: Duhok, Erbil, and Sulaymaniya, which are governed by the KRG. In addition, the Kurdistan Region claims the three so-called disputed territories: the Nineveh Governorate, the Kirkuk Governorate, and the Diyala Governorate, as well as the Makhmur District (which is part of the Erbil governorate) as part of their region (see Figure 2) (Bartu 2010; Natali 2008; Romano 2007; Wolff 2010).

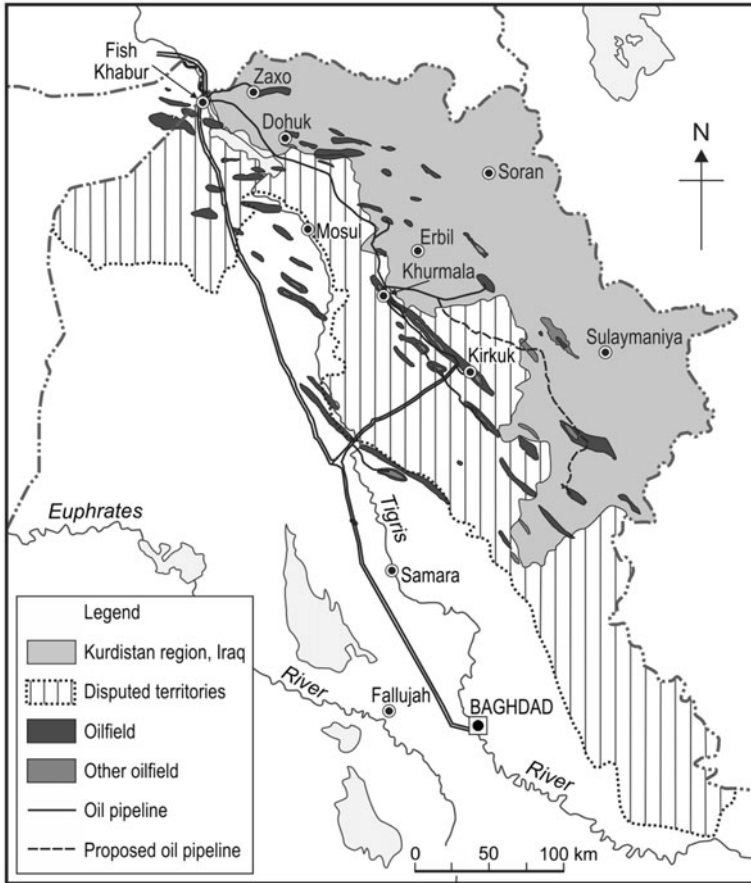


Figure 2. Disputed territories and KRG–Turkish pipelines. Source: adapted with permission from Western-Zagros (2014).

Table 1 provides some overview of the extent of the natural gas and crude oil reserves in the Kurdistan Region, Iraq. However, it has to be emphasized that numbers of proven oil and gas reserves can potentially increase significantly. While Iraq has been fully explored, the KRG region is currently still under exploration, and so far oil

Table 1. Overview of crude oil and natural gas reserves in the Kurdistan Region, Iraq.

Proven crude oil reserves	4 billion barrels
Expected unproven crude oil reserves	45 billion barrels
Proven natural gas reserves	165 TCF (those numbers are not recognized by the Iraqi Ministry of Oil)
Recoverable natural gas reserves	35.37–38 TCF

Sources: US Energy Information Agency (2013a), Myers Jaffe and O'Sullivan (2013), Western-Zagros (2013), Swint (2013a), KRG (2013).

companies have not advanced to the depth where experts believe further significant reserves are located.

1.2. Turkey's energy profile

As argued in the past (Altınay 2007; Balat 2008; Çetin and Oguz 2007; Ediger and Berk 2011; Hacisalihoglu 2008; Kiliç 2006), Turkey's fast-growing industry requires rapidly increasing amounts of energy. According to experts, similar growth will continue for the foreseeable future (International Energy Agency 2009; US Energy Information Agency 2013b). Given its own small reserves, Turkey imports over 90 percent of its oil and gas to keep the economy running, leaving the country heavily dependent on imports. In 2011, Turkey consumed an average of 706 thousand barrels per day (bbl/d) of crude oil and over 1.5 trillion cubic bbl/d of natural gas (US Energy Information Agency 2013b).

As Table 2 demonstrates, Turkey is highly dependent upon especially Russia and Iran. Hence, the country is currently trying to diversify its oil and gas sources, and limit its dependency on a limited number of nations (Altınay 2007; Balat 2008; Çetin and Oguz 2007; Hacisalihoglu 2008).

2. Turkey's energy-strategic challenges with its current main oil and gas importers

Although functioning, Turkey's most important energy partnerships are shaped by geopolitical rivalry, re-emerging regional sectarian tensions, insecurity, and obsolete oil and gas midstream infrastructure, which periodically interrupts the flow of resources. While we structure this section by main oil and gas importers to Turkey, we highlight the extent and background of those themes. Our purpose is not to express the need for Turkey to diversify its importers, as others have done this before. Rather, looking at those challenges, we want to show the benefits that an energy cooperation with the Kurdistan Region in Iraq poses, as many of those themes do not exist, or their negative effects are limited.

2.1. The central government in Baghdad

After years of embargos and war, the part of Iraq governed by Baghdad (in the following, simply Iraq) has reopened its significant oil and gas reserves to international markets. Given Turkey's need to diversify its resources, Iraq is of strategic importance (Barkey 2011; Songün Demirezen 2013). However, when it comes to considerations for

Table 2. Turkey's crude oil and natural gas sources in 2011 in percentage.

Crude oil	Natural gas
Iran (51%)	Russia (58%)
Iraq (17%)	Iran (19%)
Russia (12%)	Azerbaijan (9%)
Saudi Arabia (11%)	Algeria (9%)
Kazakhstan (7%)	

Source: US Energy Information Agency (2013b).

their long-term energy security, we argue that Ankara has moved closer to Erbil while distancing itself from Baghdad (Barkey 2011). This does not mean that Ankara is ignoring Iraq's oil for the time being, but rather that Turkey has set its sights on the Kurdish Region for the long term. This claim is based on three observations. First, Baghdad's reaction to Turkish–Kurdish energy deals is becoming increasingly hostile, as the government is well aware of the implication this has on Kurdish autonomy. Second, Iraq's security situation is fragile, and its oil and gas infrastructure was poor even before the country was attacked by an ISIS/Baathist/Sunni tribal coalition. Third, there are increasing sectarian tensions in the region whose fault lines run between Baghdad on the one side and Ankara (and Erbil) on the other.

Baghdad's response to a deepening Kurdish–Turkish energy partnership is hostile, as part of the central government is concerned over the growing autonomy that this policy brings for the Kurdistan Region. Although Ankara is still interested in maintaining a working relationship with Baghdad as part of their diversification strategy, the central government makes that very difficult, almost impossible, to pursue by following a policy where Turkey, and most recently, international oil companies (IOC's), have to decide whether to make deals with Baghdad *or* with Erbil (Halabi 2013; Pamuk 2013). In late 2013 and early 2014, the Turkish–Iraqi relationship has therefore been characterized by troughs and ridges, with attempts to mend ties thwarted by new accusations (Al Arabiya 2013; Al Khalidi 2013; Hurriyet Daily News 2013a, 2013b).

The most significant evidence of Baghdad's "choose your side" policy is the cancellation of a research license with Turkey's Petroleum Pipeline Corporation (BOTAS) and the blacklisting of Turkish oil companies such as Genel Energy for their involvement with the Kurdistan Regional Government (Salaheddin 2012; Songün Demirezen 2013). The multi-billion dollar investments by Turkey within the KRG and the close economic links to Kurdistan strongly suggest that Turkey has made a choice in favor of the KRG (Genel's activities in the KRG will be discussed below in greater detail).

Secondly, in general Iraq still faces endemic corruption and a lack of transparency of oil and gas revenues, which provides difficult ground for all companies to operate on (Agator 2013; Cockburn 2013; Le Billon 2005). However, in this section, we focus on two specific aspects that make Iraq a less reliable partner than Turkey would like it to be: its security and the current state of the oil and gas-related infrastructure. Both have a negative impact on dealings with Turkey, as a stable and continuous flow of crude and gas cannot be guaranteed. Long before the sectarian war spearheaded by ISIS in June 2014, several established business journals and (business) news platforms concurred that security, or rather insecurity, hinders the oil production and the subsequent transport of crude oil, as oilfields, staff, and other oil infrastructure are being attacked on a regular basis (Gaouette and Alexander 2013; Iraq Oil Report 2013a, 2013b; Philips 2013; UPI Business News 2013a). Given this insecurity, new investors are increasingly too frightened to invest in Iraq, despite its enormous natural resources.

Before June 2014, the security situation had deteriorated so far that Baghdad had to amend its oil production forecast downward, as security and infrastructure issues turned the initial figures into a utopic vision (UPI Business News 2013a). Similarly, Barclay's oil production forecast lowered the expected production numbers for 2014 due to a "surge in terror attacks" (Bloomberg 2013). Although there are spatial differences when it comes to attacks on the oil and gas industry (Mok 2013), incidents spike in regions with oil infrastructure relevant for Turkey, such as the greater Kirkuk region and Nineveh province. The main target of the insurgents is the pipeline connecting oil-rich Kirkuk and the strategic seaport in Ceyhan, which runs through the disputed territories.

In 2013, at least 10 attacks on the Kirkuk–Ceyhan pipeline occurred within Iraq² (AlJazeera 2013a; Cohen 2004; Iraq Oil Report 2013c, 2013d, 2013e; Lee 2013a; Lloyd’s List Intelligence 2013; The Peninsula 2013). In the same period, pipeline production had to be stopped at least three times due to leaks and technical problems (Gulf Oil and Gas 2013; Iraq Oil Report 2013f; Trade Arabia 2013). A total of 13 incidents reported in the English-language press in 2013 show that Iraq is currently unable to guarantee steady oil flow to Turkey. However, while Baghdad lacks safer spaces for export routes, the KRG does not.

At the time of writing (late June 2014), the Kirkuk–Ceyhan pipeline is standing still and it cannot be foreseen when it will be functional again (Today’s Zaman 2014). Presently, only Kurdish oil is leaving Iraq through its northern boundaries with Turkey. Falling back on their effective Peshmerga force, the KRG also took control of Kirkuk and its oilfields, a move that will most likely redraw the political geography of the region for years to come. Seeing their chance to establish themselves further as a key player in the regional and international oil market, within days of taking control of Kirkuk, the Kurds began to consider connecting the Kirkuk oil field to their new pipeline and thus increasing their oil exports to Turkey exponentially.

Thirdly, the rift between Ankara (mainly Sunni) and Baghdad (Shia-dominated) is deepened by the increased importance of the Shia-Sunni divide that runs through the Middle East, creating growing tensions and conflict (Barkey 2011; Natali 2012a; Stansfield 2013; Tocci 2013). After a decade of “zero problems with neighbors” policy, a series of regional geopolitical events forced the Sunni-dominated Turkey to take sides in the inner-Muslim power struggles. As Akyol (2013) argues, for a long time Turkey did not pursue a confrontation with Shia Muslims, but rather tried to avoid such tensions (Barkey 2011). However, a combination of external factors created a situation where a confrontation became unavoidable. This includes the Arab Spring, the war in Syria, the US withdrawal from Iraq, and Iran’s increasing hegemonic ambitions.³ Since Turkey did not pursue those tensions actively but was forced into the sectarian (mainly verbal) conflict, the situation left little room for maneuvering and demanded clear positioning. In this situation, the fact that the majority of all Kurds in the KRG are Sunni does facilitate cooperation between Ankara and Erbil. However, given the historic tensions between Turkey and the Kurds over territory and independence, religion should not be overemphasized as there are stronger geopolitical considerations at play that help to overcome past conflicts.

While verbal disputes and the blacklisting of companies might be of temporal nature and can calm down with time, the themes of insecurity, the state of the midstream infrastructure, and sectarian tensions that translate into geopolitical strains between governments are of greater significance when it comes to Turkish dependencies on natural resources and its geopolitical ambitions.

2.2. *Iran*

Turkey and Iran have a very ambivalent relationship. While on the one hand geopolitical differences create political tensions between Ankara and Tehran, on the other hand, economic relations function. As analysts argue, in the recent past tensions increased over the NATO Period anti-missile batteries at the Turkish–Syrian border (Entous 2011; Torbati 2012), and more recently, due to Iran’s Iraq and Syria policy, which Ankara interpreted as an extension of Tehran’s hegemonic ambitions (Bodansky 2010; Larrabee

2012; Raufoglu 2011; Uslu 2012). Additionally, the conflict between Turkey and Iran is becoming increasingly sectarian in nature.

Yet, despite this ongoing “undeclared warfare,” (Idiz 2013) both countries enjoy good economic ties based on oil and gas deals. Given its vast resources, Iran is and likely will remain one of Turkey’s most important oil and gas sources. Nonetheless, this relationship is shaped by Turkey’s dependency on Iran’s gas and oil. This dependency on a regional rival damages Turkey’s reputation as a hegemon and powerhouse. Also, given the US-led economic sanctions against Iran, the relationship is practically difficult (Parkinson and Solomon 2012; Watson and Tuysuz 2012). Furthermore, energy shortages occur due to technical problems linked to cold weather during the winter months (Çetin and Oguz 2007; International Energy Agency 2009; Jones 2011) and on the part of Iran, an increasing national consumption (Kardas 2012; Mills 2013). Turkey’s dependency, especially upon Iran and Russia, is the biggest threat to Turkey’s energy security. However, this paper does not imply that Turkey and Iran’s oil and gas trade will slow down dramatically or collapse in the future. The sheer volume of Iran’s resources alone makes that highly unlikely, and a new transit pipeline project between the two countries rather indicates that they are in the process of deepening their trade relations (Today’s Zaman 2014). This difficult relationship rather signals the need for Turkey to find a more stable long-term solution.

2.3. *Russia*

Historically, Turkish–Russian relationships have been tense from as long ago as the sixteenth century. Elements of the old Russian–Turkish geopolitical rivalry around territory and influence are now re-emerging, particularly around the conflict in Syria. While Turkey has sided with parts of the opposition, Russia remains one of the Assad regime’s patrons. Nonetheless, despite these geostrategic disputes, so far both countries have managed not to allow them to impact on their trade relationship, Russia currently being Turkey’s largest trading partner (Jackson 2013; Weitz 2012). However, being a regional power, Turkey is at unease over its strong dependency on a rival’s gas and oil. Experts suggest that the relationship between Russia and Turkey might thus not be as balanced as Turkey would like it to be (Çetin and Oguz 2007; Kardas 2012). Indeed, the Russian–Ukrainian “Gas Wars” (Bradshaw 2009) demonstrated Russia’s power over states dependent on its gas, and its willingness to use this dependency in geopolitical disputes (Ericson 2009).

Part of the problem, from Turkey’s perspective, is that their partner, Gazprom, is a state-controlled gas and oil company that holds the monopoly on Russia’s oil and gas resources. With Russia being one of the most gas- and oil-resource-rich countries in the world, Gazprom is a heavyweight in the industry (Ericson 2009). The fact that the Russian state holds the majority of Gazprom’s stocks and that the company has an enormous amount of power due to its monopoly position gives the heavily dependent Turkey a headache (Han 2011). Both its power and the knowledge of Turkey’s dependency on its gas not only puts Gazprom in a position to dictate the contractual terms, but also to comment on or warn about (on behalf of the Russian state) Turkey’s geopolitical moves (Ericson 2009; Han 2011; Kardas 2012; Reuters 2012; Weitz 2012). For Turkey, an ambitious state with hegemonic visions and one of the fastest developing economies worldwide, this form of dependency on a powerful former rival is not acceptable as they are trying to consolidate economic and military autonomy. While an energy partnership with the Kurdistan Region does not present a solution for all

identified themes, it can limit some of their effects and provide Turkey with more energy autonomy to counterbalance dependencies.

3. The developing KRG–Turkish relationship

In the past, the relationship between Turks and Kurds was anything but harmonious. Kurdish sovereign ambition always posed (and in parts still does pose) a threat to Ankara, who is worried about losing control over territories in the east of the country, which is mainly inhabited by the Kurdish minority. However, during the last years, this relationship has shifted dramatically (Altunışık and Martin 2011; Bengio 2011; Gunter 2013; Larrabee 2013; Tocci 2013). Turkey has now realized that the Kurds are not the harmonized enemy, always mutually supportive of each other. While the PKK, and more recently the PYD, remain a concern for Ankara, Turkey understands the energy and geostrategic potential the KRG region offers. As we will show, in return for export routes bypassing Baghdad, a combination of favorable and lucrative production-sharing contracts (PSC) enables Turkey to gain, for the first time since the Ottoman Empire, high levels of control over vast oil and gas fields close to its border. These unique deals for Turkey go beyond mere diversification; they also increase its energy security significantly, and thus strengthen its regional geostrategic position. We therefore argue that the Turkish–KRG relationship is less of a Kurdish dependency, but instead is one of an equal partnership. Furthermore, in the wake of the growing bilateral agreements and good relationships, significant trade relationships are developing in which Turkey profits from a new and growing export market while the KRG welcomes the incoming expertise and development (Barkey 2011; Gunter 2011a).

Indeed those dealings only work when the KRG is strong and increasingly independent from Baghdad. Therefore, Ankara not only tolerates Kurdish sovereignty, but supports it, beginning to act as the KRG's patron on a regional and international level (Natali 2012b). Given the geopolitical evolution of the Middle East, we claim that Turkey would much rather deal with an independent KRG than a Kurdistan Region whose power is limited by Baghdad.

In addition, Turkey has begun realizing that close ties to a strong KRG opens new possibilities when dealing with one of its oldest problems—the war with the PKK, and one of its newest threats—PYD autonomy in Syria. Seeing the positive impact of the KRG is thus a further incentive for Ankara to foster the KRG as a state-like actor, including careful first steps in the realm of foreign policy. Although the KRG's impact on these issues cannot be foreseen, existing dynamics suggest that Turkey is not only interested in a strong KRG, but that the KRG engagement offers one of the very few non-military solutions for Turkey's problems. In the following, we will return to the themes of geopolitical competition, reliability, and security we identified in section 2 and how the dealings with the KRG can limit their effects while giving Turkey more energy and thus geopolitical autonomy.

3.1. KRG's concessions and Turkey's chances

The KRG as an energy exporting entity is a very recent phenomenon. Only in 2011 did Kurdistan start exporting oil to Turkey via trucks – a mode of transport that is, however, insufficient for both sides. Thus, the KRG funded a new pipeline that can start pumping up to 400,000 barrels per day (bbl/d) of Kurdish oil a day to Turkey from early 2014 (Johnson 2014). In addition, there are plans for further deals that would increase the

export of oil to almost two million bbl/d and include the export of 10 billion cubic meters of natural gas per year (Pamuk and Coskun 2013; Rudaw 2013a).

The current pipeline runs from the TaqTaq oil field and connects with the above-mentioned Kirkuk–Ceyhan pipeline in Faysh Khabur, bypassing Iraqi territory and thus excluding Baghdad from any of the proceedings (see Figure 2).⁴ The TaqTaq field has only just recently been described as being “part of the last great onshore oilfield in the world” (Black 2013). The second pipeline will connect the TaqTaq and Tawke oilfields with Turkey (Lee 2013b). The Tawke oilfields lie directly on the Turkish border and have already generated “record” flows for the operating companies (Swint 2013b). To very little surprise, one of the oil companies involved in TaqTaq and Tawke is Genel Energy, a Turkish operator. In addition to the lucrative TaqTaq and Tawke fields, Genel also discovered a new major oilfield in early 2013 in the Chia Surkh Block (UPI Business News 2013b). Altogether, Genel is active in eight fields in the Kurdistan Region, which makes the Turkish company one of the most significant players in the region. While indeed oil sales through both pipelines cannot make up for the 17 percent of the national budget that the KRG is entitled to, their construction starts a development that aims to limit the Kurdistan Region’s dependency and vulnerability on Baghdad’s good will when it comes to budget issues. For Turkey, the ongoing deals mean short transportation routes via new pipelines possibly financed and maintained by Turkey’s national petroleum pipeline corporation.

However, it is not just that Turkish companies were given the first access to Kurdish oil (as insiders have shared with us) or that Turkey is heavily involved in the construction of midstream infrastructure, it is also the unique contract offered to oil companies in Kurdistan that supports our argument. Whilst Iraq (and Iran for that matter) offers technical service contracts only, all deals in Kurdistan are based on PSCs.

Service contracts have a distinctly nationalist flavor, as power and control over the oil and gas fields remains completely with the source country. Contractors are paid for exact tasks, which often include the development of a technical infrastructure. Service contracts can only be awarded when detailed information about the oil fields exist (so called no-risk fields). This way companies can calculate what their profits will be and if the contract is lucrative. Thus, service contracts can be characterized as low risks and clear with known profits for all involved. On the other hand, service contracts leave oil and gas companies more vulnerable to changes in the service agreement than, for example, profit sharing contracts, when for example, the political relationship between the importing and the exporting countries change. Thus, Turkey, or Turkish companies, are mere service providers and have no say in strategic decisions nor do they have any form of ownership over the fields.

The Kurdish Region PSCs are, on the other hand, more open and favorable for oil companies. Usually, such contracts are awarded when there is no certainty that an actual oil or gas field exists. In such case, an oil company could agree to a PSC and invest in the exploration of a suspected oilfield. If it turns out that oil or gas exists, the company would get a large percentage on all revenues because they took the risk of exploring the field. If there is no oil, the company would have to deal with the losses, which can be significant.

The ownership of the oil is shared and the FOC [foreign oil company] is permitted to use revenue from produced oil to recover expenditure. Once expenditure is recovered, profit is then split. Thus under PSCs, the FOC and the government body share revenues and

operating costs, although the FOC supports all capital expenditure and financial risk. (Reed Smith LLP 2013)

In the case of the KRG, however, the existence of oil in Kurdistan is almost certain. In cases where PSCs are being awarded for “expected oil,” there were seepages of crude on the surface. In the case of TaqTaq, oil was already discovered when the contract was awarded to Turkey on the basis of production sharing contracts. Hence, the risk for oil companies of ending up empty handed is very limited. Instead high profits are likely, different to the fixed fees that are the norm in the case of service contracts (Reed Smith LLP 2013).

If there is risk associated with the PSCs, it is a political one. Because of the absence of a national hydrocarbon law that would provide clear guidelines on the export of oil and natural gas, Baghdad interprets the Kurdish–Turkish partnership as illegal. However, the reason for the absence of a national hydrocarbon law is that Erbil and Baghdad pursue opposite interests. Thus, the ratification of such law in the future is unlikely as funding compromise becomes increasingly difficult. In return, oil companies could get worried about the legal base of their million-dollar investments when listening to Baghdad’s accusations. However, several years ago the so-called “game changers,” major IOC’s, arrived in the Kurdistan Region. While the negotiations between the oil giants and the KRG are not public, the presence of game changers indicates that they calculate the political risks as minimal and see the KRG as strong enough to secure their interests.

The combination of the prospect of high revenues, relative safety and stability within the three KRG provinces, and little bureaucracy in Kurdistan on the one hand (about 20 percent of the profits); and Baghdad’s insecurity and service contracts at \$1–2 per barrel (i.e. 1–2 percent of profits at \$100 per barrel oil price [Mills 2013]) as well as the blacklisting strategy on the other, have led IOC’s to start moving to Kurdistan (The Economist 2013; UPI Business News 2013a, Watson and Tuysuz 2012). However, as Natali (2012a) warns “[t]he time will come when the KRG will be pressed to pay full IOC costs and profits.” While this is indeed true, we currently see “conservative oil companies,” meaning companies that are reluctant to take high risks, being active in the KRG. Given the shadowy nature of the oil business (Coll 2012), we must therefore assume that, as Natali (2012a) also suspects, deals have been struck that will never become public.

Certainly, this is not a satisfying answer to Natali’s (2012a) concern. We would therefore extend the response by referring to the nature of the PSCs in this specific case. Most commonly, PSCs are awarded when there is a risk that the oil company might not find oil at all. As mentioned before, this risk is almost zero in the KRG. In the specific case of the KRG, it is rather the political risk oil companies have to deal with. Nonetheless, the increasing activities of IOCs suggest that this political risk is being assessed as low.

While the above refers to IOCs in general, we want to highlight the strategic importance of PSCs for Turkey specifically; PSCs include a degree of ownership rights of the fields. In a PSC, an IOC would partner with a national oil company (NOC) which, in return, means that they are “given decision-making powers and ownership rights over the produced crude, and decisions are made over the whole field in conjunction with their state-owned oil company partner” (Ghandi and Cynthia Lin 2013).

This difference between service contracts and PSCs is a key point when trying to understand the interest Turkey has in a strong Kurdistan. In Iran, Iraq, and especially

Russia, Turkish companies are completely blocked out of the production process. With the KRG Turkey gets, for the first time in modern history, the next best thing to its own resources: control and a degree of ownership only some kilometers from their border and a new midstream infrastructure partially within their own responsibility. However, as paradoxical as this sounds in light of history, to obtain this deal Turkey has to support a strong Kurdistan. If Baghdad has a say in the contracts, Turkey would lose their current control over oil and gas.

These concessions to Turkish oil companies raise the question of the agenda behind the KRG's policy. This can be answered with three points. First, PSCs enable the KRG to introduce a NOC (Rudaw 2013b), meaning that Kurdistan develops its own expertise in oil production and so becomes more autonomous than is the case if relying on service contracts. Secondly, bringing in IOCs is yet another step towards strengthening the Kurdistan Region. Developing and regulating its own oil industry automatically increases Kurdistan's autonomous status to an international level, as companies and governments are forced to negotiate with the KRG if they want to participate in the region's significant wealth. Thirdly, Kurdistan secures the mentioned export routes via Turkey and establishes a sustainable partnership with its northern neighbor. What we try to outline in this section is the developing partnership between Turkey and Kurdistan based on oil. While Kurdistan gets the needed export routes from their end of the deal, Turkey not only diversifies its sources, but also establishes long-term control over oil and gas fields as well as acquiring degrees of ownership.

3.2. *PKK and Syria. Turkey's geopolitical opportunity*

Another strong incentive for Turkey to enable the KRG's export of its oil and gas is the chance to initiate general peace talks with the PKK, and more recently, to have an impact on the Kurdish-led autonomy in northeast Syria. At the same time, it addresses very particular security concerns on the Turkish side of the border. As the PKK has proven in the past, they have the military capabilities to attack the pipelines and disrupt the flow of crude (Natali 2012c).

Dealing with the KRG in a state-like fashion, Turkey learned to leave behind many of the old sentiments against Kurds. Turkey stopped seeing the Kurds as homogenous groups of mutual support, but instead began to differentiate between the KRG as a supportive institution, with the PKK as their enemy (historically Barzani's KDP, one of the main parties within the KRG, and the PKK are old rivals that crossed swords during the Kurdish civil war in the 1990s [Gunter 2008; Natali 2013b]). Timely to the developing Kurdish-Turkish energy relationship, the Turkish Prime Minister Erdogan announced the "Kurdish opening" and another attempt to settle the conflict with the PKK. Only recently the KRG's President Barzani announced during a meeting in the Turkish-Kurdish "capital" of Diyarbakır that he supports peace talks (AlJazeera 2013b; Hurriyet Daily News 2013c). From the literature, two main reasons for the latest approach to the peace negotiations emerge: the understanding that the PKK cannot be beaten by military means, and the increasing power of the Syrian PYD, an organization with strong affiliations to the PKK (Bengio 2011; Gunter 2013; Larrabee 2013).

Bengio (2011) and Tocci (2013) suggest that responding to the constant threat of the PKK, Turkey fosters the relationship with Kurdistan to either contain or to build a Turkish-KRG alliance against the PKK and thus to settle the conflict. While there is some merit to those arguments, we judge the situation slightly differently. Two of the three main political parties within the KRG, the KDP and the PUK (Patriotic Union of

Kurdistan), have a violent history with the PKK. Today, as Natali (2013b) points out, especially the KDP and the PKK continue their rivalry, with the PKK supporting President Barzani's opposition. Also, the KDP never fought for the Kurds on Turkish territory; they therefore lack the support of Kurdish population. Thus, their influence should not be over-interpreted. We therefore do not judge the new peace process as a reason for the growing Turkish–KRG relationship, but as a result of it. We argue that the KDP's involvement in the peace talks occurs in the wake of the above-described oil and gas deals.

Nonetheless, we also do not want to downplay the importance of the KRG's involvement. By dealing with the KRG, Turkey is increasingly forced to acknowledge the Kurds as an ethnic group that exists within their territory. Meeting Barzani in Diyarbakır forces the current Turkish government to break some of the old and deeply rooted taboos in Turkish society when it comes to Kurdish identity. In this respect, the KRG's involvement presents a historically unique opportunity that has arisen out of the current geostrategic and geoeconomic situation, which can more indirectly influence the actual peace talks positively.⁵ Thus, as part of the trade dealings, Prime Minister Erdogan is required to re-consider Turkey's uncompromising position against the Kurds in general and the PKK in particular. Dealings between Turkey and the KRG increasingly affect the economically deprived Kurdish region of Turkey. It is thus likely that an improvement in the living conditions of Kurds in Turkey puts the unconditional support for the PKK into perspective. If, after decades of hard and brutal guerrilla and anti-guerrilla warfare, people enjoy improving living conditions, economic opportunity, freedom, and respect as Kurds, they will be more likely to settle for a compromise. Depending on the support of the majority of the (Turkish) Kurds, the PKK might thus be inclined to compromise during negotiations – a development we can see emerging already. However, this only works when the Turkish government does not push this point too far and mistakes willingness to compromise with weakness. Although the official line of the PKK is not to carry out attacks that harm the Kurdish people, as Natali (2012c) pointed out, they have demonstrated their ability to disrupt the oil flow between the central government in Iraq and Turkey with attacks on pipeline infrastructure. Nonetheless, by forcing Erdogan to have a respectful attitude towards Kurds in general and bringing economic development to the Kurdish part of Turkey, indirectly the Turkish–KRG relationship does have an impact on the ongoing peace talks.

In the case of the Syrian civil war and the Democratic Union Party's (Partiya Yekîtiya Demokrat [PYD]) increasing consolidation of power and autonomy, the KRG, and in particular, the KDP, have a more direct mechanism to influence events. The strongest faction amongst the Syrian Kurds is the PYD, an organization closely associated with the PKK. With their close ties to the People's Protection Units (Yekîneyên Parastina Gel [YPG]), the PYD has significant forces. In combination with an autonomous self-ruled territory which the PKK can use as a base, the PKK-Turkish conflict could potentially enter a new violent phase. Being aware of the situation and sensitive to Turkey's request, the KRG engages in foreign policy and has begun to interfere in Syria. The KRG follows a three-legged strategy in respect to the civil war. Firstly, Kurdistan takes in hundreds of thousands refugees as part of a pan-Kurdish responsibility in times of crisis. Secondly, Massoud Barzani supports the Erbil-based Kurdish National Council (KNC), the Syrian counterpart of the PYD (van Wilgenburg 2013), while at the same time criticizing the PYD's unilateral autonomy move (Ekurd.net 2013). In addition, President Barzani is the architect of the Hawler (Erbil) Agreement that unites the PYD and the KNC under the Kurdish Supreme Committee (KSC). Although officially the

YPG forces are under the control of the KSC, in reality they are still controlled by the PYD, leaving the KNC an unarmed actor in the civil war. Thirdly, the KRG trains Syrian–Kurdish fighters within Northern Iraq who could possibly return to Syria, where they would strengthen the pro-KDP position, thus limiting the influence of PKK-friendly groups (ARA News 2013; Arraf 2012).

Points two and three, in particular, express a policy that is very much in Turkey's interest, since it implies limiting the PYD's influence. In 2011 under the leadership of President Barzani, the KNC, an alliance of 16 small Syrian–Kurdish parties, was formed in Erbil. Being under the patronage of Barzani, the KNC is commonly perceived as the counterpart to the PKK-allied PDY (Gunter 2013). Attempting to find an agreement for all Syrian–Kurdish parties, President Barzani convinced the KNC and the PYD to form the Kurdish Supreme Committee that is in charge of the YPG forces and makes all relevant decisions for the Syrian Kurds. Whilst in theory that would limit the PYD's autonomy and influence, in practice the PYD does not follow the agreement and remains in control of the YPG forces. Being based in Erbil, *de facto* the Barzani-backed KNC remains with little influence on the ground in Syria. Nonetheless, this initiative is one Turkey's very few hopes to limit the PYD's influence diplomatically. Right now, the only viable peaceful option for Ankara goes via Erbil.

The third point describes Erbil's nonpeaceful solution for the containment of the PYD's power: the training of KNC loyal forces that can implement their interests on the ground. As the KRG now admits, an unknown number of Kurdish deserters from the Syrian Army who came to the KRG with the refugees are currently being trained by the KRG's Peshmerga in an undisclosed location. Again, this is one of Turkey's very few options to stop the PYD from growing stronger. However, as Barzani acknowledges himself, sending KNC-loyal fighters into Syria would make an inner Kurdish war in Syria very likely. This step has to be avoided by all diplomatic means available.

In this section, we argue that the growing relationship between Turkey and the KRG is not simply based on oil and gas deals. Instead, those deals enabled much deeper and more complex interactions to develop in the wake of the energy relationship. Given the geopolitical constellations, this is of increasing importance for Turkey as it enables possibilities Turkey did not previously have. True, the KRG, and especially President Barzani, has no direct influence over the PKK; the main negotiation partners should be Ankara and the PKK. However, having a strong Kurdish faction at the negotiation table can enable new dynamics and opportunities. More importantly, the energy dealings between Erbil and Ankara force Erdogan to overcome old resentments and start acknowledging Kurdish identity on both sides of the border. This can indeed have an indirect but strong impact on the peace talks as it demonstrates Erdogan's will to negotiate. In the context of the PYD, or rather the PYD's counterpart, the KNC, the KRG can play a much more active role and pursue policies that profit Turkey. Again, currently the influence of the KNC is limited. However, in the absence of alternatives, Erbil's efforts are Turkey's only peaceful option. Also, utilizing the developing energy relationship with the Kurdistan region not only enables Turkey to address the general peace process, but also more immediate geostrategic goals – the security of the Iraqi/Kurdish pipeline to Ceyhan on the Turkish site (see Figure 2).

4. Conclusion

Given its geopolitical situation, Turkey is currently the only viable option for the KRG to export their vast quantities of oil, and in the future, gas, in order to limit their

dependence on Iraq: a situation seemingly creating new dependencies. However, when looking closer at Turkey's geopolitical and energy politics position, the picture changes. Combined with the possibilities the KRG offers, we therefore argue for a complex, but mutually beneficial partnership.

In the first half of the paper, we took Turkey's perspective to explain the country's need for diversification. Focusing on their difficult relationship with Iraq and their reliance, particularly on Iran and Russia, revealed that diversification of energy sources is required to fuel their growing economy and to maintain their growing position as the regional hegemon. Despite its impressive economy and strong armed forces, Turkey is a vulnerable giant. Therefore, the question experts in Ankara will ask themselves is this: If a simple diversification of its energy sources is enough to consolidate its geostrategic position, will Turkey be less vulnerable to long- or short-term energy cuts if the gas imports from Iran and Russia are not between 58 and 19 percent, but 30 and 10 percent? The answer is most likely "No." What is needed is a partnership that binds a resource-rich region closely to Turkey, preferably without long transit routes through other territorial waters or land.

As we argued in the second part of the paper, with the KRG region, Turkey has such a partner at its southern border. Based on favorable PSCs, Turkish companies get partial ownership and high levels of control over oil and gas fields as well as midstream infrastructure, something the country is in desperate need of due to the absence of any significant domestic oil and gas resources. As we suggest, with those fields Turkey is able to solidify its position as a regional powerhouse that is not dependent upon its geopolitical competitors. Partnership with the Kurdistan Region in Iraq thus means that Turkey can live up to its full geopolitical and economic strength, assuming Ankara and Erbil acknowledge each other's mutual interests and play their cards well. Furthermore, in the wake of those developing geopolitical and energy political ties, we witness further developments supporting our argument; the increasing importance of trade ties and opportunities the partnership brings for Turkey's immediate internal conflicts (the PKK) and external conflicts (strengthening PYD led autonomy in Syria). A more immediate advantage of the progressing peace talks is the security of its domestic pipeline infrastructure which, in the past came under attack by the PKK.

Even before the attacks by ISIS in 2014, the region's highly complex and ever-changing power landscape made it difficult to make predictions. Right now, there are still numerous unknown variables that could potentially pose a threat to the developments we argued above. These include the continuation of the peace talks between the PKK and the Turkish government, the development of the Syrian civil war, and Kurdish-led autonomy as well as the development of regional sectarian tension and the perspective of the sections on Iran. At the same time, there are developments on a much larger geopolitical scale that can deepen the described alliances, referring in particular to the EU's dependency on Russian or Gazprom's natural gas, and especially, Germany's desire to diversify its sources in light of the ongoing tensions in the Ukraine. In this respect, the paper provides a snapshot of a fast-developing geopolitical narrative. However, by analyzing ongoing developments including Turkey's geopolitical ambitions, we try to provide an informed picture and a possible perspective for the near future. At this point, the attacks by ISIS are only two weeks old and it is too early to speculate about exactly how those events could play out in the future. However, it seems to be certain that the geopolitical landscape will be re-drawn in one way or another. Right now those events do underline the argument of this paper as all of the Iraqi crude oil imported by Turkey is Kurdish.

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Notes

1. This section is written on the eve of the national election in April 2014. By this time, Baghdad had withheld the funding for the Kurdistan Region for more than three months.
2. It should also be mentioned that there are attacks on the pipeline within Turkey conducted by guerrillas from the PKK (Business Insider 2012; Pipeline Magazine 2010). We will return to the issue of the PKK further below.
3. Since this development has been discussed in great length in the past, there is no need to go into much detail here. To follow this discussion, see for example (AlJazeera 2012; Arsu and Arango 2012; Barkey 2013; Doherty and Bakr 2012; Idiz 2013; Kuru 2012; Parkinson and Dagher 2012; Stansfield 2013; Taştekin 2013; Tocci 2013).
4. Indeed Natali (2013a) offers some valid points that put Kurdish independence in respect to the pipeline into perspective. While we acknowledge those arguments, we see the fact that the pipeline runs exclusively through Kurdish and Turkish territory as the most important aspect of those dealings.
5. In personal conversations with the authors, two of president Barzani's advisors also shared that the president of the KRG initiated the peace negotiations.

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