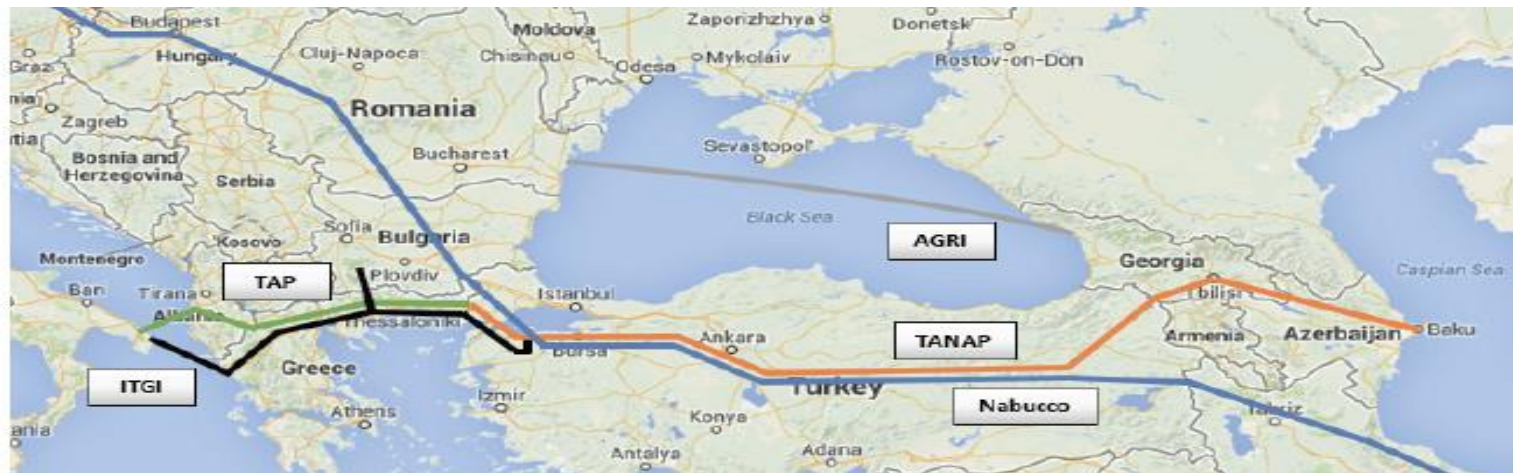


The Southern Gas Corridor & the Role of Turkey

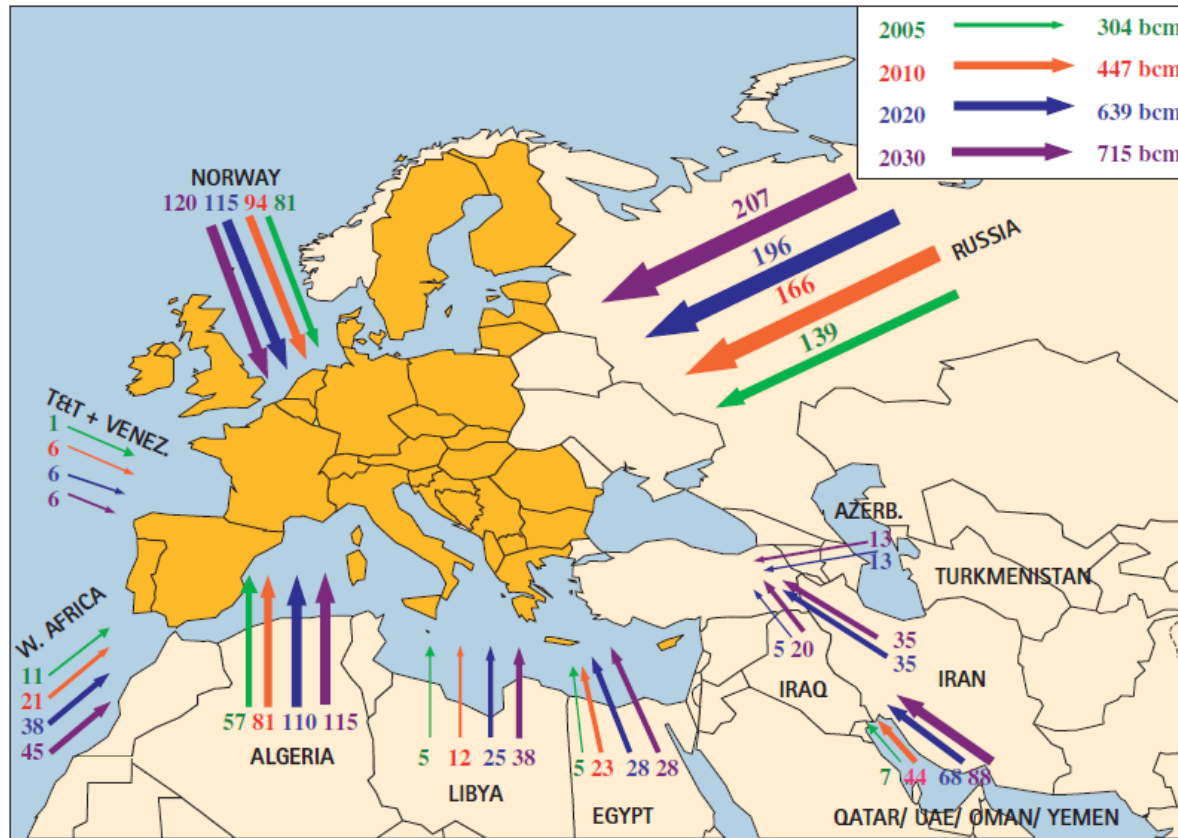
Presentation

Mirja Schröder

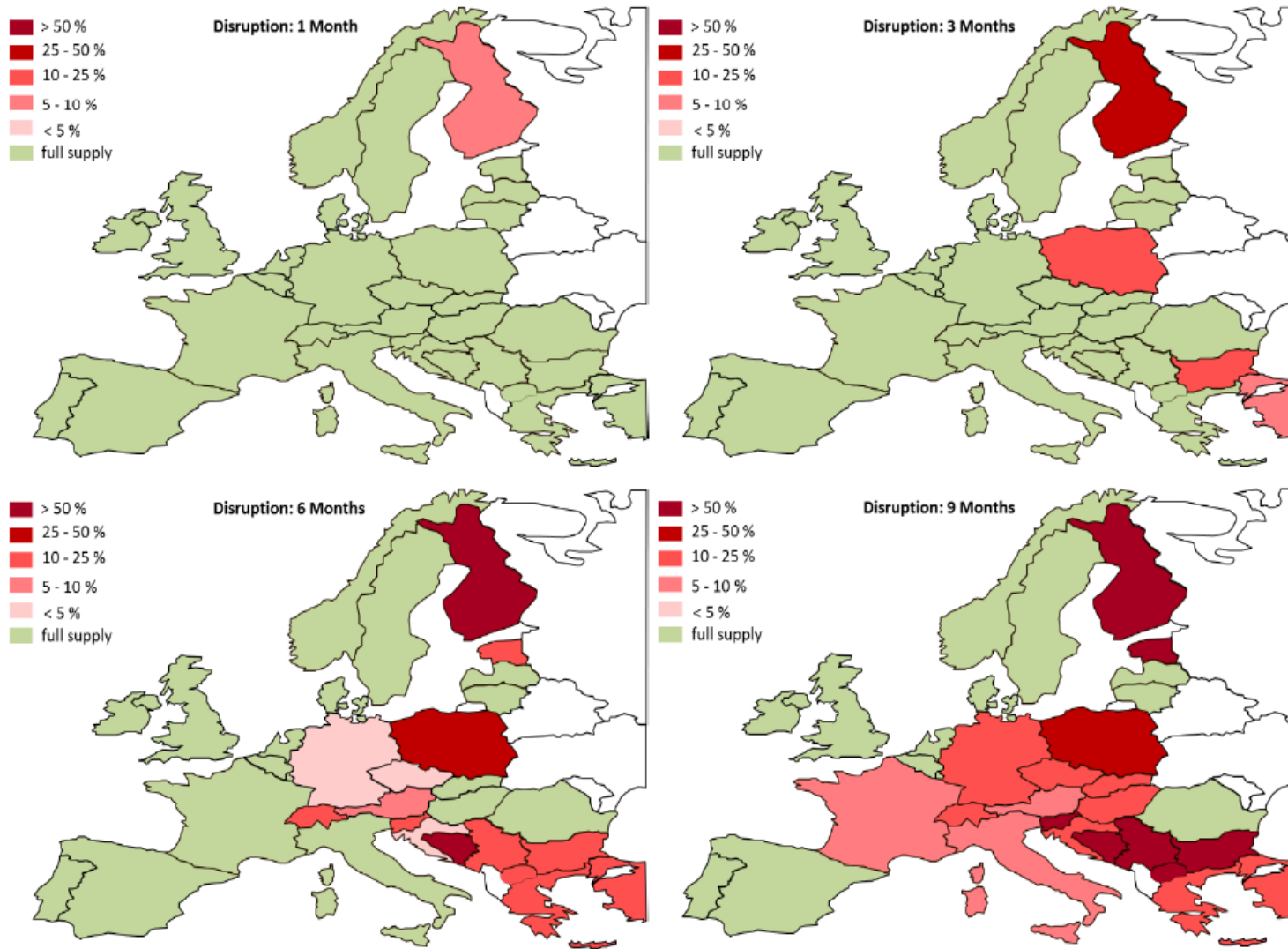
THESEUS Project Manager, Jean Monnet Chair, University of Cologne



1. Strategic Context



Source: European Commission (2014): Energy Corridors. European Union and Neighbouring Countries.



EWI (2014): An Embargo of Russian Gas and Security of Supply in Europe.

1. Strategic context

The role of energy in EU-Turkey relations - common challenges and objectives:

- Energy future will remain fossil fuel based
- Dependence on imported energy resources
- Russia = largest oil and gas supplier

→ Ensuring energy security

→ Diversification of supply routes and sources



2. The Southern Gas Corridor

- SGC has become one of the top energy priorities of the EU
- Fourth big axis of diversification of gas supply
- Connection of the EU to one of the largest deposits of gas in the world (Caspian & Middle East region)
→ Turkey as a key transit corridor



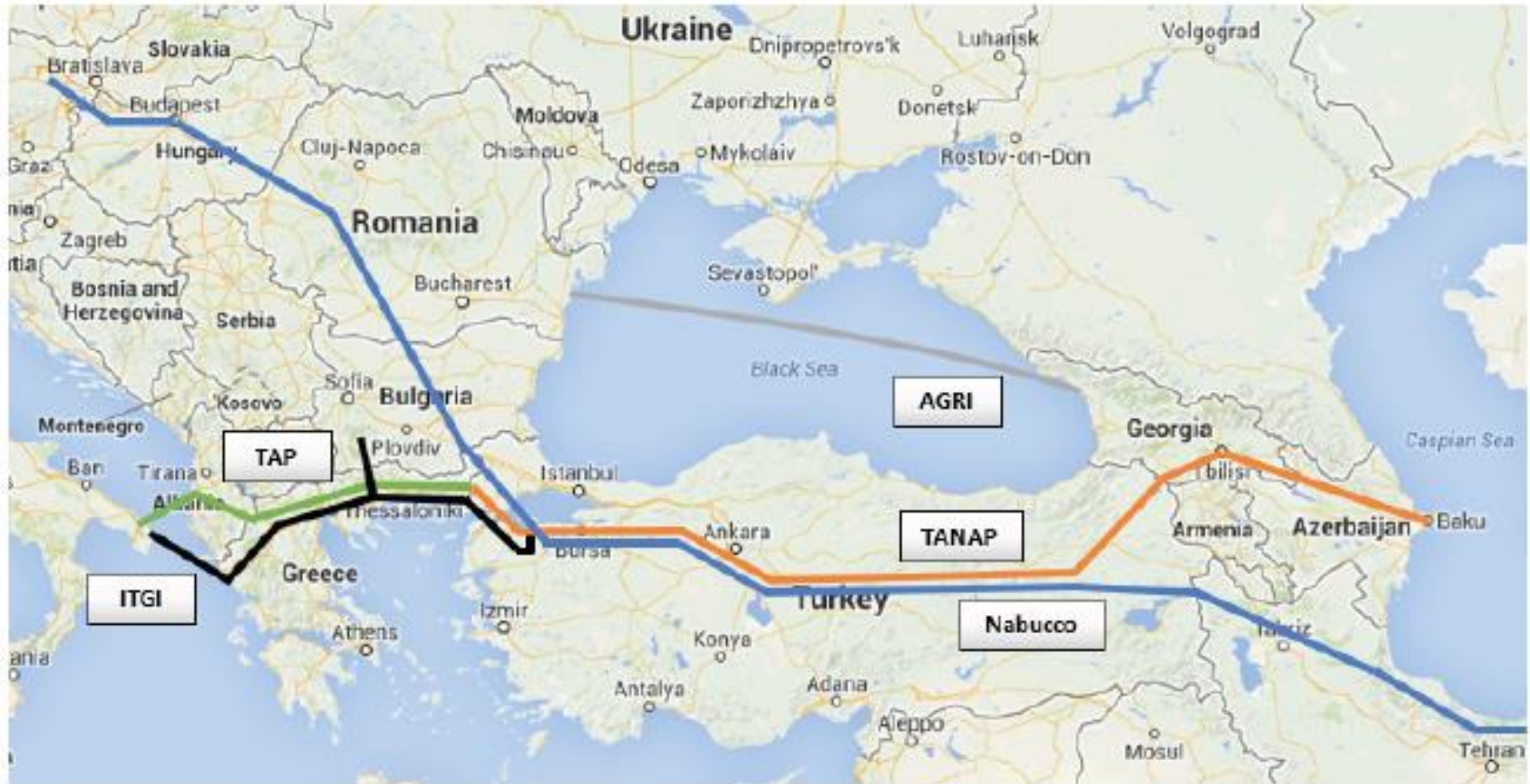
2. The Southern Gas Corridor

TANAP and TAP open up the Southern Gas Corridor

	TANAP	TAP
Length	1800 km	800 km
Route	TR/GEO border to TR/GR border	GR – ALB – IT
Capacity	16 bcm/a	10 bcm/a
Operation	2019	2019
II. Phase	23 bcm/a (2023)	20 bcm/a



3. Turkey's Role



Source: Erdogdu, Erkan (2014): Turkey's Energy Strategy and its Role in the EU's Southern Gas Corridor. In: IAI Working Papers 14.

3. Turkey's role

Transit country or Energy Hub?

- **Transit country = country through which natural gas is transported from the originating country to a final destination in a third country**
 - **Energy hub = unit where multiple energy carriers can be converted, conditioned, and stored**
- ↓
- **Transit hub = actual transit location, or physical point, at which market participants can choose to trade gas; however, the primary role is to facilitate the transit of large quantities**



4. Conclusion

- The strategic context changed, Europe became more and more concerned about Russian's reliability as an energy supplier.
- The SGC is not a short-term solution, yet in the medium-term (beyond 2020) it has the potential to become a major source of gas for Europe.
- Turkey has the potential to become a gas transit hub.



Thank you for your attention!

