

PAPER DETAILS

TITLE: Qatar Crisis and Energy

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QATAR CRISIS AND ENERGY

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1. INTRODUCTION

The crisis started between Qatar, which has the third largest natural gas reserves and the biggest LNG supply capacity, and the block of Saudi Arabia, Egypt and the UAE and its impact continues in all over the world.

This block with Bahrein, Yemen, Libya's Tobruk Government have accused Qatar as the financier of terrorism and made the decision of ceasing all relations with Qatar as a reaction.

The fact that this development occurred right after Trump's visit to Saudi Arabia where a weapon sale agreement was signed and this process is supported by many Western institutions and countries creates some questions.

In this context, answers for those questions below, potential impact of energy to this process and the results created by this process will be examined:

- What is the problem between Qatar and the other countries?
- Did they have this problem before?
- What is relation of the US and Israel with this process?
- Where is the place of energy in this process, by taking into account that Qatar is one of the most important country in the world?
- What is the relation of Turkey with the process by taking into account other developments in the Middle East?
- Does it mean a step towards Iran?
- Is Turkey's strategy correct?

2. OVERALL ANALYSES OF THE PROCESS

In this part, the crisis and the process will be analyzed by asking some questions and answering them shortly.

What is Qatar's Administration Accused of?

Qatar's administration is accused of supporting terrorism and providing financial support to some terrorist groups. In this context, in particular, the most important problem between Qatar and Saudi Arabia-Egypt is that Qatar has supported the Muslim Brotherhood overthrown by military coup in Egypt. Especially, Saudi Arabia and the UAE, financed this military coup with the directives and supports of the US and Israel. From another perspective, it may well be claimed that Sisi and his supporters can be called as terrorists opposite to the claim that the Muslim Brotherhood is a terrorist group since Mursi was a legally elected president by the public. Nonetheless, this injustice process is still prevalent since those are regarded as terrorists which is the claim of global actors in contemporary world.

- In addition to its support to the Muslim Brotherhood, accusations stated below have been artificially created to get the supports of other Arabian countries and global public:
- The fact that Qatar did not support American discourses against Iran and therefore, it looks like that Qatar is in line with Iran, which is regarded as the center of terrorism for the US.
 - Thereby, since it is in line with Iran it is claimed that Qatar:
 - Supported Husi militants in Yemen,
 - Became the financer of Shia incidents in Kaif,
 - Involved in Shia riots in Bahreyn,
 - Supported Al-Qaeda, ISIS and Hamas.

How much realistic these accusations are?

The accusations can be examined in four categories:

1. It supports the Muslim Brotherhood, which was a legal authority in Egypt before the coup,
2. Husi, Katif and Bahrain issues, which are claimed to get Arabian countries' support by linking to Iran and Shia world,
3. Al-Qaeda and ISIS receiving international public support,
4. Hamas, which was especially added in this accusation bundle by Israel.

Only the first and fourth categories can be associated with Qatar. Other categories (the second and third ones) may be regarded as they are included to receive support of some stakeholders. As it is known, Saudi Arabia supported ISIS with the US's directive during the struggle process with Al-Qaeda and Shia government in Iraq. As a short reminder, everybody knows the history behind Al-Qaeda that US created it to fight against Russian intrusion in Afghanistan and Saudi Arabia financed it. As a matter of fact, they still continue to support Al-Qaeda but today, US has made a huge propaganda about Al-Qaeda militia joining ISIS ambitions in Iraq and Syria. US had tried to claim that both ISIS

and Al-Qaeda were the same terrorist groups but that was a simple deceit because US tries to hide the fact that it purchases terrorist groups to run errands for them. Since US hides its masterpiece (terrorism), there has to be a country or countries to shoulder the blame such as Qatar in the last Saudi Arabia-Egypt-UAE triangle. Furthermore, it can be concluded that the global actors may accuse of other countries in the future to be the supporter for terrorism like in this Qatar example.

It is known that the US is active in this process, why?

New American administration, oil cartels who supported this new administration, and the steps taken for the new world order should be examined. It is because the West, which was weakened or was not able to counterstrike against the rise of the East, had to take some steps against China, which is regarded as an everlasting threat by the West.

Moreover, the most important threats which are claimed by new American administration are China's trade and monetary policies, Iran, North Korea and other so called terrorist groups. Also, as it is known, the US's attempt,

- To continue its active pursue in the Middle East without spending any money,
- To increase the battle between Shia and Sunni, which is thought to reshape the region,
- To use Saudi Arabia, Egypt, and the UAE as major pawns,
- To make Turkey, which is another active power in the region, under control by supporting PYD and YPG against other terrorist groups such as ISIS, which are established and weaponized by the US itself.
- By taking into account the US's attitude and goals, with the help of the crisis started by Saudi Arabia, the UAE and Egypt, the US aims to:
- Warning Iran before a potential unexpected Iranian move,
- Pursuing Qatar, which will be affected most from a military attack to Iran,
- Bringing Israel into safety,
- Taking a new step against to Turkey, in addition to current Syrian policy, to make Turkey isolated and decrease Turkey's prestige among Arabs and damage Turkey's economy,
- Realizing huge amount of export and fund production of new technology weapons by selling old technology weapons to these countries in very high prices,
- Giving a message to Russia, which is attempting to be active and to China, which is increasing its commercial operations that tends to suffocate the US being the leading power in this region,
- Overall, keeping its activeness and shape its projects with more blood and chaos without spending money by using these related pawns,
- Lastly, get benefit in terms of asserting dominance in the world's LNG market.

These reasons are enough for the US to get involved in this process.

If these accusations are for Iran, why did the step not taken directly towards Iran?

It is because Arabs are wanted to be used in a potential military attack against Iran. The leaders of Arabs would be Saudi Arabia and Egypt. Qatar needs to stay away from this attack since it knows that it is the country that will be affected worst by a military attack against Iran.

Under these conditions, before a military attack against Iran:

- Saudi Arabia and Egypt should unite Sunni Arab world to become the leader of the Sunnis,
- Turkey should be discredited in Arabs' views since Turkey has been supporting Qatar,
- Countries such as Saudi Arabia should be made stronger by taking their money,
- Other Arab countries which do not support a potential attack to Iran should be convinced,
- Shia population in countries such as Qatar, Yemen, Bahrein, Kuwait, Iraq, Syria, the UAE and Saudi Arabia should be suppressed and diminishing Iran's impact in these countries,
- Support of international public opinion should be guaranteed under the name of tackling terrorism,
- An image of bloody struggle among Islamic countries should be granted,
- The balances should be kept and basis for a condition under which world peace can be granted should be built with Western timely intervention to these circumstances,
- Iran should be pressured more by providing supplies needed before a potential war.

Thus, Qatar is only a fore-step. Iran is the second one on next phases.

What are the other problems between Qatar and Saudi Arabia, Egypt and the UAE?

Firstly, there are some troubles between Saudi and Qatar tribes from the past. Furthermore, the main issue is to end the Muslim Brotherhood completely. For this reason, it is essential that financial and political supports of Turkey and Qatar to this group should be ceased completely.

Furthermore, especially the UAE and Saudi Arabia do not like that the central US military base is in Qatar. In addition, Qatar criticized Saudi Arabia, which contributed to forming the fundamentals of Al-Qaeda with Wahhabi thoughts and funded it with the orders of US in the 9/11 process. That increased the hostility between them.

Will be there any military attack to Qatar?

Because of the reasons stated below, there will be no military attack:

- Presence of significant US military power in Qatar,
- Any damage to this military power is unacceptable and it is costly to move this military power to other places,
- Qatar's fair attitude,
- The goals could be achieved by keeping this intermediary role and the crisis alive,
- The real target is not Qatar,
- Going too far in any potential intervention which would result reaction of international public opinion may mean not to accomplish in the aims against Iran.

What are the goals against Turkey in this process?

One of the national security strategy of the US and some Western countries is to make Turkey, which has increased its activities by moving independently, and aiming unwanted international goals, weaken and be under control, diminish its active power. It is because Turkey has the potential to change international balances with its infrastructure, activity areas due to its historical heritage.

Gezi incidents, December 17-25 events, bloody military coup attempt and PKK, ISIS, YPG-PYD attacks, are the attempts to isolate Turkey and bend its ambitions in Syria. Economic and political attacks are the interventions of the West by considering this potential power of Turkey.

Turkey has been successful in all these attacks in spite of some loss.

Attempts in Rakka and weaponizing terrorist groups, in this scope, are all part of hidden projects against Turkey.

Especially, before the crisis process it was arisen with the e-mail messages between the UAE and some individuals and institutions, which evidenced that the UAE has supported bloody military coup attempt in Turkey. In the crisis process, this development resulted in damage of the relationship between Turkey and the UAE and Saudi Arabia, which, in fact, made Turkey to value Qatar's point of view.

May Turkey be the main target and threat like Iran? May it be declared as a terrorist country?

The current strategy of the US and West is to control the region with internal struggles and without spending any money. In this context, the most important card is a possible dispute between Sunni and Shia. Their targets against Iran are obvious by organizing some Sunni pawns. However, there is no big force they can put up against Turkey, which

is the most powerful country in its region. From this point, it is understood that they will not use Turkey against Iran. Thus, it looks like that Turkey will not be one of the main targets and will not be declared as terrorist country before,

- Establishing a strong Kurdish state in Syria,
- Combining this state with Northern Iraq,
- This new state will have an infrastructure to fight Turkey,
- Ending Turkey's positive image in other Sunni regions,
- Ending threat of Iran, which is another strong country disapproving a Kurdish state,
- Establishing an interior struggle and chaos environment in Turkey after accomplishing above aims.

Nonetheless, they will continue to create a public opinion such that Turkey would have been supporting terrorism by using short and informal speeches.

How will the Crisis Process continue?

It will continue in this format until Qatar accepts the claims. Although some countries such as Kuwait, which is supported by Turkey undergo peacemaker, it looks like that the role of peacemaker will be brought to major play makers. Hence, it will be easier for these play makers to spread the perception of that Turkey's power is not enough and they are the dominant power of the region.

A close combat with Qatar, which will definitely upset all the balances, will not be predicted by considering main targets.

In the next part, this crisis will be examined from the energy perspective.

3. QATAR CRISIS AND ENERGY

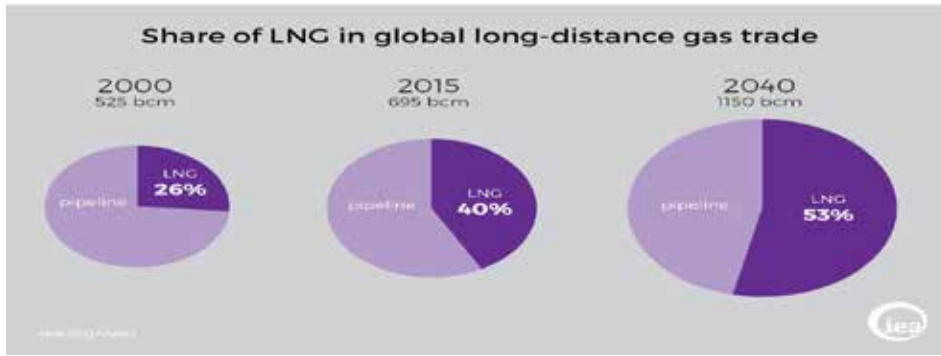
It is not correct to connect the main reason of the Qatar crisis to energy. Nonetheless, energy issues have some effects in the crisis process rather than they are the main reasons by underlining the importance of scientific approach and multi criteria analyses in such issues.

In this part, the effects of energy to the related process and the impact of the related process to the global energy policies will be analyzed after examining and interpreting some graphics which help us understand related markets from some reports.

Related Graphics

The first graphic taken from the EIA shows a rise of LNG share in the global natural gas trade markets. It can be interpreted from the Graphic 1 that LNG trade share will be higher than natural gas trade via pipeline in 2040s and it will increase to 1150 billion m³/year.

LNG share will increase gradually in the natural gas trade, which has a significant place in the global energy. Thereby, the competence in energy strategies will move to LNG.

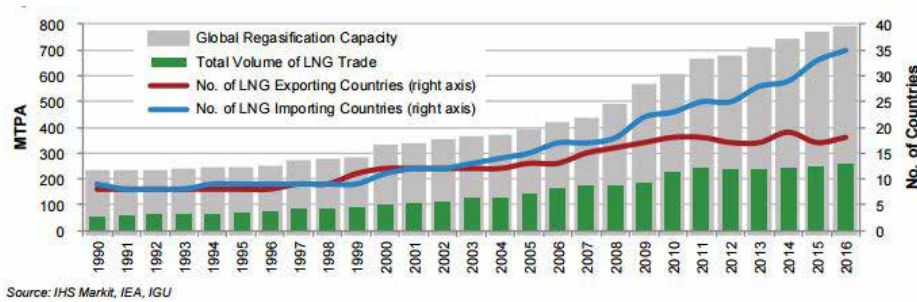


Graphic 1: LNG share in the global natural gas trade markets (Source: IEA)

Graphic 2 shows total LNG trade volume and the global gasification facility capacities, in equivalent units of annual million tons of oil. Moreover, the number of countries which import or export is included in the graphic.

It can be interpreted from the graphic that existing gasification capacities have more significant gaps than trade volumes. In other words, these gaps could be filled if resources were provided. In addition, the trade volume, technical capacity for import and the number of importer increased.

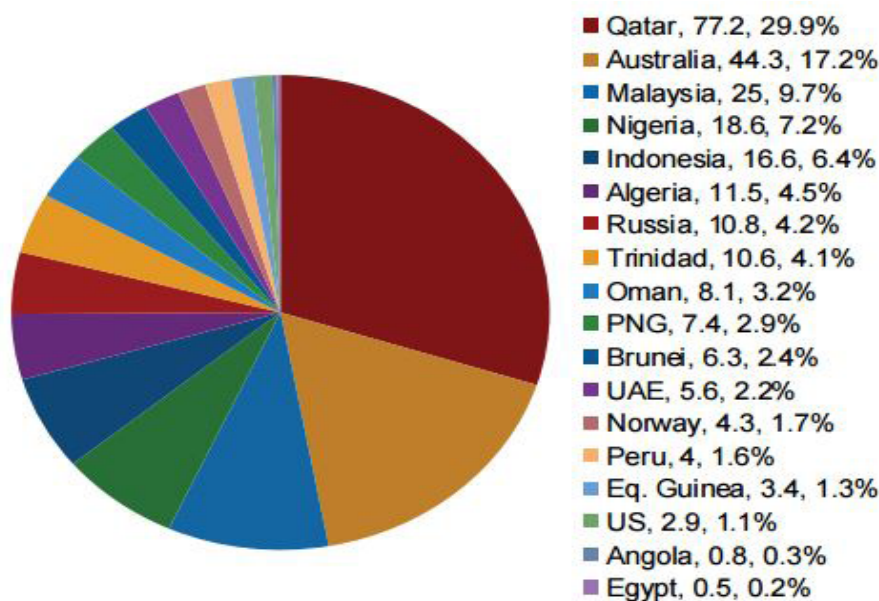
This situation is important in order to explain the Graphic 1, as well.



Graphic 2: LNG trade volume and the global gasification facility capacities (Source: IGU World LNG Report – 2017 Edition)

Graphic 3 shows the LNG exports of the related countries and their share in aggregated trade volume in 2016 in million ton.

It can be understood from Graphic 3 that Qatar is the leader in terms of world LNG trade with nearly 30 % share. The next one is Australia and the US, Egypt and the UAE which are the actors of the crisis are also in the table.

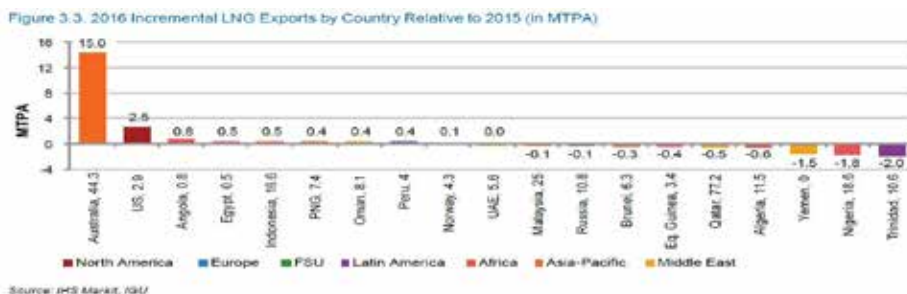


Note: Numbers in the legend represent total 2016 exports in MT, followed by market share. **Source:** IHS Markit, IGU

Graphic 3: The LNG exports of the related countries and their share (Source: IGU World LNG Report – 2017 Edition)

Graphic 4 shows the change in LNG exporter countries' exports in 2016 relevant to previous year.

It can be understood from this graphic that there is an increase in Australia and the US.

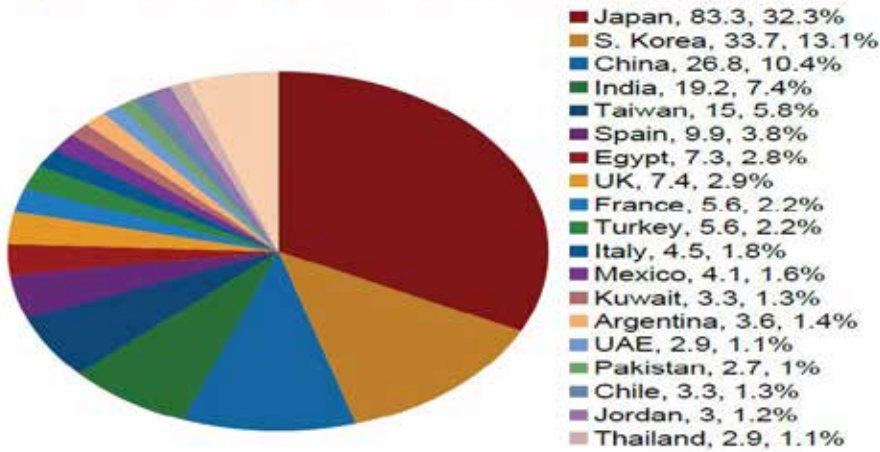


Graphic 4: The change in LNG exporter countries' exports between 2015 and 2016 (Source: IGU World LNG Report – 2017 Edition)

Graphic 5 shows the major LNG importer countries, their share in global market and the quantity of LNG imports.

It is understood from the graphic that the biggest LNG importer is Japan. The next one is South Korea. Turkey is in the table, as well.

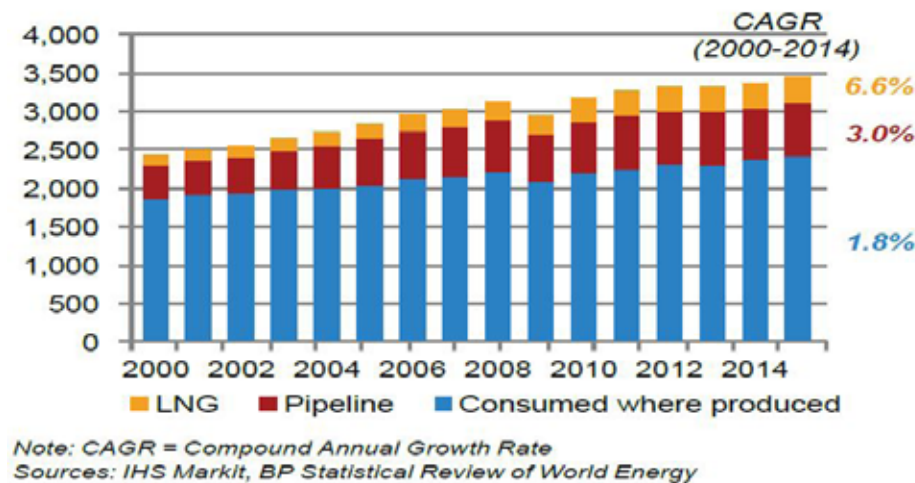
Figure 3.7. LNG Imports and Market Share by Country (in MTPA)



Graphic 5: Importer countries' share in the world LNG import in 2016 (Source: IGU World LNG Report – 2017 Edition)

Graphic 6 shows ratio of consumption of natural gas in producer countries, ratio of its export via pipeline, ratio of supply in the form of LNG and increases in these ratios.

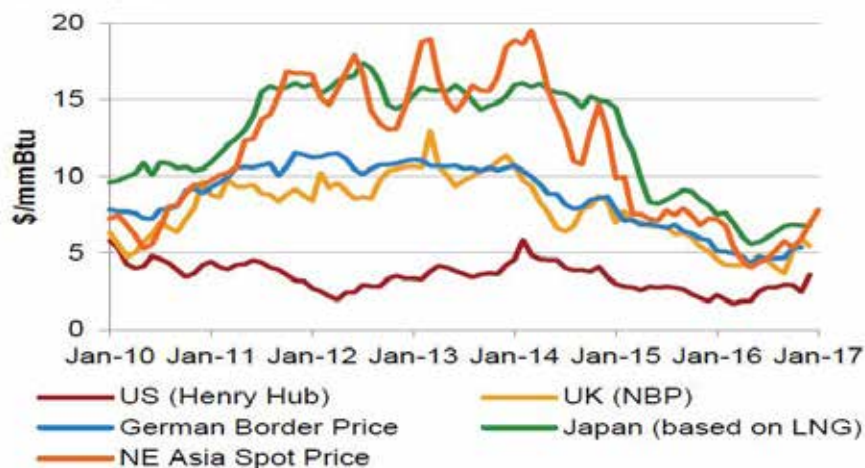
It can be understood from this Graphic that the largest increase is in LNG export and item is internal consumption.



Graphic 6: Ratios of world natural gas consumption and export (Source: IGU World LNG Report – 2017 Edition)

Graphic 7 includes monthly natural gas price averages in different regions/markets. It can be understood from this graphic that Henry Hub in the US is the market which has the cheapest natural gas price. The prices in the UK and Germany are similar to each other.

Figure 3.15: Monthly Average Regional Gas Prices, 2010 - January 2017



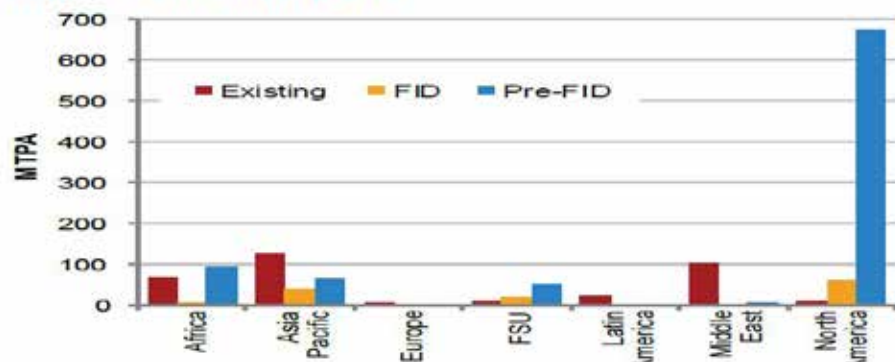
Sources: IHS, Cedigaz, US DOE

Graphic 7: Natural gas prices in different markets (Source: IGU World LNG Report – 2017 Edition)

Graphic 8 shows LNG liquefaction facility capacities which are existing, in which investment decisions were made or are being made.

The increase in LNG liquefaction facilities in which investment decisions are being made in North America shows US desire to gain dominance over global LNG markets.

Figure 4.1: Nominal Liquefaction Capacity by Status and Region, as of January 2017

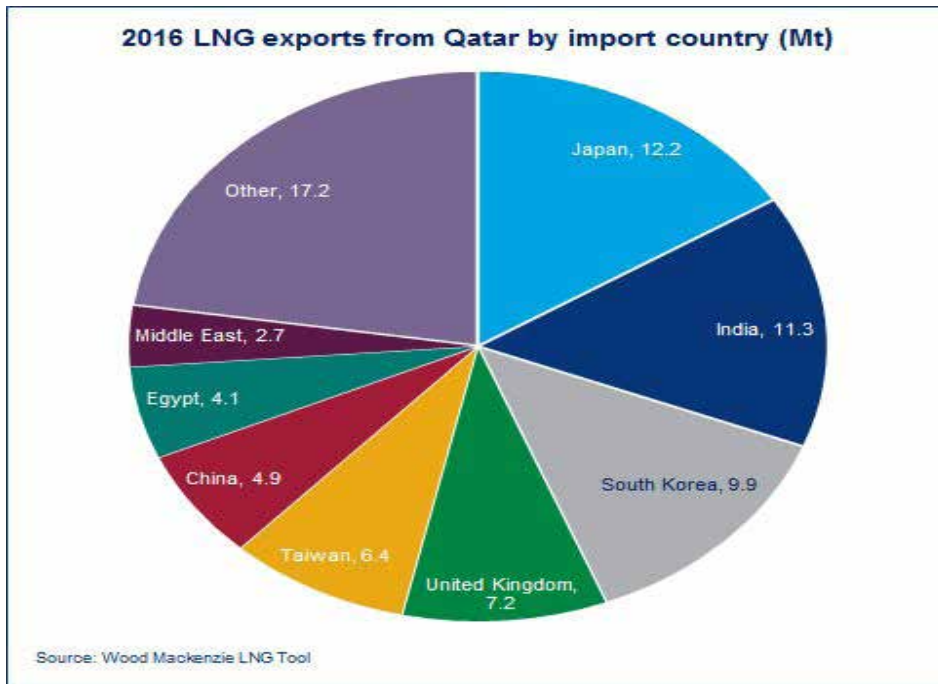


Note: "FID" does not include capacity stated to be under construction in Iran, nor is the project included in totals elsewhere in the report.

Sources: IHS, Company Announcements

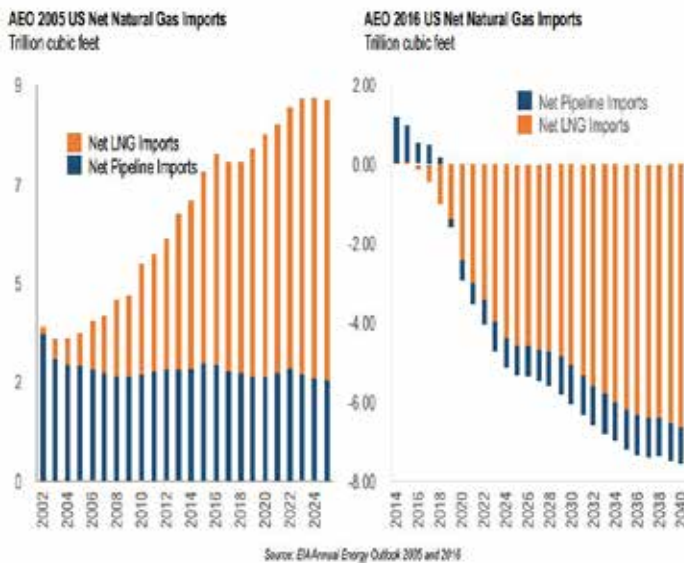
Graphic 8: Newly establishing LNG liquefaction facilities in different regions (Source: IGU World LNG Report – 2017 Edition)

Graphic 9 shows the countries Qatar exported LNG in 2016 and export quantities in million tons. It can be understood that the most sufferer countries from a supply shortage are Japan, India, South Korea and the UK respectively. These countries are in US market target in short run.



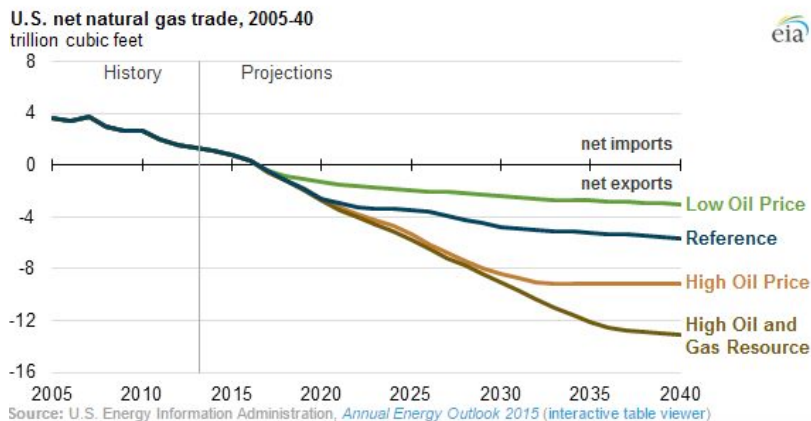
Graphic 9: Qatar's LNG exports in 2016 (Source: Wood Mackenzie)

Graphic 10 shows the projections of US natural gas import which can be understood from the increase in the planned facility capacities. It shows that the US tends to export LNG significantly.



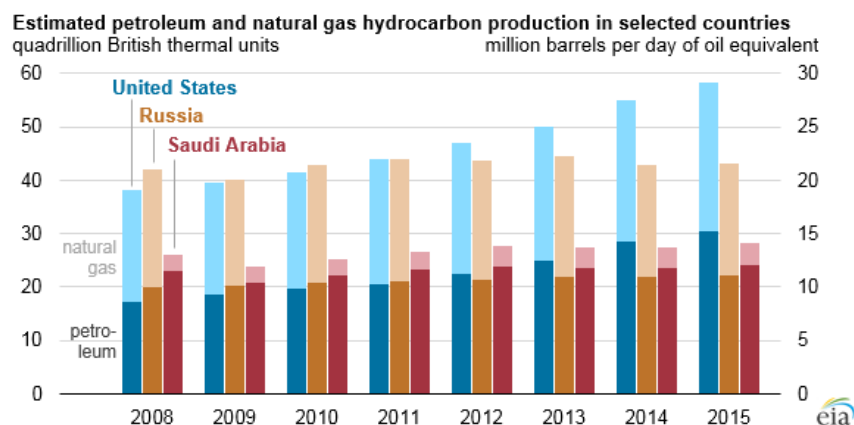
Graphic 10: US net natural gas imports (Source: EIA)

Graphic 11 shows the change in US natural gas export ratios according to different oil price projections. Thereby, high oil prices and natural gas prices are needed to develop and produce unconventional sources which are produced costlier than conventional sources and major part of US natural gas production.



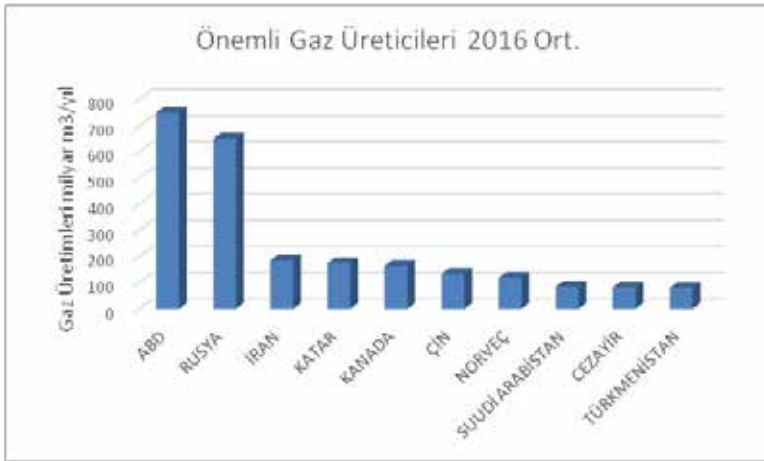
Graphic 11: US net natural gas trade (Source: EIA)

Graphic 12 shows that the US is the leader country in terms of oil and natural gas production. Though, high consumption relative to these production quantities limits its efficiency to become a net exporter.



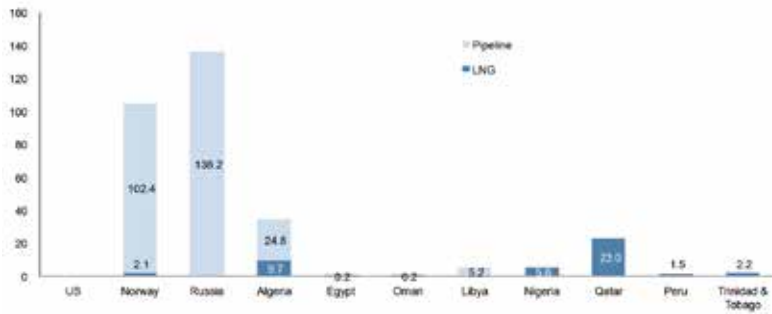
Graphic 12: Estimated petroleum and natural gas production in selected countries (Source: EIA)

Graphic 13 shows the order of major natural gas producer countries based on their 2016 average production.



Graphic 13: Major natural gas producer countries (Source: TESPAM)

Graphic 14 shows the quantity of natural gas import of the EU in 2013 in types of LNG and pipeline. As it is seen, the leader is Russia, next Norway, Nigeria and Qatar. Qatar will be the most significant competitor in these markets for the US which targets EU markets as an LNG exporter.

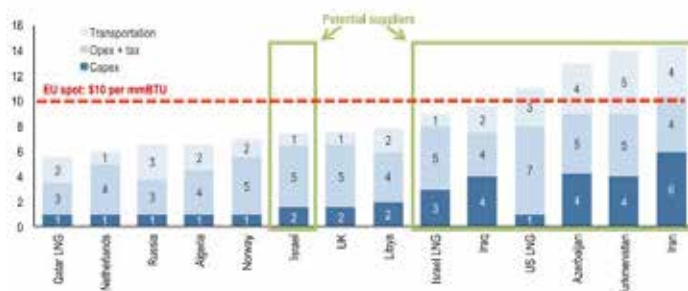


Graphic 14: EU natural gas imports in 2013 (Source: BP) (Units: billion m3)

Graphic 15 shows natural gas unit cost of selected countries when they transfer to the EU by including production, operation, tax and transportation costs.

It can be understood from the graphic that no other LNG supplier country has a chance to become a price competitor against Qatar.

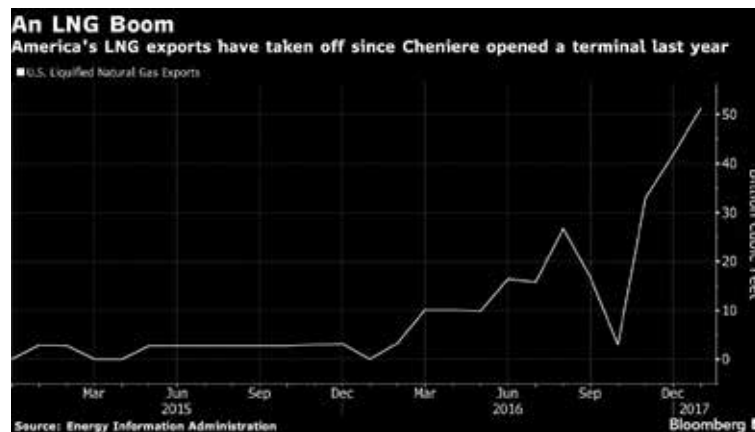
Note: Some approaches in this graphic are not consistent; however, the interpretation based on the LNG stated above is correct.



Graphic 15: EU existing and potential suppliers' natural gas costs (Source: Columbia University/SIPA)

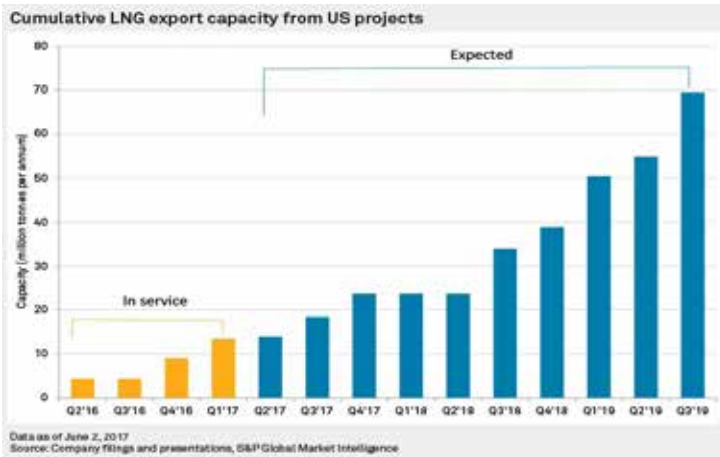
Graphic 16 shows how LNG exports of the US, which has potential of increase in source and production, after increasing its export facility capacity.

In other words, the US will increase its export capacity as it establishes new facilities in conjunction with oil prices and internal markets.



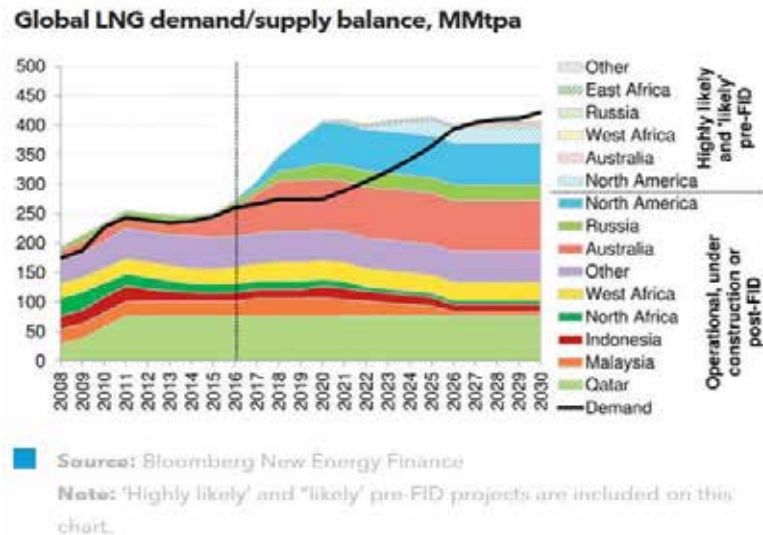
Graphic 16: Change in balances of US exports with a new LNG terminal (Source: Bloomberg)

It can be understood from the Graphic 17 that the US will have LNG export potential as Qatar has until the end of 2019 with planned and constructed LNG facilities. In other words, the US will fill the market gap easily due to a reduction in production after a potential embargo on Qatar or pressure over Qatar.



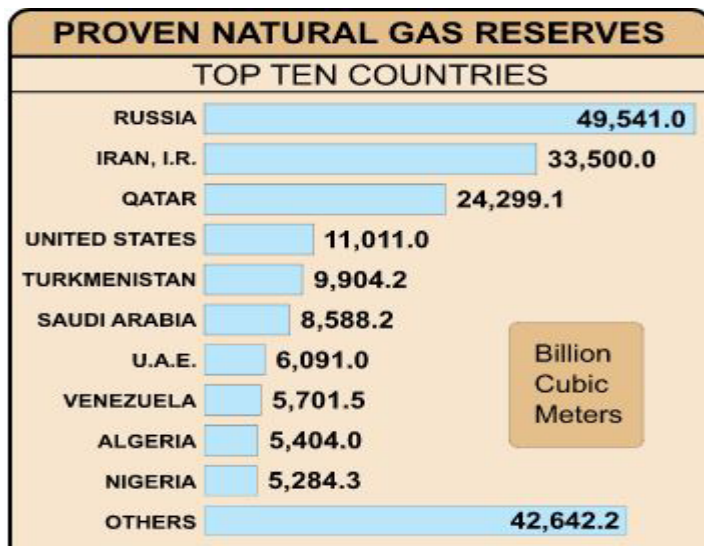
Graphic 17: US export potential with new LNG facilities (Source: S&P Global Market Intelligence)

Graphic 18 shows global LNG demand-supply balance. As it is seen, there is a competition in terms of supply between 2016 and 2025 since level of demand is lower than supply. North America (i.e. the US) which entered the LNG market recently attracts notice in this competition.



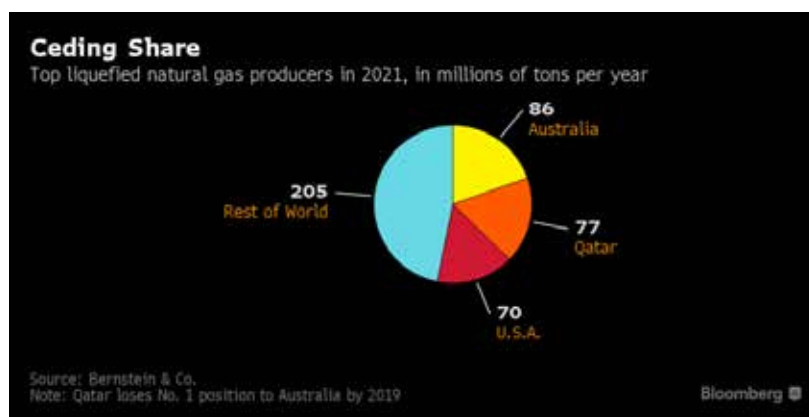
Graphic 18: Global LNG demand-supply balance (Source: Bloomberg)

Graphic 19 shows selected countries' natural gas reserves in billion m³ to compare proven source quantities. It can be understood from this graphic that Russia is the dominant country, Qatar is the third and the US is the fourth one.



Graphic 19: Natural gas reserves of selected countries (Source: 2016 Data of the OPEC <http://www.theglobaleducationproject.org/earth/energy-supply.php>)

It can be understood from the Graphic 20 that Australia rather than Qatar will be the leader in LNG market in 2021, by considering new LNG facilities planned. Nonetheless, the US will be the third country after Qatar.



Graphic 20: Top LNG producers' projected new capacities in 2021 (Source: Bloomberg)

After examining these graphics and approaches, the questions about the Qatar crisis and other energy related questions will be answered.

What is the Place and Importance of Qatar in the World Energy Balance?

As it can be understood from the graphics, Qatar is the 3rd important country in terms of natural gas reserves, the most important country in terms of LNG export, and the most advantageous county in terms of price competition by producing the cheapest LNG.

How Can the Changes in the World LNG Balance Be Summarized?

The trend toward LNG, LNG demand and LNG supply to meet this demand is increasing. LNG is becoming the most important agenda for natural gas policies and even for energy policies of many countries.

Who are the Competitor Countries for Qatar? And Who Will Be?

In this context, Qatar is the competitor for producers such as Australia, Malaysia, Russia and Nigeria. Though, if Qatar can establish the related facilities, it will be the competitor for the US and Iran.

Has Qatar Any Superiority Over These Competitors?

Yes, it has! It is evident that it has superiority in terms of its existing client portfolio, agreements, production and transportation infrastructure, price competitive power by producing and transporting cheaply, and having enough resources.

Qatar is an LNG producer with extremely low fixed and variable costs making it a deal maker. Pressure from Egypt to Qatar for not using the Suez Canal makes Qatar to look for new routes to reach European markets especially to the UK. Since these new routes increases the transport cost, Qatar may have to re-direct its export to Asia rather than European markets.

Why is Qatar Competitor for the US LNG Market?

First of all, the US targets the major LNG markets such as the EU, Japan, and India in which Qatar is the dominant country. But, the US has not any chance to compete in terms of price with Qatar in these markets.

For Russia and Iran which have significant amount of resources, it is not so important to compete with Qatar due to internal consumption, markets reached via pipelines, and not realizing planned projects because of financial problems.

Egypt's export capacity is very limited and not high.

Australia's condition is similar to Egypt. Its advantage is lower than Qatar in terms of resource amount and costs. However, it targets Chinese and Indian markets in terms of logistical advantages. In this sense, it will be the one of the competitors for the US.

Nigeria will not compete with Qatar in terms of resources, costs and stability.

Thus, the most important competitor in LNG markets for Qatar is the US.

May The Process Go Beyond Introducing Embargo in LNG Export for Qatar?

It may be possible for a short time; however, it is needed that the US can do desired steps in the process that is worth introducing the embargo. It is seen that it can reach

this capacity until the end of 2019. Nonetheless, it may attempt to change Qatar's export policies by pressing over Qatar as an easier solution. At the end of the crisis process, the US underlined that it has most reliable vendor.

Thus, such a sanction may be considered for a short time to get share for new actors in excess supply markets. On the other hand, from a different perspective, US corporations' partnerships in natural gas producer firms may have an effect preventing the embargo.

What Will Be the Impact of the Embargo in LNG Export over the Markets?

As it can be seen in the graphics above, Japan, India, South Korea and the UK will be in difficult for a short time; however, as Graphic 16 shows that excess supply will fill the gaps in the markets. Moreover, rises in the prices will be realized, too.

How Will the Process Affect Oil Prices and OPEC's Decisions on Reduction?

OPEC's decisions on reduction are very limited. Particularly, production increase in North America will reduce this impact more. The influences of the reductions will be seen after 2020 more clearly.

Qatar has 1.9 million barrel/day oil production and 1.6 million barrel/day oil export.

- An increase in oil prices is predicted since an embargo decreases or ceases production.
- Moreover, it is predicted that prices will increase because the crisis creates a tension even when any embargo is not introduced. Though, North America can change the situation reverse.
- Overall, by regarding its magnitude in oil production comparing to Saudi Arabia and the US, no significant impact like in LNG markets is expected.

Does the Crisis or a Potential LNG Export Embargo Work for Russia and Iran?

It does not work for Russia which has very limited power in LNG markets and for Iran which has no power in LNG markets to get any share in the short run. Nonetheless, a potential embargo will increase natural gas prices, which is better for both countries,

So, What is the Role of Energy in the Qatar Crisis?

Energy has no role in the Qatar Crisis as a major factor. It is just a mediator for the US to achieve some aims related to increase its activities in targeted markets. Accordingly, it is considered that energy is not a major but a minor reason in the crisis.

How to Summarize Qatar's Energy Balances?

Qatar produces 600,000-barrel oil and 1.3-million-barrel condensate daily. 300,000 barrels of this production is consumed in the internal market and the rest is exported.

It has approximately 180 billion m³ natural gas. Of this production, 106 billion m³ as LNG, 20 billion m³ via Dolphin Pipe Line (which is 48") in the UAE (17.7 billion m³) and in Omani (2.3 billion m³), and 6 billion m³ as GTL (gas to liquid) are transferred in related facilities. After transformation, they are exported to markets and the rest is consumed domestically.

When we look at energy consumption numbers, 17% of current consumption is oil, and the rest is natural gas. Electricity is generated from natural gas in a 99% ratio.

There are 14 LNG units in North Field which is the greatest natural gas field to transform natural gas to LNG. 7 units of them are operated by Qatargas (Qatar Petroleum + Exxon + Shell + Mitsui + Marubeni + Conocophilips), and 7 units of them are operated by RasGas (Qatar Petroleum + Exxon).

GTL facility in the country is operated by Qatar Petroleum and Shell.

Exxon, Occidental, Nippon, Maersk, Shell, Total, Sasol are foreign corporations operating in research, production and transportation in Qatar.

4. CONCLUSION

The US, which is attempting to form a struggle based on Sunni-Shia dispute without any active attack and spending any money after Egypt, Iraq and Libya, where the US could not fix the situation after pushing them into a chaos in spite of spending billions of dollars, has triggered a new crisis between Qatar and some other Arab countries.

The crisis has spread very quickly and the region is pushed in a new tension.

The Westerner mentality, which is very successful in terms of achieving their goals in the region with crisis and chaos and earning it with blood of Muslims, targeted Iran in principle as well as some other goals with the Qatar crisis.

Issues related to the crisis such as benefit analyses and goals are explained above.

In addition, it has been aimed to isolate Turkey by damaging its economy and diminishing the confidence in Sunni people. When we look into social media, sharing (made especially by Western groups and individuals) aim to create a perception that Turkey should cease its support to the Muslim Brotherhood and Qatar (otherwise Turkey will be declared as -so called- terrorist country), also it is not strong enough to solve this crisis.

From energy part, the principle goal is not energy in the crisis; however, it seems like that the US will benefit from the crisis by increasing its LNG export share.

Over all, Turkey, which stands by the oppressed, peace and humanity and does not want a new crisis in its region, has been taking action on whatever has to be done. The worst scenario is a potential Sunni-Shia war in the region of Middle East and Islamic World.

It should be noted that Turkey needs an agencies, which will develop and coordinate tackling of international blames, operate over global misperceptions and do great negotiations against any threat issue directed to its national security.