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## **TÜRKIYE'S CONTEMPORARY ENERGY DIPLOMACY: REGIONAL DIRECTIONS AND STRATEGIC PARTNERSHIPS**

In the context of the growing demand for energy resources and the transformation of the global energy system, energy diplomacy has become an increasingly important instrument of states' foreign policy. This study examines the main features of Türkiye's energy diplomacy in the contemporary international conditions. The main objective of the research is to analyze the structure of Türkiye's energy sector and the key directions of its energy cooperation with regions worldwide. The results of the study demonstrate that Türkiye's energy policy is shaped by its heavy reliance on energy imports, the steady growth in domestic energy demand, and the need to diversify energy sources. In this context, Türkiye's geographical position plays a crucial role. In other words, the geographical aspect enables the country to serve as a transit hub between resource-rich regions (Russia, the Middle East, North Africa, Central Asia, and the Caucasus) and European energy markets. At the same time, it facilitates the development of multi-vector cooperation with the United States of America and China. These findings led us to a better understanding of the main directions and regional dimensions of Türkiye's contemporary energy diplomacy. They also highlight the growing importance of regional energy cooperation in shaping the country's foreign policy priorities.

**Keywords:** Türkiye, Energy Diplomacy, Energy Cooperation, Transit Hub, Multi-Vector Cooperation.

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### **Түркияның заманауи энергетикалық дипломатиясы: өңірлік бағыттар және стратегиялық серіктестіктер**

Энергетикалық ресурстарға деген сұраныстың артуы және жаһандық энергетикалық жүйенің трансформациясы жағдайында энергетикалық дипломатия мемлекеттердің сыртқы саясатының барған сайын маңызды құралына айналууда. Бұл зерттеуде қазіргі халықаралық жағдайдағы Түркияның энергетикалық дипломатиясының негізгі ерекшеліктері қарастырылады. Зерттеудің басты мақсаты – Түркияның энергетикалық секторының құрылымын және оның әлемнің түрлі өңірлерімен энергетикалық ынтымақтастығының негізгі бағыттарын талдау. Зерттеу нәтижелері Түркияның энергетикалық саясаты елдің энергия ресурстары импортына жоғары тәуелділігі, ішкі энергия сұранысының тұрақты өсуі және энергия көздерін әртараптандыру қажеттілігі сияқты факторлардың ықпалымен қалыптасатынын көрсетеді. Осы тұрғыда Түркияның географиялық орналасуы шешуші рөл атқарады. Басқаша айтқанда, географиялық фактор елге ресурстарға бай өңірлер (Ресей, Таяу Шығыс, Солтүстік Африка, Орталық Азия және Кавказ) мен Еуропаның энергетикалық нарықтары арасындағы транзиттік торап ретінде қызмет етуге, сондай-ақ АҚШ пен Қытаймен көпвекторлы ынтымақтастықты дамытуға мүмкіндік береді. Зерттеу нәтижелері Түркияның заманауи энергетикалық дипломатиясының негізгі бағыттары мен өңірлік өлшемдерін тереңірек түсінуге мүмкіндік береді. Сонымен қатар олар елдің сыртқы саяси басымдықтарын қалыптастырудағы өңірлік энергетикалық ынтымақтастықтың маңызы артып келе жатқанын көрсетеді.

**Түйін сөздер:** Түркия, энергетикалық дипломатия, энергетикалық ынтымақтастық, транзиттік торап, көпвекторлы ынтымақтастық.

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### Современная энергетическая дипломатия Турции: региональные направления и стратегические партнёрства

В условиях растущего спроса на энергетические ресурсы и трансформации глобальной энергетической системы энергетическая дипломатия стала все более важным инструментом внешней политики государств. В данном исследовании рассматриваются основные особенности энергетической дипломатии Турции в современных международных условиях. Главная цель исследования – анализ структуры энергетического сектора Турции и ключевых направлений ее энергетического сотрудничества с регионами по всему миру. Результаты исследования показывают, что энергетическая политика Турции формируется под влиянием сильной зависимости страны от импорта энергоносителей, устойчивого роста внутреннего спроса на энергию и необходимости диверсификации источников энергии. В этом контексте географическое положение Турции играет решающую роль. Иными словами, географический аспект позволяет стране выступать в качестве транзитного узла между богатыми ресурсами регионами (Россия, Ближний Восток, Северная Африка, Центральная Азия и Кавказ) и европейскими энергетическими рынками, а также развивать многовекторное сотрудничество с США и Китаем. Полученные результаты позволяют лучше понять основные направления и региональные измерения современной энергетической дипломатии Турции. Они также подчёркивают возрастающую роль регионального энергетического сотрудничества в формировании внешнеполитических приоритетов страны.

**Ключевые слова:** Турция, энергетическая дипломатия, энергетическое сотрудничество, транзитный узел, многовекторное сотрудничество.

#### Introduction

In 2012, the U.S. Department of State stated that energy is fundamental to global economic development, national security, and the promotion of democratic values. This approach was institutionalized with the creation of the Bureau of Energy Resources in 2011, which identified key priorities, including energy diplomacy, energy transportation, and improved energy governance and access (U.S. Department of State, 2025).

Energy diplomacy is regarded as an important dimension of international relations and a key instrument of foreign policy. States pursue various strategic objectives through coordination on energy issues. Successful energy diplomacy strengthens geopolitical influence, reinforces the economic and political position of developed countries, and encourages developing states to use it to advance national interests through international energy cooperation. The growing importance of energy diplomacy is closely associated with the 1973 oil crisis, which resulted in sharp price increases and instability in global energy markets. As a result, in 1974, the International Energy Agency (IEA) was established to promote cooperation on energy supply and security (Gerani & Komnios, 2025).

The mid-1970s also witnessed the emergence of scholarly research devoted to energy diploma-

cy. This period was marked by growing discussions in both American and Soviet academic and policy circles concerning profound transformations in the global economy and the increasing demand for energy resources. In this context, the American scholar Philip H. Abelson emphasized the need to implement measures to reduce import dependence and address the imbalance between energy resource reserves and production levels relative to the Soviet Union. At the same time, the concept of energy diplomacy was reflected in the research of the Soviet (now Russian) scholar and diplomat Stanislav Zhiznin. Zhiznin defined energy diplomacy as a set of foreign policy measures aimed at securing and protecting a state's national interests in the energy sphere (Abelson, 1976; Zhiznin & Trusova, 2019). In Türkiye, the growing importance of energy issues has also attracted considerable attention. Among the prominent figures emphasizing the increasing significance of both conventional and renewable energy sources was former Turkish Minister of Energy Hilmi Güler. In the mid-2000s, he highlighted the continuing growth in demand for primary energy resources, particularly oil and natural gas, alongside the gradual development of renewable energy sources capable of meeting the growing needs of both domestic and global markets. H. Güler also viewed Türkiye as an active participant in regional and international energy dialogue (Güler, 2006).

Beyond the Turkish case, the strategic importance of energy was increasingly recognized internationally. Since then, energy issues have remained among the most sensitive and decisive factors in international relations. In 1992, the role of energy in the global system was widely discussed at the 15th World Energy Council Congress. It was emphasized that in the 21st century, energy would play a crucial role in economic stability, prosperity, and broader social and environmental conditions. The discussions also reiterated that the oil crises of the 1970s had fundamentally changed global perceptions, highlighting the need to develop mechanisms to ensure energy security for both individual states and the international system as a whole (Bennett, Mueller, Byam, Miremadi, & Sinyak, 1993). Subsequent developments in the global energy sector largely confirmed these assessments.

Indeed, the importance of energy in the global economy continues to grow. In 2024, global energy demand increased by 2.2%, with the electricity sector showing the fastest growth (4.3%). China, India, and the US recorded the highest levels of energy consumption. The growth in energy demand is associated with factors such as climate change, rising global temperatures, and ongoing digitalization and electrification (IEA, 2025). Against this background, investment in the energy sector continues to expand. By 2025, global energy investments are projected to reach approximately \$3.3 trillion. A significant share of these investments is directed toward nuclear and renewable energy, power grids, and energy storage technologies, while investment in the oil sector is expected to gradually decline (IEA, 2025). For comparison, global energy investment in 2015 totaled about \$1.8 trillion, significantly lower than the projected \$3.3 trillion for 2025. At that time, around 45% of investment was directed to the oil and gas sector, while investment in electricity amounted to approximately 420 billion dollars (IEA, 2016). In 2022, global energy investments reached approximately \$2.4 trillion. During this period, the role of electricity in the global energy system increased, while demand for fuel production declined (IEA, 2022).

So, rising electricity demand, growing investment in the energy sector, and increasing competition for energy resources indicate that energy continues to shape contemporary international relations. In this context, states increasingly rely on energy diplomacy to strengthen energy security, diversify supply sources, and protect their national interests.

These global trends are particularly relevant for countries such as Türkiye, whose geographical location and energy policy enable it to play an important role in regional and international energy cooperation. This study examines how Türkiye employs energy diplomacy to strengthen energy security, advance its national interests in energy, and expand its role as a regional energy hub.

### Literature review

The turbulence of the contemporary geopolitical environment and the growing importance of energy resources have intensified discussions on energy security. Academic studies on energy policy and energy diplomacy primarily examine the relationship between energy and foreign policy, changes in global energy markets, and the role of states in international energy relations. Against this background, energy diplomacy has become an increasingly important component of foreign policy, as access to energy resources and transport routes continues to influence economic development, political relations, and national security. Türkiye occupies a distinctive position within this framework. Despite its dependence on imported energy resources, the country's geographical location between major producing regions and European markets enables it to participate actively in regional and international energy projects. These projects not only help meet the country's domestic energy needs but also strengthen Türkiye's position as an important actor in the evolving global energy system (Yılmaz & Sever-Mehmetoğlu, 2016). The successful pursuit of national interests in the energy sector and Türkiye's participation in addressing global energy challenges have become particularly relevant amid the transformation of global production structures, growing energy demand, climate change, and the modernization of energy infrastructure (Goldthau & K. Sovacool, 2012). Against the backdrop of a projected long-term decline in demand for primary energy sources such as oil, gas, and coal, a growing trend toward diversifying energy sources toward renewable energy has emerged. This trend is reflected in the growing investment in research activities and policy programs to address rising energy consumption and promote sustainable development in the energy sector (Kuzemko, Lawrence, & Watson, 2019). These developments have also affected Türkiye. Over the past decades, the country has adopted several national programs to ensure stable and economically viable energy supplies.

Addressing these challenges requires policies that strengthen energy security, expand infrastructure, and adapt to changing geopolitical and environmental conditions (Gül, Ercan, Akınoğlu, & Açıkgöz, 2025). These circumstances have largely shaped the multi-vector character of Türkiye's foreign policy. Today, the country pursues its national energy interests through cooperation with the Middle East, Central Asia, the South Caucasus, Europe, Africa, and the USA. At the same time, cooperation with Russia continues to play an important role (Siccardi, 2024). In recent years, growing attention has also been paid to developing energy cooperation with the People's Republic of China, which views Türkiye as a promising investment destination within the framework of the Belt and Road Initiative (Gürel & Kozluca, 2022).

A review of the existing literature shows that most studies examine Türkiye's energy policy primarily through the lens of individual projects, energy security issues, or bilateral cooperation with specific partners. While existing studies provide valuable insights into individual projects and specific dimensions of Türkiye's energy policy, fewer examine its energy diplomacy from a broader, multi-regional perspective. Therefore, this study aims to analyze the regional dimensions of Türkiye's energy diplomacy in the contemporary international environment. Unlike previous studies focusing on individual projects, energy security issues, or bilateral relations, this article provides a comparative assessment of Türkiye's energy diplomacy across multiple regional directions and incorporates recent developments of the last years.

### Materials and research methods

This study employs comparative and systems analysis to examine Türkiye's contemporary energy diplomacy. Comparative analysis was used to examine Türkiye's energy cooperation with Russia, the Middle East, Central Asia and the Caucasus, the European Union, the United States, Africa, and China according to four criteria: the role of each partner in Türkiye's energy imports, participation in major energy projects, contribution to supply diversification, and strategic significance for Türkiye's energy security. Systems analysis enabled the examination of Türkiye's energy diplomacy as an interconnected framework linking domestic energy demand, energy security, transit infrastructure, and international cooperation. The empirical basis of the study com-

prises official statistics and reports from the IEA, IRENA, EPDK, and the Ministry of Energy and Natural Resources of Türkiye, as well as academic literature on energy diplomacy and energy security. Sources were selected according to their relevance to the research topic and the availability of statistical and analytical data. The combination of these methods provided the basis for identifying the principal regional directions and strategic priorities of Türkiye's contemporary energy diplomacy.

### Results and discussions

Türkiye is geographically located near resource-rich regions such as the Middle East, Russia, and Central Asia. This position encourages Türkiye to develop state strategies to ensure energy security and strengthen its role as an important transit corridor between these resource-rich regions and Western markets (GIFGRF, 2013). At present, Türkiye's energy dependence is approximately 74%, making the country one of the largest energy consumers after China (Orallı, 2022).

Economic growth and energy consumption are closely interconnected and shape a country's energy demand. During the pandemic period from 2020 to 2022, economic growth rates increased from 1.80% to 5.57% (Samut, 2024). In 2023, despite the devastating earthquake, Türkiye's economy grew by 5.1%, while growth reached 3.8% in the first half of 2024. The significant increase in government expenditures was largely associated with reconstruction efforts following the earthquake. At the same time, Türkiye's heavy reliance on energy imports heightens the sensitivity of its energy sector to macroeconomic fluctuations. After a decline in inflation in 2023, energy inflation rose again in 2024, affecting prices in the electricity and natural gas sectors. Meanwhile, the volume of energy imports remains substantial. After reaching a record \$96.5 billion in 2022, it declined to \$69.1 billion in 2023 and is expected to decrease further (T.C. Cumhurbaşkanlığı Strateji ve Bütçe Başkanlığı, 2024).

Türkiye's energy consumption in 2023 reached 121,5 million tonnes of oil equivalent (Mtoe), 1% higher than in 2022 but 1.4% lower than in 2021. On average, energy consumption increased by about 2.1% during 2019-2023. The largest shares of energy use were recorded in the industrial sector (30.3%), the transport sector (27.4%), the residential sector (21.8%), and trade and services (10.5%). Fossil fuels dominated the energy mix (71.8%), fol-

lowed by electricity (20.3%) and waste heat and renewable sources (7.8%). In industry, fossil fuels accounted for 59%, electricity for 30.8%, renewables for 3.2%, and other sources for 7.2% (Bağ Güllü, Aksoy, Çalışkan, Serhadlıoğlu, & Taranto, 2025).

Globally, demand for fossil fuels (coal, oil, and natural gas) remains a defining feature of the energy system, and projections suggest that this trend will persist at least until 2050, particularly for oil and natural gas. At the same time, renewable energy sources, especially solar and wind power, are expected to expand rapidly. A similar structure can be observed in Türkiye, where fossil fuels continue to dominate the national energy mix. In 2022, total energy consumption amounted to 157.7 million tonnes of oil equivalent, with oil, natural gas, and coal accounting for the largest shares. Nevertheless, over the past two decades, the use of renewable energy sources has also gradually expanded (Yılmaz, 2024).

Electricity generation and the development of renewable energy sources represent important directions of Türkiye's energy policy. The active development of the electricity sector began in the 1960s and 1970s, coinciding with the country's transition to a planned model of economic development and the establishment of the Turkish Electricity Authority, which facilitated the development of the necessary energy infrastructure. Between 2010 and 2023, the average annual growth of installed power capacity was approximately 6.5%, reaching 107.693 MW by the end of 2023. Fossil fuels long dominated electricity generation: their share increased from 75% in 2000 to about 80% in 2007-2009, but declined to 56.1% by 2019. In 2023, fossil fuels still accounted for the largest share (57.9%), while renewable energy sources reached 42.1%. In recent years, particular attention has been given to the development of solar, wind, and geothermal energy, whose combined share in electricity generation reached about 19.5% during the same period. Coal accounted for around 36.3% of electricity generation, while hydropower's share fluctuated between 16.8% and 20.3% during 2021-2023 (Türkyılmaz & Bayrak, 2024).

Despite Türkiye's considerable renewable energy potential, its share in the energy mix remains limited, with solar energy accounting for about 5% and onshore wind for 24.6%. Overall, the renewable energy sector still lacks a sufficiently developed research base and practical support for wider implementation. As a result, Türkiye continues to prioritize fossil fuels, which also influences its

foreign policy in ensuring national energy security (Aytaç, 2024). In recent years, the share of renewable energy in Türkiye's electricity generation has increased. In 2024, electricity production was based on coal (34.7%), natural gas (18.9%), hydropower (21.1%), wind (10.4%), solar (8.7%), geothermal energy (3.1%), and other sources (T.C. Enerji ve Tabii Kaynaklar Bakanlığı, 2025). In 2024, Türkiye ranked 11th globally in renewable energy development potential, with the top ten including China, Brazil, India, Germany, Japan, Canada, Spain, France, and Italy (Kazancı, 2024). Türkiye's installed renewable energy capacity increased from 31.515 MW in 2015 to 68.984 MW in 2024. By comparison, China's capacity expanded from 479.103 MW to 1.827.270 MW over the same period, significantly exceeding that of other countries. In Türkiye, hydropower capacity also increased from 25.868 MW to 32.386 MW during the same period (IRENA, 2025).

Türkiye's electricity demand grew at an average annual rate of about 4.2% between 2000 and 2023. Driven by ongoing industrialization, consumption increased from 128.3 TWh in 2000 to 306.1 TWh in 2020 and 330.2 TWh in 2023. Fluctuations in demand during this period were influenced by factors such as the 2008 global financial crisis, the COVID-19 pandemic, the 2023 earthquake, and seasonal climate variations (APLUS Enerji, 2024).

So, the analysis demonstrates that Türkiye's energy sector is shaped by high energy demand, strong dependence on imported energy resources, and ongoing economic growth. Although fossil fuels continue to dominate the country's energy mix, recent years have seen a gradual expansion of renewable energy sources and electricity generation capacity. At the same time, increasing electricity consumption and industrial development further intensify the need for a stable and diversified energy supply. In this context, Türkiye's geographical location and its expanding energy infrastructure strengthen the country's potential to serve as both a major energy consumer and an important transit hub in the regional and global energy system.

#### *Regional cooperation*

As of 2025, Türkiye's main suppliers of natural gas were Russia (42%), Azerbaijan (22%), and Iran (14%). Other countries engaged in active energy cooperation with Türkiye include Iraq, Turkmenistan, and the United States. Türkiye's geographical position between resource-rich regions and the European energy market has strengthened its ambition

to become a regional energy hub linking East and West. However, several challenges complicate this objective, including the vulnerability of some partner states to international sanctions, regional political instability, insufficient energy infrastructure, and relatively low domestic gas production (institute, 2025). Currently, natural gas production in Türkiye is concentrated mainly in several Black Sea fields, including the Sakarya field, as well as in deposits in the provinces of Zonguldak, Tekirdağ, Kırklareli, and Istanbul (GAZBIR, 2025).

Consequently, this section examines Türkiye's key regional partners in pursuing its energy interests and implementing its energy diplomacy. Türkiye's energy cooperation is primarily based on long-standing partnerships with Russia, the Middle East (particularly Iran and Iraq), and Azerbaijan, which remain the country's principal suppliers of primary energy resources. At the same time, Turkmenistan and Kazakhstan are increasingly viewed as potential partners for the further diversification of natural gas and oil supplies. Growing demand for liquefied natural gas (LNG) has also strengthened cooperation with the United States and Algeria, which is one of Türkiye's most important LNG suppliers from North Africa. Furthermore, the expansion of renewable energy and the broader energy transition have provided new momentum for cooperation with China, whose role is increasingly associated with renewable energy technologies, infrastructure investments, and the modernization of Türkiye's energy sector. In this context, the European Union occupies a distinct position in Türkiye's energy diplomacy, acting not only as a major destination market for energy resources transported through Türkiye but also as an important partner in renewable energy development and energy transition initiatives.

#### *Russia*

Turkish-Russian energy relations are based on a series of regulatory and intergovernmental agreements that structure bilateral cooperation. The first interstate energy cooperation was established in 1984 with the signing of a natural gas supply agreement (Özel & Uçar, 2019). In 1997, the countries signed another agreement to transport Russian natural gas through the Black Sea, with supplies expected to increase from 0.5 billion m<sup>3</sup> in 2000 to 16 billion m<sup>3</sup> by 2025 (President of Russia, 2005). The Blue Stream pipeline was commissioned in 2003, enabling the direct supply of Russian gas to Türkiye (Fayzullayev, 2007). Since 2020, the

TurkStream pipeline has delivered Russian gas to Southern and Southeastern Europe (Knight, 2020). The project was based on an intergovernmental agreement signed on 10 October 2016, which envisaged the construction of two pipeline lines with a total capacity of 31.5 billion m<sup>3</sup> per year (Gazprom, 2018).

The escalation of the Ukrainian crisis increased Türkiye's importance as an alternative route for energy supplies to Europe. In 2022, Russian gas still accounted for about 25% of EU imports. As European states sought to diversify suppliers and reduce dependence on Russia, Türkiye's energy dialogue with Eastern European countries, particularly Bulgaria and Hungary, gained greater significance, reinforcing its role as a key transit corridor for energy supplies to Europe (Aktaş & Bağra, 2023). At the same time, the European Union initiated negotiations with alternative suppliers to diversify its energy sources. Key partners included Azerbaijan and Iraq, while Turkmenistan also emerged as a potential supplier despite lacking a direct border with Türkiye. Additionally, the United States, Norway, and North Africa were identified as regions with significant potential for long-term energy cooperation to replace Russian supplies (Adatepe & Göçoğlu, 2025).

A major milestone in Turkish-Russian energy relations occurred on 12 May 2010, when the two countries signed an intergovernmental agreement to build and operate the Akkuyu nuclear power plant in Türkiye (Government of the Republic of Türkiye; Government of the Russian Federation, 2010). The development of nuclear energy in Türkiye is driven by the need to strengthen energy security, reduce dependence on imported fuels, diversify the energy mix through stable low-carbon electricity generation, and support sustainable economic development (Aslan & Harmanda Çakan, 2023). The Akkuyu Nuclear Power Plant is the first nuclear project implemented under the Build–Own–Operate (BOO) model, under which a foreign investor constructs, owns, and operates the facility. This approach enabled Türkiye, lacking prior nuclear experience, to reduce initial financial and technological risks while increasing long-term dependence on the external partner (Kahraman, 2025). The project includes four reactor units, whose construction began in 2018, 2020, 2021, and 2022, respectively (Rus Tur Portal, n.d.). Construction of the first reactor has been completed, and the unit is expected to begin operation in 2026 (MK-Turtsiya, 2026).

Therefore, cooperation with Russia remains essential for Türkiye's energy diplomacy and security, ensuring stable energy supplies while increasing the country's dependence on a major external supplier and reinforcing its role as an important regional energy transit hub.

#### *Middle East*

Iran is one of Türkiye's most important energy partners in the Middle East. Relations between the two countries intensified, accompanied by a rapid expansion of economic cooperation in the early 2000s. Bilateral trade increased from \$1.2 billion in 2001 to a record \$21.9 billion in 2012, raising expectations that bilateral trade would reach \$30 billion. However, economic sanctions imposed on Iran negatively affected this trend, reducing trade to \$3.5 billion in 2020 before it recovered to \$6.5 billion in 2022 (Pirouz & Tangüner, 2023). In 2025, bilateral trade amounted to \$5.7 billion (TİM, 2026). Sanctions also affected energy resources, a key component of bilateral trade. Under these conditions, Türkiye sought to diversify its energy suppliers in the Middle East, including Iraq (Özdemir, 2018). Turkish-Iranian energy cooperation is based on a 1996 agreement providing for natural gas supplies of up to 10 billion m<sup>3</sup> annually and the construction of a gas pipeline. As a result, gas deliveries began on 10 December 2001 (T.C. Enerji ve Tabii Kaynaklar Bakanlığı, 2026). Construction of the first reactor has been completed, and the unit is expected to begin operation in 2026 (Sol, 2025). Energy cooperation between Türkiye and Iran remains strategically important. However, escalating U.S.-Iran tensions and potential sanctions on countries that cooperate with Iran may affect future supplies to Türkiye. Failure to renew the agreement could have both political and economic consequences, potentially forcing Türkiye to rely more on costly alternatives, particularly liquefied natural gas imports from the United States (Öztürk, 2026; Solaker, 2026).

Iraq is another important partner for Türkiye in ensuring stable oil supplies. Energy cooperation between the two countries dates back to the 1970s, when construction of the Kirkuk-Yumurtalık oil pipeline began in 1973, and the first oil deliveries occurred in 1977. The pipeline was shut down in 1990 due to the First Gulf War, but resumed operations in 1996. The Iraq War and subsequent sanctions temporarily slowed bilateral cooperation. However, oil flows were restored in August 2003. An agreement reached in September 2010 extended oil supplies

via the pipeline for an additional 15 years (Tümen, 2020). On 20 July 2025, Türkiye and Iraq signed a temporary agreement to resume oil supplies until 27 July 2026. The short-term nature of the agreement reflects plans to modernize the Kirkuk-Ceyhan pipeline. The modernization aims to expand its capacity to transport not only oil but also natural gas, petrochemical products, and electricity. However, this process is influenced not only by technical considerations but also by regional geopolitical dynamics. If negotiations proceed successfully, the renewed agreement may further strengthen Türkiye's strategic position as a major energy hub between East and West (Gökkaya, 2025).

So, Türkiye's cooperation with Iran and Iraq remains important for maintaining energy security despite the influence of regional instability and geopolitical challenges.

#### *Central Asia and Caucasus*

Azerbaijan is one of Türkiye's key energy partners. Natural gas supplies from Azerbaijan began in 2007 at around 1.2 billion m<sup>3</sup> and gradually increased to 9.5 billion m<sup>3</sup>. As a result, the two countries have assumed important roles in bilateral energy trade and in transporting Azerbaijani oil to international markets beyond Türkiye (Kalkan, 2022). Early attempts to establish an energy dialogue between Türkiye and post-Soviet Azerbaijan date back to 1993, when the two countries agreed to cooperate on developing Azerbaijan's energy resources and to discuss the transportation of Azerbaijani oil to the Turkish port of Ceyhan. A major milestone followed on 20 July 1994 with the signing of the 30-year "Contract of the Century" (Asrın Anlaşması), under which Türkiye became one of the partners in the development of Azerbaijan's oil and gas fields alongside companies from the United States, the United Kingdom, Russia, Saudi Arabia, Japan, and Norway. Türkiye Petrolleri A.O. (TPAO) initially received a 6.75% share in the consortium. In 2017, the agreement was extended through the "New Contract of the Century" (Yeni Asrın Anlaşması), under which TPAO's share was set at 5.73% (Progonati & Gashamlı, 2021). Today, interregional energy cooperation between Türkiye and Azerbaijan is implemented through several major pipeline projects. One of the most significant is the Baku-Tbilisi-Ceyhan (BTC) oil pipeline, whose construction was approved on 18 November 1999. This project facilitated closer integration between the South Caucasus and Western markets. It strengthened Türkiye's strategic role

within the broader partnership linking the European Union, the United States, and the South Caucasus. The Baku-Tbilisi-Erzurum (BTE) gas pipeline is another major energy project established through agreements in 1996 and 2001, with construction completed in 2007. Building on this infrastructure, the Trans-Anatolian Natural Gas Pipeline (TANAP) enabled the transportation of Azerbaijani gas across Türkiye to Greece (Aslantaş, 2023), where it connects with the Trans Adriatic Pipeline (TAP), supplying Central and Western Europe. Overall, energy cooperation between Türkiye and Azerbaijan remains strategically important, particularly in the context of regional energy connectivity and the diversification of gas supplies to European markets (Yıldız & Kakışım, 2025).

Turkmenistan's opening to global markets and international cooperation is generally associated with the 2006 political transition. Despite expanding trade and energy relations, the country continues to follow a policy of permanent neutrality, avoiding participation in international political disputes. Since then, Turkmenistan's principal energy partners have included China, the European Union, Türkiye, Iran, and Russia. Energy exports to Türkiye have grown significantly, rising from \$175.8 million in 2004 to \$967.1 million in 2022, then reaching \$1.66 billion in 2023. However, the limited number of export routes has encouraged Turkmenistan to diversify its markets, particularly toward the west and south. In this context, projects such as the Trans-Caspian Pipeline (TCP) and TAPI are viewed as potential routes for exporting gas to Europe and South Asia. However, their implementation remains dependent on geopolitical, security, and geographic factors (Özsoy, 2025). The idea of the Trans-Caspian Pipeline emerged in the 1990s and included two principal export options: connecting Turkmen gas to the TANAP-TAP system or transporting it via the White Stream project through Georgia across the Black Sea to Romania (Kanapiyanova, 2021). A significant recent development for Türkiye was the 2025 energy agreement with Turkmenistan. The agreement supports Türkiye's strategy to diversify energy suppliers and strengthen its ambition to become an energy hub between East and West. For Turkmenistan, it offers an opportunity to diversify gas buyers and potentially access European markets. Under the agreement signed on 1 March 2025, around 1.3 billion m<sup>3</sup> of natural gas are expected to be supplied annually via a swap mechanism through Iran. At the same time, Türkiye has expressed in-

terest in establishing a more direct route by linking Turkmen gas to the TANAP pipeline through a Trans-Caspian connection, although such a project remains costly and politically complex (Koçak, 2025).

Kazakhstan also represents an important partner for Türkiye in energy supplies. Although the two countries are not connected by a direct pipeline, crude oil trade has taken place. In the late 2000s and early 2010s, Kazakhstan's share of Türkiye's oil imports increased significantly, peaking in 2010, when Türkiye imported about 1.786 million tons of Kazakh crude oil. In earlier years, Türkiye imported 636 thousand tons of Kazakh crude oil in 2008 and 522 thousand tons in 2009. During the same period, Kazakhstan's share in Türkiye's oil imports increased from 3% in 2008 to 11% in 2010. In subsequent years, the share gradually declined, falling to around 3% by 2015-2016 (Yılmaz Bozkus, 2018). In 2019, Kazakhstan ranked among the top ten crude oil suppliers to Türkiye, exporting about 3.2 million tons. Although this volume remained below the levels of supplies from Russia and Iraq, it exceeded imports from other Caspian states, including Iran, Turkmenistan, and Azerbaijan (IICEC, 2020). In 2023-2024, exports of Kazakh crude oil to Türkiye declined from 3.47 million tons to 1.97 million tons (Economic Research Institute, 2025). However, in 2025, Turkish crude oil imports from Kazakhstan increased again to 3.77 million tons (Pro Finansy, 2026). A notable development in Türkiye-Kazakhstan energy relations was the 2025 Memorandum of Understanding on Energy Cooperation, signed during President Kassym-Jomart Tokayev's official visit to Türkiye, which outlined cooperation in the exploration and extraction of energy resources (Directorate of Communications, 2025). Kazakhstan and Türkiye are both interested in developing the BTC pipeline, which is viewed as an important route for diversifying Kazakh exports and Turkish energy imports. The concept of diversifying Caspian export routes emerged in 1991. It was formalized in the Ankara Declaration of 29 October 1998, signed by Türkiye, Azerbaijan, Georgia, Kazakhstan, the United States, and Uzbekistan in support of the BTC project (Kolomoytseva, 2009). On 16 June 2006, Kazakhstan and Azerbaijan signed an agreement in Almaty to transport Kazakh oil to global markets via Azerbaijan (AKJ "Adilet", 2006). In October 2008, Kazakhstan began shipping oil by tanker from the port of Aktau to Azerbaijan for transport through the BTC pipeline (Guliyev & Akhrarkhodjaeva, 2008).

According to official data, Kazakh oil transported via the BTC pipeline increased from 25.000 tons in 2022 to 347.100 tons by June 2023 (Kazenergy, 2023). Despite its capacity of about 60 million tons per year, the BTC pipeline remains underutilized, with shipments reaching 1.4 million tons in 2024 (Energy Insights & Analytics, 2025) and about 1,3 million tons in 2025 (TASS, 2026).

Overall, cooperation with Azerbaijan, Turkmenistan, and Kazakhstan contributes to Türkiye's strategy for diversifying energy supplies and strengthens its role in regional energy connectivity.

### *Europe*

The European Union and Türkiye maintain close cooperation in several areas, including the energy sector. Türkiye's integration with the EU began with the Ankara Association Agreement in 1963 and continued with the Customs Union in 1995. The country received EU candidate status in 1999, and accession negotiations started in 2005, although the process remains incomplete (Girgin, 2024). Geographical proximity remains a key factor shaping the energy dialogue between Türkiye and the European Union. Positioned between major energy suppliers in the Middle East and Central Asia and European consumer markets, Türkiye occupies a strategic transit role. In this context, the INOGATE program, launched in 1996, aimed to coordinate energy cooperation with post-Soviet states, with Türkiye participating as an observer. The European Union showed particular interest in Caspian energy resources, and joint initiatives led to the completion of the Turkey-Greece gas pipeline in 2007, enabling the transportation of Azerbaijani gas to European markets (Kakışım & Kodaman, 2019). Another major initiative was the Nabucco pipeline, proposed in 2004 with a planned capacity of up to 31 billion cubic meters per year to transport Caspian gas via Türkiye, Bulgaria, Romania, and Hungary to Austria (Ayhan, 2009). However, the Nabucco project was officially canceled in 2013 due to disagreements among participating countries and financing difficulties. Alternative initiatives subsequently emerged, including South Stream and the Trans-Anatolian Natural Gas Pipeline (TANAP). The South Stream project was later abandoned because of financial constraints and political tensions among Russia, the European Union, and Ukraine, and was effectively replaced by the TurkStream pipeline. The Trans-Caspian

Gas Pipeline faced a similar fate, as high construction costs, transit tariffs, and political disagreements among participating states hindered its implementation (Önder & Maden, 2023). The issue of Caspian gas supplies was partly addressed through the Trans-Anatolian Natural Gas Pipeline (TANAP), which connects to the Trans Adriatic Pipeline (TAP) after reaching Greece. In 2024, Azerbaijan exported 73.54 billion m<sup>3</sup> of gas, of which 42.74 billion m<sup>3</sup> went to EU countries and 30.8 billion m<sup>3</sup> to Türkiye (Yılmaz & Yılmaz, 2024).

In addition to hydrocarbon cooperation, EU-Türkiye relations have also expanded in the field of renewable energy. Influenced by European initiatives promoting alternative energy, Türkiye adopted its National Renewable Energy Action Plan for 2013-2023 and introduced several legislative and regulatory measures to stimulate the development of renewable energy sources (Kulaç & Çiğeroğlu Öztepe, 2020). Türkiye's involvement in renewable energy development is particularly visible in the Balkans. Between 2013 and 2023, Turkish investments in alternative energy projects in Bulgaria exceeded \$5 billion, with additional projects in Serbia, Montenegro, North Macedonia, and Albania. Total investments are expected to reach about \$8 billion by 2027 (Lami, 2025). In 2025, the European Union and the Turkish company BOTAŞ launched a €3 million project to develop low-carbon hydrogen technologies (Erkalan, 2025). In early 2026, the European Union and Türkiye signed a Declaration of Intent under which the European Investment Bank committed €200 million to support renewable and green energy projects (Newsroom, 2026). One of the projects implemented jointly by Türkiye and the European Union is the Greek-Turkish cooperation within the SolarHub Center of Excellence for Solar Energy, which aims to integrate the two countries' innovation ecosystems and support initiatives that strengthen regional energy hub activities (European Commission, n.d.). The project is implemented within the Horizon Europe program, the European Union's main research and innovation initiative, to which Türkiye became an associated participant in 2021 (European Commission, 2025).

Consequently, energy cooperation with Europe enhances Türkiye's role as both a transit corridor and a partner in developing renewable energy initiatives.

*USA*

In 2001, Türkiye adopted the Natural Gas Market Law No. 4646, allowing the import of natural gas via pipelines and in liquefied form (Avrasya Gaz, n.d.). The law established the regulatory basis for LNG imports from the United States, which began in 2016. Supplies increased significantly from 242.86 million m<sup>3</sup> in 2016 to about 2 billion m<sup>3</sup> in 2020. A similar trend was observed in crude oil imports, which rose from 169.398 tons in 2014 to 931.142 tons in 2019 (Shkurti Özdemir, 2020). In 2024, Türkiye imported 12.6 billion m<sup>3</sup> of LNG, including 5.6 billion m<sup>3</sup> from the United States and 5.4 billion m<sup>3</sup> from Algeria (Özdemir, 2025). A key milestone in Turkish-American energy relations was the LNG supply agreement signed in September 2025, providing for annual deliveries of about 4 billion m<sup>3</sup> of U.S. LNG to Türkiye from 2026 to 2045 (MERCURIA, 2025). During the same period, the two countries also signed a nuclear energy cooperation agreement (BBC News Turkish, 2025). These strategic agreements are expected to reduce Türkiye's vulnerability to supply disruptions by diversifying energy suppliers and to lay the groundwork for future cooperation in nuclear energy (Çevrioğlu, 2025). In October 2025, the United States and South Korea were reported as potential partners in the construction of Türkiye's second nuclear power plant in Sinop, which could provide access to advanced technologies for both conventional reactors and small modular reactors (SMRs) (Daily Sabah, 2025). Renewable energy cooperation is also an important dimension of Turkish-American relations. In 2009, the two countries signed a Memorandum of Understanding on energy cooperation (Investment & Finance Office, 2009). Turkish-American cooperation contributed to the development of the Alaşehir geothermal power plant in Manisa (Ali, 2011). In 2015, the U.S. Trade and Development Agency (USTDA) financed the development of a 13.2 MW geothermal power plant in Kuyucak (Rojas, 2015).

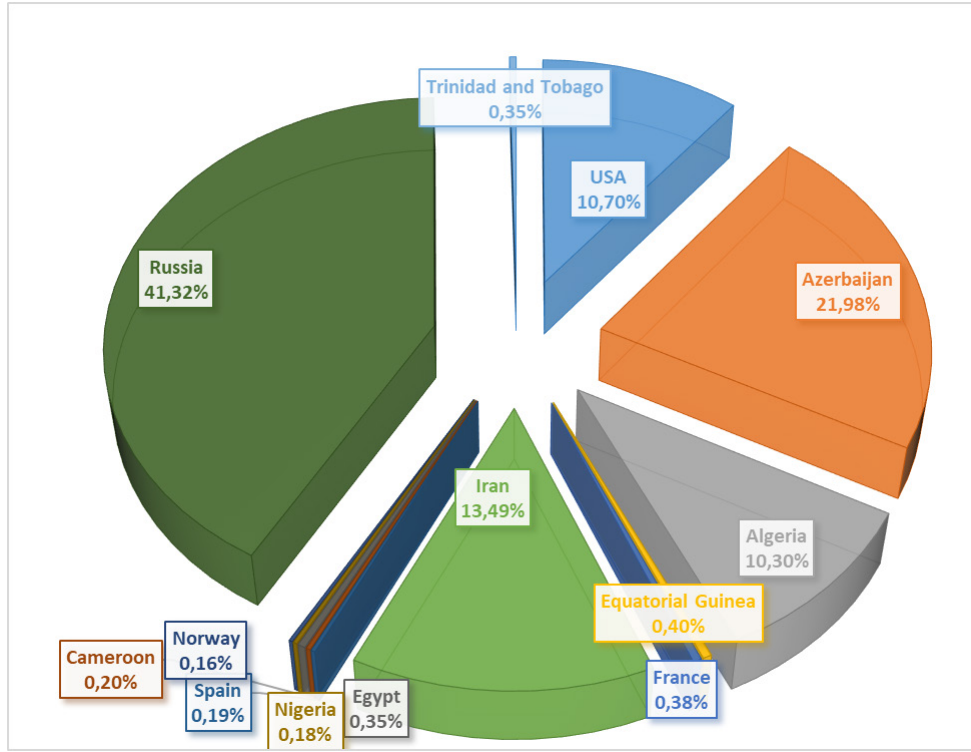
Thus, cooperation with the United States contributes to diversifying Türkiye's energy supplies while expanding collaboration in LNG and nuclear energy.

*Africa*

Africa attracts increasing attention from international actors due to its significant energy potential and opportunities for expanding economic cooperation. Energy-importing states are particularly interested in establishing stable partnerships with African countries. According to recent estimates, the continent holds about 30% of the world's mineral resources (APRM, 2025). As of 2025, Africa's largest oil producers included Nigeria, Libya, Angola, Egypt, and the Republic of the Congo (Johnson & Khaila, 2025). Africa's energy potential has encouraged external actors, including Türkiye, to strengthen cooperation with African states. Early discussions on expanding Turkish engagement in Africa emerged in 1965, when the country sent three diplomatic missions to 24 African countries. However, these initiatives achieved limited results, as the country's foreign policy during the 1960s was largely focused on the Cyprus issue (Fırat, 2009). Türkiye renewed its interest in Africa in the late 1970s with the adoption of the "Açılım Planı" (Opening Plan) in 1978. However, the initiative was suspended after the 1980 military coup. Efforts to strengthen relations resumed in 1998 with the "Açılım Eylem Planı" (Opening Action Plan). In the contemporary period, Türkiye's energy diplomacy in Africa has developed within the framework of the "Africa Opening Policy," which gained renewed momentum in 2005 (Eren, 2022). In 2005, Türkiye declared the "Year of Africa," reflecting its intention to expand cooperation with the continent, including in the energy sector. This trend was reinforced in 2008, when the country was recognized as one of Africa's strategic partners and became a potential partner of the African Development Bank (Alkan & Mercan, 2013). In 2013, Türkiye became a member of the African Development Bank (AfDB) (Alicı, 2025). In hydrocarbon energy cooperation, North Africa has emerged as Türkiye's principal partner region (Demirtaş, 2025).

The share of different countries in Türkiye's natural gas imports in 2024 is presented in Figure 1 (EPDK, 2025):

**Figure 1**  
Türkiye's Natural Gas Imports, 2024



Note. Compiled by the authors based on EPDK's Doğal Gaz Piyasası 2024 Yılı Sektör Raporu (2024)

Algeria accounts for the largest share of Türkiye's natural gas imports among African countries. Energy cooperation between the two countries is based on the LNG supply agreement signed on 14 April 1988. Following President Recep Tayyip Erdoğan's visit to Algeria in November 2023, the two countries agreed to begin LNG deliveries of about 4.4 billion m<sup>3</sup> annually starting in October 2024, with the contract extended until 2027 (BOTAŞ, 2023).

So, Africa, particularly North Africa, is an important component of Türkiye's energy diplomacy, contributing to the diversification of natural gas supplies and expanding energy cooperation with African countries.

#### China

The signing of the Strategic Partnership Agreement in 2010 marked a new phase in Türkiye–China cooperation, reflecting Türkiye's efforts to balance its relations with Western partners (Tekdal, 2023). This rapprochement enabled China to become Türkiye's largest import partner in 2016 and again in 2024–2025. According to official statistics, China's

share of Türkiye's imports reached 13.1% in 2024, 13.6% in 2025, and 14.9% in January 2026 (Ministry of Trade of the Republic of Türkiye, 2025; Ministry of Trade of the Republic of Türkiye, 2026). Bilateral trade between Türkiye and China increased from \$2 billion in 2002 to nearly \$45 billion in 2022. However, imports consistently exceeded exports: Turkish exports to China remained between \$2 and \$4 billion, while imports from China rose to about \$41 billion in 2022 (T.C. Ticaret Bakanlığı, 2023). In 2024, Türkiye exported \$3.4 billion to China, while imports reached \$44.9 billion (TİM, 2025). As of February 2026, 1419 Chinese companies operated in Türkiye, with total investments of about \$3.2 billion across sectors including transport, telecommunications, finance, services, and energy (Türk & Sevinç, 2026). As one of the world's largest producers of renewable energy equipment, China has become an important partner for Türkiye amid growing demand in this sector. One example is a solar panel manufacturing plant established in Istanbul with Chinese participation (Hamamcıoğlu & Sarı, 2026). Between 2005 and 2020, China invested about \$2.8 billion in Türkiye's energy sector,

with 21.9% allocated to renewable energy, mainly solar panel production, and 73.5% to coal-related projects (Kaya & Arı, 2021). In 2025, the Chinese company Astor Energy announced a \$700 million investment to build a solar panel manufacturing plant in Balıkesir with an annual capacity of 5 GW (Çağatay, 2025). In 2012, Türkiye and China signed an agreement to supply Chinese wind turbines totaling 600 MW (Industrial Info Resources, 2012). In 2024, the Turkish company GELGIT and China's NENG Construction agreed to build an on-shore wind power plant in Istanbul (Seetao, 2024). In 2025, Ekim Makina (Türkiye) and Tiron (China) agreed to finance the production of wind turbines in Edirne (SteelRadar, 2025). In late September 2025, Türkiye's Energy Minister discussed the construction of a 2 GW wind power plant project with Dongfang Electric Corporation, valued at about 250 million dollars (Reuters, 2025). Chinese companies are also involved in coal-fired power projects in Türkiye, most notably the Hunutlu Thermal Power Plant, one of the largest Chinese investments in the country under the Belt and Road Initiative (BRI) (Özenç, 2021). China is increasingly considered a partner in Türkiye's nuclear energy sector. In 2012, the two countries signed an agreement to strengthen intergovernmental coordination in this field, and China has since been viewed as a potential partner in building additional nuclear power plants on the Black Sea coast (Investment & Finance Office, 2012). In 2025, China, along with Russia, South Korea, and Canada, was identified as a potential partner in the construction of new nuclear power plants in Türkiye (Directorate of Communications, 2025). China's potential advantage in future nuclear projects in Türkiye lies in its ability to provide financial guarantees for large-scale infrastructure investments (Worldcrunch, 2012) and its extensive experience in nuclear technology and plant operation (NBP, 2024). China currently operates 58 nuclear reactors, with 33 additional units under construction (WNA, 2026). China ranks third globally in operational nuclear capacity (59.172 MWe), after the United States and France,

and leads the world in nuclear capacity under construction (41.100 MWe) (WNA, n.d.).

In summary, cooperation with China reflects Türkiye's growing interest in renewable energy technologies, infrastructure investment, and the modernization of its energy sector, while expanding opportunities for bilateral energy cooperation.

### Conclusion

Türkiye's energy diplomacy is shaped primarily by the country's high energy demand and continued dependence on imported energy resources. These conditions encourage the country to pursue a diversified foreign energy policy to ensure stable supplies and expand international cooperation. The analysis shows that Türkiye follows a multi-vector approach involving cooperation with Russia, the Middle East, Central Asia and the Caucasus, the EU, the USA, Africa, and China. While some partnerships are primarily focused on securing energy supplies, others contribute to the development of transit infrastructure, renewable energy projects, and investment cooperation. Türkiye's geographical location between major producing regions and consumer markets further strengthens its role in regional energy connectivity and supports its ambition to become an important energy hub. The implementation of large-scale infrastructure projects and the expansion of regional cooperation further contribute to Türkiye's deeper integration into the global energy system. Overall, Türkiye's contemporary energy diplomacy reflects the broader priorities of its foreign policy, combining the objectives of energy security, economic development, and strengthening the country's geopolitical position amid the ongoing transformation of the international energy system.

*Note: During the preparation of this manuscript, the author used Grammarly to check grammar and language accuracy. Following the use of this tool, the author reviewed and edited the manuscript as necessary and assumes full responsibility for the content of the publication.*

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Previously sent February 9, 2026

Re-registered March 17, 2026

Accepted June 2, 2026