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Türkiye's Energy Diplomacy under Justice and Development Party 2002–2025*

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Abstract

Türkiye's energy diplomacy suffered from political volatility and shifting priorities since World War II, but the AKP's 2002 electoral victory marked a transformative shift. The research aims to answer the question of what has been the strategies of the Justice and Development Party (AKP) in the field of energy diplomacy to solve the country's energy challenges? Using a mixed-methods approach (qualitative case study and quantitative statistical analysis) to assess its energy diplomacy the purpose is to determine how energy diplomacy has evolved under AKP rule and its implications for Türkiye's energy security and geopolitical influence. Findings reveal a three-tiered strategy: (1) diversifying energy sources, suppliers, and routes to reduce dependency; (2) expanding transit infrastructure to position Türkiye as a Eurasian energy hub; and (3) leveraging energy ties to enhance geopolitical influence. These measures stabilized supply, attracted investment, and elevated Türkiye's strategic importance. By integrating domestic reforms with assertive diplomacy, the AKP transformed Türkiye into a key player in global energy politics, balancing economic needs with geopolitical ambitions.

Keywords: Energy Diplomacy, Energy Security, Justice and Development Party, Hub of Energy, Türkiye

* The authors have no affiliation with any organization with a direct or indirect financial interest in the subject matter discussed in this manuscript.

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1. Introduction

Energy diplomacy refers to the use of diplomatic tools and strategies to manage and negotiate energy-related issues between countries or international organizations (Genitsaridis, 2023). It involves the development of policies and agreements that promote energy security, sustainability, and cooperation, as well as the resolution of conflicts and disputes related to energy resources and infrastructure (Ebinger, 2011). Energy diplomacy requires a deep understanding of the economic, political, and social factors that influence energy markets, as well as the ability to navigate complex international relationships and negotiations (Bahgat, 2011).

Energy diplomacy has become a crucial issue in Turkish foreign policy, as over the past two decades, Türkiye's economic and population growth (85.5 million in 2024) has led to greater reliance on imported energy (World Bank, 2024). Furthermore, the victory of the AKP in the parliamentary elections of November 2002 (with 363 seats) opened a new page in Türkiye's domestic and foreign policy (Carkoglu, 2002). The new energy diplomacy of Türkiye emphasizes modernizing the energy system, implementing a free pricing system, increasing the domestic production capacity through foreign and domestic investments, and diversifying import sources (Novikau & Muhasilović, 2023; Republic of Türkiye Ministry of Foreign Affairs, 2025).

In recent decades, many studies have been conducted on Türkiye's energy diplomacy. Three subjects are prominent in the literature on Türkiye's energy diplomacy, including: plans to meet domestic needs, Türkiye benefits from its geopolitical features because of being located at a crossroad between consumers and producers, and Türkiye's balanced diplomacy and relationships

with constructive foreign players of the energy market to maximize its benefits.

Kalehsar (2019) argued in his article that one of Türkiye's goals is to become an energy hub to supply energy resources for domestic consumption. Akcan (2014) analyzed the role of Türkiye in the energy supply of Europe as a transit country. Huseynov's (2017) research concluded the geographical role of Türkiye as the bridge between consumers and producers with a focus on natural gas producers. Tziarras (2022) analyzed Turkish energy diplomacy in the Mediterranean Sea. He concluded that Erdoğan sought to provide energy security by developing available hydrocarbon resources of Türkiye in the Mediterranean. In this regard, Erdoğan supported his country's allies in the Mediterranean Sea, including Libya, to pursue the new Ottomanism policy. Shirvani and Sharifi (1396 [2017 A.D.]) analyzed Türkiye's use of energy as a tool to advance its interest in the region and the international system. Sevim (2013) examined Türkiye's role in transporting the energy resources of Central Asia to the consumer markets, and, in this regard, he emphasized the role of pipelines, especially the Trans-Anatolian Natural Gas Pipeline (TANAP) pipeline.

The current paper, with an overview of the Turkish energy diplomacy from the establishment to the AKP ruling period, deals with the diplomatic strategies of the Turkish government to respond to the formulated energy strategies. According to previous research, the paper aims to answer the question of what has been the strategies of the AKP in the field of energy diplomacy to solve Türkiye's energy challenges? In this regard, Türkiye's energy diplomacy during the AKP has been a complex and multifaceted process. Furthermore, the AKP has pursued an active and ambitious energy diplomacy strategy, which has led to the

diversification of energy sources, the expansion of energy infrastructure, and the strengthening of Türkiye's position as an energy hub.

The article is therefore structured as follows: first we discuss the materials, methods, and theoretical framework, then we describe the historical background of Türkiye's energy diplomacy. Second, we analyze Türkiye's energy diplomacy, foreign policy regarding energy diplomacy, and pipeline politics. Finally, we provide the main findings of the research.

2. Material and Methods

This study analyzes Türkiye's energy diplomacy—a critical case, given its outsized role in global energy security despite limited domestic resources—using a mixed-methods approach combining descriptive statistical analysis and qualitative case study. First, descriptive statistical analysis is applied to existing international datasets (EIA, IEA, Enerdata) and national sources (Energy Market Regulatory Authority (EPDK)) to objectively quantify trends in Türkiye's energy capacity, import/export diversification, etc. This establishes empirical baselines for Türkiye's functional role in energy markets. Second, an in-depth case study analysis examines the geopolitical, institutional, and policy drivers underpinning this role, drawing on diplomatic agreements, etc. Energy diplomacy serves as the framework to integrate these layers: the descriptive statistics reveal what Türkiye achieves in energy systems, while the case study explains how and why, through its diplomatic strategy.

2. 1. Theoretical Framework: Energy Diplomacy

Since the 1970s energy crisis, energy security has become crucial in political science in international relations. For the first time, "Mason Willrich" dealt with energy security from the perspective of inter-state politics (Willrich, 1978). Some of the most prominent international relations thinkers, such as Kissinger, Huntington, and Brzezinski, who are known for their foreign policy and theoretical analysis, have also paid attention to the energy field.

In general, four theoretical approaches dominate the energy field: Geopolitics, interdependence, modern security studies, and energy diplomacy (Yu & Dai, 2012). Through changing theoretical perspectives, we can see how energy has been dynamic in different periods, partly because of the international system structure, influential actors, and how this concept is constructed socially. As the first theoretical approach to energy in international relations, Mason Willrich's *'Energy and World Politics'* and Bo Heineback's *'Oil and Security'* were published in 1978 and 1974 respectively after the oil crisis, respectively. According to this theoretical model, countries with abundant energy resources can influence governments that rely on their energy (Heinebäck, 1974). In this regard, the Energy security of a consumer country means being able to import energy at affordable prices without interruption. In contrast, energy producers aim to access new reserves and ensure the demand for their products (Bahgat, 2011).

Interdependence and the neoliberal debates of Robert Keohane and Joseph Nye were related to energy developments and crises in 1973 and 1979. This theory is practical for the energy security of importing and exporting countries because it considers the needs of countries. As a result, international institutions such as the

International Energy Agency (IEA) were formed to prevent anarchy in global energy diplomacy (Keohane, 2005; Nye, 2003).

As the post-cold War era progressed, traditional approaches moved into the modern field, which led to modern security studies. As Paul Stares states, the traditional approach to energy security considers interruptions in energy exports, divergence, and fluctuating energy prices as threats (Stares, 2000). However, with the emergence of a non-traditional view of energy security, the types of threats and their actors changed, and a multi-dimensional perspective of energy security emerged instead of one-dimensional and state-centric. As David Baldwin points out, modern security no longer encompasses a one-dimensional aspect, but includes population, environment, immigration, drug trafficking, and international terrorism (Baldwin, 2001). As a part of modern security studies, the fields of critical security studies and the Copenhagen school emerged. In this regard, the Copenhagen school is one of the dominant axes in energy security in the international system and anarchism.

Energy diplomacy is the fourth approach and one of the economic branches that focus on energy as the source of power, the origin of development, and the driving engine of economic growth, which should be considered as the pillar of diplomacy. The most well-known theoretician in energy diplomacy, S. Z. Žiznin, is a Russian thinker who has written outstanding scientific works and systematic analyses regarding energy diplomacy. Within international politics, energy diplomacy operates in two key dimensions: securing energy supplies and employing energy resources as a tool of statecraft (Žiznin, 2007). Considering the energy transition from fossil fuels to renewable energy, energy diplomacy should be a hybrid approach based on purpose and

instrumental orientation. Furthermore, energy diplomacy during the energy transition is becoming increasingly important as countries around the world seek to transition to more sustainable and renewable sources of energy. The transition to a low-carbon economy requires significant changes in energy policies, infrastructure, and investments, and this presents both opportunities and challenges for countries engaged in energy diplomacy (Goel, 2020).

One of the key challenges of energy diplomacy during the energy transition is balancing the interests of various stakeholders, including domestic consumers, energy producers, and international partners. Countries must navigate complex geopolitical relationships and economic interests, while also addressing environmental concerns and meeting their climate goals. This requires careful coordination and collaboration with other countries, as well as engagement with international organizations such as the United Nations (UN) and the IEA. At the same time, energy diplomacy during the energy transition presents significant opportunities for countries to enhance their global influence and competitiveness. Countries that are able to successfully transition to renewable energy sources can position themselves as leaders in the global energy market, attracting investment and fostering innovation (Griffiths, 2019). They can also strengthen their relationships with other countries by sharing their expertise and resources in the development of renewable energy technologies. Therefore, energy diplomacy during the energy transition requires a strategic approach that balances economic, environmental, and political considerations. The use of multilateral diplomacy will be crucial in deciding how far-reaching and significant this transition will be, as well as its effects on individual countries, regions, and

organizations that have mutual interests. Conversely, bilateral energy diplomacy can aid in the maintenance of long-term energy security and economic prosperity for individual nations by promoting foreign relations with regards to energy supply and demand.

Türkiye's energy strategy under the AKP vividly illustrates these theoretical approaches in action, particularly through its pipeline politics and diversification efforts. From a geopolitical perspective, Türkiye leverages its pivotal geography as an "energy corridor" between major producers (Russia, Caspian, Middle East) and European consumers (Yorucu & Mehmet, 2018). Projects like the Baku-Tbilisi-Ceyhan (BTC), Baku-Tbilisi-Erzurum (BTE), TANAP, and Turk Stream are quintessential instruments of geopolitical statecraft, designed to enhance Türkiye's strategic indispensability, secure transit revenues, and bolster regional influence by controlling critical infrastructure (Erşen & Çelikpala, 2019; Gol, 2024). Simultaneously, these pipelines embody interdependence, creating complex mutual dependencies. While Türkiye gains the security of supply and economic benefits, supplier countries (e.g., Azerbaijan, Russia) gain vital market access, necessitating ongoing institutional cooperation and mitigating pure power politics (Austvik & Rzayeva, 2017). Crucially, Türkiye's aggressive diversification strategy – reducing dependence on single suppliers by expanding sources and routes – directly reflects the modern security studies paradigm (Mehmet & Yorucu, 2020). This moves beyond traditional supply interruption threats to address multi-dimensional vulnerabilities: price volatility, political coercion, and regional instability. Diversification enhances resilience, a core non-traditional security objective (Khan, 2022). Furthermore, this strategy incorporates climate-related energy transition goals through investments in renewables (solar, wind)

and nuclear power, adding environmental security to the calculus. Thus, AKP's pipeline politics and diversification are not merely tactical moves; they represent the practical application of energy diplomacy (Zhiznin) as both a *tool* (using pipelines/diplomacy to achieve foreign policy goals like regional leadership) and a *primary goal* (securing affordable, diverse, and resilient energy supplies). This hybrid approach necessitates both bilateral deals for specific diversification and infrastructure, and multilateral engagement to manage systemic risks and transition challenges, demonstrating the convergence of all four theoretical frameworks in contemporary Turkish energy statecraft.

3. Historical Background

Turkish energy diplomacy has evolved since the establishment of the state in 1923, with an early focus on reducing reliance on foreign sources of energy through domestic production. Early efforts (1923–1940) involved institution building like Petrol Ofisi, Etibank, and research and development (R&D) organizations for coal, oil, and hydroelectric power. In the 1940s, Türkiye's energy diplomacy was affected by the consequences of World War II. Furthermore, although in the early 1940s, the Department of Natural Resources Management discovered oil in Raman, the production from the field started in the late 1949s. After the war, with the start of the comprehensive development plan in the industry and agriculture sector, which increased the need for transportation, the importance of energy was felt more than ever (Uludag et al., 2013).

In 1963, Türkiye launched a new economic model focused on cheap, sufficient, reliable, and clean energy from domestic sources.

The country aimed to reduce imports by relying on homegrown resources. To enhance energy efficiency, policymakers established institutions like the Ministry of Energy and Natural Resources (MENR) and the Turkish Electricity Administration, which still exist today (Balat, 2006). Furthermore, the energy sector in Türkiye is overseen by two primary institutions: MENR and the Energy Market Regulation Authority (EMRA). While MENR is responsible for developing energy diplomacy and establishing energy strategies, EMRA serves as an independent regulatory body that provides oversight and expertise (İşeri & Uygurtürk, 2022).

Türkiye's international payments for fuel import did not put much pressure on the government due to the low price of oil until the oil crisis in 1973. However, the rise of the oil price in 1973 and the increase in payments shocked the Turkish government. This crisis highlighted the ineffectiveness of existing energy policies, prompting policymakers to explore alternative energy sources, including nuclear power. Consequently, plans for the country's first nuclear power plant were initiated in 1983-84 (Telli, 2016). In 1902, Türkiye's first hydroelectric power plant was built in Tarsus-Adana with an 88-KW capacity. Furthermore, the first national conference on solar energy took place in Izmir in 1975. Mineral water studies began in 1962, and geothermal energy research gained traction in the 1970s, leading to Istanbul's first residential ground-source heat pump system in 1998. Additionally, the Cesme Altinyunus Resort Hotel in Izmir became the first to use wind energy for general electricity in 1986, with a capacity of 55 kW (Hepbasli & Ozgener, 2004).

Since the early 1980s, with the increase in energy demand, Türkiye's policymakers have raised the issue that access to sustainable foreign energy resources can pose a series of challenges to Türkiye's economy and industry. In this regard, energy

diplomacy became available as one of the Turkish policymakers' tools. Therefore, natural gas imports from the former Soviet Union began in the 1980s (Akiş, 2015).

Türkiye's goals were diversifying energy supply resources through access domestic energy sources, transportation routes, technology, and energy efficiency. However, these goals were hindered by changes in government and priorities. The Energy Market Regulatory Board was established to enhance energy efficiency, regulate renewables, and attract investment in transportation projects and refinery reconstruction, playing a key role in Türkiye's energy sector development (Schwartz, 2022).

In the 1990s, Türkiye experienced a booming energy diplomacy, leveraging its geographic position between rich hydrocarbon resources in the Middle East and Caspian Sea, and the energy market of the European Union (EU). Its ports and land routes facilitated pipeline construction for transporting oil and gas, while the Bosphorus and Dardanelles straits handled significant oil tanker traffic. Furthermore, Türkiye aligned its energy laws with EU regulations, joined the European Energy Community, and signed the Athens Memorandum to develop oil and gas markets in Southeast Europe. This cooperation established Türkiye as the Black Sea Regional Energy Centre (BSREC) and led to the creation of the Energy Market Regulatory Board, helping Türkiye adapt to global energy demands (Üstün, 2008).

4. Justice and Development Party's Energy Capacity and Approaches

In the last two decades, the Turkish energy diplomacy included responding to the energy demands growth and reducing its

dependence on energy imports (Gökçe et al., 2024). In this regard, to make a balance between these two strategies, Türkiye is trying to restructure the country's energy sector by moving towards modernization, liberalization, and increasing domestic production along with incentive programs to attract Foreign Direct Investment (FDI) through the private sector (Sirin, 2017). This dual focus highlights a fundamental challenge: meeting rapidly rising demand fueled by economic growth and population increase, while simultaneously attempting to curb the significant financial and strategic vulnerabilities associated with heavy reliance on imported fuels, particularly natural gas and oil. The restructuring efforts, encompassing modernization, liberalization, and domestic production boosts represent a multi-pronged approach to resolve this tension, with FDI incentives acting as a crucial catalyst for capital and technology infusion (İşeri & Uygurtürk, 2022). At the same time, the economic growth in April 2017, the MENR of Türkiye announced the country's national energy plan and mines. The Turkish national energy plan is based on three elements: First, improving energy security supply, second, localization based on the increase of domestic resources, and third developing the degree of energy market predictability (Erdoğan et al., 2018). These three pillars are deeply interconnected. Enhancing energy security is fundamentally tied to "localization" – reducing import dependency by maximizing domestic resources (renewables, coal, nuclear, and potentially hydrocarbons). Increased market predictability through stable regulations and transparent markets is essential to attract the long-term investments required for both security and localization goals, creating a self-reinforcing policy framework.

Furthermore, the National Energy Efficiency Action Plan (NEEAP) targets 2023 as the year when Türkiye will reduce its energy consumption to 14% with 55 measures in six categories:

building and services, energy, transportation, industry and technology, agriculture, and inter-regional areas (IEA, 2021). The NEEAP represents a critical, often understated, pillar of the overall strategy. Reducing energy intensity directly alleviates pressure on both the demand-supply balance and import dependency. By targeting efficiency across such a broad spectrum of sectors, Türkiye aims for systemic gains that complement supply-side investments, making the ambitious capacity expansion targets more achievable and sustainable in the long run (Erdogdu, 2025). Regarding the localization of energy infrastructure as part of the Turkish policy to improve energy security and increase domestic production, Türkiye turned to the development of renewable, nuclear, and coal resources (IEA, 2021). This resource triad reflects a pragmatic diversification strategy within the localization drive. Renewables (hydro, wind, solar, geothermal) offer clean, indigenous potential, but face intermittency challenges. Nuclear energy provides stable, high-capacity baseload power, but involves high costs, long lead times, and geopolitical dependencies. Domestic coal offers readily available fuel security, but conflicts with environmental goals. Türkiye's pursuit of all three underscores the prioritization of security and localization, even amidst competing priorities. Türkiye has also released its National Energy Plan for 2035, which aims to increase its energy capacity to 189.7 GW by 2035, with renewables accounting for 74.3% of new power capacity. The country's electricity consumption is expected to increase by 3.5% annually until 2035, reaching 510.5 TWh (Enerdata, 2024).

Türkiye's renewable energy installed capacity was 55,998 MW in 2022 (Statista, 2024). Türkiye also plans to build nuclear power plants to diversify its energy consumption. The Akkuyu power

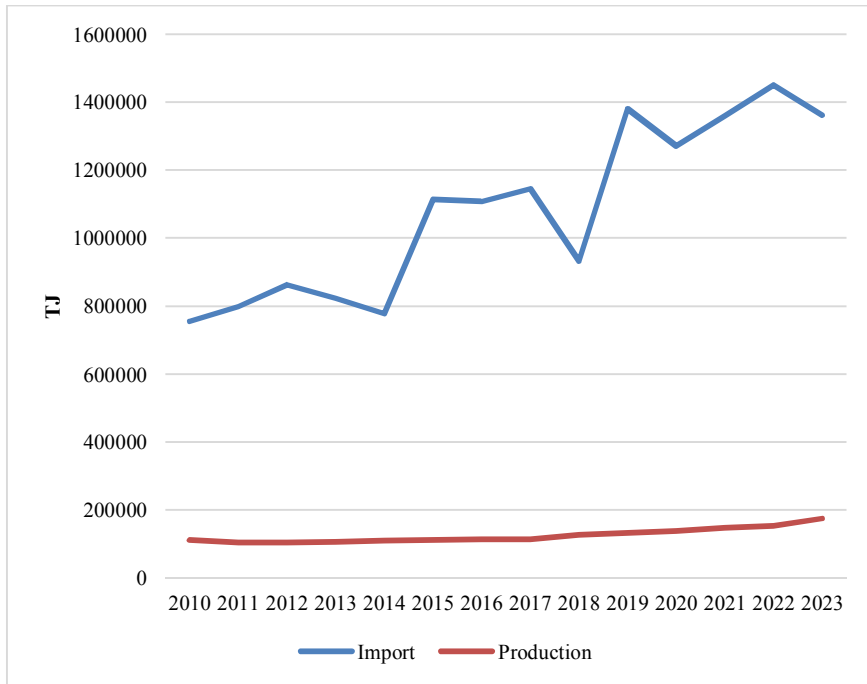
plant, with four reactors in Mersin province, was developed by Russia and began operating its first nuclear reactor in April 2023 with a generation capacity of 1.2 GW. The full capacity of this power plant with four reactors will generate 4.8 GW by the end of 2026. Japan was set to develop Türkiye's second nuclear power plant, the Sinpo project, on the Black Sea shore, but withdrew in 2018. Negotiations are ongoing to find a new contractor. Türkiye's third nuclear power plant is currently in the process of selecting a construction site (IEA, 2024). The nuclear program exemplifies both the potential and the complexities of Türkiye's localization and diversification strategy. Akkuyu's progress marks a significant milestone in adding large-scale, predictable domestic capacity, enhancing baseload security (Kahraman, 2025). However, its exclusive reliance on Russian technology, finance, and fuel creates a new form of strategic dependency, contrasting with the aim of reducing overall import reliance (Güler, 2020). The setbacks with Sinop highlight the geopolitical and financial risks inherent in such mega-projects, underscoring the challenges Türkiye faces in replicating the Akkuyu model for subsequent plants and finding reliable international partners willing to undertake the substantial risks involved (Aydın, 2020).

4. 1. Oil

In 2023, Türkiye had 371 million barrels of proven oil reserves, mainly situated in the southeastern areas of Batman and Adiyaman, as well as the northwestern region of Turkish Thrace. President Erdogan announced on December 12, 2022, that Türkiye's state-owned energy company, Türkiye Petrolleri Anonim Ortaklığı (TPAO), has found an additional 150 million barrels of oil reserves worth \$12 billion in Gabar Mountain (EIA, 2024).

According to figure 1, Türkiye imports the majority of its crude oil consumption. In this regard, nearly 90% of the crude oil consumed by the country in 2022 was imported. Crude oil accounts for 41% of Türkiye's supply portfolio and 45% of primary energy consumption. Furthermore, since 2019, Turkish energy imports were decreased because of the Covid-19 pandemic, but with the reduction of the epidemic, oil imports of this country increased.

Figure 1. Turkish Crude Oil Supply Network 2010-23

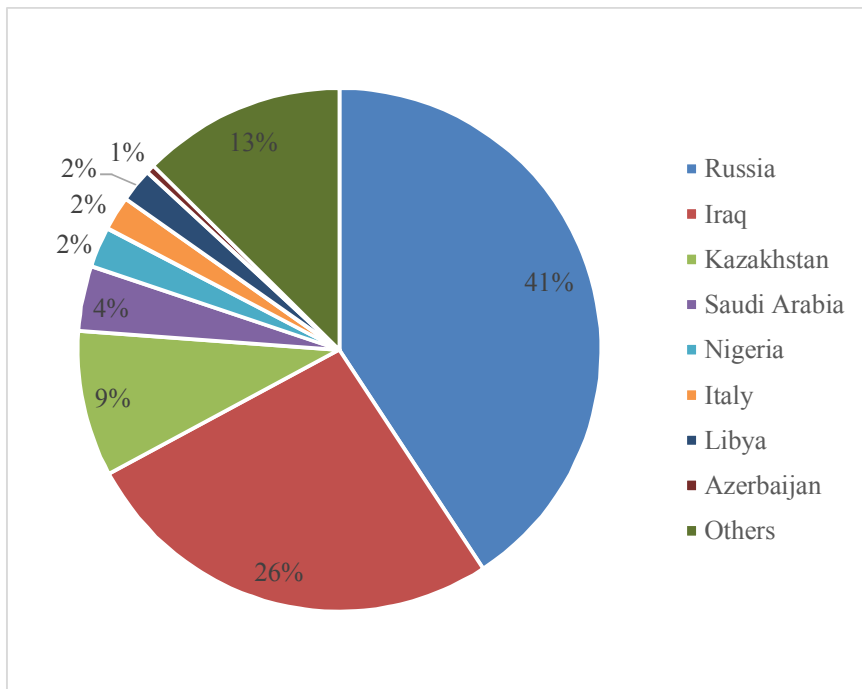


Source: IEA, 2024

As illustrated in figure 2, Türkiye's petroleum product imports are predominantly sourced from Iraq, Saudi Arabia, and Russia.

This import structure underscores Türkiye's role as a strategic energy transit hub, facilitating the movement of substantial oil volumes between key Eurasian and Middle Eastern supply regions and European demand centers (Novikau & Muhasilović, 2023).

Figure 2. Türkiye's Petroleum Product Import by Country in 2022



Source: The Turkish Energy Market Regulatory Authority, 2022

In this regard, figure 3 shows Türkiye's massive oil infrastructure. These infrastructures help Türkiye play a significant role in energy trade.

Figure 3. Turkish Oil Infrastructure

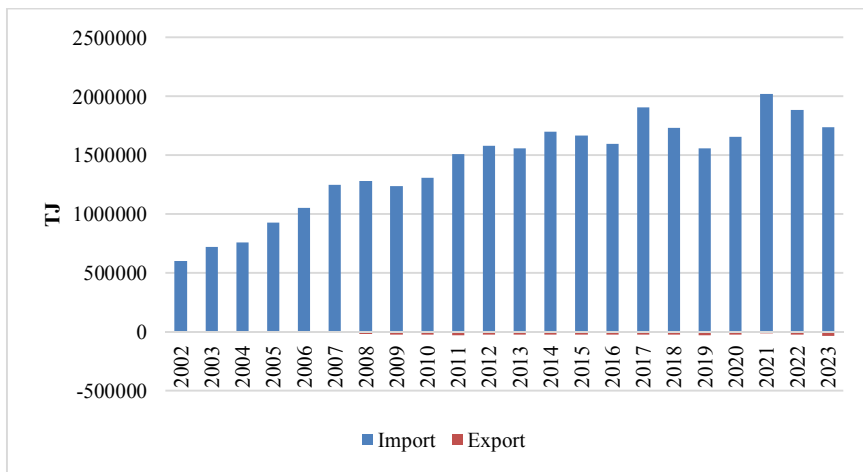


Source: Ackerman, 2022

4.2. Natural Gas

Türkiye has made considerable progress in providing its citizens access to natural gas in the last two decades. In this regard, in 2002, only five large cities of the country had access to gas, but today the cities' access to natural gas has reached 81 cities (i.e., 66.4 million or 80% of the population) (GAZBIR, 2021).

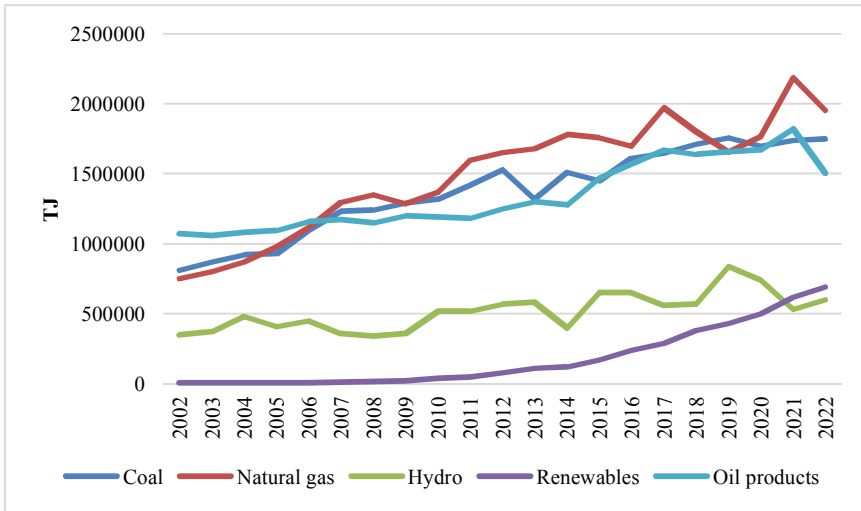
Figure 4. Türkiye's Natural Gas Import vs Export 2002-23



Source: IEA, 2024

According to figure 4, Turkish natural gas demand is met by imports since the share of domestic gas production (less than 1%) is used to supply domestic demand. Furthermore, Turkish natural gas consumption has steadily increased, becoming the first-largest energy source in Total Final Consumption (see figure 5).

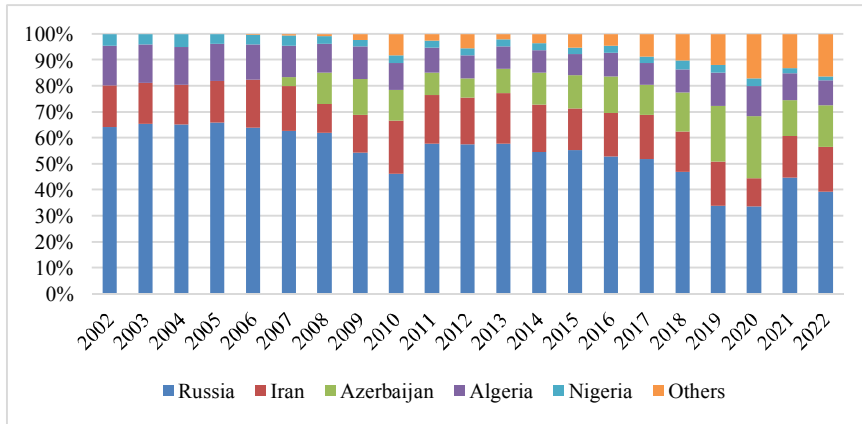
Figure 5. Total Final Consumption (TFC) of Türkiye by Source, 2002-22



Source: IEA, 2024

According to the EIA (EIA, 2024), Türkiye's proven natural gas reserves were at 111 billion cubic feet (Bcf) in 2023, and the country heavily relies on natural gas imports, as shown in figure 4. However, on December 26, 2022, Türkiye announced the discovery of a 2 trillion cubic feet (Tcf) reserve in the Caycuma-1 field and revised its reserves estimate for the Sakarya field from 19 Tcf to 23 Tcf. Furthermore, the country aims to achieve sustained plateau production from the Black Sea by 2027-28. In this regard, the domestic production capacity growth will improve Türkiye's ability to purchase and import energy. According to figure 6, in 2022, 39% of Türkiye's gas imports were supplied from Russia, followed by Iran (17.1%) and Azerbaijan (15.9%).

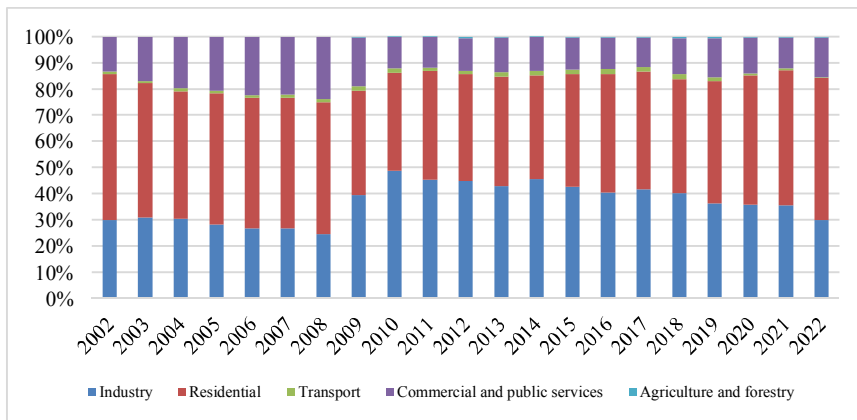
Figure 6. Türkiye's Natural Gas Suppliers 2002-22



Source: The Turkish Energy Market Regulatory Authority, 2022

Figure 7 shows that households and industrial sectors consume the most significant amount of natural gas. On the other hand, the agricultural and transport sectors consume the least amount of natural gas.

Figure 7. Natural Gas Final Consumption of Türkiye by Sector 2002-22



Source: The Turkish Energy Market Regulatory Authority, 2022

Due to the natural gas industry liberalization, Türkiye changed its laws related to the gas market in 2001 and 2007, and amended them in 2008. The changes in the law were made in the field of licenses, transit tariffs, marketing licenses, import and re-export licenses, operation of the distribution transmission network and services, as well as infrastructure and technical equipment (World Bank, 2017). Furthermore, in 2019, the Turkish Energy Market Regulatory Authority announced the rules regarding pipeline imports to make Türkiye a regional gas transmission and trade hub.

Türkiye has 16000 kilometers of pipelines and 17 entry points; in this regard, Türkiye had an import capacity of 245 million cubic meters per day in 2019, which can be increased to 320 million cubic meters at its peak. According to table 1, Turkish transmission infrastructure, which has multiple pressure boosting stations, has seven points of connection to international gas lines, while five points can inject LNG. Furthermore, Türkiye's natural gas network is connected from three points to internal fields and two points to underground gas tanks. Türkiye's goal is to reach the final import capacity of 463 million cubic meters in 2023. The country also currently has four LNG import terminals. Table 1 shows the name, status, and capacity of Türkiye's LNG terminals.

Table 1. Türkiye's Liquefied Natural Gas (LNG) Import

Project	Daily capacity (mcm)	Operator	Status
Marmara Ereğlisi LNG	37	BOTAŞ	In service
Izmir Aliğa LNG	40	EgeGaz	In service
Etki LNG	28	Etki	In service
Dörtöyol LNG	20	BOTAŞ	In service
Saros FSRU	20	BOTAŞ	Under construction

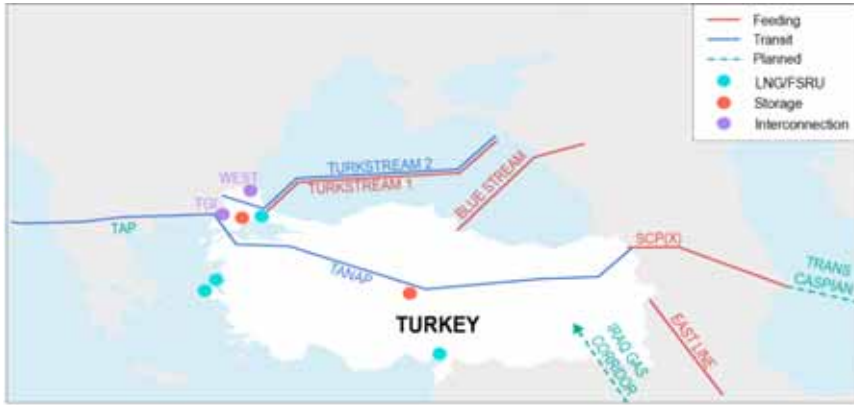
Source: IEA, 2021

Although LNG has increased in recent years, pipelines remain essential for gas transmission in Türkiye (72% imported by pipelines in 2022). As a result of numerous gas pipelines going into Türkiye, Russia has become the largest gas exporter in the country. Since 1986, Türkiye has imported gas from Russia via the Western pipeline through Eastern Europe and the Bulgarian border through long-term contracts. The Western pipeline, in 1988, reached Ankara and had a capacity of 18.8 bcm per year (Bacik, 2006). In this regard, the pipeline was shrunk to a small-scale importer in 2020, as Russian gas extended to Türkiye through Turk Stream.

The Blue Stream pipeline, with an annual capacity of 16 bcm, which has been commissioned since 2003, brings Russian gas to Türkiye via the Black Sea. Furthermore, 10.4 bcm of natural gas supply is exported by pipeline from Iran to Türkiye via the Eastern pipeline since 2001. Another gas pipeline is the Turkish Stream. Türkiye and Russia signed a contract in 2016 for the construction of Turkish stream; the pipeline, commissioned in 2020, is capable of carrying 31.5 bcm of gas annually. According to the agreement between the two governments, the volume of 14 bcm of gas that was delivered to Türkiye through the Western pipeline will enter the country from now on through this new pipeline (Tastan, 2022).

Furthermore, as figure 9 shows the Southern Gas Corridor (SGC) project, TAP+TANAP+SGC pipelines begin at the Shah Deniz field in Azerbaijan and pass-through Georgia and Türkiye to reach Italy. The project provides suitable levers to diversify Türkiye's natural gas supply and provide a better environment to reach affordable gas prices for gas supplies.

Figure 9. Türkiye's Natural Gas Infrastructure and Transmission Lines



Source: IEA, 2024

Table 2. Date of Long-term Contracts for Importing Natural Gas to Türkiye

Agreement	Signature date
Nigeria (LNG)	1995
Iran	1996
Algeria (LNG)	1988
Russia (Blue Stream)	1997
Russia (Turk-Stream 1)	1998
Azerbaijan (Shah Deniz Phase 1)	2001
Azerbaijan (TANAP)	2011

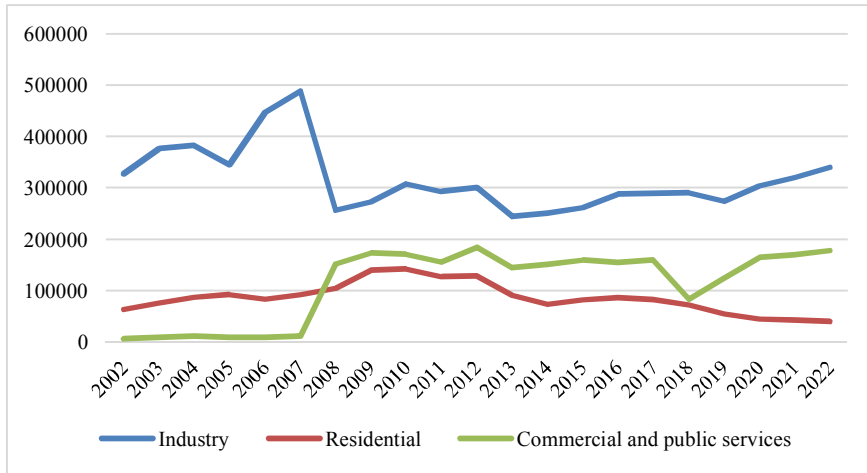
Source: IEA, 2024

TANAP and Turk-Stream pipelines increase the capacity of Turkish gas import to 215 bcm, while Türkiye can now export gas to Europe if the flow direction in the Western pipeline is reversed. Türkiye has long-term natural gas import contracts with Algeria, Azerbaijan, Iran, Nigeria, and Russia, all of which were signed by BOTAŞ Türkiye (see table 2). By 2021, the contracts have been signed by BOTAŞ with Russia (from the Western Stream route, which has now been transferred to the Turkish Stream pipeline) and Azerbaijan (from the Shah Deniz field, the first phase). Thus, Türkiye will be given new opportunities to import gas into the country by diversifying actors in the energy market. The Turkish Energy Regulatory Authority announced in September 2019 that gas importers to Türkiye were able to trade single cargo through the pipeline starting in 2020. The announcement specifies that 30% of the capacity without contracts or empty lines will be allocated to annual, 40% to seasonal and 30% to monthly contracts (World Bank, 2016).

4. 3. Coal

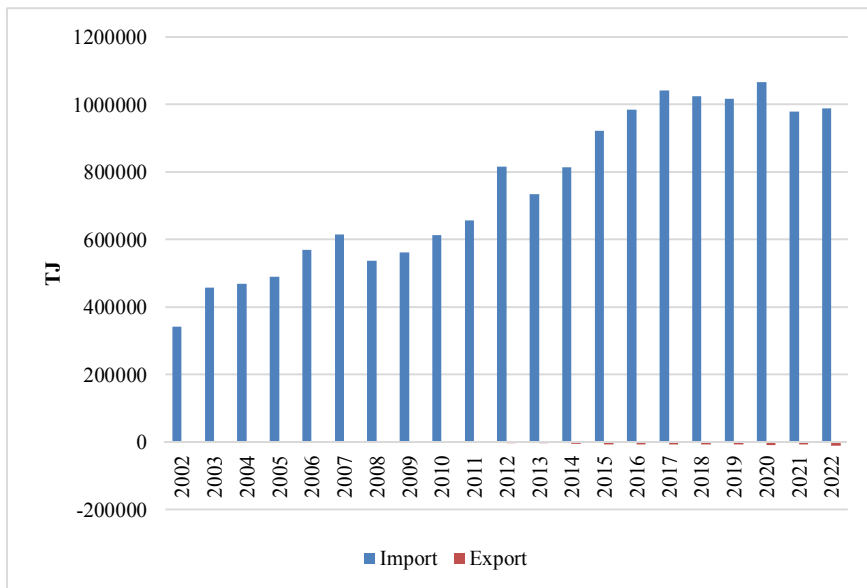
In recent years, coal has stabilized its share in the total primary energy supply, but its share in total final consumption has decreased; however, its share in electricity generation has increased. Türkiye owns large coal reserves called Lignite, which represent approximately 42% of the domestic energy mix. According to Figure 10, industry, residential, commercial, and public services sectors consume the most amount of coal. Furthermore, figure 11 illustrates the fact that Türkiye's coal import has increased since 2010.

Figure 8. Coal Final Consumption by Sector, Republic of Türkiye 2002-2022



Source: IEA, 2024

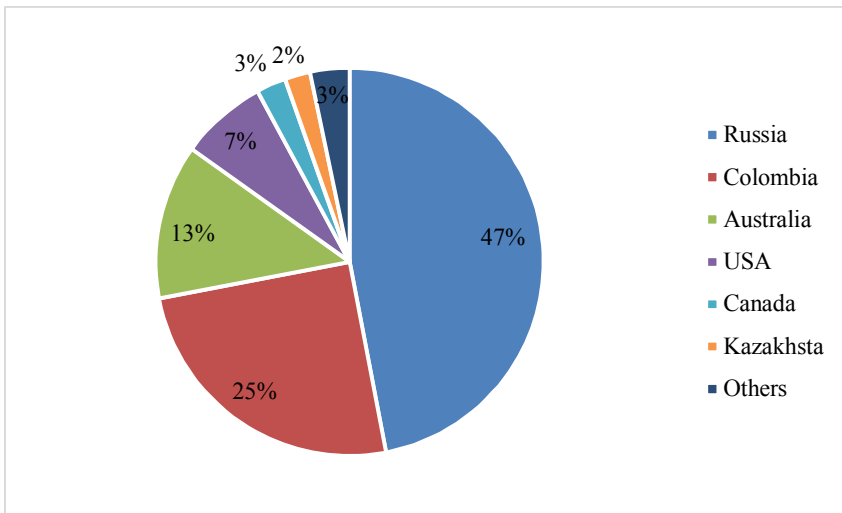
Figure 9. Coal Imports vs. Exports of Türkiye 2012-2022



Source: IEA, 2024

According to the figure 12, most of Türkiye's coal is supplied by Russia, the United States, Colombia, and Australia. Türkiye's coal imports have doubled in the recent decade, with 80% of imports coming from Colombia and Russia. In 2022, Türkiye imported coal from Russia (47%), Colombia (25%), Australia (13%), and the US (7%).

Figure 10. Coal Import of Türkiye by Country 2022



Source: Trend-economy, 2023

Türkiye's low-quality coal resulted in lower domestic coal consumption. Meanwhile, the Turkish government gives subsidies to coal miners who extract and power plants, which burn the coal that it produces. Over the last decades, coal demand has grown by 39%, reaching 40.8 million tons in 2018, up from 29.4 million tons in 2008.

4. 4. Nuclear Power

Türkiye began studying nuclear power plant construction in 1965, resulting in the launch of two research reactors in 1962 and 1982, but the power plants were never built or commissioned. Since the AKP took power, the effort to build a nuclear power plant resumed, which resulted in the approval and notification of Law No. 5710, relating to the nuclear power plants construction in 2007 (Jewell & Ates, 2015). The construction contracts for two nuclear power plants were signed with Russia (2010) and Japan (2013)¹ at Akkuyu and Sinop sites, respectively (Aydın, 2020).

Türkiye participates in all international institutions and organizations dealing with nuclear safety, security, and protection, including the International Atomic Energy Agency (IAEA), OECD, and Nuclear Energy Agency (NEA), as part of its international relations to strengthen nuclear tools and relations. Furthermore, Türkiye has had bilateral cooperation with several countries for the peaceful use of nuclear energy.

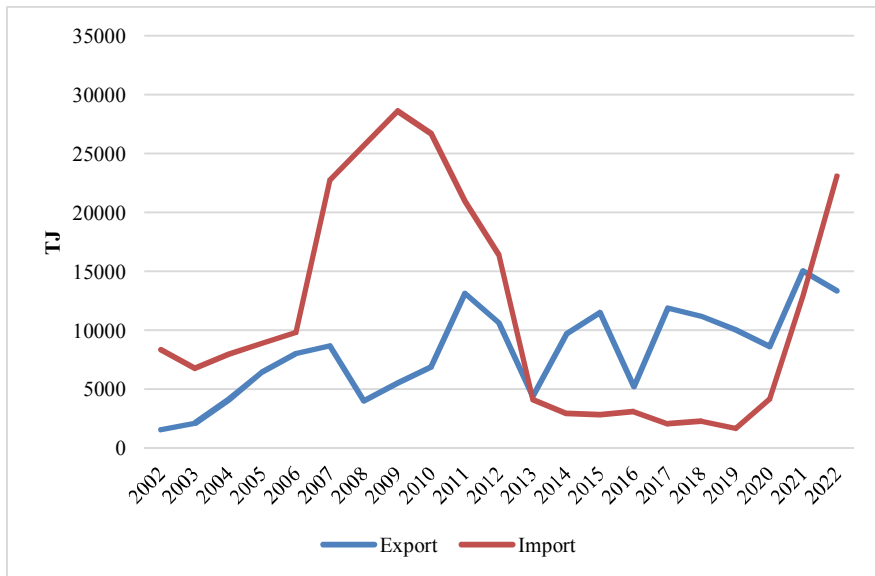
4. 5. Electricity

The Turkish electricity network is connected to most of its neighbors, but the amount of electricity imported and exported is relatively insignificant compared to the amount consumed and produced within the country. Türkiye exported approximately 3710 GWh in 2022, less than 1% of its domestic production, and imported nearly 6414 GWh. As a result of Turkish export and import, the country imported 2704 GWh in 2022. Figure 13 shows

1. Japan withdrawal from the contract in 2018

that Türkiye's electricity imports and exports have fluctuated in recent decades; therefore, it is sometimes a net exporter of electricity and sometimes a net importer of electricity. Furthermore, Türkiye is connected to most of its neighbors, imports mainly from Bulgaria and exports mainly to Greece, but the net trade is small compared to the total amount of electricity produced.

Figure 11. Türkiye Import and Export Electricity 2002-22



Source: The Turkish Energy Market Regulatory Authority, 2022

Figure 14 shows Türkiye's cross-border interconnection electricity capacity. Through interconnections with Greece and Bulgaria, Türkiye can import 600 MW of electricity and export 500 MW to Europe.

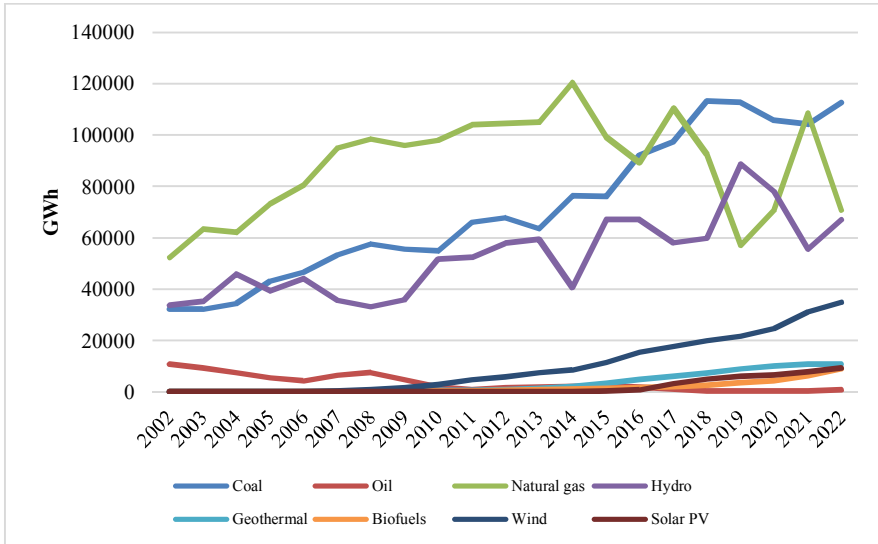
Figure 12. Cross-border Interconnection Capacity of Türkiye



Source: IEA, 2024

According to figure 15, in 2022 coal was the first fuel for electricity generation, while the second fuel for electricity generation was natural gas.

Figure 13. Electricity Generation of Türkiye by Source 2002-22



Source: The Turkish Energy Market Regulatory Authority, 2022

5. Türkiye's Energy Diplomacy during AKP

Historically, Türkiye was seen as a country that primarily relied on energy imports, and its economy was vulnerable to disruptions in the energy supply. However, when the AKP took power in 2002, Türkiye's foreign policy structure underwent significant changes, and its energy diplomacy became heavily influenced by its foreign policy principles.

5. 1. Period of 2003-2007

Due to Türkiye's national energy demand, the state is striving to develop a more effective energy diplomacy to meet its national demand and promote sustainable economy. However, domestic factors such as a high dependence on foreign energy resources, uneven urbanization, unstable economic structure, and inefficient policies have hindered the implementation of a practical energy diplomacy. Türkiye's strategic location between the Middle Eastern and Caucasian energy basins gives it a significant advantage in becoming an energy corridor and utilizing energy as a diplomatic asset. Furthermore, Nuclear energy has become a priority for Türkiye's future energy prospects, not only for resource diversification, but also for strategic value. Energy security has also become a major concern, leading Türkiye to focus on pipeline security measures in the Black Sea countries and the Caspian Basin (Uludag et al., 2013).

In addition, Türkiye has taken steps to adopt EU regulations and rules for increasing bilateral cooperation in energy sectors, since Türkiye aims to be a major energy transporter for the EU and use this role as a key component of its energy diplomacy. Its proximity to the Caspian basin and Middle East allows it to bring different

energy suppliers to the EU market and provide a stable market for their reserves (Tezcür, 2022).

Generally, Türkiye's energy diplomacy principles indicate that the main goals of the AKP are based on maximizing its benefit, geopolitical location, cooperation with energy suppliers and consumers, and construction of multiple pipelines.

5. 2. Period of 2008-2011

Since 2008 renewable energy has become a significant alternative source to Türkiye's energy consumption diversification policy. Furthermore, the Turkish society played a crucial role in highlighting renewable energy's importance for the government. For example, in 2008, in a survey conducted in 21 provinces, 84% of Turks supported the development of wind and solar energy, and 71% of them supported requiring electric utilities to use more alternative energy sources, even if it would increase costs in the short term. In this regard, on 29 December 2010, the parliament of Türkiye approved the amendments to the Law No. 6094. The law increased electricity generation by renewable energy sources, as well as incentives for the development of renewable energy infrastructure. Therefore, the new law provided conditions for the promotion of indigenous technology (Bayülgen, 2013).

5. 3. Period of 2011-2015

Since the energy laws were amended in the field of renewable energy, renewable energy became very crucial during the tenure of Taner Yıldız in MENR. Furthermore, during Taner Yıldız' tenure in MENR (2009-15), he played a significant role in shaping

Türkiye's energy policies, particularly in renewable energy areas and energy security (Ahmadi & Hatamabadi Farahani, 1390 [2011 A.D.]). Under Yildiz's leadership in MENR, Türkiye made significant progress in developing its renewable energy sector. The country increased its installed wind and solar power capacity, and Yildiz announced ambitious targets for further expansion of renewable energy (Kemal, 2009). For instance, in 2012, he stated that wind power increased from 17 MW to 1700 MW over the past decades (Yılmaz & Sever-mehmetoğlu, 2016). He also oversaw the construction of Türkiye's first nuclear power plant, which is expected to provide a significant portion of the country's energy needs. Furthermore, he implemented some policies to encourage investment in renewable energy and energy efficiency, such as the establishment of a feed-in tariff system for renewable energy projects (Yildiz, 2010).

In this period, Türkiye's energy diplomacy has not seen enormous changes, but the renewable energy infrastructure development caused the imported energy to Türkiye to consumption decrease and the energy re-export policy to increase.

5. 4. Period of 2015-2018

Türkiye's foreign policy experienced fundamental changes under Ahmet Davutoğlu's leadership during the AKP; attention to the new Middle East, the new culture and native considerations of the Middle East were the basis of Türkiye's foreign policy during Davutoğlu's rule, which was called Ottomanism. The adoption of the Ottomanism policy is facing criticism because it conflicts with the Türkiye's pro-Western policies, while the country is trying to improve its strategic position in the Middle East as well as its

position as a member of NATO, and become one step closer to the gate of the EU (Albayrak & Turan, 2016).

In the years when Davutoğlu held the position of Türkiye's Foreign Minister, economic issues such as export markets, investment opportunities, tourism, and energy supply were the driving forces of this country's foreign policy. As the leader of Türkiye's foreign policy, he emphasized in his book *Strategic Depth 2001* that the economy and interdependence are factors that shape foreign policy. In his book, Davutoğlu (2001) also emphasized that very similar to Türkiye's experiences, countries that are trying to move from an import-oriented policy to an export-oriented policy based on the development model have understood that it is necessary to consider its politics and foreign policy as the main variables of economic interests (Davutoğlu, 2011).

The idea of Türkiye becoming an energy transfer hub was promoted by several Turkish political leaders, such as Süleyman Demirel and İsmail Cem in the second half of the 1990s. In this regard, Davutoğlu's geopolitical perspectives as a Foreign Minister (2009-14) and Prime Minister (2014-16) have played a significant role in implementing these ideas. Türkiye's foreign policy changed from passive diplomacy to active diplomacy as a reflection of the "zero problems with neighbors" and "maximum cooperation" strategy during the period of the AKP in the four strategies: maximum profit, Geopolitical position, cooperation and of pipeline politics (İşeri & Uygurtürk, 2022).

To become an energy hub, Türkiye needs to have diverse sources of energy consumption to be able to re-export its imported oil and gas resources. In this regard, during his tenure in the Ministry of Energy, Berat Albayrak focused on developing the

production of domestic resources and reducing the import of foreign resources. In 2017, he launched the "National Energy and Mining Policy" (NEMP), which aimed to ensure a strong economy and national security through three pillars: supply security, localization, and market predictability. The NEMP emphasized all national resources utilization, including controversial nuclear plants, to diversify energy resources, foster economic development, and enhance the country's competitiveness. Despite conflicting views on Türkiye's nuclear program, the AKP government framed nuclear energy as the only viable alternative to achieve these goals (Temocin, 2018). In addition, Berat Albayrak identified several projects in 2018 that would help Türkiye achieve its goal of becoming an energy hub. These projects included TANAP, Turk-Stream, LNG terminals, and the Tuz Golu gas storage facility (Erşen & Çelikipala, 2019).

5. 5. Period of 2018 until Now

President Erdoğan has been implementing a strategy since 2016 to establish Türkiye as a significant player in regional energy trade and geopolitics. The aim of this strategy is to reduce the country's dependence on energy imports and alleviate its political and economic vulnerabilities by diversifying its market mix, supply routes, and portfolio of contacts. To achieve this goal, the Minister of Energy (2018-2023), Fatih Dönmez, has announced that Türkiye will explore every corner of its seas for energy resources to attain energy independence. This ambitious plan reflects Türkiye's determination to become a self-sufficient energy producer and reduce its reliance on foreign resources. Furthermore, Türkiye's increased interest in developing gas fields in the off-shore Black Sea region since 2019 carries region-wide implications in its

commitment to further decrease import dependence on conventional suppliers like Russia (Talbot, 2018).

Since the Russia-Ukraine war, non-Russian pipelines have become increasingly important for the EU. The EU regards Türkiye as an indispensable ally and primary transit hub in the Southern Energy Corridor, significantly aiding in reducing dependence on Russian energy (Schislyaeva et al., 2022). However, Türkiye's efforts to extend control over conflict in the region, from Syria and Libya to Nagorno-Karabagh, have put it in a precarious position. The potential use of energy as a coercive weapon by Russia in regional conflicts adds a risk premium to Türkiye's economic outlook, prompting the government to seek mitigation strategies against pipeline politics. These concerns have led Ankara to tackle the daunting task of aligning geopolitics and foreign policy with energy security (Cubukcuoglu, 2022). Therefore, Türkiye seeks to secure its national interests through its energy policies, using a conscious strategic non-cooperation and creating a common balance with Russia and the West.

Overall, changes in attitudes and programs led to the prioritization of factors affecting the decision-making process in Türkiye, including those of governmental, non-governmental, and international institutions during the AKP period. Traditionally, foreign policy formulation in Türkiye has involved key institutions, such as the military and the foreign ministry. However, in recent years, the role of economic and logistical ministries—such as energy, trade, and transportation—has grown significantly in shaping diplomatic decisions. This is mainly because the realization of Türkiye's planned figures in the field of economic development, including exports of five hundred billion dollars, the gross domestic product of two trillion dollars, and the status of one

of the top ten economies in the world, required guaranteed sources of energy.

The general goals of Türkiye's energy diplomacy, based on the country's strategic documents, include the following (Eksi, 2010a).

- Supplying energy at an affordable price and sustainable,
- Managing energy governance in environments,
- Supplying energy demands by domestic and renewable resources; and promoting Research and Development in the field of energy,
- Diversifying of energy supply resources and pipelines,
- Replacing traditional gas-burning power plants with Nuclear power plants as part of the diversification policy,
- Privatizing the energy sector and maximizing efficiency,
- Increasing the efficiency of energy-saving products,

Based on the Turkish strategic documents, Türkiye's energy diplomacy goals in a pragmatic understanding of energy politics to use its strategic position and become a transit country between producers and consumers are based on pipeline routes as follows (Eksi, 2010b):

- Becoming an energy corridor Between East-West and North-South,
- Türkiye aims to be a transit country by using its geopolitical position to become Europe's fourth main artery of energy supply (following Norway, Russia, and Algeria).

- The Ceyhan port transforms into an energy distribution center in global energy markets, such as the Amsterdam port in the Netherlands.

6. Energy Pipeline Politics in Justice and Development Party

Türkiye's pipeline policy has been on the agenda since the 1990s; it can be analyzed from different angles. Several experts have analyzed Türkiye's energy hub strategy over the past decades based on a specific schedule. However, dealing with pipeline politics based on the target countries may yield more comprehensible results.

6. 1. Russia

The year 1986 marked the beginning of Turkish-Russian energy relations based on gas pipelines with the conclusion of a 25-year contract between the Soviet Union and the Republic of Türkiye. As a result of this contract, in the 1990s, Russia proposed increasing gas volumes through the Black Sea, which was accepted by T00FCrkiye, leading to the Blue Stream pipeline being constructed from Russia to Türkiye in 1996. The gas flow from the pipeline started in 2003, but the pipeline officially operated in 2005. Furthermore, Russia proposed to Türkiye the Blue Stream II pipeline construction for supplying gas to Türkiye and several other Middle Eastern countries including Israel, Syria, Lebanon, and Cyprus (Koutroumpis, 2019).

A natural gas pipeline, called the South Stream Pipeline, which was signed by Russia had Türkiye in 2012, was completed in 2014. In 2016, the two countries signed another contract to construct the

Turk Stream pipeline through the Black Sea. Under the 2016 contracts, two pipelines were to be built. The first pipeline, commissioned in 2020, is for domestic consumption in Türkiye, and the second pipeline is intended for re-export to southern Europe (Häfner & Tagliapietra, 2015).

Since 2003, Türkiye has tried to gain profit from the energy sector by adopting a cooperation policy instead of competition. The Russian government welcomed Ankara's change of perspective and used it to realize its two strategic objectives in the energy sector: delivering more energy to the West and selling products at market prices in the Mediterranean region. In 2006 and 2009, the conflict between Russia and Ukraine led to a gas crisis; this crisis played a significant role in accelerating the energy cooperation between Russia and Türkiye. In this regard, Ankara and Moscow signed 20 agreements in 2009, most of which dealt with energy. Energy convergence between the two countries has progressed to the point where Türkiye and Russia agreed develop their nuclear energy cooperation (Kuzegar Kaleji, 1389 [2011 A.D.]).

As Europe reduces its dependence on Russian energy, Ankara can use its geographical location to maximize its profit. Although the relationship between Russia and Türkiye has always been complicated, during the reign of the AKP, the energy cooperation has turned a historical competition into comprehensive bilateral cooperation (Mikhelidze et al., 2017).

Even though there have been major political and security incidents in relations between Russia and Türkiye, including a military clash in Syria and a downing of a Russian military plane by Türkiye, Türkiye's energy imports from Russia do not face disruption (Yesevi, 2018). This is mainly due to the fact that the pipelines policies can be explained more effectively

based on complex interdependencies, rather than based on dependency relations, which are linked to asymmetric power relations, and parties show greater desire and effort to maintain these ties.

6. 2. Iraq

The Kirkuk-Ceyhan pipeline was commissioned in 1977 to transfer Iraqi oil to Türkiye. The pipeline was Türkiye's first project to become an energy hub. The events in Iraq during the 1990s and 2000s caused a cease in the Iraqi oil flow; however, following the normalization of the situation in Iraq, Baghdad, and Ankara extended their oil contract until 2025. Nevertheless, after the imposition of UN sanctions on Iraq at the beginning of the 1990s and the fall of Saddam Hussein in 2003, the country's situation never returned to pre-90s. This is mainly because of the fact that in the north of Iraq, an autonomous government was formed with its center located at the city of Erbil. Kirkuk, rich in oil, was under Erbil's control, forcing Türkiye to recognize the Kurdistan Regional Government in 2009 at the cost of making tension with Baghdad after years of boycott and hostility. The Turkish government changed its policy toward the Kurdistan region due to oil and gas resources and their benefits to Türkiye. Furthermore, in 2013, the Kurdistan Regional Government of Iraq and Türkiye constructed another pipeline with a daily capacity of 1 million barrels to transfer oil from Iraqi Kurdistan to Ceyhan port (Adam, 2012). Meanwhile, Türkiye is looking to import gas from Kurdistan; in this way, Türkiye can export its energy resources to Europe.

6. 3. Islamic Republic of Iran

In 1996, Iran and Türkiye signed a 25-year gas contract, which came into effect in 2001. In this regard, Iran delivers 10 bcm of gas to Türkiye annually for domestic consumption. Iran's abundant natural gas and Türkiye's efforts to become the energy transit country to Europe caused the Turkish state oil company to sign a memorandum of understanding with Tehran to develop the third phase of the South Pars field in 2007, but the American pressure and international sanctions prevented the progress of the project. The two countries signed an agreement to export Iran's gas to Europe via Türkiye on November 2008, called Iran-Türkiye-Europe (ITE) pipeline. In this regard, Türkiye was supposed to invest 5.5 billion Dollars in the South Pars field development. Finally, due to American pressure, this plan also remained sterile. Furthermore, Türkiye tried to transfer Turkmenistan's natural gas to Türkiye through Iran and signed a Memorandum of Understanding (MoU) with Ashgabat in 2009, which was not completed due to Iran's opposition.

6. 4. Republic of Azerbaijan

The Baku-Tbilisi-Ceyhan oil pipeline was commissioned in 2005 to export oil from the Republic of Azerbaijan and the Caspian Basin via Georgia to the Mediterranean, and is considered a turning point in Turkish energy diplomacy. BTC transports the oil of the Caspian Basin to the Mediterranean and the European market without crossing the Black Sea and the Bosphorus and Dardanelles straits. The success of the BTC had convinced Türkiye to focus on the other pipeline projects that bypass the Black Sea route on the agenda. The BTC and BTE pipelines were commissioned between

2006-2007 and supported by the United States' official leaders because they saw it as a strategic tool to limit the traditional influence of Russia in Central Asia and the South Caucasus regions. The pipeline projects established a tripartite strategic cooperation between Türkiye, Azerbaijan, and Georgia in the Caucasus.

The Turkish pipeline construction intensified the competition between Russia and Türkiye regarding the East-West Corridor because Russia considered America's attempt to turn Türkiye into a corridor for transferring Caspian energy to Europe as a strategic threat to itself (Movassaghi & Alizadeh, 2014). However, Türkiye's efforts and insistence on economic cooperation strategies instead of geopolitical competition led to the opening of the Baku-Tbilisi-Erzum gas transmission pipeline in 2007 and the conclusion of the TANAP natural gas pipeline agreement for the transmission of Azerbaijani gas to Türkiye and Europe in 2012. It happened in a friendly atmosphere and away from political tensions.

7. Conclusions

Under the AKP government, Türkiye pursued a sophisticated, multi-tiered energy strategy focused on enhancing security and leveraging its geopolitical position. The first level addressed the fundamental challenge of domestic resource scarcity by strategically employing energy diplomacy to secure sustainable supplies of oil and gas at competitive global prices, actively seeking supplier diversification to mitigate import dependency. Concurrently, the second level capitalized on Türkiye's unique location as a bridge between energy-rich regions (Caspian, Middle East, Russia) and consumer markets (Europe), transforming it into

a critical energy transit corridor. This was concretized through major infrastructure projects such as the BTC oil pipeline and the TANAP, alongside significant investments in expanding ports and terminals to facilitate energy exports. Furthermore, recognizing energy as a potent tool of statecraft, the third level explicitly tied energy diplomacy to foreign policy objectives, aiming to elevate Ankara's role in global energy politics, resolve disputes with neighbors and great powers, strengthen regional ties, and solidify Türkiye's position as an indispensable energy hub. This multi-dimensional approach, encompassing pipeline diplomacy and infrastructure development, concurrently fostered an energy transition ecosystem that attracted FDI, generated job opportunities, and facilitated the transfer of technology and knowledge, contributing to broader economic and strategic goals.

This analysis effectively outlines Türkiye's multi-tiered hydrocarbon strategy, but overlooks its growing focus on renewable energy and "green diplomacy". Future research should explore Türkiye's potential renewable energy, the way in which it integrates climate goals and mineral supply chains into foreign policy, and whether renewable leadership strengthens its role as an energy bridge in a decarbonizing world. This would expand our understanding of Türkiye's energy strategy to include the vital green dimension.

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