

Turkey's strategic position in Europe's Energy Transition: Opportunities and Challenges in the post-Ukraine War Era

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Recent developments in the world have shown that security is not a one-dimensional concept, as traditional security schools have suggested. On the contrary, political entities can be threatened in various ways. The energy crisis triggered by Russia in the EU may be the most recent example of this argument. The immediate economic and social consequences of Russia's blackmail have demonstrated how energy can be weaponized in international politics.

However, the measures taken by the EU and the partnerships it has fostered paint a more dynamic picture. In this context, what should we expect from EU–Türkiye relations, and what role will energy play in this equation? Türkiye already generates a significant share of its electricity from renewables, and this share continues to grow. With its considerable potential, could Türkiye become a meaningful part of the EU's energy future? And to what extent could its fluctuating political relationship with the EU shape that outcome?

Weaponization of Energy

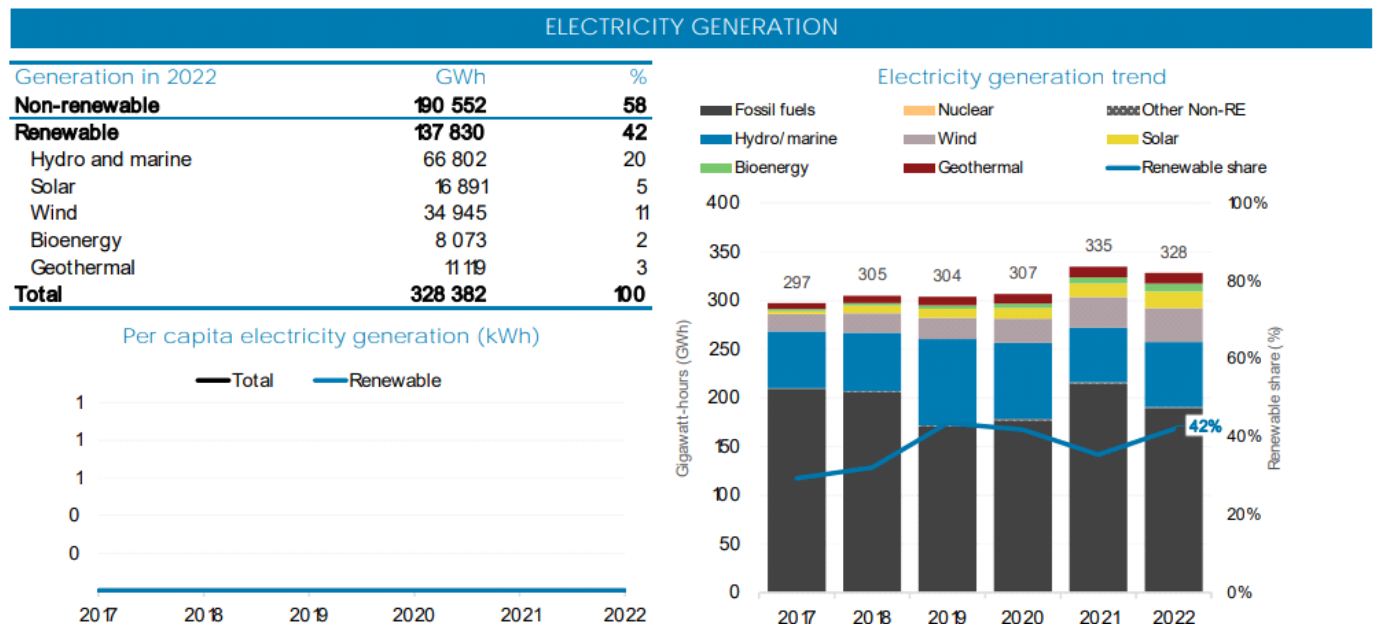
Before the war, there had already been discussions surrounding the EU's vulnerabilities stemming from its energy dependency. Russia used to be the main exporter of the Union's natural gas, accounting for 42% of EU gas imports. It also held a substantial share in oil and coal imports (European Commission, 2025). The EU's pro-Ukrainian stance in the Russo-Ukrainian War was met with retaliation: Russia restricted gas flows to the EU, triggering a sharp increase in energy prices and contributing to inflation. In response, the EU launched several measures and packages—chief among them, the RePowerEU plan—which aimed to establish energy partnerships with neighboring countries and invest heavily in renewables to achieve long-term energy independence.

Three years after the onset of the war, the EU has diversified its energy sources and significantly reduced its dependence on Russia. Russia's share in EU gas imports has dropped to 19% (Ibid, 2025). Algeria, Azerbaijan, Central Asian countries, Norway, and American LNG suppliers have attempted to fill the gap. Alongside these exporters, Türkiye has become a key player in Europe's energy security, with around 10% of the EU's gas imports transiting through Turkish territory (Ibid, 2024).

RePowerEU not only re-emphasized partnerships but also set ambitious targets for renewable energy in electricity consumption. In 2023, the EU raised its renewables target from 32% to 45% (EIB, 2024). Furthermore, 40% of the Recovery and Resilience Fund—totaling 648 billion euros—has been allocated to the green transition (Ibid, 2024). As a result, wind and solar energy investments have surged. For the first time in 2023, electricity generated from wind energy surpassed that from gas (EMBER, 2024). Decarbonization efforts have now become intertwined with the goal of energy security.

Türkiye's Place in European Energy Security

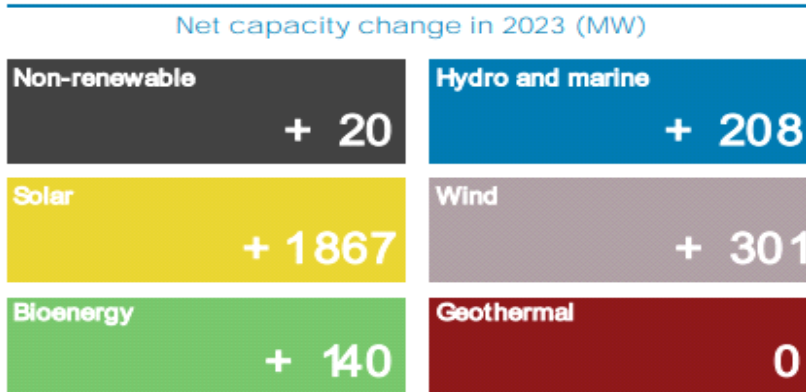
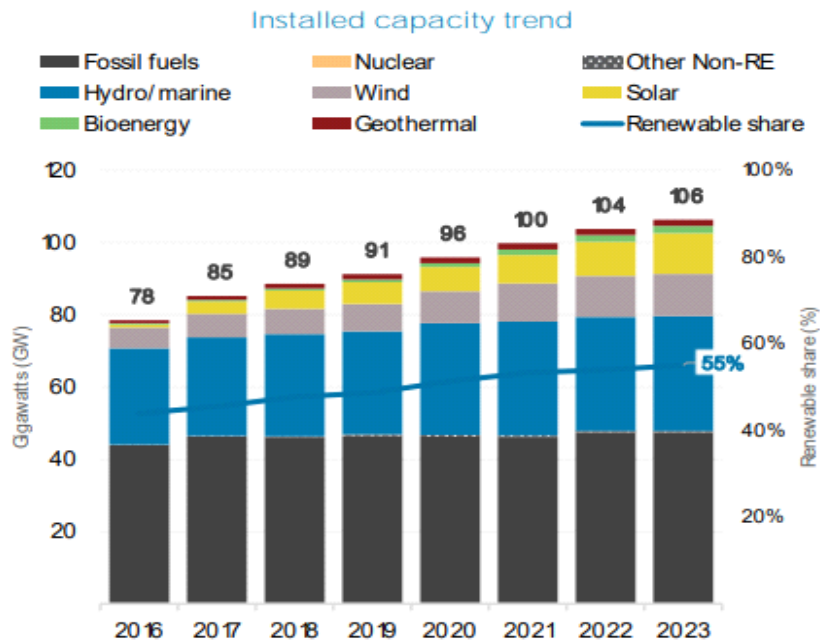
Türkiye aspires to become a regional energy hub and contribute to regional energy security. To that end, it hosts major pipelines such as the Baku-Tbilisi-Ceyhan Crude Oil Pipeline (BTC), the South Caucasus Natural Gas Pipeline (SCP), the Baku-Tbilisi-Erzurum Natural Gas Pipeline (BTE), the Türkiye-Greece Natural Gas Interconnector (ITG), and the Trans-Anatolian Natural Gas Pipeline (TANAP) (Republic of Türkiye Ministry of Foreign Affairs, 2025).



Türkiye's significance as an energy partner for Europe has grown since Russia's invasion of Ukraine. Approximately 10% of the EU's gas now transits through Turkish territory (European Commission, 2024). As a part of the Southern Gas Corridor, the Trans-Anatolian Gas Pipeline delivers Azerbaijani natural gas to Europe. If the Trans-Caspian Natural Gas Pipeline is realised, the importance of TANAP will increase even further. Beyond natural gas, Türkiye is also expanding its renewable energy capacity and receiving EBRD funding for green energy projects.

Source: IRENA, 2024. Country Profiles: Türkiye

In addition to its role as a transit country, Türkiye has the potential to become a strategic actor in renewable energy generation. According to IEA reports, 42% of Türkiye's electricity generation in 2022 came from renewables, marking a 69% increase since 2000 (IEA, 2022). While hydropower makes up about half of this share, wind and solar sources have shown steady growth (IEA, 2022). In 2025, Türkiye's solar capacity surpassed 12,000 MW, and for the first time, 78.5% of its daily electricity was generated from renewables (Daily Sabah, 2024). This figure is expected to rise further due to the proliferation of unlicensed solar installations



To accommodate this growing renewable capacity, Türkiye has introduced regulatory reforms inspired by EU practices. These include energy aggregation and demand response mechanisms, which were first implemented in EU countries and are now being applied in Türkiye.

Energy Partnership

While Türkiye is currently an important gas supplier for the EU, it also holds significant promise in electricity collaboration. Türkiye is synchronized with the European electricity grid and maintains a 2.2 GW interconnection capacity with its EU neighbors, Bulgaria and Greece (European Commission, 2024), to whom it exported electricity worth 101 million and 65 million dollars respectively (OEC, 2023). Although this trade remains limited, it is expected to grow. As digital transformation drives higher electricity demand, Türkiye's growing renewable capacity, synchronized grid infrastructure, and regulatory alignment position it as a promising partner.

Presently, energy relations between Türkiye and the EU focus mainly on natural gas rather than

renewables. Despite green energy being a top priority in the EBRD's Türkiye portfolio (Anadolu Agency, 2025), there are no direct renewable energy investments from EU institutions or the European Investment Bank. Additionally, the High-Level Energy Dialogue remains suspended due to political tensions in the Eastern Mediterranean. Although the Russian invasion of Ukraine has highlighted Türkiye's strategic importance, ongoing disputes with EU member states—particularly Greece—pose challenges to long-term cooperation. Nevertheless, European green energy companies remain active in the Turkish market, either through partnerships with local firms or technology exports (Republic of Türkiye Investment and Finance Office, 2025).

Conclusion

The EU's concept of energy security has evolved substantially in the wake of the Russian invasion of Ukraine. Once highly dependent on Russian fossil fuels, the Union is now focused on diversifying supply, reducing vulnerabilities, and accelerating its renewable energy transition. Türkiye, with its dual role as a gas transit country and an emerging renewable energy hub, has gained visibility as a strategic player in this new landscape.

However, despite Türkiye's technical capacity and policy efforts, a structured renewable energy partnership with the EU has yet to materialize. The suspension of the High-Level Energy Dialogue and political frictions with certain member states continue to limit institutional collaboration. Still, Türkiye's synchronized electricity grid, regulatory reforms, and expanding green capacity offer considerable opportunities for mutual gain.

Looking ahead, reviving dialogue mechanisms and separating energy cooperation from broader political disputes could help unlock Türkiye's renewable potential in alignment with EU goals. With political will and strategic foresight, Türkiye and the EU could foster a new chapter in their energy relations—one built on sustainability, stability, and shared long-term interests.

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