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MASTER'S THESIS

Ertuğrul AKDAĞ

ADVISOR

Prof. Dr. Wolfgang Wessels

ISTANBUL, June 2025

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ISTANBUL, June 2025

DECLARATION

I hereby declare that this thesis is an original work. I also declare that, I have acted in accordance with academic rules and ethical conduct at all stages of the work including preparation, data collection and analysis. I have cited and referenced all the information that is not original to this work.

Ertuğrul AKDAĞ

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ABSTRACT

This thesis investigates Türkiye's energy policy alignment with the European Union after the war in Ukraine, as Türkiye's energy policy plays a crucial role in both its EU candidacy and its ambition to become an energy hub. The thesis is based on Andrew Moravcsik's liberal intergovernmentalism framework, while also considering geopolitical perspectives. The thesis mainly focuses on two decades of infrastructural, institutional, and legal developments after the start of accession negotiations in 2005 until 2025. In addition, the thesis also considers earlier periods of Türkiye's relations with the European Union, starting with Türkiye's application to associate with the European Economic Community in 1959. The thesis employs a primarily qualitative research design, supplemented with quantitative data. The thesis relies mainly on the "Turkey Progress Reports", later renamed "Türkiye Reports". At the same time, it also uses various data and official documents published by the International Energy Agency, Eurostat, the Turkish Statistical Institute, the European Union and Türkiye. However, since the war in Ukraine is a fairly recent event, the thesis uses relevant newspaper and academic articles in addition to the aforementioned Türkiye reports, data and documents. The independent variables of the thesis are the status of the European Union accession negotiations, the shifting security concerns following the war in Ukraine, and the domestic political atmosphere in Türkiye, which are argued to have influenced Türkiye's energy policy alignment with the European Union during the given period. Empirical evidence shows that while the early stages of accession were characterised by a steady adoption of the EU energy acquis and joint infrastructure projects, this later evolved into a selective alignment due to diverging security concerns and stalled accession talks, which became even more visible following the war in Ukraine.

Keywords: Türkiye, Turkey, European Union, Energy, Policy Alignment, Geopolitics, Liberal Intergovernmentalism, Energy Security

Date: 17.06.2025

ÖZET

Bu tez, Türkiye'nin enerji politikasının hem AB adaylığı hem de enerji merkezi olma hedefinde önemli bir rol oynaması nedeniyle, Ukrayna savaşı sonrası Türkiye'nin enerji politikasının Avrupa Birliği ile uyumunu incelemektedir. Tez, Andrew Moravcsik'in liberal hükümetlerarasıcılık çerçevesine dayanırken, jeopolitik perspektifleri de dikkate almaktadır. Tez, 2005 yılında başlayan üyelik müzakerelerinden 2025 yılına kadar geçen yirmi yıllık altyapı, kurumsal ve hukuki gelişmelere odaklanmaktadır. Ayrıca tez, Türkiye'nin 1959 yılında Avrupa Ekonomi Topluluğu'na ortaklık başvurusuyla başlayan Avrupa Birliği ile ilişkilerinin daha önceki dönemlerini de ele almaktadır. Tez, nicel verilerle desteklenen, ağırlıklı olarak niteliksel bir araştırma tasarımı kullanmaktadır. Tez, esas olarak "Türkiye İlerleme Raporları"na dayanmaktadır. Bu raporlar daha sonra "Türkiye Raporları" olarak yeniden adlandırılmıştır. Aynı zamanda, Uluslararası Enerji Ajansı, Eurostat, Türkiye İstatistik Kurumu, Avrupa Birliği ve Türkiye tarafından yayınlanan çeşitli veriler ve resmi belgeler de kullanılmaktadır. Ancak, Ukrayna'daki savaş oldukça yeni bir olay olduğundan, tezde yukarıda bahsedilen Türkiye raporları, verileri ve belgelerin yanı sıra ilgili gazete ve akademik makaleler de kullanılmıştır. Tezin bağımsız değişkenleri, Avrupa Birliği üyelik müzakerelerinin durumu, Ukrayna'daki savaşın ardından değişen güvenlik endişeleri ve Türkiye'deki iç siyasi atmosferdir. Bu değişkenlerin, söz konusu dönemde Türkiye'nin enerji politikasının Avrupa Birliği ile uyumuna etki ettiği savunulmaktadır. Ampirik kanıtlar, katılım sürecinin ilk aşamalarının AB enerji müktesebatının istikrarlı bir şekilde benimsenmesi ve ortak altyapı projeleriyle karakterize olduğunu, ancak daha sonra güvenlik endişelerinin farklılaşması ve katılım müzakerelerinin durması nedeniyle seçici bir uyum haline geldiğini göstermektedir. Bu durum, Ukrayna'daki savaşın ardından daha da belirgin hale gelmiştir.

Anahtar Kelimeler: Türkiye, Avrupa Birliği, Enerji, Politika Uyumu, Jeopolitik, Liberal Hükümetlerarasıcılık, Enerji Güvenliği

Tarih: 17.06.2025

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LIST OF ABBREVIATIONS

AKP: Adalet ve Kalkınma Partisi / Justice and Development Party

BOO: Build-Own-Operate

BOT: Build-Operate-Transfer

BOTAŞ: Boru Hatları ile Petrol Taşıma A.Ş. / Petroleum Pipeline Corporation of Türkiye

BTC: Baku–Tbilisi–Ceyhan Pipeline

CAP: Common Agricultural Policy

CoE: Council of Europe

EC: European Commission

ECSC: European Coal and Steel Community

EEC: European Economic Community

EMRA: Energy Market Regulatory Authority (of Türkiye)

EU: European Union

EUROSTAT: Statistical Office of the European Union

IAEA: International Atomic Energy Agency

IEA: International Energy Agency

LI: Liberal Intergovernmentalism

LNG: Liquefied Natural Gas

MHP: Nationalist Movement Party

NATO: North Atlantic Treaty Organization

NDK: Nuclear Regulatory Authority (of Türkiye)

NPP: Nuclear Power Plant

OECD: Organisation for Economic Co-operation and Development

OPEC: Organization of Petroleum Exporting Countries

OAPEC: Organization of Arab Petroleum Exporting Countries

SOCAR: State Oil Company of Azerbaijan

TANAP: Trans-Anatolian Natural Gas Pipeline

TEAŞ: Turkish Electricity Generation and Transmission Company

TEK: Turkish Electricity Authority (Türkiye Elektrik Kurumu)

TRIGA: Training, Research, Isotopes, General Atomics (Reactor type)

TÜİK: Turkish Statistical Institute

UN: United Nations

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CHAPTER 1 INTRODUCTION

Since the dawn of the Industrial Revolution, states have increasingly prioritised energy and its supply. In the early stages of this period, the primary sources of energy were wood and coal. In particular, the geographical distribution of coal led states to fight over coal resources to ensure their energy needs were met. Subsequently, after the First World War, the dominance of coal was replaced by oil on a global scale. With the beginning of the dominance of oil as the main energy resource, questions of energy security began to be heard. During the Second World War, the supply of energy and its security became one of the main concerns of the countries involved in the war, and it has remained a central issue for policymakers ever since.

After the Second World War, the process known as European integration began in Western Europe. From the very beginning, European integration has been fundamentally linked to energy. The predecessor of the European Union (EU), the European Coal and Steel Community (ECSC), was established in 1951. This was followed by the Euratom Treaty of 1957, which regulated nuclear energy. Although energy remained a national issue until the 1973 oil crisis, the necessities of the crisis led European states to cooperate against energy market shocks. In response to oil supply disruptions, the Western countries established the International Energy Agency (IEA) outside the existing framework. At the same time, natural gas began to emerge as an alternative energy source to oil. This shift became even more apparent in the aftermath of the Chernobyl disaster. Following the shift to natural gas, states began to connect their energy infrastructures via pipelines, which made them even more interconnected than ever before. In this study, concerns of energy security and energy policy alignment of Türkiye with the EU will be examined. The purpose of this thesis is to examine the alignment of the energy policies of the European Union (EU) and Türkiye since the beginning of the war in Ukraine in 2022.

Firstly, in order to examine the energy situation in the EU and Türkiye, it is necessary to analyse the history of their diplomatic relations and the historical developments of their energy policies. Official relations between the EU and Türkiye

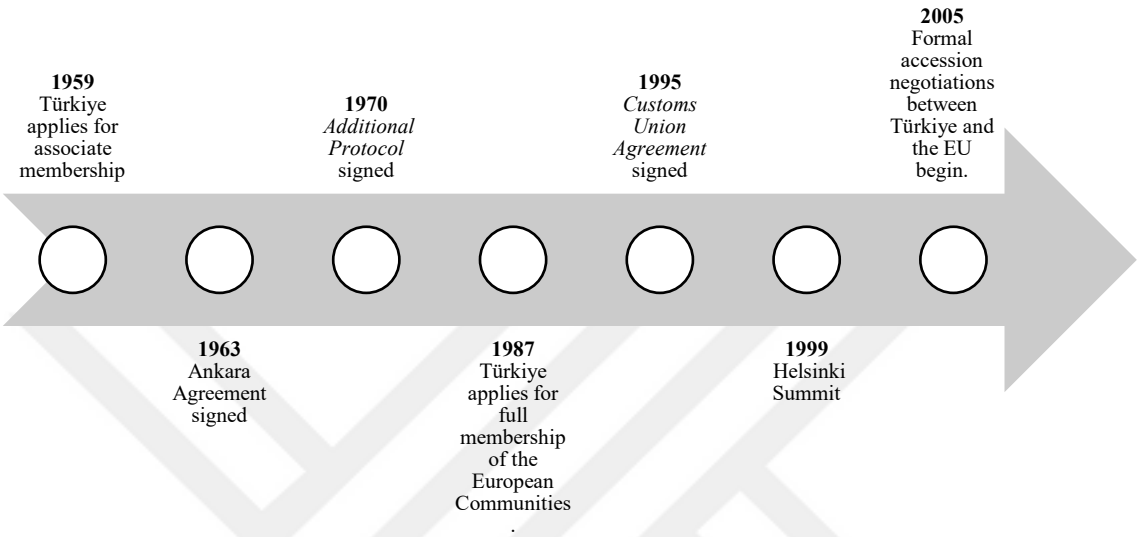
began with Türkiye's application to associate with the European Economic Community (EEC) in 1959. Subsequently, Türkiye's application was accepted, leading to the signature of the 1963 Ankara Agreement, also known as the Association Agreement, which led to Türkiye's association with the EEC. In the early stages of diplomatic relations between Türkiye and the EU, the first development in the field of energy security can be traced back to the Additional Protocol to the Ankara Agreement signed in 1970. Annex 1 to the Protocol stated that the Community would allow petroleum oils and gases refined in Türkiye to be imported into the EEC free of customs duties ('Additional Protocol', 1970, Annex No. 1). Subsequently, energy security became a major concern for EEC member states with the oil crisis of the 1970s (Tekin & Williams, 2013a, pp. 19–21).

The oil crisis of the 1970s led numerous European states to rethink their energy policies and find alternative energy sources and suppliers to diversify their energy mix. This situation led to the emergence of energy relations between the Western and Eastern blocs of the Cold War and started a trend of importing Soviet gas in the West. Austria was the first country outside the Eastern bloc to import Soviet gas in 1968, followed by West Germany in 1973, Italy in 1974 and France in 1976 (Graaf & Sovacool, 2020, p. 36). Subsequently, on 18 September 1984, Türkiye signed an agreement with the Soviet Union on gas trade between the two states, which later led to the signing of another agreement on 14 February 1986, promising a 25-year purchase of natural gas from the Soviet Union (Republic of Türkiye Ministry of Energy and Natural Resources, 2023b).

Türkiye's strategic geographic location at the crossroads of Europe, Asia, the oil-rich Middle East, and the Caucasus positions the country as a potential energy transit hub. Hence, Türkiye is an important state for the European Union's energy security (Müftüler-Bac, 2000, p. 498). Following the dissolution of the Soviet Union in 1991, the EU and the Russian Federation began to cooperate more than ever in the energy field, leading to interdependence between the two and the dismissal of energy security concerns in favour of cheap Russian gas. However, the 2005-2006 gas conflict between Ukraine and Russia brought energy security concerns back to the fore. Consequently, since the start of Türkiye's formal accession negotiations in 2005, the energy sector has emerged as a major concern. However, Chapter 15 on energy has never been officially opened due to a veto by the "Republic of Cyprus" (Tekin & Williams, 2013b, p. 169). This led to Türkiye

becoming partially aligned with the EU when it comes to energy policy (Tekin & Williams, 2013b, p. 180).

Figure I: Timeline of Significant Events in Türkiye–EU Relations (1959-2005)



Source: Own work.

The research question of this thesis is, "How has the alignment of Turkish energy policy with the EU changed from the period of active EU accession negotiations to the present day, considering domestic preferences and geopolitical changes?". This research question is significant because the alignment signifies Türkiye's integration into European energy markets, which has far-reaching implications for energy security, economic stability and geopolitical relations. In order to answer the research question, the present study analyses existing literature, data and the annual reports of the European Commission (EC) from 1998 to the present. Analysis of these reports provides an overview of Türkiye's alignment with the EU. Although the war in Ukraine is a recent event, since the war began, the EU has published only two annual reports on Türkiye. As a result, this study makes use of a variety of data from relevant government and international agencies, as well as from newspapers.

This study tests three hypotheses. The primary hypothesis of this study is that the energy policy alignment between the EU and Türkiye has shifted since the war in Ukraine due to their different geopolitical priorities and security concerns. The second hypothesis

is that domestic circumstances in Türkiye forced the Turkish government not to align its energy policy with the EU. Finally, the third hypothesis is that the stalled accession negotiations led Türkiye to diverge from the EU in its energy policy.

The independent variables of this thesis are "Status of EU accession negotiations", "Post-war security concerns in Ukraine" and "Domestic Politics in Türkiye". The dependent variable is "energy policy alignment."

CHAPTER 2 THEORETICAL FRAMEWORK

International relations is a field with different theoretical perspectives that allow the researcher to analyse the case(s) at hand from many different angles. As this study aims to explain the alignment of Turkish energy policy with that of the EU, the initial focus is on Liberal Intergovernmentalism. Although it should be noted that some other theoretical perspectives, such as Europeanisation, Neoliberal Institutionalism and Realism, could also be used, due to the limitations of a master's thesis, liberal intergovernmentalism is chosen as the primary IR theory to be used in the thesis. Before moving on to an overview of liberal intergovernmentalism, it is necessary to introduce the concept of integration.

2.1 CONCEPT OF INTEGRATION

Concept of integration, or European integration, in our case, is a vast and complex field that attracts plenty of research. In order to discuss the concept of integration and its theories, it is necessary to establish a definition of the term "integration". Ernst Haas defines integration as "the process whereby political actors in several distinct national settings are persuaded to shift their loyalties, expectations and political activities toward a new centre, whose institutions possess or demand jurisdiction over the pre-existing national states." (Wiener & Diez, 2009, p. 2). This definition establishes one of the benchmarks of neofunctionalism as a theory of integration. However, this is not the only definition of integration. In contrast to this definition, intergovernmentalism suggests a more limited definition that focuses on the establishment of political institutions to which member states choose to subscribe, thereby narrowing the meaning of the term. Although a separate thesis could be written on the question of what integration is, it is outside the

scope of this thesis and will not be discussed further outside the scope of liberal intergovernmentalism.

2.2 LIBERAL INTERGOVERNMENTALISM

Andrew Moravcsik's liberal intergovernmentalism is one of the most influential theories of European integration, born out of the claim that neofunctionalism is inadequate to explain European integration. Andrew Moravcsik first presented his arguments against neofunctionalism in 1998 in "The Choice for Europe". In the book, Moravcsik criticises neofunctionalism for its empirical and theoretical weaknesses in explaining the process of European integration.

Moravcsik argues against the claims of neofunctionalism, such as that integration is an almost autonomous process led by supranational political entrepreneurs like Jean Monnet, who trigger a spillover effect whereby initial cooperation automatically leads to further integration. In contrast, Moravcsik challenges this view as a misreading of the real drivers of European integration. According to Moravcsik, European integration was never an unintended outcome driven solely by technocratic expertise. Rather, it has been a deliberately constructed process, deeply tied to national political choices and the economic interests of states. In other words, the “spillover” effects of supranational institutions are related to the decisive impact of national political will of the states. He supports this assertion with the treaty decisions and the bargaining process behind them (Moravcsik, 1999). Moravcsik also argues against the neofunctionalist argument that integration develops through the interaction of transnational forces, leading to an almost inevitable alignment of interests beyond states. Moravcsik claims that the integration process is fundamentally about rational choices of the national governments. He stresses that the preferences of domestic actors are the real drivers of integration. He refers to France's opposition to British membership as an example of his argument. The well-known British membership debate is best understood in terms of the economic concerns of French farmers. Thus, he claims that neofunctionalism neglects the observable reality of state-centred bargaining (Moravcsik, 1999). He argues that through empirical observation, European integration has been characterised by irregular progress, often interrupted by significant domestic political conflicts. Moreover, the emphasis on market liberalisation, as evidenced by policies such as tariff policy, has overshadowed

consideration of areas such as nuclear energy and public transport, which are more typically subject to state intervention. (Moravcsik, 1999).

Additionally, the consolidation of power by the EU's supranational institutions lacks consistency, as decision-making is still largely based on the consensus of member states, and this is unlikely to change in the near future. According to Moravcsik's theoretical position, neofunctionalism is characterised by its ambitious and vague nature. Moravcsik argues that neofunctionalism fails to provide a clear explanation of how national interests are formed, how conflicts are resolved, or how preferences become policy. As a result, neofunctionalism's predictions remain unspecified. Furthermore, neofunctionalism's heavy reliance on the spillover process does not adequately address cases where integration stagnates or reverses (Moravcsik, 1999). In response to the shortcomings of neo-functionalism, Moravcsik develops the theory of liberal intergovernmentalism, which provides a framework that emphasises the rational behaviour of states. According to the framework of liberal intergovernmentalism, national governments are the primary actors and their decisions on integration are driven by domestic interests rather than an automatic spillover effect. Moravcsik emphasises that the driving forces behind integration can be reduced to three main factors: commercial interest, the relative bargaining power of states, and the need to establish credible commitments. These three factors are deeply rooted in the domestic economic and political circumstances of states and thus provide a more realistic and empirically testable framework (Moravcsik, 1999). Liberal intergovernmentalism characterises European integration as a product of intergovernmental bargaining. Decisions on major issues such as the Common Agricultural Policy (CAP) show that outcomes depend on the relative bargaining power and economic interests of individual nation states. According to this framework, the distribution of gains is uneven due to asymmetries in interdependence and economic power. From the perspective of liberal intergovernmentalism, these dynamics can be explained by national governments negotiating hard bargains rather than passively submitting to technocrats in supranational institutions (Moravcsik, 1999). It also advocates the idea that states delegate only limited aspects of their sovereignty to international institutions in order to provide security or credible commitments. This delegation of sovereignty is not driven by a supranational logic, but by a strategic response to domestic political pressures and the challenges of coordination between

states. Thus, the institutional designs of the European Community, which later evolved into the European Union, are not seen as the result of spillover effects, but as carefully constructed mechanisms developed through inter-state bargaining (Moravcsik, 1999).

Lastly, Moravcsik argues that liberal intergovernmentalism is better aligned with the historical evidence. The empirical evidence of integration decisions, such as treaty reforms, highlight the calculated interests and considerations of individual states over time, thus strengthening claims of liberal intergovernmentalism. In short, Moravcsik explains the foundational principles of his theoretical framework as follows: “My central claim is that the broad lines of European integration since 1955 reflect three factors: patterns of commercial advantage, the relative bargaining power of important governments, and the incentives to enhance the credibility of interstate commitments.” (Moravcsik, 1999).

Regarding the enlargement process of the European Union. Liberal intergovernmentalism suggests that member states will assess the pros and cons of enlargement, taking into account the economic and social implications of possible accession. On the one hand, candidate countries show a strong interest in joining the existing bloc, while on the other hand, the existing members are more likely to adopt a gradual approach to promoting enlargement, guided primarily by the most favourable interdependence relationships with the potential new members. The existing members also use their advantageous bargaining position to impose conditions and exceptions on the candidate country (Moravcsik & Schimmelfennig, 2009). In this regard, the relationship between Türkiye and the EU provides an appropriate context for the application of LI, particularly in light of the complicated dynamics between these two entities.

Table I: Application of LI in the Thesis

LI Component	Application in the thesis	Example
National Preference Formation	Preferences shaped by energy security needs, pricing control, domestic actors	Türkiye prioritising gas infrastructure over EU market rules
Interstate Bargaining	Türkiye engages with the EU only when strategic interests align	Participation in BTC/TANAP while resisting regulatory convergence
Institutional Choice	Türkiye avoids binding integration, prefers bilateralism or selective adoption	No alignment with the full acquis in the energy sector

Source: Own work.

2.3 GEOPOLITICS

The influence of geography on human, and therefore state, behaviour has been discussed by many since the antiquity (Hagan, 1942, p. 478). Geopolitics is a loose term that is used every day in the study of politics and international relations. By its very nature, it is subject to many definitions. The Britannica encyclopaedia's article on geopolitics defines it as "the analysis of the geographical influences on power relations in international relations" (Deudney, 2025). While Colin Flint defines geopolitics as "as a word that conjures up images. In one sense, the word provokes ideas of war, empire, and diplomacy: geopolitics is the practice of states controlling and competing for territory. There is another sense by which I mean geopolitics creates images: geopolitics, in theory, language, and practice, classifies swathes of territory and masses of people.(Flint, 2007, p. 13)"

The geographical distribution of the world's resources is uneven, so geography has a clear influence on the way in which states determine their energy policies. Geography also determines how and where the associated energy infrastructure is developed. Sartori, in his 2013 work, quotes a representative of the TAP consortium, which applies here: "Pipes are 90% politics and 10% steel." (Sartori, 2013, p. 2).

Domestic Politics (LI) ←→ Energy Preferences ←→ Bargaining Outcome

↑

Geopolitics

Energy relations between Türkiye and the EU are obviously influenced by the geopolitical atmosphere. Türkiye's position as a bridge between energy-rich regions and European consumer markets inherently gives the country a political leverage, while exposing it to the competing geopolitics of customers and exporters (Kardaş, 2011; Özpek, 2013). Türkiye's role as an energy transit state illustrates a classic logic of geopolitics. Erşen and Çelikpala argue that the country's pipeline diplomacy is representative of Türkiye's geopolitical position of balancing between Russia and the EU while increasing its strategic autonomy (Erşen & Çelikpala, 2019). Similarly, Austvik and Rzayeva stress that pipeline development and energy cooperation depend as much on political will and geopolitical calculations as on market conditions and technical feasibility (Austvik & Rzayeva, 2017). Türkiye's nuclear energy programme also appears to be influenced by geopolitics. The Akkuyu nuclear power plant, built by Rosatom, indicates a deep bilateral dependence that goes beyond energy production.

It should also be noted that as global energy transitions change quickly, the geopolitical landscape is also undergoing structural changes. According to Blondeel et al, the shift from fossil fuels to renewables is redistributing geopolitical influence away from oil- and gas-rich countries and towards those that dominate technology, grid systems and critical minerals (Blondeel et al., 2021). Their “whole systems geopolitics” approach frames the energy transition as a process of power reconfiguration in which actors such as Türkiye must adapt their strategies to remain relevant in a post-carbon world. Finally, the Russian invasion of Ukraine in 2022 marked a geopolitical opening that realigned energy priorities across Europe and the world. Theophylactou notes that Turkish foreign policy has increasingly combined hard power with soft power - or what Joseph Nye calls “smart power” - as Ankara seeks regional leadership and influence beyond the framework of EU accession (Theophylactou, 2012). This mix of pressure, persuasion and regional

diplomacy shows a calculated geopolitical ambition to reposition Türkiye as a key power broker in the Eastern Mediterranean and Eurasia.

CHAPTER 3 LITERATURE REVIEW

There is a vast body of literature on Türkiye's accession to the EU and the energy policies of both Türkiye and the EU. Therefore, this literature review does not summarise everything but will discuss main points. The literature review begins with a periodisation of Türkiye-EU relations, followed by the accession process, and then moves on to Türkiye's energy policy alignment with the EU.

Türkiye and the EU have been politically linked since 1959, when Türkiye applied to join the European Economic Community. This is a period of 66 years, and as a result there have been various periodisations of the relationship between Türkiye and the EU. Eralp (2009) provides one of the more basic frameworks, dividing the relationship into three main phases: a period of harmony (1959-1970), followed by emerging discord (1970-1999), and a more constructive turn beginning with the Helsinki Summit in 1999 (Eralp, 2009). In 2016, Hauge, together with Eralp, Wessels and Bedir, provides a more specific periodisation of Türkiye-EU relations, which also takes into account the narratives of the relationship. In the 2016 work, they periodise the relationship up to that point as 6 phases: “Phase 1(1959-1970):The Ankara Agreement Economy and Security as Main Drivers”, “Phase 2 (1970-1989): Growing Conflict the Political Dimension Gains Ground”, “Phase 3 (1989-1999): Post-Cold War Europe: a Marginalized Turkish Application” “Phase 4 (1999-2005): Turkey Becomes Accession Candidate a Positive Turn with Geopolitical Motivations?”, “Phase 5 (2005-2013): Between Stagnation and Growing Tensions”, “Phase 6 (since 2013): Migration as a Driver Forward and Political Change in Turkey”(H.-L. Hauge et al., 2016). In 2019, Hague, Özbey, Eralp and Wessels expanded the narrative approach and emphasised changes in the narratives of both sides (H. L. Hauge et al., 2019).

While Aydin-Düzgit and Rumelili's research examined the Türkiye-EU relationship from a constructivist perspective, and they periodised the relationship as “1997–1999: Exclusion from the Enlargement Wave”, “2000–2010: Rise of Membership Prospects” and the “Period of Convergence, 2011–2020”. In addition, Zihnioğlu uses the

concept of Europeanisation and has divided the subject under discussion into four periods. The period spanning from 1963 to 1999 is characterised by the transition from association to candidacy (Zihnioğlu, 2019). The period from 1999 to 2004 is characterised as a period of blossoming, while the subsequent period from 2005 to 2012 is marked as one of stagnation. Lastly, the final period from 2013 to 2019 is described as one of turbulence (Zihnioğlu, 2019).

On the other hand, Torun's research examines the compatibility of Turkish and EU foreign policies, she divides the compatibility of Turkish and EU foreign policies into 4 phases: "Starting Points of Convergence and Divergence within the Western Alliance: 1959-1998", "Turkey's Regional Activismà la EU: 1999-2002", "Turkey Adopts the EU's Soft Power Approach: 2003-2010", "Diverging Paths in the Foreign Policies of Turkey and the EU: 2011-2020" (Torun, 2021).

Regarding the periodisation of Türkiye-EU energy relations, Hacıbektaşoğlu (2021), in a master's thesis that specifically focused on energy relations from a Europeanisation framework, periodises Türkiye-EU energy relations as follows: the pre-Helsinki period into preparatory (1964-1970), transitional (1973-1995), and integrative (1996-1999) phases. For the post-Helsinki period, he proposes recovery (1999-2005), discontinuity (2005-2011) and regression (post-2011) (Hacıbektaşoğlu, 2021). On the other hand, Tagliapietra does not make an explicit periodisation of Türkiye-EU energy relations. He uses the milestones of the Southern Gas Corridor and changing geopolitics. If one were to make a periodisation from his research, it would start with the Nabucco project, followed by TANAP and TAP, and it would also mention the development of Kurdish-Iraqi and Israeli energy resources and the Russia-Ukraine crisis of 2014 (Tagliapietra, 2014).

Moving to the existing literature on the application of the liberal intergovernmental framework in Türkiye's EU accession process. Liberal intergovernmentalism explains Türkiye's EU accession process by attributing its dynamic shifts to intergovernmental bargaining and institutional constraints. In the studies that use this framework, notably Saatçioğlu (2012) and Tsarouhas (2021), EU member states' preferences, mediated by the enlargement framework (e.g. the Copenhagen criteria), shape the negotiation phases and set exceptionally strict membership conditions

(Saatçioğlu, 2012; Tsarouhas, 2021). Although this theme is not prominently discussed in Saatçioğlu's study as national preference formation or interstate bargaining dynamics, Saatçioğlu highlights how the EU's institutional framework for enlargement, particularly the Copenhagen criteria, set the parameters for Türkiye's accession process. The study also argues that post-2015 Türkiye-EU relations are functional, based on interdependence, not membership conditionality (Saatçioğlu, 2012). While Tsarouhas's study examines EU-Türkiye relations over time using the LI framework. Liberal Intergovernmentalism framework, Tsarouhas focuses on how EU institutions mediate between member states' preferences and outcomes in the accession process. The study suggests that these institutional arrangements have facilitated a more transactional, issue-specific relationship between the EU and Türkiye. Tsarouhas also (2021) claims relations are transactional and issue-specific, unlikely to change soon; economic interests bind both sides (Tsarouhas, 2021).

On the other hand, Ugur (2010) focuses on the institutional choice of open-ended accession negotiations, arguing that this framework leads to suboptimal outcomes. He suggests that the structure of the negotiation process itself may constrain the potential for successful outcomes in terms of both reform implementation and membership prospects (Ugur, 2010). Ugur (2010) argues that the open-ended nature of accession negotiations has led to suboptimal outcomes in reform implementation. Hale (2011) indirectly addresses institutional constraints by examining how the EU's requirement for Türkiye to conform to the Copenhagen criteria acted as an external driver for reforms (Hale, 2011). This illustrates how EU institutional frameworks can shape domestic policy choices in candidate countries. Hale also notes significant progress between 2001 and 2004, followed by a slowdown after 2005– The study highlights how external pressure from the EU initially drove reforms, particularly in human rights, but later internal dynamics became more important (Hale, 2011).

Onar (2007) touches on institutional constraints within Türkiye, particularly how the interplay between Kemalist institutions and the AKP government has affected the reform process. Onar (2007) provides an understanding of how the interplay between Kemalists, Islamists, and liberals has affected reform implementation (Onar, 2007). Tocci (2005) argues that while domestic factors primarily drive reforms, the EU accession process shapes their timing and form, Patton (2007) identifies EU behaviour towards

Türkiye's, election politics, and resistance from Kemalist institutions as factors affecting reform implementation (Patton, 2007; Tocci, 2005).

Across these studies, a pattern emerges of initial progress in reform implementation, driven by EU accession incentives and domestic political will. However, this progress is followed by a period of stagnation and regression. This trend is influenced by a number of factors, including changing domestic political dynamics in Türkiye, developments in EU-Türkiye relations, the structure of the accession process itself and geopolitics.

The second part of the literature review is regarding Türkiye's energy policy which underwent rapid legislative reform in the early 2000s as policymakers sought to harmonise domestic regulations with EU standards in anticipation of accession.

One of the earliest studies in this regard is Işık's 2004 study, which documents the rapid changes in the framework of the energy market in Türkiye and notes that these reforms are initially in line with the EU energy acquis, despite continuing challenges to market functioning. Işık highlighted that the privatisation of electricity generation and the liberalisation of cross-border trade were identified as key proposed changes to align with EU policy. These market-oriented reforms demonstrate Türkiye's early efforts to create a more competitive and EU-compatible energy sector (Işık, 2004). However, subsequent studies from the early 2000s to 2019 have documented a decline in alignment to a partial level of domestic market transformation. Sartori (2021) argues that while progress has been made in areas such as renewable energy development and technical cooperation, full market liberalisation has not yet materialised. Instead, legislative reforms now coexist with significant domestic and geopolitical constraints (Sartori, 2021).

Geopolitics plays a key role in Türkiye's foreign affairs and its energy relations; undoubtedly, geopolitical events and Türkiye's geopolitical position have influenced the country's energy policy. In their 2009 study, Tekin and Williams highlighted the impact of EU-Russia relations on Türkiye's role as an energy corridor. The study notes that Russia's control over energy supplies and its efforts to secure Caspian gas supplies have influenced both the EU's and Türkiye's energy security strategies (Tekin & Williams, 2009). On the other hand, in 2013, Özpek examines the impact of Russia's energy policy on Türkiye's accession to the European Union (Özpek, 2013). In his 2014 study,

Tagliapietra examines the impact of the 2014 Ukraine crisis on EU-Türkiye energy relations. He argues that this geopolitical event is seen as a revival of the EU's efforts to diversify its gas supplies, thus increasing Türkiye's strategic importance for the EU (Tagliapietra, 2014, 2017). In their 2022 study, Arman and Gürsoy argue that asymmetric energy relations with Russia have made both Türkiye and the EU dependent on Russia, and that this dependence has also created a national security risk for Ukraine. They argue that Russia's "military operation in Ukraine" will lead both Türkiye and the EU to develop new policies regarding energy dependence on Russia (Arman & Gürsoy, 2022).

Arınç argues in his 2016 study that geopolitical tensions in Türkiye's neighbouring regions affect the country's ability to act as an energy bridge between the Middle East and the Caucasus, which is also supported by Tagliapietra and Kozma for Iraq's Kurdistan region and Israel's offshore gas (Arinc, 2016; Kozma, 2017; Tagliapietra, 2014), and by Ruble, Winrow, Sartori, Yorucu and Mehmet for tensions in the Eastern Mediterranean (Ruble, 2017; Sartori, 2021; Winrow, 2016; Yorucu & Mehmet, 2022). Lastly, Kardaş examines how Türkiye has attempted to use its geo-strategic position as leverage in EU accession negotiations, particularly in the context of the Nabucco pipeline project (Kardaş, 2011).

The studies mentioned in the second part of the literature review demonstrate an evolution from strong alignment driven by accession prospects to a more complex, moderate convergence shaped by competing domestic priorities and evolving geopolitical realities.

CHAPTER 4 METHODOLOGY

The research question of this thesis is: "How has the alignment of Turkish energy policy with the EU changed from the period of active EU accession negotiations to the present, taking into account domestic preferences and geopolitical changes?

In order to answer this research question, this thesis uses a qualitative research methodology, which is guided by the framework of liberal intergovernmentalism and is therefore longitudinal in nature. A number of indicators are used to measure alignment, such as the adoption of EU directives and regulations, energy market integration,

sustainability and, last but not least, energy security measures. The above indicators are analysed from the start of Türkiye's accession negotiations in 2005 to 2025, covering 20 years. However, policy changes since Russia's annexation of Crimea in 2014 and the start of the war in Ukraine in 2022 are of primary interest. The main focus of the thesis is on energy policy developments in Türkiye and the European Union over the given timeframe. However, other relevant countries such as Azerbaijan and Russia are also mentioned in some instances.

The data collection method used in the thesis consists mainly of qualitative aspects. However, quantitative data is also used where available. The primary data sources of the thesis are the European Commission's Progress/Türkiye reports, which have been published annually since 1998, with the exception of 2017. Although the war in Ukraine is a recent event, the EU has published only two annual reports on Türkiye since the war began. As a result, this study makes use of data published by the International Energy Agency (IEA), the Turkish Statistical Institute (TÜİK), Eurostat and Statista. Finally, official statements and publications from both the EU and the Turkish government are used, as well as existing academic literature and newspapers. The quantitative data is illustrated via the R programming language, which is an open-source programming language and software environment primarily used for statistical computing and graphics.

This study does not include any interviews. Although efforts were made to interview stakeholders, including the Delegation of the European Union to Türkiye and the Istanbul office of SOCAR, no responses were received.

This study tests three hypotheses using the given methodology and data. The primary hypothesis of this study is that the energy policy alignment between the EU and Türkiye has shifted since the war in Ukraine due to their different geopolitical priorities and security concerns. The second hypothesis is that domestic circumstances in Türkiye forced the Turkish government not to align its energy policy with the EU. Finally, the third hypothesis is that the stalled accession negotiations led Türkiye to diverge from the EU in its energy policy. The independent variables of this thesis are "Status of EU accession negotiations" and "Post-war security concerns in Ukraine" and “Domestic Politics in Türkiye”. While the dependent variable is "energy policy alignment." Finally,

due to the constraints of a master's thesis, the scope of the thesis is largely focused on the alignment of fossil energy resources, especially those related to natural gas and nuclear energy.

CHAPTER 5 ENERGY AND ENERGY SECURITY

5.1 ENERGY

The concept of energy has undergone significant development over time. Prior to the nineteenth century, the notion of energy was not associated with thermodynamics; rather, it was frequently linked to the concepts of work and human virtue (Daggett, 2019). Thus, a basic definition of today's energy is "Energy is the ability to do work" (EIA, 2025). Another definition of energy posits that it is the elementary material for the production process (Hacıbektaşoğlu, 2021, p. 22). In accordance with this definition, a significant role is attributed to this factor in the development of industry and the state.

Energy exists in various forms such as potential, kinetic, thermal, electrical, chemical, nuclear, or other forms (Britannica, T. Editors of Encyclopaedia, 2025). Energy can be converted from one form to another. For instance, the chemical energy stored in coal or natural gas, as well as the kinetic energy of water flowing in rivers, can be converted into electrical energy. This electrical energy can then be transformed into light and heat (EIA, 2025).

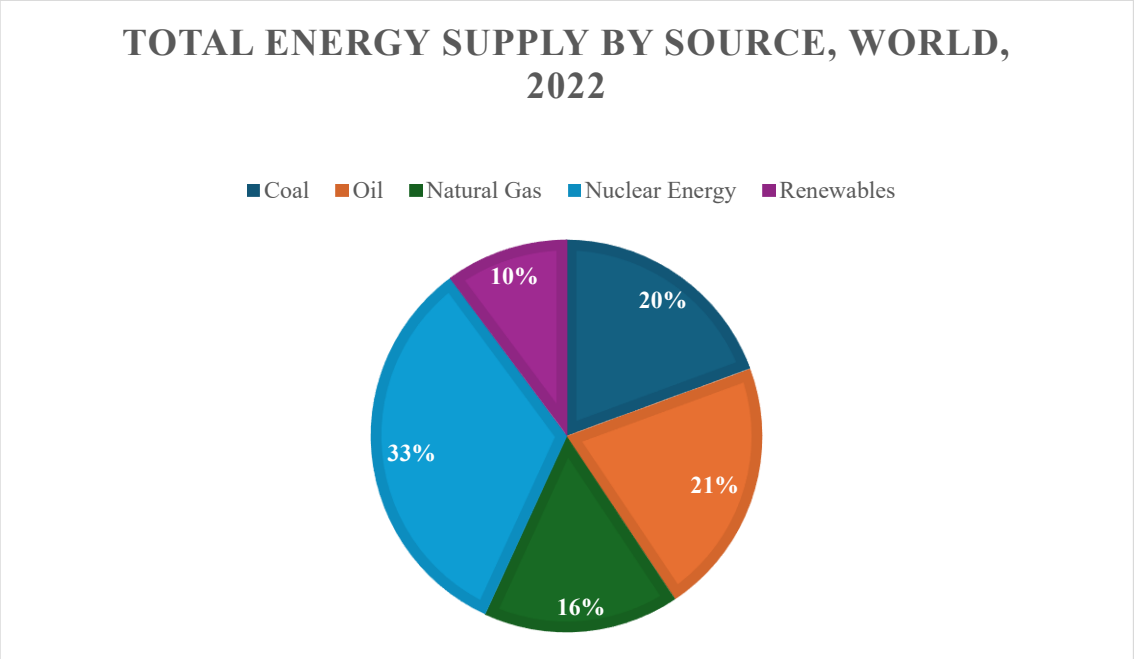
Energy sources are typically classified into two categories: renewable and non-renewable (fossil fuels). The term "non-renewable energy sources" refers to those energy sources whose supplies are limited to what can be mined or extracted from the Earth.

The following list names the primary categories of non-renewable energy sources: Coal, petroleum, natural gas, and hydrocarbon gas liquids. However, the distribution of these resources on Earth is not equal; rather, there are concentrations of areas in which they can be extracted (Cherp et al., 2012, p. 327). This fact creates a state of interdependence on imported energy resources among countries with constrained energy supplies. This dynamic gives rise to critical questions surrounding energy security (Graaf & Sovacool, 2020). Despite the evident energy security concerns, the considerable role of non-renewable energy sources in the global energy supply is not an anomaly. This is

primarily due to the prior development of the necessary infrastructure for these sources. Secondly, the utilisation of non-renewable energy sources has been demonstrated to be more cost-effective than renewable energy alternatives, despite their associated environmental concerns. Thirdly, fossil fuels are characterised by ease of storage. Furthermore, the utilisation of non-renewable energy sources extends beyond mere energy production (Graaf & Sovacool, 2020). For instance, oil can be processed into plastic products (Hacıbektaşoğlu, 2021, p. 22).

According to data reported by the International Energy Agency (IEA) in 2022, the global energy mix is predominantly comprised of non-renewable sources. Oil occupies the predominant position, accounting for 30.2% of the global energy mix. Coal is the second-largest source, accounting for 27.6% of the total, followed by natural gas at 23.1% and lastly nuclear energy with 4.7% of the total. Collectively, these non-renewable sources account for an overwhelming majority of 85.6% of the world's energy supply (IEA, n.d.).

Figure II: Total energy supply by source, World, 2022



(Figures in the graph may not add up to totals due to rounding.)

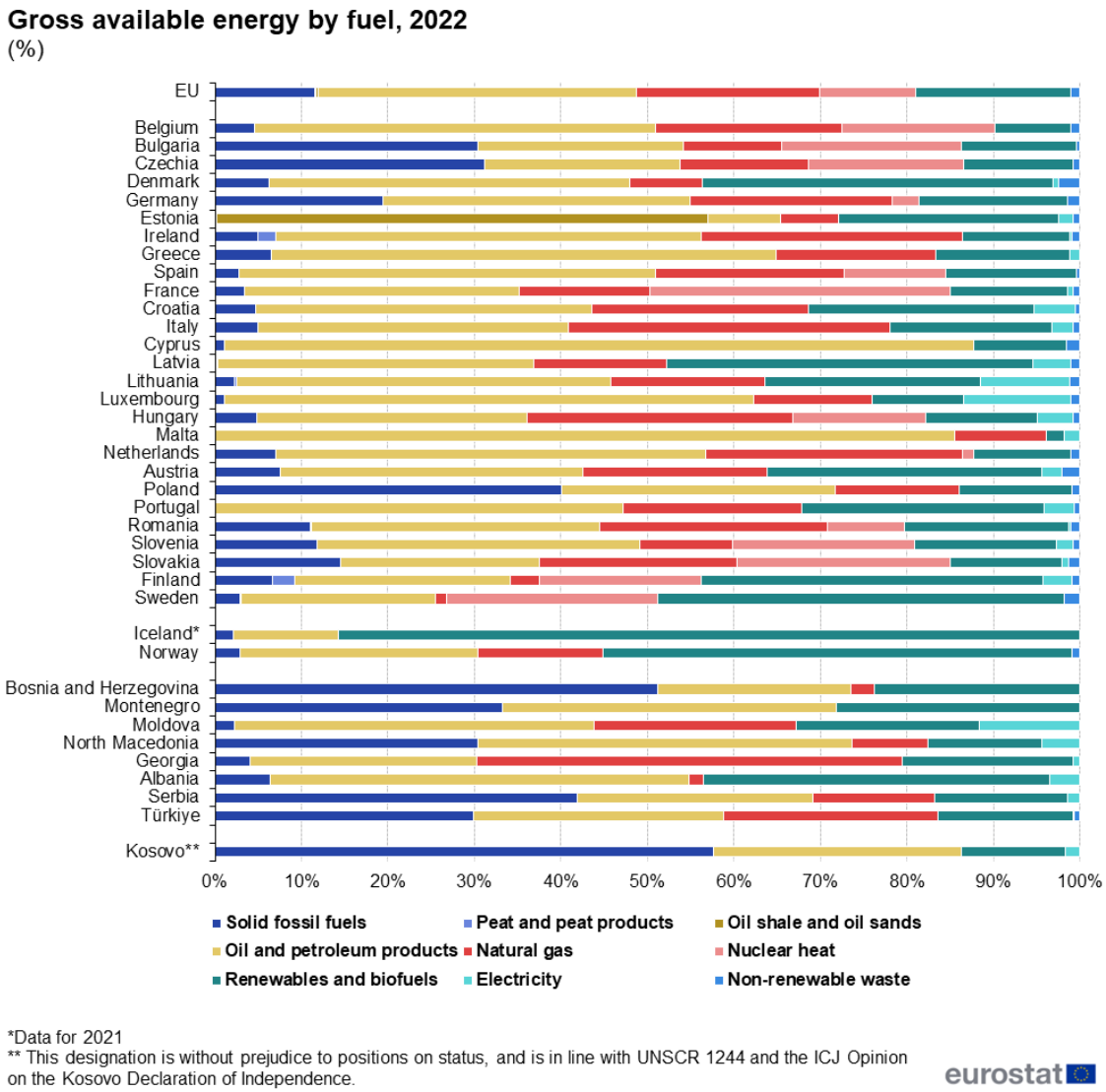
Source: Own graph, adapted from data provided by (IEA, n.d.)

Despite the fact that merely 14.4% of the world's energy supply is derived from renewable sources, this figure is indicative of a growing trend in the global energy

landscape (IEA, n.d.). Moreover, the limited availability of non-renewable energy sources is a matter of concern. It is imperative to acknowledge the inevitable depletion of these resources over time. Nonetheless, it is necessary to acknowledge the continuous advancements in renewable energy technologies. These technologies are poised to play an important role in the future, potentially assisting countries with limited resources in ensuring their energy security (Blondeel et al., 2021).

Both Türkiye and the EU's energy mixes are predominantly comprised of non-renewable sources, similar to the global energy mix. In addition, both are heavily dependent on imports of these non-renewable sources. According to data from the IEA, the energy supply of Türkiye is comprised of the following: The following energy sources were identified as the most prevalent: 29.2% oil, 26.3% natural gas, 26.1% coal, 3.5% hydropower, 11.6% wind and solar power, and 3.3% biofuels (IEA, n.d.). While in 2023, the EU's gross available energy structure was dominated by oil and petroleum products, which accounted for 37.6% of the total. This was followed by natural gas, which accounted for 20.4% of the total, while solid fossil fuels represented 9.4%. It is evident that 67.4% of all energy in the EU was derived from coal, oil and gas. At the same time the nuclear and renewable energies accounted for 11.8% and 19.5% of the total(Eurostat, 2025).

Figure III: Gross available energy of the EU and candidate states by fuel, 2022



Source: (Eurostat,2021)

5.2 ENERGY SECURITY

Energy security has been a subject of extensive research and of significant importance in the domain of political science for an extended period. However, a common definition of the term "energy security" remains elusive (Cherp et al., 2012, pp. 330–332).

The definition of energy security remains a subject of considerable debate within academic circles. A substantial number of scholars have identified the term as vague and elusive (Chester, 2010, p. 887). It is important to note the distinction between the terms of energy security and energy independence. In his study, Anderson highlighted the

distinction between security and energy independence, emphasising that they should not be considered as intertwined concepts (Anderson, 2015).

In the existing literature, energy security is predominantly defined as the reliable supply of energy at an affordable price (Dorian et al., 2006; Hughes, 2009, p. 2459; Yergin, 2006). Another common definition of energy security is the capacity to provide critical energy services uninterruptedly (Ang et al., 2015, p. 1078; Cherp et al., 2012, p. 327). Asia Pacific Energy Research Centre (APERC) has proposed a simplification of these definitions, reducing them to the Four As of energy security: Availability, affordability, accessibility, and acceptability (Asia Pacific Energy Research Centre, 2007). Hughes's study employs a similar simplification, transforming Four As into Four Rs. The four Rs, as outlined by Hughes, are as follows: The first is "Review," which involves comprehending the issue at hand. The second is "Reduce," which involves minimising energy consumption. The third is "Replace," which involves transitioning to secure resources. The fourth and final "Restrict" involves limiting new demand to secure resources (Hughes, 2009).

Chester and Vivoda highlight that the nature of energy security is polysemic and multi-dimensional (Chester, 2010; Vivoda, 2010). Chester's classification of definitions can be categorised as follows: Market-centric definitions, quantitative measurement and broader definitions involving qualitative aspects (Chester, 2010). The International Energy Agency (IEA) has defined its mission as "working to avoid, mitigate, and manage energy disruptions and crises." (*IEA*, 2025b). This is a prime example of a market-centric definition.

Quantitative measurement is not merely a definition; rather, it is a methodological approach to the analysis of energy security indicators. Chester cites a report by the Department for Business, Enterprise and Regulatory Reform (DBERR) and interprets their assertion that "To be analytically beneficial, a metric of supply security must be quantifiable" (Chester, 2010).

Broader definitions involving qualitative aspects, categorising considerations of qualitative data, are critical and must not be overlooked. In this category, he emphasises the dimensions of qualitative data because policymakers typically utilise energy security indicators that are not quantitative. Additionally, a more expansive conceptualisation of

energy security is evident, involving dimensions beyond mere market supply and market price (Chester, 2010).

A group of Singaporean scholars has taken this categorisation a step forward. According to a study by B.W. Ang, W.L. Choong, and T.S. Ng: “There has been some broad agreement with what it should cover but no consensus on what it exactly should be.”(Ang et al., 2015). In their study, the existing literature is categorised into seven overarching themes, which are as follows: Energy availability, infrastructure, energy prices, societal effects, environment, governance, and energy efficiency. In accordance with the arguments put forth by Ang, Choong, and Ng, this thesis will prioritise a broad agreement on the scope of the term "energy security" rather than an exact definition.

CHAPTER 6 HISTORY OF ENERGY POLICIES OF TÜRKİYE AND THE EUROPEAN UNION (PRE-2000)

In order to understand how energy policies in Türkiye and the EU have changed over the last 20 years, it's important to look at their energy policies before the accession process began. This chapter looks at the energy policies of both before they joined a formal framework.

6.1 HISTORY OF ENERGY POLICIES OF TÜRKİYE (PRE-2000)

6.1.1 Early Stages of Turkish Energy Policy

When the Republic of Türkiye was proclaimed, electricity was produced in only a few locations, such as Istanbul, Izmir, Tarsus, and Adapazarı, with per capita production at less than 5 kWh per year (Erol, 2007, p. 72). Although the new republican regime was not opposed to foreign investment, a statist policy had developed by the 1930s as the state was unable to attract new foreign investment (Erol, 2007, p. 79).

In 1933, the First Industrial Plan, covering the years 1933-1938, and in 1938, the Second Industrial Plan, covering the years 1938-1942, were put into practice, and in these plans, importance was attached to the development of the energy sector, especially the electricity sector. The main objective was to reduce external dependence by increasing

electricity production and thus saving foreign exchange. However, the first nationalisation of previous foreign private investment in the electricity sector did not take place until 1938 (Erol, 2007, p. 79). After the early institutions such as the Electricity Works Research Department (Elektrik İşleri Etüt Dairesi in Turkish) and "Etibank" in 1935. Türkiye continued to establish state institutions after World War II, such as the State Hydraulic Works (Devlet Su İşleri in Turkish) in 1953, Turkish Coal Operations Authority (Türkiye Kömür İşletmeleri in Turkish) in 1957 and the Turkish Electricity Authority (Türkiye Elektrik Kurumu in Turkish) in 1970. In the post-war period, Türkiye's energy policy was characterised by significant state involvement, a centralised model focused on the development of hydropower and the expansion of electricity infrastructure (Erol, 2007).

The oil shocks of the 1970s, caused by the decisions of OPEC (Organization of Petroleum Exporting Countries), had a significant impact on the economy of Türkiye, like European countries. This led to an awareness of the risks associated with the energy supply in Türkiye (Erol, 2007, p. 34). However, instead of a liberalisation approach, the state responded to this by strengthening its control over energy pricing and supply management. This approach continued until the Özal government (Erol, 2007, p. 99).

One of the biggest developments during this period was the construction of the Iraq-Türkiye crude oil pipeline. The framework agreement regarding it was signed a few months prior to the OPEC oil crisis in October. The first pipeline was commissioned in 1976, and the first tanker was loaded on 25 May 1977 (Republic of Türkiye Ministry of Energy and Natural Resources, 2023a).

6.1.2 1980s–1990s: Market Pressures and the Discourse of Liberalisation

In the wake of the 1980 coup d'état, the first free elections were held in 1983, and Turgut Özal was elected as the country's new prime minister. Özal's government initiated liberal economic reforms, which set the foundation for the transformation of the Turkish economy. During the Özal government(s), the private sector was encouraged to participate in the production and distribution of energy, particularly electricity. However, the energy sector remained dominated by the state, which retained significant control through BOTAŞ and TEAŞ (Turkish Electricity Generation and Transmission Company)

(Erol, 2007, pp. 99–112). Following the 1980 military coup d'état, liberal economic reforms began under the leadership of Prime Minister Turgut Özal, who laid the foundations for a thorough transformation of the Turkish economy, including the energy sector. During this period, the private sector was gradually encouraged to participate in the energy production and its distribution, particularly electricity (Dinçel, 2021, pp. 305–306).

As it was mentioned in the introduction of the thesis, on 18 September 1984, Türkiye signed an agreement with the Soviet Union on gas trade between the two states, which later led to the signing of another agreement on 14 February 1986, promising a 25-year purchase of natural gas from the Soviet Union (Republic of Türkiye Ministry of Energy and Natural Resources, 2023b), thus leading to a new era of Türkiye's energy infrastructure and energy relations between the two states. Construction of the pipeline bringing Soviet gas to Türkiye began on 26 October 1986, and the pipeline reached Türkiye on 23 June 1987 (Erol, 2007, p. 36). From then on, both imported Soviet natural gas and domestic Turkish natural gas were used to generate electricity in Türkiye. The pipeline was later extended to Ankara in August 1988. (BOTAŞ, n.d.; Republic of Türkiye Ministry of Energy and Natural Resources, 2023b). The foundations of Türkiye's current energy structure were established during this period, thereby influencing its contemporary energy politics even today.

In the 1990s, Türkiye's energy security concerns increased as its energy consumption began to exceed its production. Additionally, Türkiye's energy strategy was primarily intended to ensure its own energy security, as well as to support various pipeline projects crossing Turkish territory. The ambition was to establish itself as a key player in the regional energy market (Tastan, 2022a, p. 2). To this end, it entered into long-term gas supply agreements with Iran, Russia and Azerbaijan.(Güney, 2016, p. 71).

6.1.3. Türkiye's Early Nuclear Policy Initiatives

After the 1955 International Conference on the Peaceful Uses of Atomic Energy in Geneva, Türkiye began to study nuclear technology. As a result of this conference, Türkiye established the country's Atomic Energy Commission and prepared relevant legislation, particularly Law No. 6821 of 1956 (Artantas, 2024, p. 12). The following

year, on 29 July 1957, Türkiye became a founding member of the International Atomic Energy Agency (NDK, n.d.) (IAEA, 2024).

The Atomic Energy Commission was established to coordinate, support and control the scientific, economic, technical and administrative issues necessary for the use of nuclear energy and its application in related technologies. In 1961, Türkiye began operating a 1 MW test reactor at the Çekmece Nuclear Research and Training Centre, which is the country's first nuclear energy reactor, although it is mainly used for educational purposes (Artantas, 2024; Aydın, 2020). In the 1970s, Türkiye's interest in nuclear power became more visible. The country prepared a feasibility study for a commercial NPP in 1970, proposing a 300 MWe reactor, which was followed by an agreement in 1973 to build an 80 MWe demonstration plant. Akkuyu, where the current Rosatom NPP is being built, was first mentioned in 1976 as a possible site for a NPP because of its strategic advantages, such as proximity to major consumer centres such as Adana and Antalya, low population density, access to maritime infrastructure for heavy component transport and the area's seismic stability (Artantas, 2024; Aydın, 2020). However, these early attempts failed due to financial instability and changing political priorities of governments. In 1977, a tender for an NPP project failed for the same reasons. Apart from the ITU TRIGA Mark-II (Training, Research, Isotopes, General Atomics) training and research reactor, which has been in operation since 1979. Türkiye didn't see any significant improvements in nuclear power until the 1990s (Aydın, 2020, p. 2).

The Chernobyl nuclear disaster in 1986 also had a major impact on Türkiye's attempts to develop nuclear power due to its proximity and the scale of the disaster; public opinion on nuclear power changed negatively. This situation led the country to suspend all nuclear projects in 1986 and to close down TEK's nuclear power plant division in 1988. Despite these challenges, Türkiye reintroduced nuclear energy interests into official planning in 1993 and organised a tender for the construction of a NPP in 1996(Artantas, 2024; Aydın, 2020).In 1996, a tender for a NPP was issued under a build-operate-transfer (BOT) model. The tender received bids from Atomic Energy of Canada Limited, Westinghouse-Mitsubishi, and Framatome-Siemens. Although this attempt looked promising at first, the project was officially cancelled in July 2000 due to repeated delays caused by protracted negotiations over financial guarantees and tariff structures, as well as concerns about foreign ownership and rising costs (Artantas, 2024; Aydın, 2020).

The failed attempts on nuclear energy in Türkiye and most significantly the effects of the Chernobyl nuclear disaster created scepticism towards nuclear energy in Türkiye. This scepticism is still evident in discussions about the Akkuyu NPP project.

6.2 HISTORY OF ENERGY POLICIES OF THE EUROPEAN UNION (PRE-2000)

The EU's energy policy is one of the Union's most important areas of integration. Since its foundation, the EU has been linked to energy (Tekin & Williams, 2013a, p. 1). In order to understand the current energy policy of the EU. It is necessary to have a knowledge of the Union's past experience, therefore this subsection looks at the historical development of the EU's energy policy before the accession process and current geopolitical events.

6.2.1 Early Stages of the European Union’s Energy Policy

From the very beginning, European integration has been fundamentally linked to energy. In the aftermath of the Second World War, large quantities of steel were needed for reconstruction and large quantities of coal for steel production and electricity generation.

In May 1950, French Foreign Minister Robert Schuman put forward the idea of linking these two industries in the declaration that bears his name. The priority at the time was to rebuild the war-ravaged economies of Western Europe and ensure lasting peace on the continent. Directly quoting from Schuman’s declaration: “The solidarity in production thus established will make it plain that any war between France and Germany becomes not merely unthinkable, but materially impossible.” (Schuman, 1950) He proposed that “Franco-German production of coal and steel as a whole be placed under a common High Authority, within the framework of an organisation open to the participation of the other countries of Europe. The pooling of coal and steel production should immediately provide for the setting up of common foundations for economic development as a first step in the federation of Europe, and will change the destinies of those regions which have long been devoted to the manufacture of munitions of war, of which they have been the most constant victims.” (Schuman, 1950)

Following the Schuman Declaration, the European Coal and Steel Community (ECSC) was established in 1951 by the Treaty of Paris, which came into force in 1953. By pooling the coal and steel resources of France, Germany, Italy, Belgium, the Netherlands, and Luxembourg, the ECSC aimed to prevent post-war conflicts and stabilise industrial production by allowing the free movement of coal and steel, ensuring equal and free access to coal and steel through the creation of a common market/customs union. In order to exercise control and ensure market-independent supervision, a supranational authority was established (European Union, 2017).

In the 1950s, Europe's energy mix was dominated by coal, but European coal faced two threats: first, coal was cheaper overseas, and second, oil was becoming more important. There was a need to think about a more coordinated energy policy that went beyond coal and steel. The Suez Canal crisis of 1956 served to worsen the prevailing concerns at the time, thereby leading to a more favourable climate in Europe for the establishment of a community centred around atomic energy, given the fear of unreliable oil imports from the Middle East (Jegen, 2014, p. 4). Two treaties were signed in Rome on 25 March 1957 - hence the name Treaty of Rome - the Treaty establishing the European Economic Community (EEC) and the Treaty establishing the European Atomic Energy Community (Euratom). Both came into force in 1958 (European Union, n.d.-b). The Treaty establishing the European Economic Community and the Euratom Treaty of 1957 marked a significant effort to achieve common control of critical energy resources. Among the main objectives of the Euratom Treaty were to promote research and the dissemination of technical information; to establish uniform safety standards to protect the public and industrial workers; to facilitate research; and to ensure that civil nuclear materials are not diverted to other uses, particularly military ones (European Union, n.d.-a). Euratom also played a critical role later in the EU's enlargement process towards Eastern Europe, as nuclear power was an important source of energy for many Eastern European countries, but safety standards in their nuclear power plants and the level of protection of the public and workers were not always sufficiently high. Euratom provided the context for EU assistance (European Union, n.d.-a).

6.2.2 1970-1986 A Period of Energy Crises

During the 1960s, coal gradually lost its place to oil in the energy mix of European countries, making them more dependent on oil imports from overseas, particularly from the Middle East. Although the first signs of the fragility of energy security were seen in the Suez Canal crisis of 1956, and again in the Six-Day War of 1967, it wasn't until the 1973 oil crisis as a result of the Yom Kippur War that it became a primary concern (Graaf & Sovacool, 2020; Sever, 2013, p. 19). Foreseeing future problems, the Council of the European Communities on 20 December 1968 imposed an obligation on EEC Member States to maintain minimum stocks of certain petroleum products, namely motor spirit (and its aviation counterpart), gas oil, diesel oil, kerosene (including kerosine-type jet fuel) and fuel oils (European Communities, 1968). The minimum stock level was set at an amount equivalent to 65 days of average daily internal consumption recorded during the previous calendar year. However, a deduction of up to 15% was allowed for the part of internal consumption covered by domestically produced (indigenous) oil, while supplies intended for the bunkering of seagoing vessels were excluded from this calculation (European Communities, 1968). The Directive also established a monitoring mechanism to ensure compliance and a crisis management mechanism, providing a framework for consultation between Member States through the Commission (European Communities, 1968; Tekin & Williams, 2013b, p. 20).

In the early 1970s, several oil-producing countries, such as Libya, Iraq and Venezuela, moved to nationalise major oil companies, which had previously been controlled by Western countries through private oil companies (Graaf & Sovacool, 2020, pp. 26–29). By 1973, OPEC had 12 member states producing 53.9% of the world's total oil output, slowly seizing control of production and prices from the 7 Sisters (also known as the oil majors) (Graaf & Sovacool, 2020, p. 26). In 1973, Western Europe imported 62.9% of its energy supplies (Möckli, 2010, p. 191). Approximately 45% of its energy needs were met by Arab oil (Möckli, 2010, p. 191), creating a dependency and weakness in their relationship. The Yom-Kippur War of October 1973 triggered the oil crisis. On 16 October 1973, OPEC, as a cartel of producers, raised the price of crude oil by 70%, and a further increase in the price was to follow in December (Schramm, 2024, p. 61). The day after OPEC's decision, the Organization of Arab Petroleum Exporting Countries

(OAPEC) agreed in Kuwait to an immediate 5% cut in production, followed by further monthly cuts until Israel withdrew to its 1967 borders. On 4 November 1973, the decision was amended to cut production by 25% of September levels. These production cuts applied to countries considered neutral in the Arab-Israeli conflict. Those considered "hostile" to the Arab position faced a total embargo, while "friendly" countries were to be supplied as normal (Möckli, 2010, p. 190). This classification not only threatened the economies of Western Europe, it also posed a direct political challenge to the unity of the EEC, as OAPEC utilised its "oil weapon" to treat individual members of the Community differently: France and the UK were considered "friendly" nations and received normal oil supplies; the Dutch, along with the US, faced an oil embargo; and the remaining six were grouped as "neutral" and faced gradual production cuts. This situation was further worsened by the threat of OAPEC ministers to impose additional sanctions on any country assisting those under an embargo by reallocating oil. This situation was further worsened by the threat of OAPEC ministers to impose additional sanctions on any country assisting those under an embargo by reallocating oil (Möckli, 2010, p. 191).

As the sole EEC country subjected to the Arab oil embargo, the Dutch government appealed to European solidarity, thereby putting the viability of the Community to the test. Moreover, it reminded the other countries that the common market ensured full and equal access to the Community's energy resources. However, the Dutch appeal for solidarity was disregarded, with France and the UK rejecting the distribution of their oil. It was claimed that the Dutch government's pro-Israel stance would only serve to provoke the Arab countries and result in an expansion of the embargo. These developments signalled limited preparedness for European solidarity and the sharing of energy resources at the time (Schramm, 2024, p. 62). In the aftermath of the supply disruptions witnessed in 1973, the American Secretary of State, Henry Kissinger, made an effort to establish a new organisation that would serve as an anti-OPEC or as a cartel of consumers. However, this initiative met with resistance from European states and Japan, who were more vulnerable to supply interruptions and were unwilling to accept the proposed arrangement. In November 1974, an agreement was reached on the International Energy Program, thereby establishing the IEA as an autonomous agency of the OECD (Graaf & Sovacool, 2020, p. 27). Despite the fact that the IEA was established outside of the EEC framework, most of the EEC members were also part of the IEA. This ultimately led to

the initiation of oil stockpiling by most of the member states of the EEC. Ultimately, the European Council adopted Directive 77/706/EEC in 1977 to synchronise its emergency policies with those of the IEA. The new directives called for the establishment of a consultative body to coordinate action between the member states, particularly concerning the rationing of consumption in times of shortage and the regulation of prices to prevent excessive volatility (Tekin & Williams, 2013b, p. 20; *Decision - 77/706 - EN - EUR-Lex*, n.d.).

The 1973 crisis was followed by the 1979 revolution in Iran. Iranian oil production had fallen from 5.5 million barrels per day to 40,00 barrels per day by January 1979, causing oil prices to soar, and before prices could recover, war broke out between Iran and Iraq in September 1980 (Graaf & Sovacool, 2020, p. 29). Developments in the 70s and 80s forced Western European countries to reconsider the security of their energy supplies. The aforementioned circumstances resulted in the establishment of energy relations between the Western and Eastern blocs of the Cold War, which consequently facilitated the arrival of Soviet gas in the West. In 1968, Austria became the first country outside the Eastern Bloc to import Soviet gas. This was followed by West Germany (1973), Italy (1974) and France (1976) (Graaf & Sovacool, 2020, p. 36).

In the late 1970s, many countries also opted for nuclear power in the face of rising oil prices, but the fall in oil prices in the mid-1980s, escalating start-up costs and growing public opposition following the Three Mile Island and Chernobyl accidents led to a decline in nuclear investment (Goldthau, 2013, p. 171). It also led the EU to adapt the Council Decision of 14 December 1987 on arrangements for the early exchange of information in the event of a radiological emergency (The Council of European Communities, 1987).

6.2.3 1987-2000 The Rise of Environmental Concerns and Liberalisation

In this period, environmental concerns also began to grow in the 1980s, as evidenced by the Single European Act in 1987 (European Communities, 1987); later, sustainability was formally incorporated into the EU's objectives with the Maastricht Treaty in 1992. The Maastricht Treaty also included the first explicit reference to energy in the primary law of the European Community. This was followed by the EU's

ratification of the Kyoto Protocol in 1997, which led to a shift in energy policy towards "green" or "clean" energy (Wood, 2010, p. 311). Around the same time, the trend towards liberalisation of the EU energy market gathered pace, with state monopolies being dismantled (Jegen, 2014, pp. 9–12). The EU adopted its first electricity directive in 1996 (Directive 96/92/EC), requiring the member states to unbundle transmission systems and allow third-party access (Jegen, 2014, p. 6; European Parliament & Council of the European Union, 1996). The 1998 Gas Directive (98/30/EC) extended similar principles to gas, although vertical integration persisted in many markets (European Parliament & Council of the European Union, 1998). These measures aimed to break up monopolies, increase competition and reduce consumer prices.

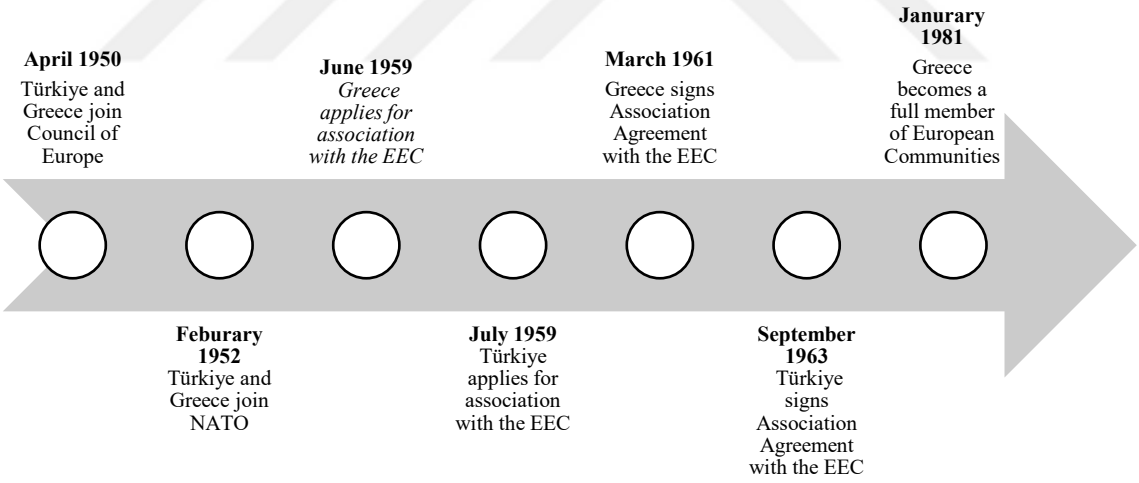
6.3 POLITICAL BACKGROUND OF TÜRKİYE-EU RELATIONS

Since its foundation, Türkiye has played a major role in European politics and has become an important state in the region. In the republic's early years, Türkiye sought to participate in international institutions such as the League of Nations, which it joined in 1932 at the invitation of Spain. After World War II, Türkiye became a founding member of the United Nations (UN), and together with Greece, became the first enlargement of the Council of Europe (CoE) on 13 April 1950. Türkiye and Greece also became the first enlargement of the North Atlantic Treaty Organisation (NATO), which they both joined on 18 February 1952. Türkiye's national preference to commit to European cooperation and governance structures is demonstrated by its participation in international institutions (Karaca, 2010; MFA Türkiye, n.d.-b, n.d.-a).

Türkiye's efforts to integrate into Europe and to counterbalance Greece in international organisations led the country to establish closer economic and political ties with the European Economic Community (EEC) (Eralp, 1999, p. 484). Ultimately, shortly after Greece's application, Türkiye applied for associate membership of the EEC (Tsarouhas, 2021, p. 49). Following the formalisation of the Ankara Treaty, also known as the Association Agreement, on 12 September 1963, which entered into force in 1964, Türkiye officially became associated with the EEC. The Association Agreements signed with Türkiye and Greece, unlike the later Association Agreements, granted full membership rights (Eralp, 1999, p. 485).

The Ankara Treaty outlined a three-phase process for Türkiye's association: preparation, transition, and the establishment of a customs union. As part of this process, the Additional Protocol to the Ankara Agreement was signed in 1970, preparing the road for the establishment of the current customs union between Türkiye and the European Union. This development coincided with a divergence in the foreign affairs policies of Greece and Türkiye, as both nations sought to address the challenges of establishing a customs union. While Greece sought full membership of the EEC in 1975 to meet the challenges posed by a customs union, Türkiye opted to suspend its relations with the EEC to safeguard the interests of the country's industrialists. Following Greece's accession to the European Community in 1981, another challenge in the relations between Türkiye and the European Community emerged, which Eralp calls the "Greek factor", as Greece adopted a stance that hindered the normalisation of relations between Türkiye and the European Community (Eralp, 1999, p. 489).

Figure IV: A Timeline of Greece-Türkiye Political Memberships in International Organisations



Source: Own work

Despite these challenges, Türkiye sought to revive and formalise its relations with the European Community, which eventually led to the country's formal application for full membership of the European Economic Community in April 1987 (Eralp, 1999, p. 490; Kuniholm, 2001, p. 25). In the same year, Morocco also applied for full membership of

the European Economic Community, which was rejected on the grounds that Morocco was not a European state. At the same time, Türkiye's application was accepted for review, as it was outlined in Article 28 of the Ankara Agreement, which anticipated the possibility of full membership. According to the European Parliament, this decision was influenced by factors such as Türkiye's long-standing engagement with European institutions and its role in European politics. Notwithstanding the geographical reality that part of Türkiye's territory is in Asia, successive EU bodies have stated that the concept of a "European state" can transcend geographical boundaries, emphasising the political and historical considerations for the eligibility criteria (European Parliament, n.d.-a). Türkiye's application for full membership of the European Economic Community was a major milestone in its integration into the European Union. However, the Customs Union Agreement signed in 1995 was equally important.

6.3.1 Institutional Milestones in the Accession Process

6.3.1.1 1995 Customs Union Agreement

The Customs Union Agreement between the European Communities and Türkiye is an important milestone in their relations, which marks a new stage in the integration of Türkiye into the European Communities. The Customs Union between Türkiye and the European Community was foreseen in the Ankara Agreement and the Additional Protocol to the Ankara Agreement (Association Council, 1995; Eralp, 1999). The aforementioned Agreement and Protocol formalised the establishment of a Customs Union, which was expected to reinforce Türkiye's alignment with the EU's regulations and policies. However, the period following the Additional Protocol has seen an increase in problems and a decrease in alignment in relations.(Eralp, 1999, p. 485). As previously mentioned, Türkiye chose to suspend its relations with the EEC to safeguard interests of its industrialists (Eralp, 1999, pp. 485–488). This decision postponed implementation of the final phase of the Customs Union until it was finalised on 22 December 1995, which damaged Türkiye's accession to the EU.

The Customs Union establishes rules for the free movement of goods only, with the exception of agricultural products, and outlines the trade policy between the two. The exclusion of Turkish agricultural products from the Customs Union is due to the long-

standing Common Agricultural Policy (CAP) of the European Communities, which aims to safeguard the interests of European farmers. However, this exclusion became part of a long-standing demand from Türkiye to modernise the Customs Union. It should also be noted that the structure of the Customs Union limits Türkiye's decision-making power in EU trade negotiations. While Türkiye is obliged to adhere to EU trade policies, it is excluded from discussions on relevant free trade agreements, which puts it in a disadvantageous position (Usta, 2022). However, the establishment of the Customs Union has been identified as an important factor in the significant increase in the volume of trade between the two countries, even though its scope has remained limited to industrial and processed agricultural products, as it recognises the free movement of goods of Turkish, European or third country origin that have undergone the necessary import formalities and customs duties; the abolition of all import and customs duties, as well as any equivalent charges; and the prohibition of quantitative restrictions on imports and exports, with the exception of specific cases where public interests such as morality, health or security justify their application (Association Council, 1995).

Although there is no direct energy-related part of the Customs Union, there are some parts, albeit in a secondary capacity. Since Türkiye is obliged to harmonise its technical regulations and standards with those of the EU, it is also obliged to comply with EU energy efficiency standards, especially for household electrical appliances such as refrigerators, freezers and lighting systems. By adopting these EU standards, Türkiye ensured that energy-related products meet EU efficiency criteria and reduce energy consumption (Turkey – EC Customs Union Joint Committee, 2006). While this does not create a framework for energy trade or infrastructure, it does provide for the alignment of Türkiye's technical regulations on energy efficiency through standardisation.

Despite the passage of three decades since the ratification of the Customs Union Agreement, it continues to serve as a decisive cornerstone of Türkiye-European relations in the present day. The Turkish government has repeatedly called for its modernisation, highlighting the associated issues. Nevertheless, there has been no notable progress in the modernisation of the customs union agreement (Usta, 2022).

6.3.1.2 Helsinki Summit and Accession Negotiations

Türkiye applied for full membership of the European Union in April 1987, but its application was not reviewed for a long time. Türkiye was initially declared eligible for EU membership at the 1997 Luxembourg Summit. Yet, the country was not granted candidate status due to concerns over human rights, the protection of minorities, and Türkiye's strained relations with Greece (European Parliament, n.d.-c). Candidacy status gives countries access to the European Union's pre-accession assistance funds to help them in their accession process, but since Türkiye wasn't declared a candidate country, it wouldn't be able to receive them. At the Luxembourg summit, Türkiye was offered a special status instead of full membership of the European Union, which was widely perceived by Turkish elites as discriminatory and unfair, given that there were many candidate countries, including "Republic of Cyprus", with enough worrying problems already. This exclusion led to a rise in anti-European sentiment in Türkiye, which in turn led to the suspension of political dialogue with the EU. The decisions of the Luxembourg Summit further reinforced the perception that Türkiye's integration into the EU was being superseded by the EU's primary focus on Central and Eastern Europe. Nevertheless, given Türkiye's geopolitical importance, the country's exclusion became indefensible. Over time, the combined pressure of the United States and a shift in European strategic priorities led certain EU member states, such as France and Italy, to advocate for a more inclusive approach towards Türkiye (Eralp, 2002).As a result of these developments, the approach to Türkiye changed at the Helsinki Summit in 1999. In particular, this summit led to the formal recognition of Türkiye's candidate status, aligning it with the other candidates in the process and allowing it access to EU financial and technical assistance to support its future accession (European Parliament, n.d.-b). This development marked a redefinition of the relationship between Türkiye and the EU, as well as Greece's approach to Türkiye's membership (Agnantopoulos, 2013; Torun, 2021, p. 328).

Although Türkiye was granted candidate status in 1999, accession negotiations didn't begin until 2005. On 1 May 2004, the European Union underwent its biggest enlargement since its foundation when it welcomed 10 new Member States, including "Republic of Cyprus". In the period immediately preceding "Republic of Cyprus's" formal accession to the European Union, the island held a significant referendum on

reunification under the Annan Plan. Although turnout in the referendum was high in both communities, the results were different. On the Turkish Cypriot side, 65% of voters approved the plan, while 76% of Greek Cypriots rejected it, leading to an involuntary defection and Cyprus joining the EU as a divided island (Yorucu & Mehmet, 2022, p. 85). As a result of this development, Türkiye's accession negotiations began in 2005 in a highly handicapped state (Cop & Zihnioğlu, 2017, p. 3; Turhan & Reiners, 2021, pp. 12–13).

Formal accession negotiations between Türkiye and the EU began on 3 October 2005 with an open-ended framework (Turhan, 2016, p. 5). The opening of accession negotiations set the objective of aligning Türkiye's policies, laws, and standards with those of the EU, leading to a series of significant reforms. The negotiation framework set by the EU comprised 35 thematic chapters, each representing a sector of the Acquis Communautaire. A total of 16 of these have been opened, while one has been provisionally closed (Directorate for EU Affairs, 2024). Political decisions by the EU Council and the "Republic of Cyprus" have blocked a total of 14 chapters. According to the EU General Affairs and External Relations Council Decision of 11 December 2006, the fulfilment of Türkiye's commitments under the Additional Protocol establishes an opening benchmark for eight chapters and a closing benchmark for all chapters (Directorate for EU Affairs, 2024). The decision mentioned above states that: *"As concerns Turkey, the Council decided in particular to suspend negotiations on eight chapters relevant to Turkey's restrictions with regard to the Republic of Cyprus, and will not close the other chapters until Turkey fulfils its commitments under the additional protocol to the EU-Turkey association agreement, which extended the EU-Turkey customs union to the ten member states, including Cyprus, that joined the EU in May 2004.*" (European Commission, 2006b). Furthermore, during the EU General Affairs Council meeting of 8 December 2009, Greek Cypriots declared that the unilateral "normalisation" of relations was set as a precondition for the progression in six chapters (Directorate for EU Affairs, 2024).

Table II: Current Situation in Accession Negotiations

Chapter No	Chapter Title	Opened	Provisionally Closed	Blocked by EU Council (2006)	Blocked by "Republic of Cyprus"	Chapters without political blockages until 13 December 2016
1	Free Movement of Goods			Yes		
2	Freedom of Movement for Workers				Yes	
3	Right of Establishment and Freedom to Provide Services			Yes		
4	Free Movement of Capital	Yes				
5	Public Procurement					Yes
6	Company Law	Yes				
7	Intellectual Property Law	Yes				
8	Competition Policy					Yes
9	Financial Services			Yes		
10	Information Society and Media	Yes				
11	Agriculture and Rural Development			Yes		
12	Food Safety, Veterinary and Phytosanitary Policy	Yes				
13	Fisheries			Yes		
14	Transport Policy			Yes		
15	Energy				Yes	
16	Taxation	Yes				
17	Economic and Monetary Policy	Yes				
18	Statistics	Yes				
19	Social Policy and Employment					Yes
20	Enterprise and Industrial Policy	Yes				
21	Trans-European Networks	Yes				
22	Regional Policy and Coordination of	Yes				

	Structural Instruments					
23	**Judiciary and Fundamental Rights**				**Yes**	
24	**Justice, Freedom and Security**				**Yes**	
25	**Science and Research**	**Yes**	**Yes**			
26	**Education and Culture**				**Yes**	
27	**Environment**	**Yes**				
28	**Consumer and Health Protection**	**Yes**				
29	**Customs Union**			**Yes**		
30	**External Relations**			**Yes**		
31	**Foreign, Security and Defence Policy**				**Yes**	
32	**Financial Control**	**Yes**				
33	**Financial and Budgetary Provisions**	**Yes**				
34	**Institutions**					**Yes**
35	**Other Issues**					**Yes**

Source: Adapted from the data provided by (Directorate for EU Affairs, 2024)

While in the early years of accession negotiations the Turkish government introduced EU-inspired reforms, such as the abolition of the death penalty in 2002 (Müftüler Baç, 2005, p. 24), by 2010 Cyprus and other disputes had "stalled" the accession process, and this institutional gridlock led to a pattern of selective alignment, whereby Türkiye aligns with certain EU norms without being part of a formal roadmap. In the mid-2010s, relations between Türkiye and the EU were thrown into fresh turmoil by the migration deal signed on 18 March 2016, which aimed to halt unregistered migration from Türkiye to the EU in exchange for financial aid and visa liberalisation for Turkish citizens. However, the coup d'état attempt in Türkiye on 15 July 2016 changed the possible positive outcome of the accession process agreement. Following the coup d'état attempt, Türkiye carried out a massive purge of judges, journalists and state officials, accusing them of being linked to the coup d'état and the terrorist organisation FETÖ (Fetullah Gülen Terrorist Organisation). The EU condemned the crackdown and warned that Türkiye was moving away from EU standards, further straining relations and leading to the freezing of accession negotiations. Since 2016, the EU has cited Türkiye's

“democratic backsliding” in areas such as press freedom, rule of law and civil liberties in its reports.

CHAPTER 7 EMPIRICAL EVIDENCE

This chapter periodically examines the energy policy alignment between Türkiye and the EU between 2000 and 2024 using a Liberal Intergovernmentalism framework.

7.1 DEVELOPMENTS AFTER THE HELSINKI SUMMIT (2000-2006)

During this period, there were sudden shifts in Turkish domestic politics and in the geopolitical landscape of Eastern Europe, particularly in Georgia and Ukraine. The non-violent changes of power resulting from the Rose Revolution in Georgia in 2003 and the Orange Revolution in Ukraine in 2004 reduced Russian influence in both states while boosting their relations with the EU and the US (Alp, 2020, p. 26). These developments later led to Russia experiencing crises with Ukraine and Georgia, disrupting the geopolitical order and the energy market.

7.1.1 Domestic Developments in Türkiye Influencing Alignment (2000-2006)

Turkish politics changed significantly in the years following the Helsinki Summit, as the country went through an economic crisis that led to the fall of the traditional political parties and several major reforms in the country's institutions, most notably the political rise of the newly formed Justice and Development Party (Zihnioğlu, 2019, pp. 27–33).

In the early 2000s, Türkiye faced a severe economic crisis, intensified by the financial crash of 2001, resulting in a sharp contraction of GDP, soaring inflation and widespread public discontent. To overcome the crisis, several structural reforms were initiated as part of an agreement with the International Monetary Fund (IMF). These reforms paved the way for future alignment with the EU. The 2002 general election marked a major shift in Turkish politics (Patton, 2007, p. 339). Due to the widespread disappointment with traditional political parties, the newly formed Justice and Development Party (AKP) won a landslide victory and secured a parliamentary majority with 34.28% of the votes (Müftüler Baç, 2005, p. 24; T.C Resmi Gazete, 2002). Despite

being founded by former members of the banned Welfare Party, the AKP positioned itself as a pro-EU, reformist actor committed to economic recovery and institutional alignment with European standards (Müftüler Baç, 2005, p. 28; Onar, 2007, pp. 273–274; Zihnioğlu, 2019, p. 31). The AKP has been the ruling party ever since its first election in 2002 and has therefore been responsible for Türkiye's accession negotiations throughout its duration. These developments have resulted in a positive national preference formation towards the EU accession process.

7.1.2 Developments in Türkiye's Alignment with the EU Energy Acquis (2000-2006)

Following the recognition of Türkiye as an EU candidate country at the Helsinki Summit in 1999, Türkiye undertook a more structured process of alignment with the EU in the energy sector, as well as in many other areas. This was due to the commencement of formal intergovernmental bargaining as part of the accession negotiations. Although the pace and depth of progress varied across sectors due to institutional choices, between 2000 and 2006, Türkiye's alignment with the EU increased in terms of energy market liberalisation, institutional restructuring and legislative harmonisation.

The most significant progress was seen in the internal energy market, where the adoption of the Electricity Market Law in 2001 and the Natural Gas Market Law in 2001 represented turning points. These laws prepared the legal foundation for market liberalisation and called for the unbundling of state monopolies in the generation, transmission, and distribution of energy in accordance with the EU acquis (European Commission, 2001). Furthermore, the Energy Market Regulatory Authority (EMRA) was established to supervise and regulate the market. By 2005, EMRA had expanded its scope to include petroleum products, and its staff had increased to nearly 300. Despite these advancements, the authority faced constant challenges such as limited operational independence and political influence over decision-making processes (European Commission, 2005).

Although legislation had been largely aligned with the acquis, its implementation had been slow. In the electricity market, the thresholds for eligible customers were gradually lowered, but state-owned companies such as Türkiye Elektrik İletim Anonim

Şirketi (TEİAŞ) and Türkiye Elektrik Ticaret ve Taahhüt Anonim Şirketi (TETAŞ) continued to dominate generation and transmission. Long-term power purchase agreements remained in place, undermining competitive dynamics. Similarly, in the gas sector, the 80% market opening target was not met as BOTAŞ maintained its monopoly on imports and trading. The "gas release programme", which was supposed to reduce BOTAŞ's dominance, was repeatedly postponed (European Commission, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006a).

In the area of energy security, Türkiye continued to comply with the International Energy Agency's 90-day stockholding requirement, although without harmonising the calculation methods with EU practice. Türkiye also pursued a strategy of diversifying its supply routes and improving its transit role. Projects such as the Baku-Tbilisi-Ceyhan oil pipeline, the Blue Stream gas pipeline and the Türkiye-Greece gas interconnector were either completed or under construction during the period. These developments have been positively noted by the EU, in particular concerning their contribution to the Union's security of supply (European Commission, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006a).

Despite early references to energy efficiency in progress reports, no framework law had been adopted by 2006 (European Commission, 2006a). While the potential for energy savings was often mentioned and some institutional bodies were created, concrete measures remained limited. Renewable energy took its first major legislative step in 2005 with the adoption of the Law on the Use of Renewable Energy Resources in Electricity Generation. However, the law lacked binding targets and a strategic framework, making it a modest rather than transformative development (European Commission, 2005).

Nuclear energy policy during this period was characterised by inconsistency. The aforementioned Akkuyu project was cancelled in 2000, and nuclear plans remained undeveloped until 2005 (European Commission, 2000, 2005). Although Türkiye had signed a safeguards agreement with the International Atomic Energy Agency (IAEA) and operated a small research reactor, its regulator (see 6.1.3 for details), TAEK, lacked full independence and continued to perform both regulatory and promotional functions.

Overall, the period 2000-2006 was a transition from legislative preparation to partial implementation in Türkiye's energy alignment with the EU. Several important

legal instruments were adopted, and several essential institutions were established in the electricity and gas markets. However, full compliance was hindered by rooted monopolies, regulatory deficiencies and a lack of strategic depth in sustainability policies. While the foundations for integration with the EU energy acquis had been set, the realisation of an effectively liberalised and competitive energy market remained incomplete.

7.1.3 Early Infrastructure Projects

In the early 2000s, Türkiye invested in energy transit projects such as the Baku-Tbilisi-Ceyhan (BTC) crude oil pipeline with Azerbaijan and Georgia and the Blue Stream natural gas pipeline with Russia, contributing to regional energy security and supply diversification in line with EU energy priorities. However, the emergence and development of these projects, in particular their financing, operational control and legal frameworks, show that this alignment has been largely pragmatic rather than formal integration into the EU's internal energy market framework. This section examines these early projects to see whether they represent the first steps of a genuine alignment with EU policy or instances of parallel but independently defined strategic interests.

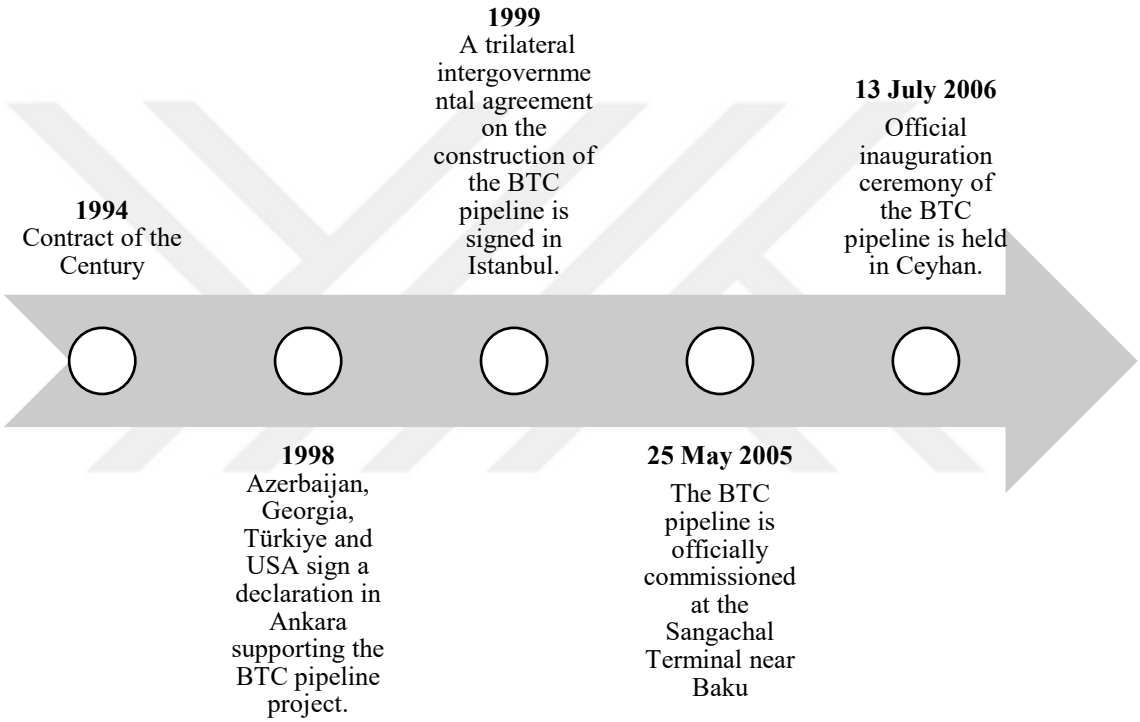
7.1.4 Baku-Tblisi-Ceyhan Crude Oil Pipeline and Baku–Tbilisi–Erzurum Natural Gas Pipeline

The Baku-Tblisi-Ceyhan crude oil pipeline is one of the most important energy infrastructure projects since the end of the Cold War. The pipeline transports crude oil from the Azeri-Chirag-Gunashli (ACG) fields in the Caspian Sea through Azerbaijan, Georgia and Türkiye to the Mediterranean port of Ceyhan. The 1,768km pipeline - 443km in Azerbaijan, 249km in Georgia and 1,076km in Türkiye - was built under BP's leadership and came on stream in 2006, with throughput later increased to 1.2 million barrels per day (bp, n.d.; T.C. Enerji ve Tabii Kaynaklar Bakanlığı, n.d.).

The pipeline has significant geopolitical implications because it bypasses both Russia and Iran, breaking Russia's pipeline monopoly in the region. (Musayeva, 2018, p. 126) The pipeline allowed Azerbaijan to pursue a foreign policy more independent of

Russia and to diversify its export options (Marosvari, 2012, pp. 3–5). The pipeline was a product of coordinated efforts between Azerbaijan, Georgia, Türkiye and the United States, while European interests also aligned with its development as part of an energy security strategy. For its part, Türkiye has used the BTC to strengthen its role as a regional energy hub, positioned between Caspian producers and European consumers, which is in line with Ankara's long-term energy and foreign policy aspirations (Tekin & Walterova, 2007, p. 84).

Figure V: Timeline of the Baku–Tbilisi–Ceyhan (BTC) Pipeline



Source: Own work

A parallel development was the Baku-Tbilisi-Erzurum (BTE) pipeline, which became operational in the following year. Built to deliver natural gas from Azerbaijan's Shah Deniz field to Türkiye via Georgia, BTE reinforced Türkiye's growing role as a natural gas corridor (Republic of Türkiye Ministry of Energy and Natural Resources, 2023b). Like BTC, the BTE pipeline was developed through strategic partnerships and bilateral diplomacy, with minimal institutional involvement of the European Union. While both pipelines were consistent with EU objectives of transit diversification and market security, they did not show legal or regulatory harmonisation of Türkiye with the EU energy acquis. Instead, they represented pragmatic cooperation shaped by Türkiye's

geopolitical interests and bilateral agreements, confirming the expectation under liberal intergovernmentalism that states will align externally if it serves internally defined preferences.

7.1.5. Blue Stream Pipeline

The Blue Stream pipeline was initiated by a bilateral agreement between Gazprom and BOTAŞ under the intergovernmental protocols signed in 1997, and the pipeline became operational in 2005 (Republic of Türkiye Ministry of Energy and Natural Resources, 2023b). The pipeline is designed to deliver up to 16 billion cubic metres of Russian natural gas per year to Türkiye via an underwater route under the Black Sea (Bacik, 2001, pp. 88–89; Republic of Türkiye Ministry of Energy and Natural Resources, 2023b). The pipeline allows Russia to bypass Ukraine and the Balkans.

At the time, Blue Stream coincided with the EU's security of supply and was welcomed by the EU. The project didn't have anything to do with the EU's legal framework or principles. The project was criticised for the decisive Russian influence in Türkiye due to concerns about increased dependence on Russian gas and the legal provisions of the agreement. In particular, the Nationalist Movement Party (MHP), the second largest member of the coalition at the time, had reservations about the project. At the time, Russia already accounted for around 70% of Türkiye's natural gas imports and Blue Stream was seen by many as reinforcing this situation (Bacik, 2001, pp. 89–92).

The Blue Stream is a product of shared interests similar to those of BTC and BTE. While Türkiye sought to meet growing energy demand and prevent domestic shortages, Russia sought to strengthen its export routes and consolidate its regional position. However, this cooperation did not lead to any spillover effects. Blue Stream is thus an example of strategic convergence without legal or normative alignment with regional frameworks.

7.2 PERIOD BETWEEN THE 2006 UKRAINE-RUSSIA GAS TRANSIT CRISIS TO THE ANNEXATION OF CRIMEA (2006-2014)

Following the energy security concerns that arose in Europe after the first Russo-Ukrainian natural gas crisis, the EU launched a new diversification policy in 2008, aiming

at the construction of LNG receiving terminals in Central and South-Eastern Europe and the pursuit of the Southern Gas Corridor to bring natural gas from Caspian and Middle Eastern sources without crossing Russia. The implementation of this strategy received further impetus following the Russian invasion of Georgia in 2008 and a second gas crisis between Russia and Ukraine in January 2009 (Yorucu & Mehmet, 2018, p. 47).

In 2012, the EU and Türkiye launched a positive agenda aimed to revive bilateral relations amid stagnation in Türkiye's EU accession negotiations While the agenda was encompassing multiple policy areas-from judiciary reform to foreign policy dialogue-the agenda's energy policies emerged as a critical driver of the agenda (Akçay, 2017).

7.2.1 Domestic Developments in Türkiye Influencing Alignment (2006-2014)

During this period, the ruling party AKP consolidated its executive authority amidst ongoing constitutional reforms. This period shows how internal institutional restructuring and executive dominance have shaped Türkiye's national preferences, particularly regarding EU alignment and policy autonomy.

Between 2006 and 2014, the ruling AKP government further consolidated its authority, leading to rising social tensions and a stagnation in EU-Türkiye relations (Zihnioğlu, 2019). In 2010, Türkiye held a referendum on constitutional reform, which was presented as an attempt to comply with EU norms. Following the AKP's victory in the 2011 general election with 49.9% of the vote (haberler.com, n.d.), the country began discussing a presidential model, although the formal constitutional change did not take place until 2017. The consolidation of executive authority met with public resistance in the Gezi Park protests of 2013, which began as a small-scale environmental protest and escalated into nationwide anti-government protests. The government responded to the protests with a strong security-oriented approach and critical rhetoric, which drew attention from the EU and worsened the tensions in bilateral relations (Zihnioğlu, 2019, p. 38).

Between 2006 and 2014, while the AKP continued to pursue selective reforms aligned with the EU acquis, particularly in the early years of this period, there was a growing tension between liberalisation rhetoric and authoritarian practice. Thus, national

preference formation during this period was increasingly shaped not by broad societal consensus or EU conditionality, but by an executive-driven policy agenda that prioritised regime consolidation and strategic autonomy over institutional alignment (Bürgin & Oppermann, 2019, p. 483; Zihnioğlu, 2019, p. 13).

7.2.2 Developments in Türkiye's Alignment with the EU Energy Acquis (2006-2014)

Reflecting the difficult intergovernmental bargaining during the accession negotiations, Türkiye's energy policy alignment with the EU varied over this period, showing progress, stagnation, and even occasional regression. In the security of supply category, steady progress has been made, highlighted by critical infrastructure developments such as the commissioning of the BTC pipeline in 2006, the initiation of the Samsun-Ceyhan pipeline in 2007 and important agreements on the Trans-Anatolian Pipeline (TANAP) and Trans-Adriatic Pipeline (TAP) projects between 2012 and 2014. Despite this progress, limited progress has been made in the management of strategic oil stocks due to differences between Türkiye's stockholding practices and EU requirements (European Commission, 2006a, 2007, 2012, 2013, 2014).

In the electricity market, Türkiye continued to liberalise the market, gradually reducing eligibility thresholds and launching privatisation processes, especially after 2009. However, persistent problems of high levels of electricity theft and technical losses, combined with cross-subsidisation, highlighted structural deficiencies. The most significant setback in this category was the repeated delays in establishing a transparent cost-reflective pricing mechanism (European Commission, 2009).

The gas market also showed varied results: on the progressive side, the expansion of distribution networks from 54 cities in 2006 to 76 cities in 2014 and the increase in private sector participation in gas imports were noted. On the other hand, the continued monopolistic control of the state-owned BOTAŞ has meant stagnation, heightened by the failure of gas release programmes and recurrent delays in revising the gas market law (European Commission, 2014). Meanwhile, renewable energy has been a consistent success story in terms of EU alignment over this period. The share of renewables in Türkiye's energy mix has increased impressively from 17% in 2009 to 29% in 2014,

supported by a strengthened regulatory framework and incentives (European Commission, 2014).

Energy efficiency continued to suffer from administrative capacity problems and insufficient national targets, despite the adoption of a basic framework law in 2007 and subsequent regulatory measures. There have also been significant delays in aligning Türkiye's energy efficiency legislation with EU directives (European Commission, 2007). In the field of nuclear energy, Türkiye has taken some initial legislative and regulatory steps, notably the agreements for the Akkuyu and Sinop NPPs for the period 2010-2014. However, Türkiye continued to lack an independent nuclear regulator, while its reluctance to accede to major international nuclear safety conventions indicated significant structural deficiencies. The continued dual operational and regulatory role of the Turkish Atomic Energy Authority (TAEK) was a critical point of regression, with significant differences from EU standards (European Commission, 2010, 2011, 2012, 2013, 2014).

Subsequently, institutional capacity and regulatory independence continued to emerge as an area requiring attention. Although regulators such as the Energy Market Regulatory Authority (EMRA) showed initial improvements, their continued struggle with limited capacity and lack of independence demonstrated institutional weaknesses that hindered alignment with EU regulatory standards (European Commission, 2006a, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014).

Table III: Yearly Progress of Türkiye in EU Energy Policy Areas (2006–2014)

Category / Year	2006	2007	2008	2009	2010	2011	2012	2013	2014
Security of Supply	Progress	Partial Progress	Progress	Progress	Progress	Partial Progress	Partial Progress	Progress	Progress
Internal Energy Market	Partial Progress	Partial Progress	Partial Progress	Progress	Progress	Progress	Partial Progress	Partial Progress	Partial Progress
Natural Gas Market	No Progress	Partial Progress	Partial Progress	Partial Progress	Little Progress	Partial Progress	Partial Progress	Partial Progress	Partial Progress
Renewable Energy	No Progress	Partial Progress	Progress	Progress	Progress	Progress	Progress	Progress	Progress
Energy Efficiency	No Progress	Partial Progress	Partial Progress	Progress	Progress	Partial Progress	Progress	Partial Progress	Partial Progress

Source: European Commission Reports

Legend:

- Progress = Clear advancement and active alignment with EU policies
- Partial Progress = Steps forward with notable limitations or incomplete alignment
- No Progress = Little or no advancement towards alignment goals

7.2.3 Nabucco

The Nabucco pipeline project was seen as a flagship project of the European Union's Southern Gas Corridor strategy when it was launched in 2002. Its main objective was to diversify Europe's natural gas imports by providing an alternative to Russia from the Caspian region and the Middle East. The project aimed to transport up to 31 billion cubic metres of gas per year along a 3,300 km route from the Turkish-Georgian and Turkish-Iranian borders through Türkiye, Bulgaria, Romania, Hungary and finally Austria. From the beginning, Nabucco was seen not only as a commercial project but also as a geopolitical initiative of the EU. Especially after the gas crises between Russia and Ukraine, which highlighted the risk of over-dependence on Russian supply routes, the Nabucco project became more crucial than ever. The first legal step was taken with an intergovernmental agreement, which was signed in Ankara in July 2009. (Tagliapietra, 2017, p. 3). In contrast to the aforementioned BTE, BTC and Bluestream pipeline projects, Nabucco was more formally integrated into the EU's internal energy market framework, rather than operating on a bilateral basis.

Despite its strategic appeal, Nabucco ultimately failed to materialise due to structural, commercial and geopolitical constraints. One of the major constraints was the lack of confirmed gas volumes to justify the full capacity of the pipeline. While Azerbaijan's Shah Deniz Phase II field provided a partial supply base, it was insufficient to meet the planned throughput of 31 bcm, and expected additional supplies from Turkmenistan, Iran, Iraq and Egypt remained unrealised due to political instability, international sanctions and the lack of critical infrastructure (Petkova, 2015, p. 36). The biggest obstacle to the project was its financial cost. With construction costs estimated at around €8 to 10 billion, Nabucco struggled to find willing investors. Competing pipelines such as the Trans Adriatic Pipeline and the Russian-backed South Stream emerged as more commercially attractive and logistically simplified alternatives, offering lower costs (Tagliapietra, 2017, p. 3). The final blow to the project came in 2013, when the Shah Deniz consortium chose TAP over Nabucco West as the route for Azerbaijani gas to Europe due to TAP’s shorter route, lower financial risk. This decision effectively ended the Nabucco project (Sartori, 2021, p. 390).

7.3 THE PERIOD BETWEEN CRIMEA'S ANNEXATION AND THE WAR IN UKRAINE (2014-2022)

In February-March 2014, Russia invaded Ukraine and annexed Crimea, while actively supporting separatist movements in Donetsk and Luhansk (Marie-Louise Gumuchian et al., 2014). This situation strained Russia's relations with the EU and led to the imposition of the first wave of sanctions from the EU against Russia, which Türkiye did not participate in despite supporting Ukraine's sovereignty and territorial integrity openly (MFA Türkiye, 2014).

7.3.1 Domestic Developments in Türkiye

Türkiye's politics and economy have undergone significant changes, as has the world's geopolitical environment. These changes have redefined not only the country's internal governance but also its external engagements, including in the energy sector. The internal consolidation of executive power under the authority of the president, combined with the economic crisis and shifting regional alignments, challenged Türkiye's willingness to align with the EU beyond areas of common interest. As a result, Türkiye's national preference formation and engagement with the EU has evolved into transactional, issue-specific cooperation, leading to a pattern of selective alignment.

First, during this period, Türkiye's political system was transformed into a centralised executive presidency, and a failed coup d'état attempt in 2016 led to a two-year state of emergency that accelerated the consolidation of executive authority (Zihnioğlu, 2019, p. 41). These extraordinary circumstances paved the way for a constitutional referendum in April 2017, which was narrowly passed and formally established a presidential system in Türkiye (NTV, n.d.; 'Referandum 2017', 2017). The presidential and parliamentary elections held in June 2018 marked the official transition of the system, with Erdoğan elected president and the AKP securing a parliamentary majority through its alliance with the Nationalist Movement Party (MHP) (Hürriyet, 2018). At the same time, Türkiye's economic conditions deteriorated to the point that by the middle of the decade, external imbalances widened as a result of an unsustainable credit boom, worsened by dependence on energy imports. These structural weaknesses culminated in the currency crisis of 2018, triggered by an external shock. The Turkish lira

lost almost half of its value against the US dollar, inflation surged above 25% and investor confidence deteriorated sharply (Aliriza & Yekeler, 2019), while the central bank's autonomy was repeatedly undermined by political intervention, notably by President Erdoğan's public opposition to interest rate hikes (Bloomberght, 2018).

Although temporary stabilisation was achieved through interest rate hikes and support from external actors such as Qatar (TCMB, 2019, 2020, 2018), underlying vulnerabilities remained unaddressed. A second wave of currency depreciation and inflationary pressures resurfaced in 2021-2022, culminating in inflation rates above 80% in late 2022. These repeated economic crises severely constrained the government's fiscal space and increased the strategic importance of foreign capital, energy cost management and external investment flows (Kubilay, 2022). Due to the reasons mentioned above, maintaining cooperative relations with both the EU and non-Western actors became a matter of economic survival, reinforcing the rationale for selective alignment.

Türkiye meets most of its primary energy needs through imports, and as global energy prices have risen sharply since 2016, Türkiye's dependence has meant that any increase in global oil and gas prices has caused problems for the country, while also widening the country's current account deficits. This situation has led the country to diversify its energy suppliers and invest in infrastructure projects that would strengthen its role as a regional transit and distribution hub, allowing the country to access cheaper energy sources. As a result of this approach, Türkiye has simultaneously supported both EU-backed and Russia-linked pipeline projects (Devres & Durukan, 2013, p. 374). On the one hand, Türkiye played a central role in the EU's Southern Gas Corridor through the construction and operation of the Trans-Anatolian Natural Gas Pipeline (TANAP), which was inaugurated in 2018. TANAP enabled Azerbaijani gas to reach European markets via Türkiye, directly contributing to the EU's goal of reducing its dependence on Russian gas. On the other hand, Türkiye also deepened its energy relations with Russia through the TurkStream pipeline, inaugurated in 2020, which allowed Russian gas to bypass Ukraine and reach Southeast Europe via Turkish territory.

The geopolitical positioning of Türkiye during this period reinforced the aforementioned pattern above. Türkiye's relations with the EU remained troubled during this period due to the country's authoritarian turn and maritime disputes in the Eastern

Mediterranean with EU member states such as Greece and the Republic of Cyprus (Toygür & Tekin, 2022; Yorucu & Mehmet, 2022). While the EU became increasingly critical of the Turkish government, especially after the post-coup d'état crackdown and "the erosion of the rule of law", trade and energy interdependence prevented a complete split. Despite repeated condemnations and the formal freezing of Türkiye's accession negotiations in 2017, the EU remained Türkiye's largest trading partner and an important source of investment (European Commission, 2024b). This interdependence led the EU to launch another positive agenda to restore the relations in 2020 (IKV, 2021; Suzana Anghel & Dawid Fusiek, 2021). However, the intergovernmental bargaining process was severely damaged by the freezing of accession negotiations.

This dichotomy, normative disalignment combined with economic interdependence, has further incentivised Ankara to compartmentalise its foreign policy, cooperating with the EU in areas such as energy infrastructure, migration management and customs union upgrades, while resisting alignment on governance and human rights (Saatçioğlu et al., 2020).

Meanwhile, Türkiye's relations with Russia also underwent dramatic changes during this period. In 2015, Turkish-Russian relations reached their lowest point when the Turkish Air Force shot down a Russian fighter jet (Çopuroğlu & Karpuzcu, 2017; Sönmez, 2015). Remarkably, the two states have repaired their deteriorating relations. Russia quickly became an important partner not only in energy trade but also in strategic infrastructure development, including the country's first commercial nuclear power plant, the Akkuyu NPP project, which is being fully financed and built by Russia's Rosatom. Energy cooperation between Türkiye and Russia has also deepened as a result of Türkiye's growing dependence on Russian fossil resources such as oil, gas and coal.

7.3.2 Developments in Türkiye's Alignment with the EU Energy Acquis (2014–2022)

During this period, Türkiye's alignment with the EU in the energy field continued to be selective. While notable progress has been made in specific areas such as security of supply and renewable energy, progress in other areas such as gas market liberalisation, energy efficiency, and nuclear safety has been very limited or has stagnated, as they

required deep structural reforms such as unbundling and transparency. This asymmetry is the result of national political choices linked to economic interests rather than a process of regulatory alignment with the EU for accession. It is also noteworthy that the EU did not publish a report on Türkiye in 2017. Additionally, the high-level dialogue on energy, which was established in 2015, was suspended in July 2019. This was the first time that the EU had suspended high-level dialogue meetings in certain areas, including energy. Consequently, there has been an absence of high-level political dialogue. (High Representative of the Union for Foreign Affairs and Security Policy, 2022).

According to the Progress/Türkiye reports, between 2014-2022: In the area of security of supply, Türkiye has actively aligned itself with the EU and has made steady progress over the period. However, Türkiye and the EU differed on some issues, such as the TurkStream pipeline. The commissioning of the Trans-Anatolian Natural Gas Pipeline (TANAP) and the TurkStream pipeline, as well as the expansion of LNG terminals and underground gas storage capacity, supported Türkiye's ambition to act as a regional energy hub as well as contributing to the EU's Southern Gas Corridor ambitions, allowing for alignment without deep institutional reform (European Commission, 2014, 2015, 2016, 2018, 2019, 2020, 2021, 2022a).

In contrast to the progress above, the internal energy market alignment remained partial. Although some advancement was made in the electricity sector, such as the implementation of market-based mechanisms and integration with European electricity networks, deficiencies continued. Transparent, cost-reflective, and non-discriminatory pricing mechanisms were not properly established throughout the period. State intervention, particularly in the form of cross-subsidies and market-distorting practices, continued to characterise Türkiye’s electricity and natural gas sectors, raising continual concerns on the part of the European Commission. In addition to the internal energy market, the gas market has also been one of the most problematic areas of energy alignment. Repeated calls by the Commission to unbundle BOTAŞ and adopt a legally binding schedule for full market liberalisation have been ignored. Initial efforts on eligibility thresholds and gas trading platforms were later reversed or suspended. By 2022, the gas market reform process had not only stalled but regressed, with no effective separation of transmission and trading functions (European Commission, 2022a). At the same time, progress on energy efficiency was described as rhetorical, despite the adoption

of the National Energy Efficiency Action Plan (NEEAP) in 2018 (European Commission, 2018).

In the area of renewable energy, Türkiye has made more consistent progress, albeit with significant reservations. In October 2021, Türkiye finally ratified the Paris Agreement and set a net-zero emissions target for 2053 (Tastan, 2022a, p. 3). The Turkish government's willingness to diversify the energy mix led to an increase in installed capacity and the commissioning of wind and solar power. However, the continued use of local content requirements, particularly in renewable energy zones, was contrary to the principles of the EU-Türkiye Customs Union and World Trade Organization (WTO) rules and led to repeated criticism from the EU. These local content requirements hampered the access of EU-based renewable energy companies to Türkiye and limited the pace and progress of Türkiye's renewable energy potential (European Commission, 2021, 2022a).

In the field of nuclear energy and radiation protection, alignment with the Euratom acquis remained minimal. Although efforts to restructure the regulatory framework were initiated with the establishment of the Nuclear Energy Regulatory Authority (NDK), they were hindered by institutional instability and legal uncertainty. The annulment of the law establishing the NDK by the Constitutional Court of Türkiye in 2021 further complicated the regulatory framework (European Commission, 2021). Despite the continuing construction of the Akkuyu nuclear power plant in cooperation with Russia, Türkiye did not accede to major international conventions and agreements, and significant gaps remained in ensuring regulatory independence and safety compliance during this period.

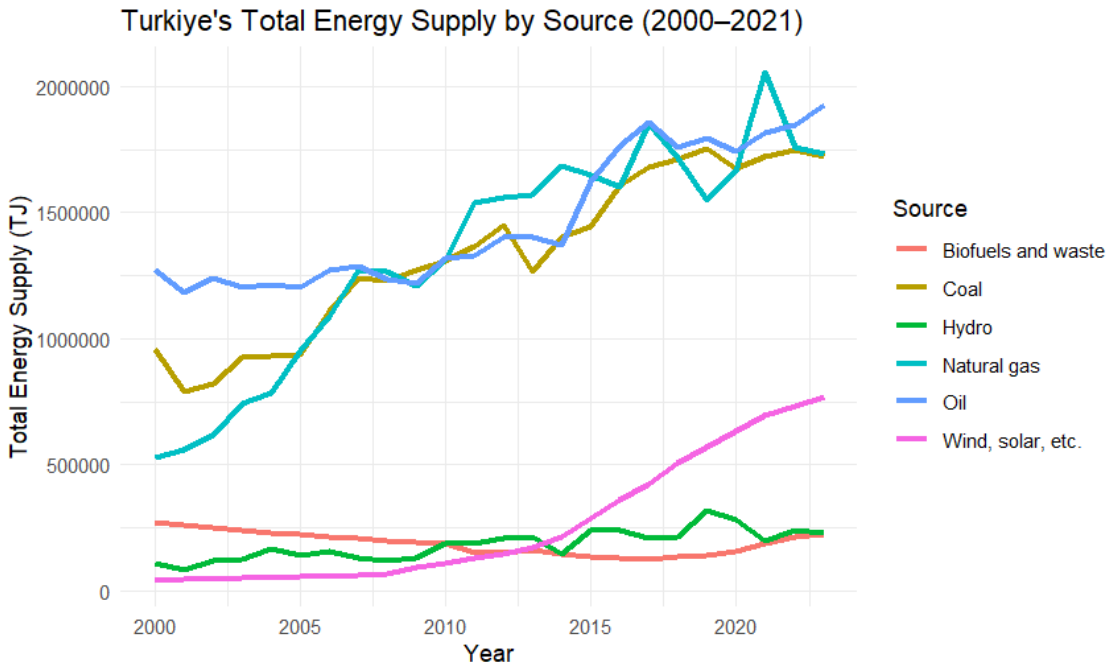
Finally, Türkiye's alignment in the field of hydrocarbons was only mentioned in 2016 (European Commission, 2016). The first time it was mentioned, alignment was described as advanced, as Türkiye had already implemented the EU's Hydrocarbons Authorisation Directive (European Commission, 2016). Later, however, diplomatic problems with two EU member states, Greece and “Republic of Cyprus” in the Eastern Mediterranean over disputed maritime zones showed a divergence from the EU, but the alignment remained advanced despite the geopolitical tensions (European Commission, 2018, 2019, 2020, 2021, 2022a).

Table IV: Yearly Progress of Türkiye in EU Energy Policy Areas (2014–2022)

Year	Security of Supply	Internal Energy Market	Natural Gas Market	Renewable Energy	Energy Efficiency	Nuclear Safety and Radiati-on	Hydro-carbons
2014	Good Progress	Progress	Some Progress	Progress	No Progress	Limited Progress	Not Mentioned
2015	Significant Progress	Important Progress (Electricity), Limited (Gas)	Some Progress	Good Progress	No Progress	No Progress	Not Mentioned
2016	Significant Progress	Progress (Electricity), Uneven (Gas)	No Progress	Positive Developments	No Progress	No Progress	Advanced Alignment
2018	Good Progress	Good Progress (Electricity), Some Progress (Gas)	Limited Progress	Good Progress	Good Progress	Limited Progress	Advanced Alignment
2019	Very Good Progress	Some Progress	Insufficient Progress	Good Progress	Good (Legislation), Moderate (Implemen-tation)	Moder-ate Progress	Advanced Alignment
2020	Very Good Progress	Limited Progress	Limited Progress	Well Advanced	Some Progress	Some Progress	Advanced Alignment
2021	Good Progress	Limited Progress	No Progress	Progress with LCR Issues	Some Progress	Some Progress with Legal Gaps	Advanced Alignment with Continued Issues
2022	Continued Progress	Limited Progress	Limited Progress	Continued Progress with LCR Issues	Limited Progress	Some Progress	Advanced Alignment with Activities in Dispute Zones

Source: European Commission Reports

Figure VI: Türkiye's Total Energy Supply by Source (2000-2021)



Source: (IEA,nd.) data illustrated with R

From LI's perspective, Türkiye's alignment with the EU has become increasingly selective in terms of energy. Following the annexation of Crimea, the EU began to rethink its energy security strategy, particularly regarding reducing dependence on Russian energy. However, Türkiye's domestic preferences and energy diversification strategies shifted a different direction. Major infrastructure commitments, such as TANAP and TurkStream, were pursued not through EU mechanisms but through bilateral agreements with Azerbaijan and Russia. These projects offered visible geopolitical and economic benefits to Türkiye and reinforced its regional energy hub agenda. In contrast, progress in legal harmonisation with the EU energy acquis has declined and alignment with directives has stagnated. Domestic preference formation of the Turkish government explains this divergence. Faced with a deteriorating EU accession climate and seeking "greater strategic autonomy", Türkiye recalibrated its energy policy. Moreover, domestic developments in the EU and the blocked Chapter 15 reduced the value of EU alignment and led to a cost-benefit approach. As a result, Türkiye approached the EU acquis with its national interests and relative bargaining power rather than with a sincere integration effort.

7.3.3 TANAP

The Trans-Anatolian Natural Gas Pipeline (TANAP) is a major infrastructure project linking the Caspian Basin to Türkiye. The project also extends to Europe through the Türkiye-Greece-Italy Interconnector Gas Pipeline (ITGI) and the Trans-Adriatic Pipeline (TAP). TANAP is the project that put the final nail in the coffin of Nabucco and put an end to the Nabucco initiative for good (see 7.2.3 for discussions about Nabucco). TANAP was launched as a bilateral initiative between Türkiye and Azerbaijan in 2011 through a memorandum of understanding signed by the governments of both countries (Republic of Türkiye Ministry of Energy and Natural Resources, 2023b). The total length of TANAP is approximately 2,000 km and its initial capacity was set at 16 billion cubic metres per year, of which 6 bcm is for domestic consumption in Türkiye and the remaining 10 bcm is for export to Europe. The pipeline started supplying gas to Türkiye in 2018 and also started supplying gas to Europe via TAP in 2020. According to projections, TANAP's capacity can be increased to 31 bcm by 2026 and even 60 bcm in the longer term through additional compressor stations and infrastructure(Republic of Türkiye Ministry of Energy and Natural Resources, 2023b).

Although TANAP established the Southern Gas Corridor together with TAP, it differs from the original Nabucco initiative not only in terms of financing and governance, but also in its legal and political structure. First, the ownership structure of the pipeline differs significantly from Nabucco: in the initial stage of the project, the State Oil Company of Azerbaijan (SOCAR) held an 80% stake in TANAP, while BOTAŞ held 15% and TPAO held 5%. This structure was subsequently revised (Tagliapietra, 2014, p. 5). By the time the pipeline became operational, SOCAR's stake had been reduced to 58%, with BOTAŞ holding 30% and BP 12% (Tagliapietra, 2014, p. 5). To date, SOCAR remains the main operator with a majority stake. Second, the cost of the project was financed by Azerbaijan through its sovereign wealth fund, SOFAZ. The project cost US$8.5 billion (Tagliapietra, 2014, p. 5).

In terms of legal and political differences with Nabucco, TANAP does not follow the EU energy acquis, as neither Türkiye nor Azerbaijan are members of the Energy Community and have not fully harmonised their energy legislation with the EU

(Tagliapietra, 2014, p. 6). As a result, TANAP is not subject to the EU acquis and third-party access to the pipeline remains limited, allowing Azerbaijan to prioritise gas from its own fields and, in the long term, restrict access to other suppliers if necessary. Azerbaijan's dominance in TANAP and TAP, as well as its majority stake in Greece's DESFA, strengthens Azerbaijan's hand in international politics and could potentially lead to a potential dependence to Azerbaijan. Although Türkiye's role in TANAP is mainly that of a transit country, the project runs parallel to Ankara's efforts to become an energy hub, although it does not give Ankara much influence over upstream or downstream decisions compared to Nabucco. Türkiye undoubtedly benefits politically and economically from hosting the pipeline and has partially secured its own energy needs, although SOCAR retains operational control and determines how the pipeline operates (Sartori, 2013, p. 5). Finally, TANAP serves as a case study in how interstate agreements and state-led infrastructure can replace multilateral regulatory frameworks in the context of energy security.

7.3.4 TurkStream

TurkStream represents a clear departure from the EU framework, while deepening energy cooperation with Russia. After Russia cancelled the South Stream project in 2014, TurkStream replaced it (Mikhelidze et al., 2017, p. 8). Despite the troubles in Russian-Turkish relations in 2015, especially following the downing of a Russian aircraft by the Turkish Air Force in November 2015 (Çopuroğlu & Karpuzcu, 2017; Sönmez, 2015), the two states managed to quickly restore their relations and signed the long-delayed TurkStream deal in July 2016.

TurkStream is a two-string pipeline system built under the Black Sea, similar to Blue Stream, which is also being built under the Black Sea. The first line, TurkStream I, is designed to supply the domestic market of Türkiye, and has a capacity of 15.75 billion cubic metres per year, effectively replacing the old Soviet-era Trans-Balkan pipeline that ran through Ukraine and Bulgaria. The second phase, TurkStream II, is designed to deliver Russian gas to south-east European markets via Türkiye(Yorucu & Mehmet, 2018, p. 59; Mikhelidze et al., 2017, p. 8). TurkStream, along with NordStream, has allowed Russia to reduce its transit dependence on Ukraine, especially in the wake of tensions

following the annexation of Crimea in 2014. On the Turkish side, TurkStream provided an opportunity to secure lower gas prices and consolidate Türkiye's position as a key transit country, while enhancing its aspirations to become an energy hub. However, it also meant increasing Türkiye's dependence on Russian gas imports, which accounted for around 55% of Türkiye's gas supply in the mid-2010s. From the EU's point of view, TurkStream is structurally and politically different from the EU-backed Southern Gas Corridor. TurkStream is not subject to the rules of the EU's Third Energy Package and does not involve multilateral regulatory oversight (Mikhelidze et al., 2017, p. 8). Instead, it involves bilateralism between state-controlled companies of Türkiye and Russia.

Although Türkiye has engaged with Russia on TurkStream, it has also supported TANAP as part of a balanced approach that secures energy from multiple sources while avoiding political confrontation with Russia or the EU, giving Türkiye diplomatic flexibility not available to EU member states due to their obligations under the Energy Community framework (Mikhelidze et al., 2017, p. 16). It should also be mentioned again that since the beginning of Türkiye's accession process until its freeze, the energy chapter (Chapter 15) has never been opened and Türkiye is not a member of the Energy Community, in addition to the open-ended negotiations, this absence leads Türkiye to be selective in its alignment with the EU in some areas, as can be seen from TurkStream.

7.3.5 Akkuyu Nuclear Power Plant

The Akkuyu Nuclear Power Plant project is a long-discussed energy initiative of Türkiye (for the early debates, see 6.1.6). Currently, the project is a central component of Türkiye’s energy diversification and energy autonomy strategy, particularly after the post-2010 policy shifts.

Türkiye and Russia signed an intergovernmental agreement in 2010, marking a major breakthrough in Türkiye's nuclear energy incentives (Aydın, 2020, p. 5). Unlike previous failed tender-based approaches (see 6.1.3), the current project is structured on a build-own-operate model, giving full responsibility for financing, construction, ownership and operation to Russia's state nuclear corporation, Rosatom (Hickey et al., 2021, p. 4). As a result of the intergovernmental agreement, Akkuyu Nükleer A.Ş., a project company, was established under Turkish law. However, Article 90 of the Turkish Constitution states that

international agreements are immune to constitutional challenge once they have been ratified (Hickey et al., 2021, p. 4). Furthermore, the project's majority Russian shareholding has given rise to concerns about potential over-dependence on Russia. The agreement includes a 15-year government-guaranteed power purchase agreement at $0.1235 per kWh for some of the electricity generated. However, several Turkish electrical engineers oppose this, claiming it is too expensive (euronews, 2024; Özdağ, 2021; Tiryaki & Çamdalı, 2024).

Construction of the Akkuyu NPP began in 2018, with the first of four VVER-1200 pressurised water reactors expected to be operational in 2025, and the remaining units gradually connected to the national grid in the following years. Since construction began, Akkuyu has been in the Turkish media on several occasions for protests against the nuclear plant, workplace accidents, and for not paying salaries on time (Yeşil Gazete, 2024). Furthermore, the decision taken by the Turkish government not to publish Integrated Nuclear Infrastructure Reviews of the International Atomic Energy Agency (IAEA) gave rise to a number of questions (Hickey et al., 2021, p. 2). Despite these problems, construction continues to this day and when completed the plant is expected to have a total installed capacity of 4,800 MW, making it the largest single power generation facility in Türkiye (Akkuyu Nükleer A.Ş, n.d.).

The Akkuyu project has also urged Türkiye to improve its institutional and legal framework for nuclear governance. Significant legislative and regulatory developments are taking place in parallel with construction. In particular, the establishment of the Nuclear Regulatory Authority and the development of an independent oversight structure, as well as the accession of Türkiye to the international conventions on nuclear energy (Artantas, 2024, pp. 208–213). These reforms are a direct result of the operational needs of the Akkuyu project and formalise Türkiye's nuclear energy policy. Nevertheless, the Akkuyu NPP is a politically and socially controversial project that will continue to generate debate in the future.

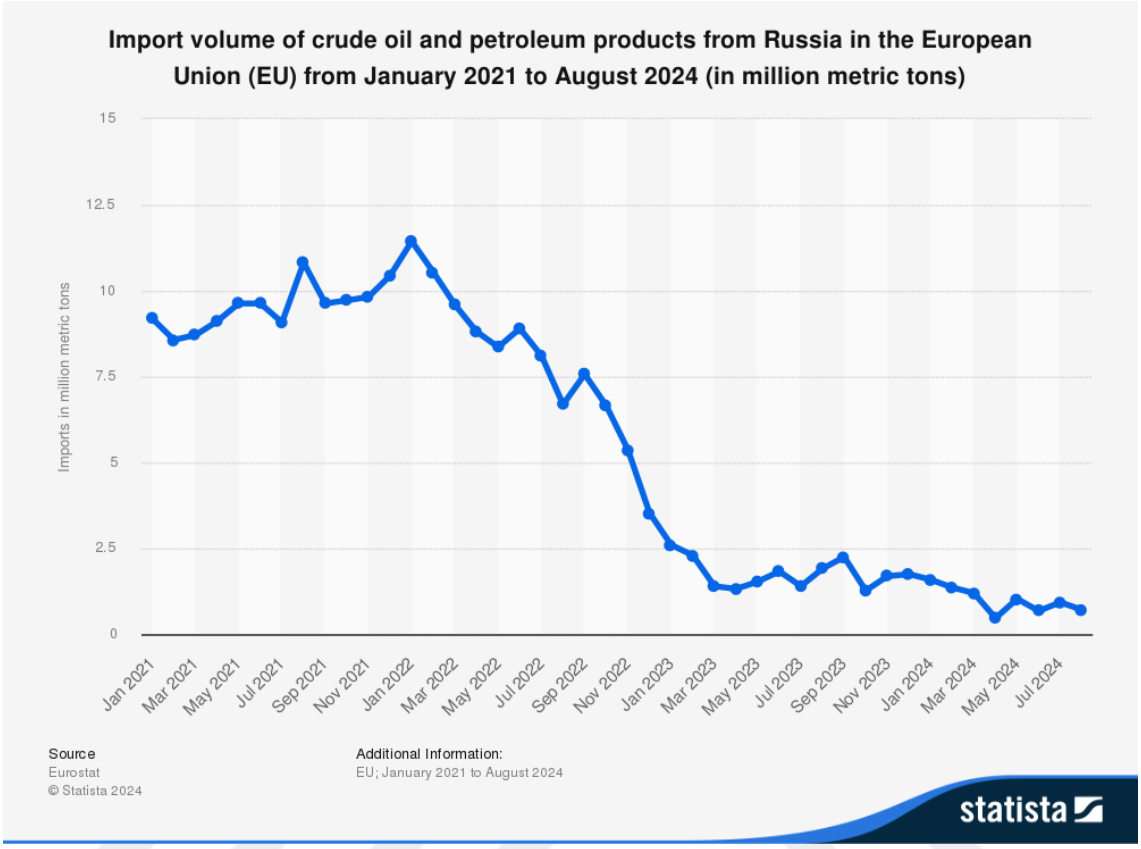
7.4 POST-2022 PERIOD: WAR, REALIGNMENT, AND ENERGY AUTONOMY (2022-TODAY)

The Russo-Ukrainian conflict entered a new phase on 24 February 2022, when Russia launched a full-scale invasion of Ukrainian territory. After the initiation of full-

scale invasion, the oil prices skyrocketed while gas prices soared, leading to uncertainties in the energy market (BBC, 2022; World Economic Forum, 2022). On the political side of the invasion, Russia consolidated the Western bloc for the first time since 9/11, which even led to the accession of Finland and Sweden to NATO. The invasion also led Western states to impose newer and harsher sanctions on Russia, Russian oligarchs such as Roman Abramovich and close allies of Russia, such as Belarus, Iran and North Korea (Council of the European Union, 2025).

In this context, the EU has imposed several import and export restrictions on Russia as part of economic sanctions. At the same time, the EU has frozen Russian assets within its borders and imposed targeted sanctions on key Russian individuals. The restrictions include a ban on the export of certain goods, technology, equipment and services for use in the oil refining and energy industries and a ban on the import of crude oil and refined petroleum products, liquefied petroleum gas (LPG), coal and other solid fossil fuels of Russian origin, clearly targeting Russia's energy industry. Given that around half of Russia's total oil exports used to go to the EU, the impact of the oil ban is significant as it covers 90% of the EU's oil imports from Russia (Council of the European Union, 2025). An interesting anecdote, however, is that while the EU was diversifying its energy supply via new routes and new countries of origin, Russia was also diversifying its energy exports, particularly to China (Sharples, 2016). In the same time, the EU launched its RepowerEU initiative to increase energy efficiency, diversify energy supplies and produce clean energy (European Commission, 2022b). The European Union has reduced its share of Russian gas imports from 45% to 19%, a development due to the REPowerEU Plan, which was initiated in May 2022 with the objective of reducing the bloc's reliance on Russian energy. Nevertheless, the European Union experienced a rebound in Russian gas imports in 2024. Following this development the EU prepared a roadmap to phase out Russian energy imports (European Commission, 2025).

Figure VII: Import volume of crude oil and petroleum products from Russia in the European Union (EU) from January 2021 to August 2024



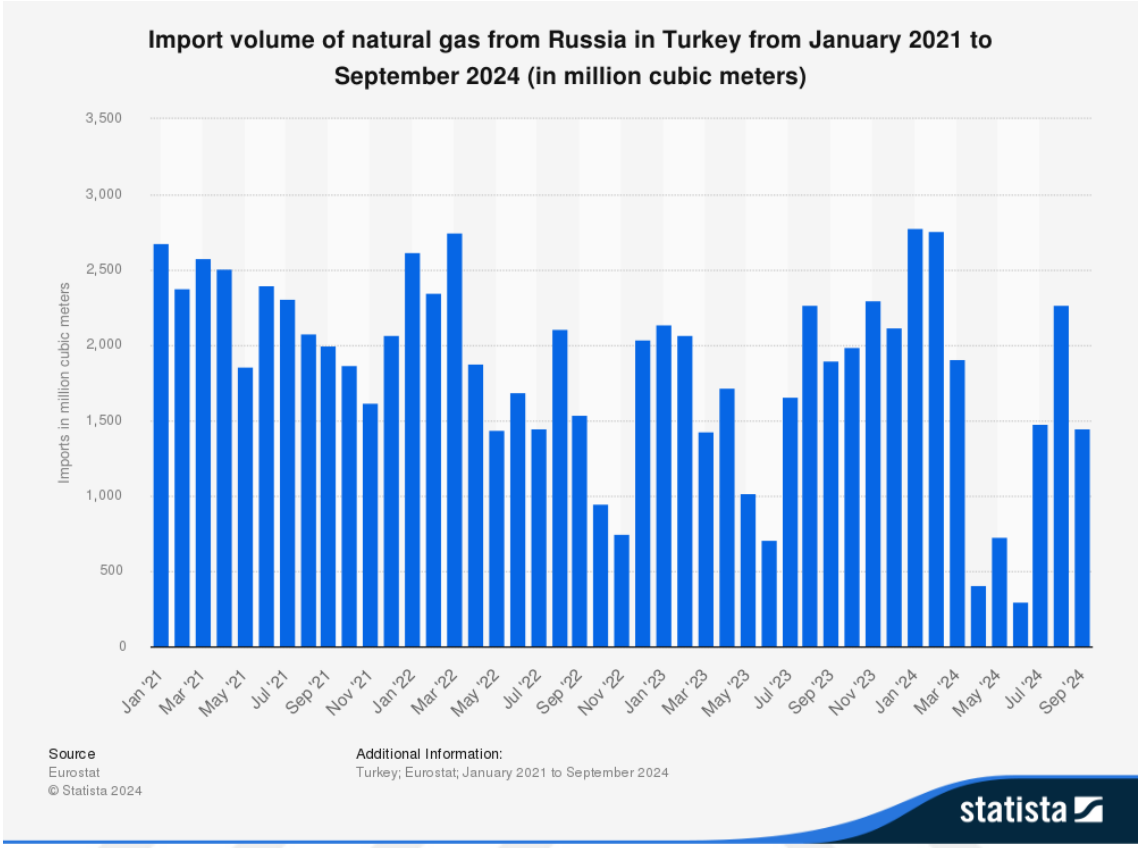
Source: (Statista, 2024a)

On the Turkish side, Türkiye condemned Russia's invasion of Ukrainian territory but, unlike the West, did not impose sanctions on Russia or break off diplomatic relations (Dimitar Bechev, 2024; Emre Karaca, 2022; MFA Türkiye, 2022). In contrast, Türkiye tried to act as a mediator between Ukraine and Russia, as it had good relations with both sides, which allowed it to launch the Black Sea Grain Initiative with the warring sides and the UN (United Nations, n.d.). Interestingly, while Russia complained about Türkiye's military partnerships with Ukraine and its military exports to Ukraine, particularly drones (Reuters, 2022), it did not start a crisis between Russia and Türkiye; on the contrary, since the beginning of the war, Russia has deepened its trade and energy relations with Türkiye (Dimitar Bechev, 2024; Fontelles, 2022).

Direct quote from an article published in NordicMonitor on 14 October 2022: “Russian President Vladimir Putin on Thursday told his Turkish counterpart, Recep Tayyip Erdoğan, that Türkiye has become the most reliable route for gas supplies to

Europe and offered to create a European gas hub in Türkiye, during a meeting on the sidelines of the sixth summit of the Conference on Interaction and Confidence-building Measures in Asia (CICA), in the Kazakh capital of Astana. Approaching the proposal cautiously in front of the cameras, Erdoğan suggested that they take a step forward on Türkiye's second nuclear power plant, the construction of which is planned for Sinop on the southern coast of the Black Sea." (Kenez, 2022). The declaration comes as gas and oil transit through Ukraine has been halted under an expired agreement that wasn't renewed because of the war. Despite Türkiye's well-known ambitions to become an energy hub, President Erdoğan approached the proposal cautiously, concerned about US and EU reactions. However, this caution has not prevented Russian-Turkish energy cooperation from deepening. In fact, Türkiye has taken several steps in this direction since 2022. Türkiye's efforts to become a natural gas hub resurfaced in September 2023, when Putin and Erdogan met in Sochi. The meeting referred to a roadmap between Russian energy company Gazprom and Turkish oil pipeline company BOTAŞ, with the establishment of a joint working group as the next step (Kazancı, 2023). In November 2024, Russian Deputy Energy Minister Pavel Sorokin told Anadolu Agency at the Istanbul Energy Forum that: "It is a very convenient transit route from many traditional energy supply areas." He also praised Türkiye for not politicising energy and for putting the economy first (Yüksel & Kazancı, 2024). In January 2025, pro-government Turkish media began to highlight the country's potential role in addressing Europe's energy challenges in the face of declining Russian gas supplies. Reports suggested that Türkiye could re-export imported natural gas and LNG to Europe through a process dubbed 'Turkish Blend' (Kenez, 2025; Şimşek, 2025). In the same month, TurkStream and Türkiye's ambitions to become an energy hub were praised by Hungary's ambassador to Türkiye, Viktor Matis, and Slovakia's prime minister, Robert Fico (Daily Sabah, 2025; Kenez, 2025). Türkiye's energy minister, Alparslan Bayraktar, also said that Türkiye's talks with Russia on a gas trading hub are ongoing and that the Istanbul hub could be operational by 2025, but has not yet been realised to this day (Demirhan, 2024).

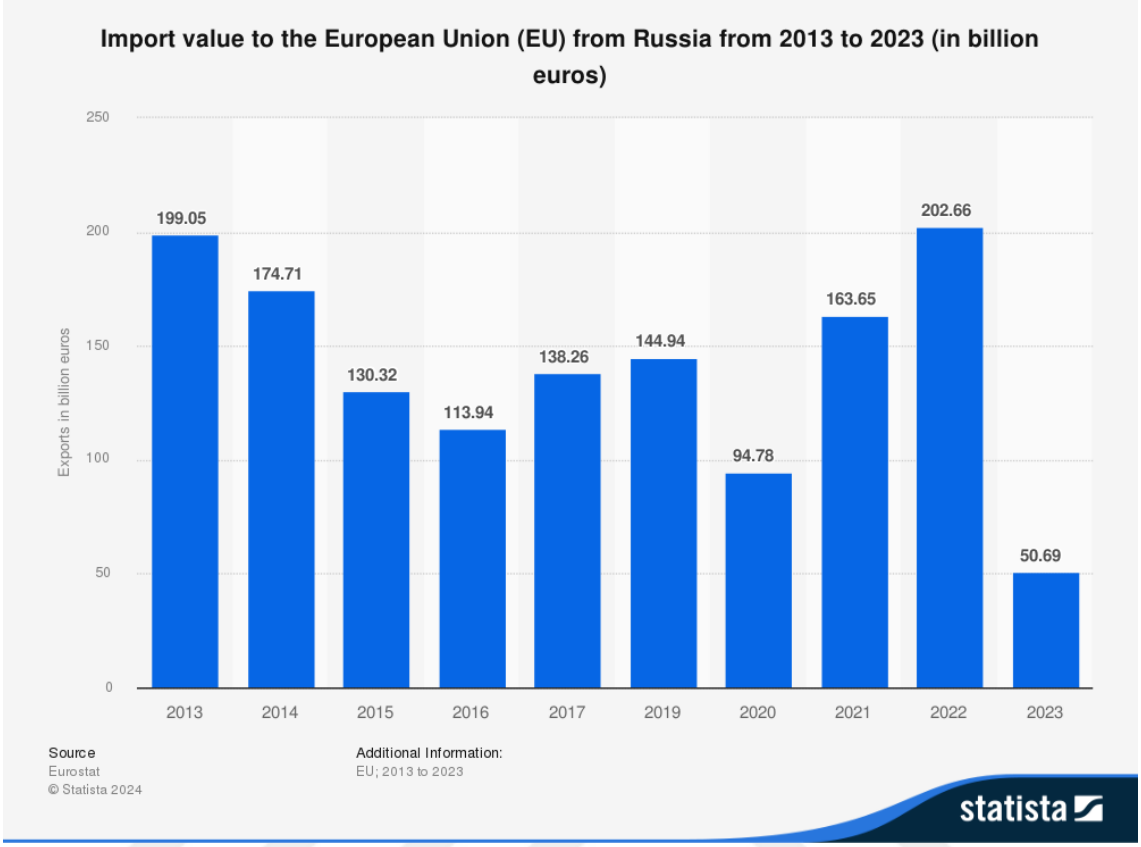
Figure VIII: Import volume of natural gas from Russia in Türkiye from January 2021 to September 2024



Source: (Statista, 2024b)

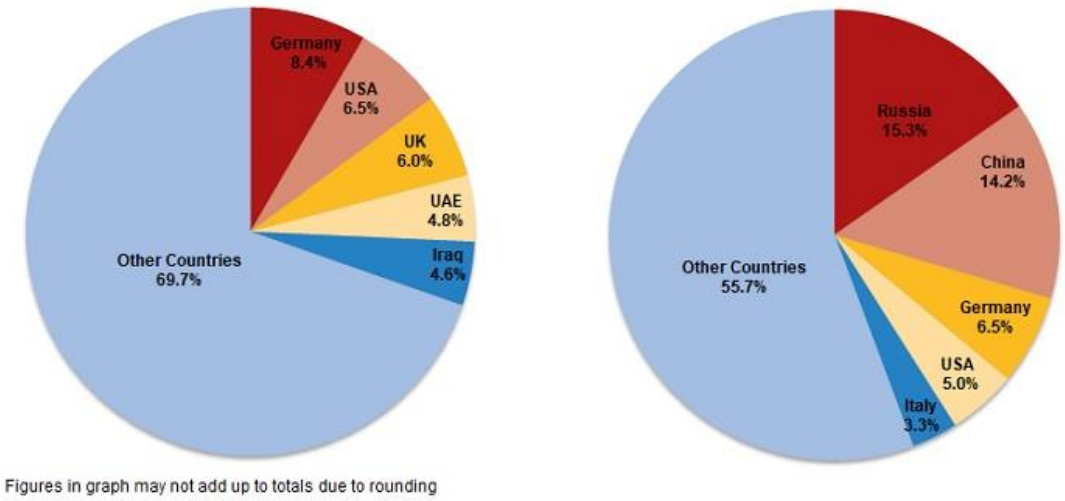
On the nuclear side, delayed but continued construction of Akkuyu NPP, also deepened Russian-Turkish energy ties despite concerns, while it also strained relations with Germany due to Siemens' delays in delivery (Boran, 2024; TÜNAŞ, n.d.). At the same time, due to the ongoing sanctions against Russia, Türkiye struggled to make payments to Russia for the Akkuyu NPP and had to find a creative way to make the payments, which was later achieved when the US granted a waiver to Türkiye for Gazprom Bank (Soylu, 2024a, 2024b, 2024c; Türkiye Today, 2025). Another of Türkiye's divergences from the EU is its booming trade with Russia. As the charts below show.

Figure IX: Import value to the European Union (EU) from Russia from 2013 to 2023



Source: (Statista, n.d.)

Figure X: Türkiye's Exports by countries, January 2025 (left) Türkiye's Imports by countries, January 2025 (right)



Source: (TÜİK, 2025)

7.4.1 Domestic Developments in Türkiye

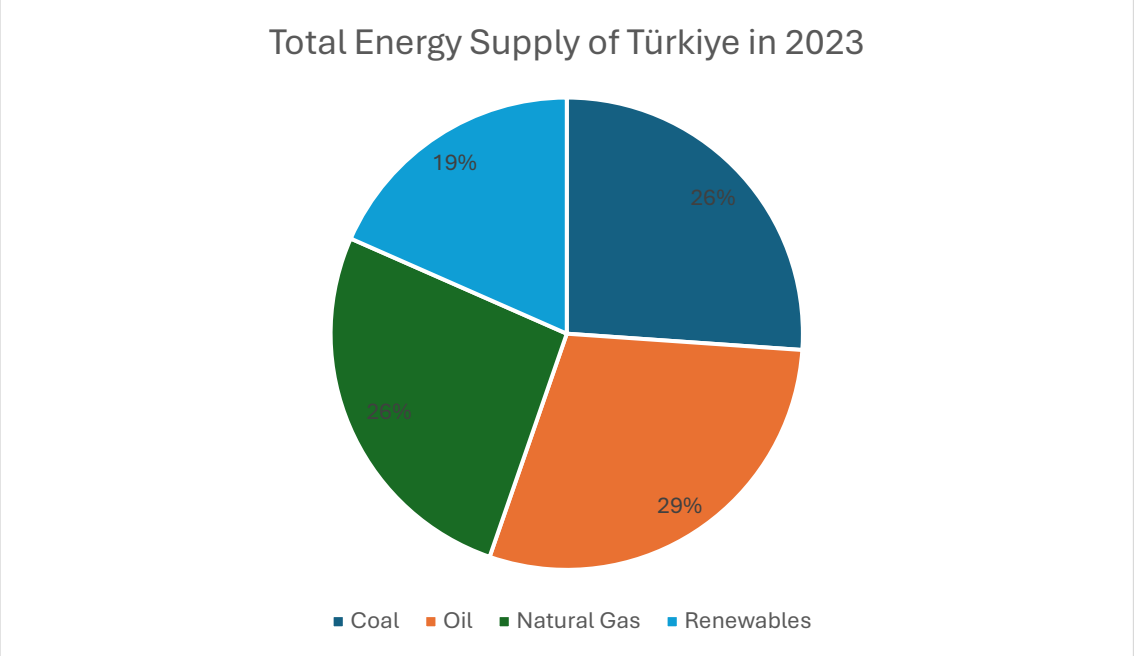
Türkiye's economic hardships deepened after the war in Ukraine, as the country is a net importer of energy. The changes in the energy market have worsened the country's economic conditions. Türkiye's inflation peaked at over 60% in late 2022 (BBC News Türkçe, 2023a; TCMB, n.d.; TÜİK, 2023), and the country's currency, Turkish lira, faced a dramatic devaluation (*Turkish Lira - Quote - Chart - Historical Data - News*, n.d.). The country also experienced catastrophic earthquakes in February 2023, which devastated the southeast of Türkiye, a few months prior to the scheduled for May 2023 general elections. In spite of the devastating earthquakes, the general elections were not postponed and declared to be held on time. During the election campaign, President Erdoğan announced energy subsidies and symbolic inaugurations such as the Black Sea gas delivery from the recently discovered Sakarya gas field (Recep Tayyip Erdoğan [@RTErdogan], 2023), which the opposition claimed to be subsidised by cheap Russian gas (BBC News Türkçe, 2023b). Despite all the hardships in the economy and the catastrophe in the south-eastern Türkiye ruling coalition managed to retain power in the general elections (BBC News, 2023). Despite its success in the parliamentary elections, the ruling coalition lost a number of important municipalities in the following local elections, and the AKP came second for the first time in the election results (Kirby & Kasapoglu, 2024). The current geopolitical climate forces the Turkish government to strike a delicate balance between the EU and Russia. This is due to the country's fragile economic situation.

7.4. 2 Developments in Türkiye's Alignment with the EU Energy Acquis (2022-2024)

Since Russia's full-scale invasion of Ukraine in 2022, Türkiye's foreign policy alignment with the EU has decreased, which has also affected its energy policy alignment. Based on Türkiye Reports between 2022 and 2024. Türkiye's alignment with the EU energy acquis remained selective. However, the differences became more visible than ever. While progress continued on physical infrastructure and security of supply, where Türkiye's national interests always overlap with the EU to some extent, regulatory alignment, where Türkiye has always been cautious, remained limited as important liberalisation reforms were either postponed or actively reversed, leading to a regression

in alignment (European Commission, 2022a, 2023, 2024a). In terms of the infrastructure and security of supply, uninterrupted operation of TANAP has allowed the EU to strengthen its sanctions against Russia, while Türkiye's continued investment in LNG terminals, storage capacity and pipeline interconnections has also demonstrated the development of Türkiye as a regional energy hub, helping the EU to avoid Russian natural gas and oil. At the same time, the development of the recently discovered Sakarya gas field in the Black Sea and the growth of renewables—which accounted for 99.5% of new capacity additions in 2023—clearly show that Türkiye, like the EU, is investing in diversifying its domestic energy supply. However, Türkiye is not following the sanctions against Russia, and Türkiye's energy supply is still largely dependent on Russian fossil sources (Tastan, 2022b). Since the outbreak of the war, Türkiye's natural gas imports from Russia have decreased, while its oil and coal imports from Russia have increased. In 2023, 73% of Türkiye's coal imports came from Russia, despite Türkiye's incentives for domestic production (European Commission, 2024a).

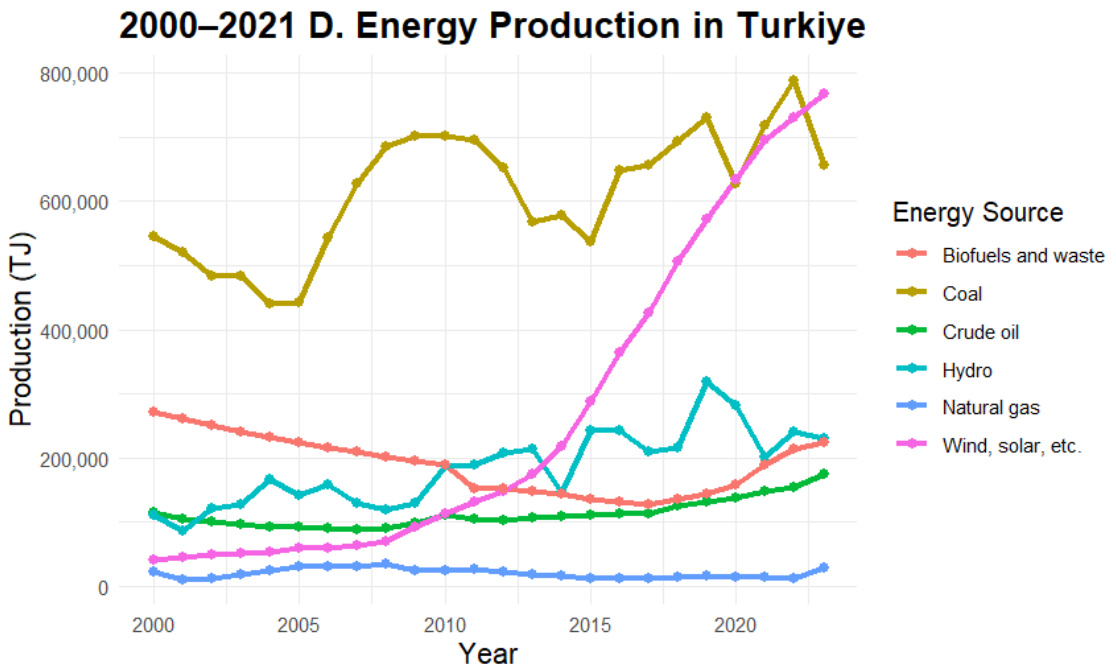
Figure XI: Total Energy Supply of Türkiye in 2023



(Figures in the graph may not add up to totals due to rounding.)

Source: (IEA, 2025a)

Figure XII: Domestic Energy Production in Türkiye by Source (2000–2021)



Source: (IEA, 2025a) data, illustrated via R

Regarding the regulatory alignment. Türkiye has been unwilling to align with the EU in certain areas, in particular, the repeated suspension of the unbundling of BOTAŞ and the 2023 legislative amendments have weakened liberalisation objectives. Even though Türkiye nominally aligned with EU law, BOTAŞ remains dominant and intact, contrary to EU single market principles of transparency, competition and cost-reflectiveness(European Commission, 2022a, 2023, 2024a).

Another divergence from the EU, or perhaps it is better to say a conflict with the EU, concerns Türkiye's protectionist industrial focus on renewable energy. In the EU's view, Türkiye's local content requirements for renewable energy products such as solar panels violate both WTO rules and the EU-Türkiye Customs Union. At the same time, it limits Türkiye's development in the renewable energy sector and prevents the country from realising its full potential. In the field of nuclear energy, although there has been gradual progress in regulatory formalisation, with the launch of peer review procedures for the Akkuyu NPP, Türkiye has not joined the European Community Urgent Radiological Information Exchange (ECURIE). While Türkiye acceded to the Joint Convention on the Safety of Agent Fuel Management and on the Safety of Radioactive Waste Management, it also declared its refusal to accept its obligations vis-à-vis the

Republic of Cyprus as a party to the said Convention. Additionally, Türkiye's energy policy lacked operational depth until 2024 (European Commission, 2024a).

Finally, it should be noted that despite its growing electricity generation capacity, in 2024, Türkiye became a net importer of electricity for the first time in 7 years (European Commission, 2024a). Overall, Türkiye's alignment with the EU has remained selective even after the war in Ukraine. This selective alignment defines the recent trajectory of Türkiye-EU energy relations, or indeed Türkiye-EU relations as a whole. Türkiye resists where it risks redistributive costs or challenges its strategic autonomy, while pursuing alignment in areas of mutual benefit or functional necessity.

Table V: Yearly Progress of Türkiye in EU Energy Policy Areas (2022–2024)

Category/Year	2022	2023	2024
Security of Supply	Progress	Progress	Progress
Internal Energy Market	Limited Progress	Limited Progress	Regression
Natural Gas Market	Limited Progress	Limited Progress	Regression
Renewable Energy	Progress	Progress	Progress
Energy Efficiency	Limited Progress	Limited Progress	Progress
Nuclear Safety and Radiation	Limited Progress	Limited Progress	Limited Progress
Hydrocarbons	Limited Progress	Limited Progress	No Progress

Source: European Commission Reports

Legend:

- Progress = Clear advancement and active alignment with EU policies
- Limited Progress = Steps forward with notable limitations or incomplete alignment
- No Progress = Little or no advancement towards alignment goals
- Regression = Notable setbacks or reversals in policy.

CHAPTER 8 CONCLUSION

The thesis has traced the trajectory of Türkiye's energy policy vis-à-vis the European Union from its earliest post-World War II engagements through the accession era and into the present moment, where the alignment that once was expected has become conditional, strategic, and selective. In order to understand this trajectory, it is essential to have a knowledge of history of energy policies of both Türkiye and the European Union that have shaped their energy policies long before the formal accession negotiations started.

The 1950s marked the beginning of Western Europe's integration with international organisations such as the Council of Europe (CoE), the North Atlantic Treaty

Organisation (NATO), the European Economic Community (EEC), and the European Atomic Energy Community (Euratom). Türkiye's accession to the Council of Europe (CoE) and its subsequent accession into the North Atlantic Treaty Organisation (NATO) following the Korean War represented a significant milestone in Türkiye's engagement with European political structures. Following those developments, Türkiye's application for association with the EEC in 1959, marked a crucial cornerstone in Türkiye's diplomatic and economic integration with the Europe, at the same time paving the way for the energy relations. The 1963 Ankara Agreement, which formalised Türkiye's association with the EEC, and the subsequent 1970 Additional Protocol are crucial documents in this regard, with the Additional Protocol granting duty-free access for petroleum products refined in Türkiye being a clear sign of the future potential of energy relations. However, throughout the 1960s and 1970s, Türkiye's energy policies remained firmly rooted in domestic, state-led development. This limited the country's integration with European structures. Institutions such as the Turkish Electricity Authority (TEK), founded in 1970, exemplified a model of centralised control, in which energy was regarded as a public good and a tool for socioeconomic planning. The 1970s saw two significant events that exposed the vulnerability of the global energy market and the importance of a reliable supply: the 1973 Yom Kippur War embargo and the 1979 Iranian Revolution. In response, the EEC countries and Türkiye took measures alongside the rest of the world. Both Türkiye and the EEC states joined the newly founded International Energy Agency (IEA) and signed contracts with the Soviet Union to diversify their energy supplies, while also stockpiling oil to mitigate potential threats. Despite these developments, there was no significant progress in energy relations between the EEC and Türkiye throughout the 1980s and early 1990s, until the mid-to-late 1990s.

The formal application for full membership of the European Economic Community submitted by Türkiye in April 1987, the subsequent establishment of the Customs Union in 1995, and the Helsinki Summit, which declared Türkiye a candidate state, all changed the trajectory of EU–Türkiye relations, thus affecting energy relations. By the beginning of the 21st century, Türkiye and the EU were more closely linked than ever due to the commencement of formal accession negotiations in 2005. On the one hand, Turkish policymakers acknowledged that EU membership promised political rewards as well as easier access to capital, technology, and regulatory know-how.

However, Turkish politics and the entrenched positions of state institutions such as BOTAŞ limited this alignment, eventually leading to strategic cooperation rather than integration. This thesis investigated this dynamic across four distinct periods. The initial period under study spanned from 2000 to 2006, containing the period between the Helsinki Summit and the Ukraine-Russia gas crisis of 2006. This period was characterised by a notable interest in the alignment of Türkiye's energy policy with that of the EU, which coincided with a rapid shift in Turkish politics, marked by the emergence of the new AKP government. The government's approach to the accession process was not merely a political objective, but also a strategic economic modernisation initiative. In this regard energy policy became one of the key fields to demonstrate Türkiye's commitment to achieving the accession to the European Union. The 2001 Electricity Market Law and the Natural Gas Market Law introduced unbundling of transmission and distribution, mandated third-party access and required the establishment of an independent regulatory body, leading to the creation of EMRA and bringing it into line with EU directives. As outlined in Chapter VI, these legal reforms demonstrated Türkiye's deliberate choice to adopt an EU-style market mechanism within its domestic framework, reflecting the national preferences of the time. Simultaneously, infrastructure projects such as the Baku-Tbilisi-Ceyhan (BTC) pipeline and the Nabucco projects have been developed, signifying Türkiye's potential role as an energy hub connecting Caspian and Middle Eastern resources to the EU. The BTC pipeline was the result of complex interstate bargaining between Türkiye, Azerbaijan, Georgia and the Nabucco, involving EU member states such as Bulgaria and Romania. Another significant development during this period was the technical assistance missions from the EU to Türkiye, which provided expert teams and EU funds to support capacity building for EMRA and efforts to liberalise the market. Despite the integration of EU directives into national legislation, the path dependency of the past persisted. To summarise, the present period has seen the convergence of both domestic and external incentives, thus rendering EU alignment both politically and economically feasible.

The period from 2006 to 2014 produced mixed results. Regulatory progress in Türkiye continued and the expansion of the gas network to comply with EU regulations. Türkiye also became an observer to the Energy Community Treaty, indicating its openness to a broader Southeast European energy market. However, "the Republic of

Cyprus's" veto on many negotiation chapters, including Chapter 15 (the energy chapter), in 2008 exposed the EU's limited ability to enforce full alignment. Due to the Cypriot blockage on the energy chapter, Türkiye lost one of the most powerful incentives for deep alignment with the EU. Over the same period, developments in Turkish politics also began to impact relations. The 2010 constitutional referendum, the strengthening of executive and the Gezi Park protests in 2013 signalled a divergence from EU accession due to domestic politics. During this period, although Türkiye continued to formally adapt EU directives, the gaps in their implementation widened. EMRA struggled with limited resources and the politicisation of regulatory appointments, which impeded independent oversight. Meanwhile, cooperation on infrastructure increasingly shifted towards bilateral frameworks following the failure of the Nabucco project. The Trans-Anatolian Gas Pipeline (TANAP) and the TurkStream project exemplified a strategic manoeuvre away from the EU's original Southern Corridor vision with Nabucco. These projects demonstrate that, when supranational incentives weaken, rational state actors opt for bilateral relationships that better protect domestic interests and yield immediate gains, as predicted by Liberal Intergovernmentalism. Azerbaijan offered reliable Caspian gas via TANAP, while Russia provided financing and predictable gas volumes via TurkStream. As both partners required fewer concessions on regulatory autonomy, this led Türkiye to choose TANAP over Nabucco, preserving a high degree of control over transit revenues and energy pricing while only nominally adhering to EU expectations.

The period from 2014 to 2022 deepened the pattern of selective alignment. Russia's annexation of Crimea in 2014 was a significant event that underscored Europe's reliance on Russian gas and oil and reminded how quickly geopolitical events could disrupt energy markets. Although Türkiye publicly condemned Russia and expressed solidarity with Ukraine, Türkiye also recognised that Russian partnership was indispensable for Türkiye's energy needs. In late 2014, Türkiye revived the long-stalled Akkuyu Nuclear Power Plant (NPP) project with Rosatom. Despite the 2015 jet crisis, which saw Turkish-Russian relations reach their lowest point when the Turkish Air Force shot down a Russian fighter jet, relations between the two countries recovered quickly and energy cooperation was unaffected. The coup d'état attempt in 2016, followed by a sweeping security crackdown, further shifted domestic politics towards a consolidation of power under the executive authority. Concurrently, the EU voiced criticism, thereby

worsening the existing state of relations. In this context, energy policy debates in Türkiye shifted further away from the EU and became more selective. The 2018 switch to presidential system concentrated decision-making authority in the executive, enabling executive to impact free regulatory bodies such as EMRA. Although Türkiye has transposed some EU energy directives, the implementation of these directives has often been delayed. IEA data show that although renewable energy capacity increased, coal and gas still accounted for a high proportion of Türkiye's total energy mix. Furthermore, Türkiye's investments in LNG terminals have helped reduce the country's dependence on Russia. The European Commission's reports for the period 2014–2022 reflect this situation: while Türkiye's legal framework often met the minimum requirements for transposition, the operational independence of market actors weakened, cross-border interconnections remained suboptimal, and strategic decisions shifted towards partnerships outside the EU. Consequently, Türkiye's energy relations with the EU were characterised by conflictual cooperation, as evidenced in the Eastern Mediterranean, with no expectation of deeper institutional integration.

The post-2022 era, following Russia's full-scale invasion of Ukraine, further entrenched Türkiye's selective alignment. While the EU was busy replacing Russian gas with the REPowerEU agenda, Türkiye continued to pursue its regional energy hub ambitions, which would ensure its energy security while deepening its energy relations with Russia and diversifying its energy mix. However, Türkiye continued to align with the EU selectively, regressing in some areas. These developments are fit for illustration of the institutional choice under liberal intergovernmentalism. In line with the LI framework, it can be argued that when the prospect of membership loses its significance and external bargaining incentives diminish, a rational state actor will revert to bilateral or ad hoc arrangements to maintain its flexibility. Through all these phases, the empirical evidence gathered in the thesis show that national preferences in Türkiye's energy policy have swung between two poles. The EU driven modernisation and the sovereign control. In the early 2000s, the former dominated; after 2014, the latter prevailed. Interstate bargaining shifted from multilateral coordination, via EU funded projects and Energy Community dialogues, to bilateral pragmatism that prioritised expediency over alignment. EMRA is a significant example of this situation. Created for the EU accession process, it was expected to follow the example of EU regulators. However, its

implementation was repeatedly reshaped by political directives, illustrating how domestic policies change when alignment ceases to serve the state's interests. Through the lens of liberal intergovernmentalism, Türkiye's energy policy alignment with the EU has been anything but linear. Rather, it has been characterised by the shifts in domestic policies, transformations in the interstate bargaining dynamics, and institutional choices.

It is important to note that no single theoretical framework can fully capture the complexity of Türkiye–EU energy relations, or Türkiye–EU relations as a whole. While LI convincingly explains the rational logic of selective alignment, Europeanisation remains relevant for understanding the normative attraction that drove reforms in the early 2000s. Similarly, realism is useful in explaining Türkiye's post-2014 balancing act between Russia and the West, and how strategic autonomy became a significant political narrative. Historical institutionalism provides an understanding of how path dependency constrains policymakers' options. Due to the limitations of an MA thesis, some topics could not be covered, but several promising areas for future research were identified. First, as Türkiye and the EU both accelerate their energy transitions, albeit on different timelines and different emphases, there is an opportunity to assess whether common decarbonisation goals will lead to a new space for alignment. Will Türkiye's 2053 net-zero pledge and the EU's Fit for 55 package generate sufficient normative and material incentives for deeper cooperation in renewable energy? Second, a comparative study of other EU candidates (such as Serbia, Ukraine and Georgia) could reveal whether Türkiye's pattern of selective alignment is exceptional or reflective of broader dynamics among the candidate states.

In conclusion, Türkiye's energy policy alignment with the EU is best understood not as a linear line of integration, but as a dynamic line of convergences and divergences, shaped by shifts in domestic political principles, bargaining dynamics, and institutional choices and historical legacies. From the early steps of Ankara Agreement, through the transformative 2000-2006 period of harmonisation, to strategic bilateralism of the post-2014 and the geopolitical shifts in the post 2022 era, each period showed conditional nature of alignment. Liberal intergovernmentalism highlights that states commit to supranational frameworks only insofar as such commitments align with national preferences. As both Türkiye and the EU navigate the uncertainties of decarbonisation, digitalisation, and geopolitical competition, the interplay of historical dependencies,

domestic politics, and external incentives will determine whether Türkiye's energy policy will once again align with the EU or whether it will chart an independent trajectory of selective cooperation.

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