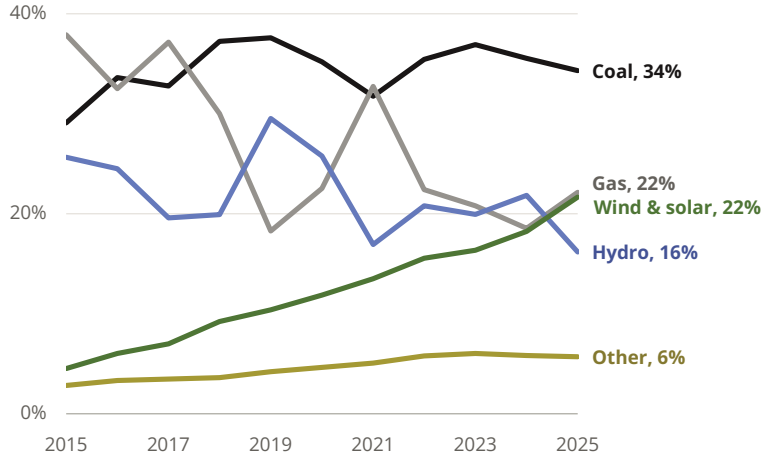
Türkiye at a glance

Türkiye has accelerated its transition in line with its goals of energy security, lower import dependence and net zero by 2053, though progress has been uneven as renewables grow alongside continued fossil fuel use.

Key transition conditions: Renewables already align with Türkiye's core national interests, while coal and gas continue to be treated as strategic security assets.

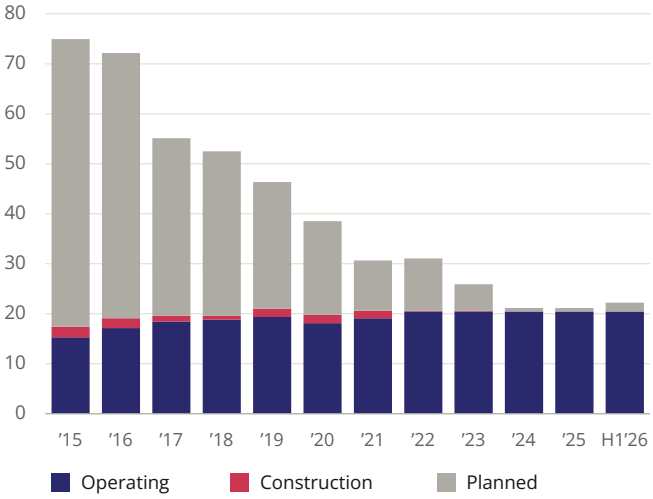
Electricity generation by source

2015–2025

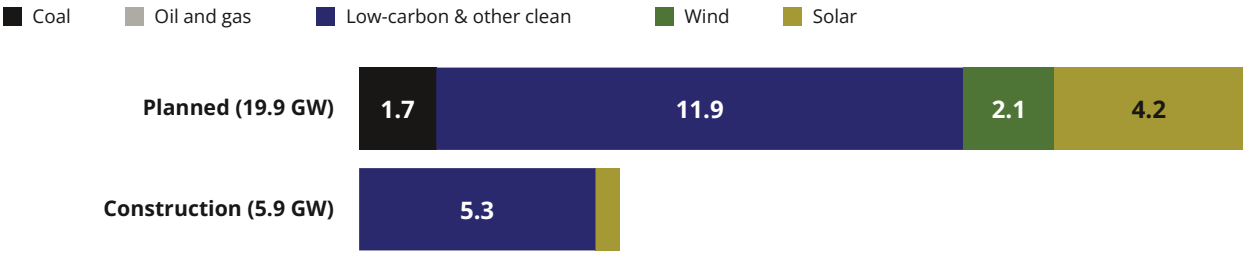


Coal capacity by status

GW, 2015–H1 2026



Capacity under development by source



Solar 0.5 GW (construction)

Power system landscape

57% of electricity came from fossil fuels in 2023, down from nearly 80% in 2013. Renewables are over 50% of installed capacity and about 40% of generation. Nearly all gas, most oil and substantial coal are imported.

Clean transition trends

Solar capacity doubled from 9.7 GW in mid-2022 to 22 GW by mid-2025. Türkiye has committed to **120 GW** of wind and solar by 2035, up from around 30 GW in 2024. No new coal is likely, though a formal commitment is not yet in place.

Enablers and bottlenecks

Renewables fit the "domestic and national energy" agenda, supported by the **$5bn** TIDIP platform and a planned ETS. Permitting delays, grid limits, high capital costs and fossil fuel subsidies could slow progress, and SMEs often lack capital.

Opportunities for international cooperation with *Türkiye*

- **COP31 diplomacy can be an opportunity:** the "35 by 35" electrification target, grid investment pipeline and Climate Implementation Bridge offer entry points aligned with domestic priorities.
- **Clean power as energy security offers common ground:** it is presented as protection against volatile markets and as roughly 50% cheaper than fossil generation.
- **Industrial decarbonisation finance can turn compliance into opportunity,** especially for SMEs facing CBAM, paired with technical assistance and knowledge sharing.

Sources: *Ember annual electricity data; Global Energy Monitor annual capacity charge data and coal plant tracker data*

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This country profile was produced as part of the report *Powering Across Divides – Clean energy cooperation in a fragmented world*, published November 2026. The full report is available from **https://www.e3g.org/publications/powering-across-divides-clean-energy-cooperation-fragmented-world/**

Türkiye's profile

Outline and domestic political economy context

Türkiye has expanded renewable capacity, which now represents over 50% of installed capacity and about 40% of electricity generation. Wind and solar generated around 15% of electricity in 2024. Indeed, solar capacity doubled in three years from 9.7 GW in mid-2022 to 22 GW by mid-2025. Türkiye has also committed to nearly quadrupling its solar and wind capacity from around 30 GW in 2024 to 120 GW[1] by 2035), including 5 GW of offshore wind. The first offshore tender is expected in 2026, with annual additions of 8–10 GW required. Meanwhile, fossil fuel generation has dropped from nearly 80% to approximately 57% (2013–2023).

Despite this shift, fossil fuels remain vital for system reliability and economic reasons, **as Türkiye is both a major importer and consumer of these fuels.** It imports nearly all its gas (even though domestic gas production is scaling rapidly), most of its oil and substantial amounts of coal, to support an economy in which such energy-intensive industries account for around 20% of GDP.[2] This reliance creates macroeconomic, security and political vulnerabilities. While renewable energy growth, clean manufacturing, and export-driven industry decarbonisation are expected to rise, fossil fuel use will persist since domestically produced lignite coal, supported by state subsidies, and growing domestic gas production are promoted as cheap, home-grown energy sources that reduce reliance on imports.

Türkiye's structural dependence is more about fossil fuel imports than fossil fuel production revenues. Energy imports put significant pressure on the economy, making affordable energy central to industrial competitiveness and political stability. This is further supported by the public, as inflation, employment and security top the lists of social and political priorities. Therefore, the government's key themes of energy transition centre on energy security, sovereignty and economic strength. Renewables are part of domestic, affordable energy that benefits industry, making clean energy broadly palatable without deep ideological conflict. However, gas also serves as an energy security[3] and geopolitical goals: LNG imports diversify supply beyond pipeline gas, while expanded LNG and pipeline

[1] This target is currently under review, with an updated figure expected to be announced later in 2026.
[2] World Bank Group, **Manufacturing, value added (% of GDP)- Türkiye** (webpage, accessed 5 August 2026)
[3] Humeyra Ayaz, 18 May 2025, **New Black Sea gas discovery bolsters Türkiye's geopolitical role**

infrastructure connects suppliers to European markets and supports Türkiye's ambition to become a regional hub.

Türkiye's transition approach supports the expansion of fossil fuel infrastructure as much as clean energy. Renewables, clean technology, as well as LNG, domestic gas and coal can all be justified under the same "domestic, secure, affordable energy" narrative. This creates momentum for diversification but weakens pressure for a structural exit from fossil fuels, especially given the government's established recognition of LNG and domestic gas as critical infrastructure for energy independence and a bargaining chip in Europe. Another issue is the fiscal stickiness of a coal phase-out, with lenders facing critical transition risk as loans to thermal power plants account for around 2% of Turkish bank assets, with non-performing loan rates above the banking sector average.

No new coal is likely to be built in Türkiye, though a formal "No New Coal" commitment remains politically elusive. Türkiye previously revoked licences for two pre-construction projects, Kirazlıdere and Karaburun, and in July 2026 the courts revoked the Environmental Impact Assessment (EIA) of the Afşin Elbistan A expansion, the last remaining domestic project.[4] However, a new complication has emerged with the Cenal plant fired with imported coal entering the EIA process in June 2026, making the "No New Coal" commitment politically harder to frame while this proposal is live.

Türkiye's export-oriented economic model also impacts its transition, though not in one simple way. Export-oriented firms linked to EU value chains are already responding to the CBAM and supply-chain pressures, while domestic-facing firms and SMEs are less prepared. SMEs are especially important because they make up the majority of firms and employment yet often lack the capital and technical capacity to decarbonise. To support their transition, Türkiye has established the Long-Term Climate Strategy,[5] one of many important milestones, as well as the planned Emissions Trading System (ETS)[6] development and the Turkish Industrial Decarbonisation Investment Platform (TIDIP).[7] It remains to be seen whether these will serve as catalysts for a real transition or more as a measure to protect the competitiveness of its domestic industry.

Historically, **Türkiye has demonstrated a pragmatic approach to climate diplomacy**, **often aligning it with its broader political goals.** For instance, its ratification of the Paris Agreement is often cited as a strategic move, rather than as a purely environmental action,[8] to secure a memorandum of understanding with multilateral finance institutions (the World Bank Group and EBRD) and countries (France and Germany); the funding initially amounted to US$3.5 billion (€3.1 billion), then expanded to a US$5 billion investment plan

[4] Euro News, 14 July 2026, **'Victory' as Turkiye ends major coal plant expansion – but still lacks phaseout plan**
[5] UNFCCC, 2024, **Türkiye's 2053 Long-Term Climate Change Strategy** (PDF)
[6] Turkish Presidency General Secretariat, Directorate General of Law and Legislation, 2025, **Climate Law**
[7] European Bank for Reconstruction and Development, November 2024, **Türkiye launches industrial decarbonisation investment platform**
[8] Jonathan Spicer and John Irish, 14 October 2021, **EXCLUSIVE Turkey set to receive 3.1 bln euro loans to help Paris climate goals – sources**

as the agreement transformed into TIDIP) in 2024. Türkiye's current foreign policy stance – balancing security, economic resilience and strategic independence – reflects ambitions that pull in two directions simultaneously: seeking to become a regional clean industry leader while also expanding its role as an energy transit and trading hub for fossil fuels. Türkiye may aspire to advance both ambitions on the international stage via hosting COP31, framing its energy transit role as integral to a stable and secure energy transition rather than at odds with its climate leadership objectives – though this may generate tensions between how ambitiously Türkiye chooses to act and how it chooses to be seen to act.

Summary of key domestic transition factors

- **The strongest enabling condition is that renewables already align with Türkiye's core national interests.** Wind and solar reduce import exposure, support industrial competitiveness and fit the government's "domestic and national energy" framing.[9] The alignment between foreign policy priorities and climate diplomacy could also further accelerate the transition by increasing international commitments and establishing fast-streamed policy tools.

- **The biggest risks are political economy risks: coal and gas remain politically and strategically protected as security assets in Türkiye.** Issues such as permitting delays, higher financing costs of renewables, grid limitations and uncertain coal phase-out plans could slow down progress. Other factors also all foster caution about a rapid transition – including continued fossil fuel subsidies, volatile macroeconomic conditions, high capital costs, selective financing, and the "too big to fail" status of coal-linked assets.

Opportunities for international collaboration

1. **Focus on COP31-related diplomacy where pragmatic solutions to Türkiye's domestic transition needs (such as integrating renewables into urbanisation and infrastructure planning), or foreign policy priorities, can serve as negotiation points to increase the country's commitments and make them more ambitious.** Indeed, the Turkish COP31 Presidency has placed electrification at the centre of its Action Agenda, seeing COP31 as the start of a global conversation about a "35-by-35" target of 35% of global final energy consumption coming from electricity by 2035. The COP31 Presidency's delivery-focused agenda also features the grid investment pipeline and the Climate Implementation Bridge (see Chapter 3), which all create concrete ways for international partners to support Türkiye's ambition while responding to its domestic priorities.

[9] Erdal Tanas Karagol et al. 2017, **National Energy and Mining Policy of Turkey** (PDF)

2. **Support Türkiye in advancing clean electricity as part of its agenda to improve energy security and reduce fossil fuel imports.** Türkiye already frames domestically produced and affordable energy as central to strengthening energy security and reducing exposure to volatile external markets. International cooperation can help Türkiye translate the growing energy security case for clean power into accelerated deployment, including through investment, grid development and other measures. This would reinforce the government's existing emphasis on domestic and affordable energy while helping ensure that energy security concerns drive clean energy expansion rather than further fossil fuel infrastructure and diversification.

3. **Source industrial decarbonisation finance for Türkiye, especially for SMEs**, to transform compliance with existing international standards, as well as EU trade and supply-chain requirements, notably CBAM, CSRD-related supply-chain pressure and standards alignment, into an economic opportunity. To maximise the benefit of this finance, it should be paired with technical assistance and knowledge sharing on economy-wide decarbonisation, grounded in an understanding of structural barriers specific to Türkiye. The coal phase-out will play a key role here, as it is central to decarbonising the power sector; it is also where barriers are most visible, including: multiple layers of transition exposure for local economies and employment, stranded assets in the coal-related industry and financial-sector assets tied to coal infrastructure.

ABOUT E3G

E3G is an independent think tank working to deliver a safe climate for all.

We drive systemic action on climate by identifying barriers and constructing coalitions to advance the solutions needed. We create spaces for honest dialogue, and help guide governments, businesses and the public on how to deliver change at the pace the planet demands.

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