

## Electricity policy ankara

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This chapter is part of a report on the prospects for enhanced cooperation between Turkey and Western countries in the Black Sea region in the new geopolitical setting following Russia's full-scale invasion of Ukraine.

Understanding the evolution of the European natural gas strategy provides important context for Turkey's ongoing ties with EU nations, especially given the direct implications for EU gas supplies following Russia's invasion of Ukraine. Prior to Russia's invasion of Ukraine in February 2022, the EU relied heavily on Russian natural gas, representing 40 percent of imports,<sup>1</sup>"Share of Russian Gas in EU Natural Gas Imports 2021," Statista, n.d., <https://>, accessed July 10, 2024. or 150 billion cubic meters (bcm), in 2020.

In line with the ongoing high investments in LNG infrastructure, the EU increased its LNG import capacity by 40 bcm in 2023, with plans to add another 30 bcm by 2024,<sup>7</sup>"Liquefied Natural Gas," European Commission, January 2024,[https://energy.ec\\_ropa\\_/topics/carbon-management-and-fossil-fuels/liquefied-natural-gas\\_en](https://energy.ec_ropa_/topics/carbon-management-and-fossil-fuels/liquefied-natural-gas_en). though this infrastructure is still under construction. The share of LNG in the EU's gas supply rose from 20 percent in 2021 to 41 percent in 2023, reflecting a radical diversification of energy sources in response to the conflict in Ukraine.

Importantly, while the EU continues to purchase Russian LNG via Novatek, the fourteenth sanction package,<sup>8</sup>"EU Reaches Milestone Agreement on Energy Policy," European Commission, June 24, 2024, [https://ec\\_ropa\\_/commission/presscorner/detail/en/ip\\_24\\_3423](https://ec_ropa_/commission/presscorner/detail/en/ip_24_3423). which was established in June 2024, fully prohibits all forms of reexport agreements. This measure will prevent Russian LNG carriers from utilizing the EU's developed LNG infrastructure in the near future.

Finally, the majority of the EU's dependence on Russian gas was based on long-term natural gas pipelines.

Notably, historical pipeline agreements, such as the Gazprom-Naftogaz deal, allowed Russian gas transit through Ukraine. This \$7 billion agreement<sup>9</sup> Simon Pirani, "The Russia-Ukraine Gas Transit Deal: What's at Stake?" Oxford Institute for Energy Studies, February 2020, <https://> aimed to transit 225 bcm from 2020 to 2024. Post-invasion reductions led Naftogaz to seek international arbitration against Gazprom, and the collaboration will no longer exist after 2024.

In October 2021, the European Commission introduced a comprehensive "toolbox"<sup>11</sup> "A Toolbox for Action and Support," European Commission, October 2021. designed to help EU member states address rising energy prices and bolster energy supply security by reducing dependence on Russian natural gas. Key measures included enhancing gas storage efficiency, establishing a collective gas purchasing platform, and reassessing the EU's electricity market with the support of the Agency for the Cooperation of Energy Regulators (ACER).

In April 2022, the EU launched the EU Energy Platform<sup>12</sup> "Briefing: The European Green Deal," European Parliament, July 11, 2023, [https://\(2023\)751411](https://(2023)751411). to focus on demand aggregation, joint purchasing of non-Russian gas, efficient use of natural gas infrastructure, and extensive international outreach. This platform aims to mitigate intra-EU competition, diversify supply chains, and reduce reliance on Russian energy sources in a coordinated and multilateral manner.

During this period, Germany faced two significant political-economic challenges in its dealings with Russia. First, the USSR engaged in barter trade, exchanging natural gas for steel pipes, pipe-laying equipment, and other related infrastructure materials with Germany via its companies. Second, Germany leveraged its robust domestic iron and steel sectors to secure cheap Russian natural gas, which it then sold to its European allies.

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