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Friedrich Ebert Stiftung

Is Türkiye's climate and energy policy ready for COP 31?

As the 31st meeting of the Conference of the Parties to the UN Framework Convention on Climate Change (COP 31) begins in Antalya, Türkiye is stepping into the international spotlight as a climate policy actor. The country is rapidly expanding its wind and solar capacity, while continuing to rely on coal, oil and natural gas. Economic interests and a lack of concrete phase-out plans make it harder to envision a transition that sustainably reduces emissions. At the same time, the COP-Presidency increases the pressure on the Turkish government to align its climate commitments with its national energy policies.

The Turkish COP presidency

COP 31 will take place in Antalya from 9 to 20 November 2026. Türkiye will hold the presidency: Environment Minister Murat Kurum will chair the conference, while Australia's Climate Change Minister Chris Bowen will lead the negotiations. This division of responsibilities stems from an agreement between the two countries that bid to host the conference.

The Turkish presidency aims to turn existing climate commitments into concrete projects and mobilise finance, technology and investment to support them. Its guiding principles are dialogue, consensus and action. Nationally determined contributions are to be developed into bankable project portfolios.

The Turkish COP presidency's action agenda includes initiatives in areas such as clean energy, electrification, 'Zero Waste' and the circular economy, resilient cities and green industry. The COP presidency proposes increasing electricity's share of global final energy consumption to 35 per cent by 2035, halving the projected increase in global waste generation, reducing the energy intensity of buildings by at least 25 per cent and increasing the share of materials used in a circular manner to at least 15 per cent. 'Zero Waste' aims to prevent waste, strengthen reuse and recycling, and reduce methane emissions. However, this proposed international agenda conflicts with Türkiye's national climate and energy policy, which continues to allow emissions to rise and makes no provision for a binding coal phase-out.

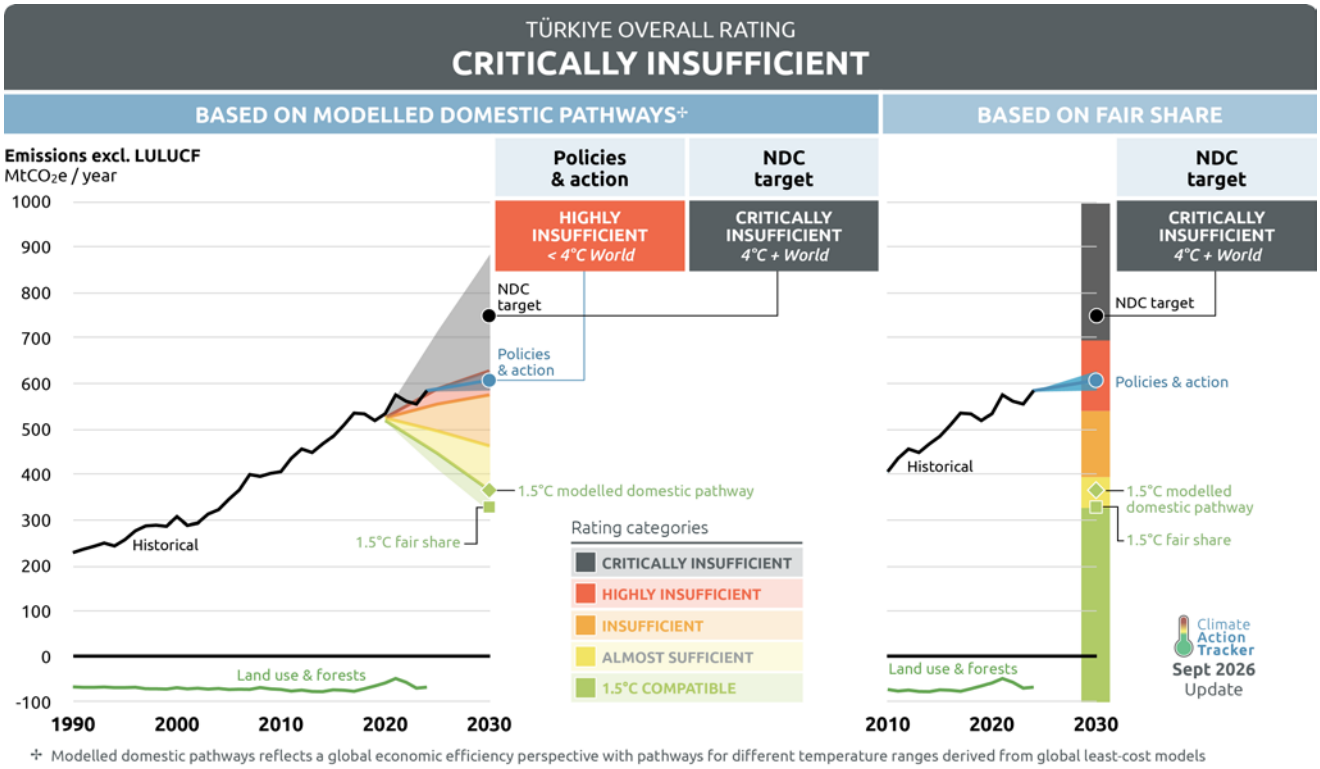


Figure 1: Türkiye | Climate Action Tracker

Coal and fossil fuels shape the emissions profile

Climate targets allow emissions to rise further

In 2025, Türkiye accounted for 1.13 per cent of global greenhouse gas emissions (compared with Germany's 1.22 per cent), placing it 14th. According to estimates from the European Commission's EDGAR emissions database, per capita greenhouse gas emissions stood at 7.09 tonnes of carbon dioxide equivalent in 2025, exceeding the average of 7.06 tonnes across the 27 EU member states.[1]

Under these conditions, Türkiye's target of reaching net zero emissions by 2053 also appears unrealistic. Net zero means that no more greenhouse gases are emitted than can be absorbed by natural or technological sinks. In 2024, total greenhouse gas emissions amounted to 584.5 million tonnes of carbon dioxide equivalent.[2] This unit of measurement makes the different climate impacts of greenhouse gases comparable by converting them into the equivalent impact of carbon dioxide (CO_2). Türkiye's nationally determined contribution limits net emissions in 2035 to 643 million tonnes of carbon dioxide equivalent.

This target already takes account of the effects of land use and forestry, whereas the figure of 584.5 million tonnes for 2024 refers to gross emissions.[3] The nationally determined contribution therefore contains no target for an absolute reduction in emissions. It merely promises to limit their increase. Even if this commitment were met, enormous efforts would be needed in the 18 years remaining until 2053 to achieve net zero emissions.

The energy sector is crucial here: in 2024, it was responsible for 419.9 million tonnes of carbon dioxide equivalent, almost 72 per cent of all greenhouse gas emissions. Phasing out coal would therefore be a key step towards significantly reducing emissions and making the net zero target achievable. So far, there is no binding timetable for closing coal-fired power plants.

The Climate Action Tracker (CAT), which monitors governments' climate action and assesses it against the goals of the Paris Agreement, gives Türkiye an overall rating of 'critically insufficient'. If all countries submitted a nationally determined contribution like Türkiye's, the planet would face warming of more than four degrees. It rates the measures already implemented one category higher, but still as insufficient.[4]

1 Europäische Kommission, EDGAR: GHG Emissions of All World Countries – 2026 Report
2 TÜİK: Sera Gazı Emisyon İstatistikleri, 1990–2024 , 27.3.2026.
3 Climate Action Tracker: https://climateactiontracker.org/countries/turkey/targets/
4 Climate Action Tracker: https://climateactiontracker.org/countries/turkey/targets/



Protest against forest clearance for coal mining: two women embrace a tree in Akbelen Forest in western Türkiye. 31 July 2023

New coal projects and no phase-out plan

Two of Türkiye's largest coal-fired power plants are located in Kahramanmaraş province in southern Türkiye. Afşin-Elbistan A has a capacity of 1,355 megawatts, and plant B a capacity of 1,440 megawatts. For years, there were plans to build additional coal-fired power plants there. However, financing problems, pressure from the movement campaigning for a coal phase-out, resistance from the local population and the expansion of renewable energy have led to many of these plans being put on hold for the time being.[5]

There are still plans to expand the privatised Afşin-Elbistan A coal-fired power plant by adding two units with a combined capacity of 688 megawatts. Greenpeace, local residents and other local actors challenged the favourable environmental impact assessment (EIA) decision in court. In July 2026, an administrative court annulled the decision. The ministry appealed against the ruling, thereby defending the planned expansion. The ministry's appeal document in the Afşin-Elbistan case bore the logo of the COP 31 presidency.[6]

Even in the year of its COP presidency, Türkiye continues to rely on fossil fuels. In numerous provinces, the authorities have authorised exploration for natural gas and oil.

In Akbelen Forest in the south-west of the country, coal is mined for the Yeniköy and Kemerköy power plants. Given their age, their location in an important tourism and agricultural region, and dwindling coal reserves, these plants might be among the first to close under a coal phase-out plan. Today, however, they are the centre of the internationally recognised resistance movement in Akbelen. Developing new coal deposits requires the destruction of Akbelen Forest and the olive groves on which the villagers depend for their livelihoods.[7]

Dependence on imports and high associated costs

Coal-fired power plants accounted for around 34 per cent of Türkiye's electricity generation in 2025. Plants fuelled by imported coal accounted for around 22 per cent of total electricity generation.[8] In 2010, the share of imported coal in electricity generation had still been below ten per cent.[9]

5 HEAL: Chronic Coal Pollution Turkey
6 Greenpeace Türkiye: Mahkeme'nin Termik Santralde Ek Ünite İptaline Bakanlık'tan ve Şirketten İtiraz, 4.8.2026.
7 İklim Ağı: 2025 İklim Karnesi, veröffentlicht bei Greenpeace Türkiye, 6.1.2026.
8 Ember: Türkiye Electricity Review 2026.
9 Ember: Türkiye Electricity Review 2024.

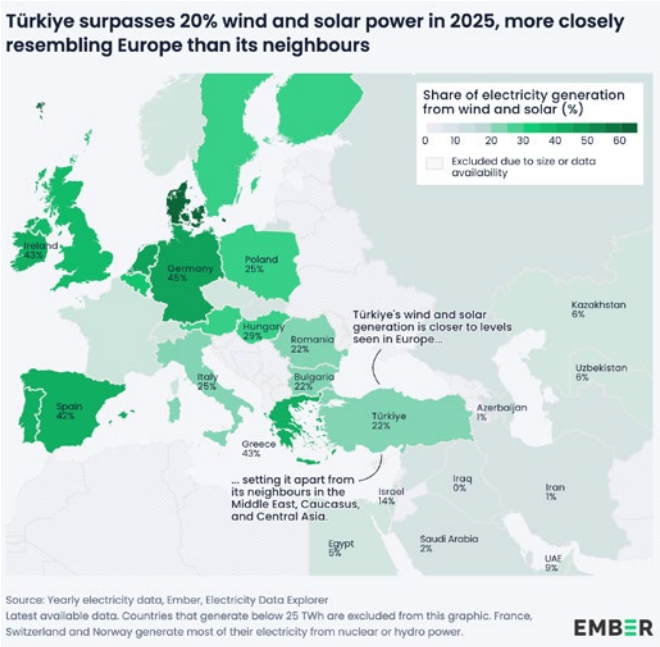


Figure 2: ember-energy.org [EN] TER_2026

The coal comes mainly from Russia and Colombia.[10] Türkiye`s coal imports, despite its own reserves, can also be explained by the structure of its power generation fleet: plants fuelled by imported coal are designed to use imported hard coal, whereas domestic reserves consist mainly of lignite. At the same time, demand in key European markets is declining as numerous countries phase out coal-fired power generation. Since 2022, the EU has also banned imports of Russian coal. Türkiye, by contrast, has become an important market. An unclear climate policy, disregard for air pollution and slogans such as 'domestic coal' and 'clean coal' have facilitated this development. With the growing number of plants fuelled by imported coal, Türkiye has also become heavily dependent on other countries for coal.

There are also substantial health consequences. The Health and Environment Alliance (HEAL) estimated the economic costs of the damage to health caused by coal-fired power plants in Türkiye in 2019 at between €2.86 billion and €5.88 billion.[11] A coal phase-out could therefore reduce emissions, air pollution and dependence on imports at the same time. Environmental organisations such as Greenpeace are therefore calling on the government, ahead of COP 31, to initiate a binding and socially just coal phase-out.[12]

Transport remains geared towards roads

The government also continues to rely on fossil fuels in the transport sector. In Türkiye in 2023, a total of 90.9 per cent of domestic passenger transport and 90.6 per cent of freight transport was carried by road. A shift to electric vehicles and a greater reliance on rail for long-distance freight and passenger transport appear essential to reducing emissions.

The share of air travel in passenger transport rose from 1.8 per cent in 2000 to 6.8 per cent in 2023. The utilisation rate of rail freight capacity, by contrast, fell from 75 per cent in 2013 to 51 per cent in 2021.[13]

Renewable energy is becoming important

Rapid expansion of wind and solar

Türkiye has made significant progress in expanding renewable energy. Installed wind and solar capacity more than doubled between 2021 and early 2026, from 18,423 to 40,689 megawatts. The government aims to reach 120,000 megawatts by 2035. State tenders for new wind and solar farms and the expansion of transmission grids are intended to support this increase in capacity. In 2025, renewable energy accounted for around 44 per cent of electricity generation; around half of this came from wind and solar energy. Renewables are thus already a mainstay of the electricity supply. Their further expansion offers an opportunity to replace fossil fuels and reduce dependence on imports.[14]

Grids and storage must expand in parallel

The energy transition depends on aligning this expansion with electricity demand, grid and the phase-out of fossil fuel power plants. The installed capacity of all power plants, at 127,000 megawatts, compares with a peak load to date of 60,000 megawatts, meaning the highest electricity demand measured at any one time.[15] However, this does not imply a corresponding surplus, because wind and solar generation depends on the weather and is not available at full capacity at all times.

10 Weltbank, WITS: Turkey – Bituminous Coal Imports by Country, 2024.
11 HEAL: Chronic Coal Pollution Turkey.
12 Greenpeace Türkiye: Türkiye'de Kömürün Gizli Maliyeti.
13 Umweltministerium: Ulaştırma Türlerine Göre Taşınan Yolcu ve Yük Miktarı.
14 Energieministerium: Yenilenebilirde Sessiz Devrim.
15 TEİAŞ: Täglicher Betriebsbericht, 31.10.2026.

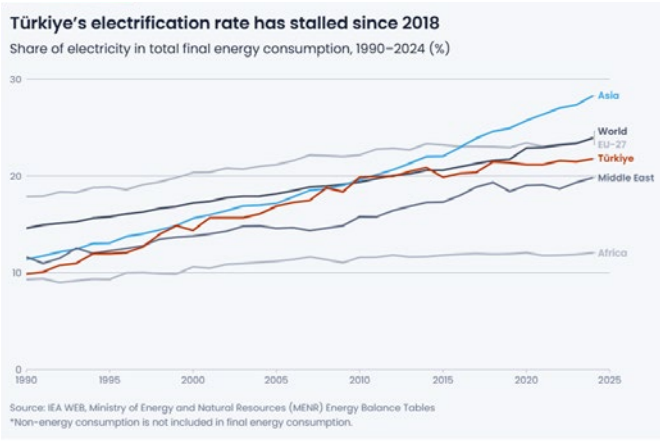


Figure 3: Türkiye could electrify 85% of its energy use | Ember

In addition, storage projects with a total power capacity of 33,000 megawatts have received preliminary approval. This does not yet indicate how much energy they can store. Storage facilities, reservoir hydropower plants, biomass and geothermal energy can help balance fluctuations. In addition, electricity use can be shifted to different times and reduced through greater efficiency. Without such coordination, there is a risk of building additional power generation capacity while existing fossil fuel plants continue to operate. The aim should be to replace fossil fuel electricity generation with renewable energy.

Greater electrification of transport can open up new markets for Türkiye's automotive industry. The extent to which this reduces emissions depends largely on the electricity mix. If this remains heavily reliant on fossil fuels, the climate mitigation potential of electric vehicles will be limited.

Economic opportunities and fair conditions

Another common misconception is that renewable energy is expensive.

According to calculations by the International Renewable Energy Agency (IRENA), even combinations of renewables and storage at favourable locations can provide a continuous electricity supply more cheaply than new coal- or gas-fired power plants.[16]

Of the 28,719 megawatts of solar capacity installed in Türkiye as of October 2026, 25,595 megawatts came from installations that do not require an electricity generation licence. These installations are not necessarily small private rooftop systems. The expansion of solar energy is being driven by small and large power plants, factories, and investment by medium-sized and large companies.

There are only a few examples among private end users, for instance on the roofs of blocks of flats. Energy co-operatives are being held back. Bureaucratic hurdles remain substantial. While balcony solar systems are spreading around the world, Türkiye looks on.

Political interests shape the transition

Privatisation and economic resistance to change

Türkiye's continued reliance on fossil fuels can also be explained by the energy policy decisions of the past two decades. Since the early 2000s, the focus has been on privatising the energy sector. After 2010, fossil fuels, particularly coal, were promoted under the slogan 'domestic and national energy'. The High Planning Council's 2004 strategy paper on the reform and privatisation of the electricity sector laid the groundwork for privatisation across the entire sector. The government promised a secure energy supply, modernisation and expansion without placing a burden on public finances, and greater efficiency. The 2009 strategy paper on the electricity market and security of supply focused particularly on privatising electricity distribution. The paper also required climate change and environmental impacts to be taken into account in all activities throughout the sector. Under Energy Minister Berat Albayrak, the National Energy and Mining Policy was promoted under the slogan 'Our coal, our energy'.[17]

In the privatisation process, the provisions of the strategy papers were largely implemented. In 2008, the state-owned Electricity Generation Corporation Elektrik Üretim AŞ (EÜAŞ) and its subsidiaries accounted for 50 per cent of Türkiye's electricity generation. By 2025, this share had fallen to 17 per cent. Privatisations have become a factor influencing the phase-out of fossil fuels in Türkiye. The privatisation of coal-fired power plants that had already reached the end of their economic life has made it more difficult to implement coal phase-out plans. The companies that acquired the plants want to keep them operating for as long as possible to recoup the purchase prices and the costs of extending their operating lives, while also generating additional profits. Payments under the so-called capacity mechanism have made the operation of some coal-fired power plants even more lucrative. Under this mechanism, payment is made simply for making generation capacity available.

16 IRENA: 24/7 Renewables: The Economics of Firm Solar and Wind.
17 Anadolu Ajansı: Enerji ve Tabii Kaynaklar Bakanlığından yerli kömür videosu.



Rooftop solar power: photovoltaic panels on a residential building.

For example, the Yeniköy power plant, which is around 40 years old, and Kemerköy, which has been operating for 33 years, were privatised in 2014 for US$2.7 billion.[18] According to the company, more than US$300 million in additional investment went into modernisation after privatisation.[19] Given their age, their location in an important tourism and agricultural region, and dwindling coal reserves, these plants might be among the first to close under a coal phase-out plan.

It is also frequently alleged that the AKP has long used the energy sector as an instrument to enable companies close to it to accumulate capital. In its report 'The AKP Government's Energy Record', the energy working group of the Union of Chambers of Turkish Engineers and Architects (TMMOB) found that disregard for rules, violations of the law and regulations tailored to particular individuals and business groups had increased under the presidential system.[20]

Large-scale projects and democratic participation

The government's economic policy, however, prioritises road and air transport. Roads and bridges generate contracts for the automotive and construction industries and can therefore easily translate into electoral support. Both factors play a major role in shaping Türkiye's transport policy. A study on motorway expansion concludes that it has benefited the AKP's share of the vote.[21]

As early as 2021, Doğan Aydal, as deputy leader of the Yeniden Refah Partisi (New Welfare Party), accused distribution network operators of obstructing the expansion of solar energy and criticised their business connections. The underlying argument is that distribution network operators' profits would fall if consumers met their own electricity needs with solar energy. At the same time, industry representatives confirm that technical problems, such as limited transformer capacity, do exist. Paving the way for balcony solar systems could become a litmus test here, showing how distribution network operators really view solar energy.

The prices achieved in state tenders for designated areas for the use of renewable energy (YEKA) show that electricity from renewable sources can be offered at low prices under market conditions. One example is the solar agreement with Saudi Arabia, which has attracted strong criticism because of the extensive special rights granted to foreign investors. Electricity from the planned solar power plants is to be purchased for 30 years, at an average price per kilowatt-hour of 2.74 euro cents in Sivas and 2.45 euro cents in Karaman.[22] These prices are close to the results of the YEKA tenders. By contrast, for a contractually specified proportion of its output, the operating company of the Akkuyu nuclear power plant is guaranteed an average purchase price of 12.35 US cents per kilowatt-hour for 15 years.[23] This is significantly higher than the solar electricity prices cited above. The expansion of nuclear energy also raises questions of safety, radioactive waste disposal, costs and dependence on other countries.

Outlook

Assessing global climate targets also involves historical responsibility and the unequal capacities of states to act. Developed industrialised countries account for the largest share of historical CO_2 emissions from fossil fuels and industry. Türkiye's share of cumulative emissions from these sources between 1750 and 2024 is around 0.7 per cent, compared with Germany's 5.1 per cent.[24]

18 YK Enerji: Sürdürülebilirlik Raporu 2024.
19 Limak: Ankündigung der Kraftwerksmodernisierung.
20 TMMOB: AKP İktidarının Enerji Karnesi: Enerjide Son 20 Yıl.
21 M. Akbulut-Yüksel, D. Okoye, B. Turan: Expressway to Votes, The Economic Journal 134 (657), 2024, S. 48–94.
22 ANKA / Olcay Aydilek: Bericht vom 4.5.2026.
23 Energieministerium: Nükleer Enerji Hakkında Sıkça Sorulan Sorular.
24 Our World in Data / Global Carbon Budget 2025: Deutschland; Türkei.



Launch action by the activist group 'Peoples' Climate Summit' (Halkların İklim Zirvesi) in Antalya in August 2026 under the slogan 'If the world burns, it is because of fossil fuels'.

Developing countries and emerging economies often have fewer financial, technological and institutional resources at their disposal. Developed industrialised countries therefore bear a particular responsibility to reduce their emissions rapidly and to support climate mitigation and adaptation in countries of the Global South through finance, technology transfer and capacity building. At the same time, the expansion of renewables demonstrates Türkiye's own capacity to act.

A binding coal phase-out plan, more ambitious national climate targets and the accelerated expansion of grids, storage and renewables could bring these advances together. A socially just transition must involve workers and coal regions. Further training, new jobs and reliable public infrastructure are as much a part of this as democratic participation in shaping the transition.

Domestically, COP 31 offers the government a platform to gain legitimacy. Official communications explicitly link the presidency to Recep Tayyip Erdoğan's leadership. What matters is whether this international attention leads to lasting changes.

Türkiye's active environmental movement is putting forward proposals of its own. Alongside COP 31, the 'Peoples' Climate Summit' (Halkların İklim Zirvesi) will take place in Antalya from 14 to 18 November, and the 'Climate Justice Forum' (İklim Adaleti Forumu) from 14 to 17 November. Environmental groups, trade unions, local initiatives, and women's and youth organisations aim to discuss the phase-out of fossil fuels, energy democracy and socially just ways out of the climate crisis with international partners. Experiences from conflicts such as Afşin-Elbistan and Akbelen connect climate mitigation with health, work and democratic participation.[25]

25 Peoples' Climate Summit: Join Us for Climate Justice.

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