



Climate Action Tracker

Türkiye's power shift

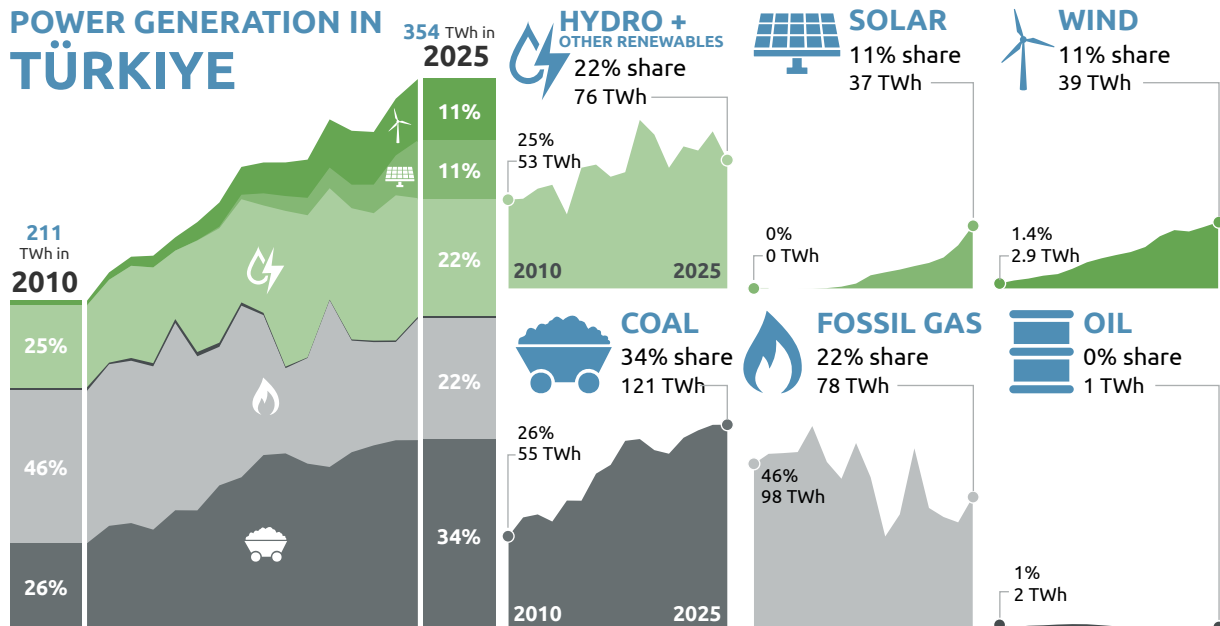
Power sector transformation at a crossroads

September 2026



Executive Summary

POWER GENERATION IN TÜRKİYE



Türkiye's power sector stands at a crossroads. While in recent years the government has successfully installed and deployed new wind and solar energy facilities, increasing both the share and absolute levels of renewables in the power mix, total energy use – and fossil fuel use in the power sector – has also been increasing.

Türkiye's role as COP31 co-host gives it a unique responsibility to lead on implementing the COP28 decision to transition away from fossil fuels - agreed under the first Global Stocktake of the Paris Agreement (GST-1). While COP31 president Murat Kurum has repeatedly framed this COP as being where **past decisions will be turned into action**, Türkiye's **plans** still see fossil fuels as a central component of the country's energy mix, only to be reduced if cheaper alternatives emerge. These plans fall well short of the urgency and clarity expected from a COP presidency.

And yet, clean power technologies are already either cost-competitive with, or cheaper than coal and other fossil fuels. Solar power, now Türkiye's **lowest-cost source of electricity**, undercuts domestic coal by a wide margin. These cheaper alternatives to fossil fuels not only exist but are readily available. By Türkiye's own stated logic, now is the time to move away from fossil fuels.

As governments move from high-level pledges to transition away from fossil fuels to concrete climate action, it will be difficult for a COP host to champion implementation abroad without a clear plan to phase out fossil fuels at home. Türkiye could demonstrate leadership as COP president by building on its recent successes in increasing its renewable energy capacity and announcing targets and plans to phase-out coal and gas ahead of COP31.

The recent energy crisis has shown that fossil fuels are neither a reliable nor an affordable foundation for long-term energy security, strengthening the case for Türkiye to base its leadership on a decisive shift to renewables. A faster rollout of clean power and electrification would cut emissions, protect against price spikes, and reduce import dependence.

Türkiye has put a global target of **35% electrification by 2035** at the centre of its COP31 Action Agenda. However, its own National Energy Plan projects electricity's share of final energy consumption to reach only 24.9% in 2035, from 21.8% in 2020. Meeting the 35% target would therefore require a substantial step-change in electrification policies and in the deployment of renewable power, grids and flexibility. Without a parallel phase-out of fossil fuels, rising electricity demand risks being met in part by coal and fossil gas rather than delivering the emissions reductions the target is intended to achieve.

By setting out a clear and just plan to phase out fossil fuels at home – and by making this central to its COP31 agenda – Türkiye can turn its rhetoric on implementation into reality and demonstrate genuine climate leadership. This would require the Turkish government to:

Develop just phase-out plans for coal and fossil gas that include an immediate end to subsidies, exploration and the development of new infrastructure. Such plans currently do not exist. To align with [1.5°C compatible benchmarks](#) in the power sector, coal should be phased out by 2040 and fossil gas by 2045 at the latest.

Continue to build on recent success in accelerating renewables expansion, by updating the national energy plan's wind and solar targets to align with the pace of installed capacity increases needed to meet 1.5°C compatible installed capacity benchmarks of at least 90 GW of combined capacity by 2030, 150 GW by 2035, and around 400 GW by 2050. This scale-up should be accompanied by policies to accelerate end-use electrification, putting Türkiye on a credible domestic pathway towards the 35% by 2035 global electrification target it is championing through the COP31 Action Agenda.

Accelerate the installation of wind and solar capacity to match the necessary trajectory to meet these 1.5°C compatible installed capacity benchmarks. To align with a 1.5°C compatible trajectory, Türkiye's wind and solar capacity additions would need to increase at 8.6 GW per year, from 2023 to 2030, and by 12 GW per year, from 2031 to 2035. Türkiye's wind and solar capacity increased by 7.15 GW in 2025, but the capacity additions in previous years were slower.

Outline plans to remove barriers to the rollout of wind and solar infrastructure.



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1 Türkiye's power sector today

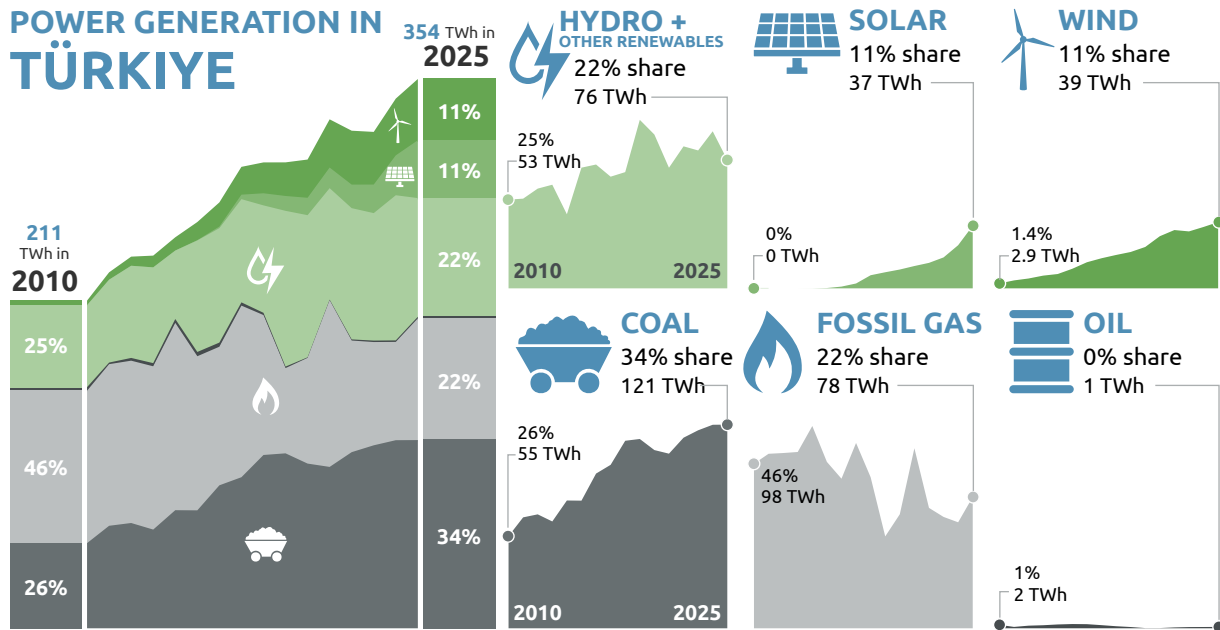


Figure 1 Power generation and share of different sources in Türkiye's power sector from 2010 to 2025.

Renewables are expanding, but fossil fuels remain entrenched

The story of Türkiye's power sector decarbonisation has two sides:

- ▶ The country has had good success with the installation and deployment of new wind and solar energy facilities in recent years, with the share of electricity generation from these sources increasing to 22% in 2025, up from 12% in 2020 and around 1% in 2010 (Ember, 2026a).
- ▶ At the same time, however, the percentage share of generation coming from fossil fuels has remained high, at 56% in 2025. This share has not changed much since 2019, having come down from 70-80% over the 2000-2018 period. The absolute level of emissions from fossil fuels in the power sector reached its highest level in 2025.

While generation from wind and solar sources is increasing, total energy use and fossil fuel use in the power sector is also increasing, rather than decreasing.

This increase in the absolute level of fossil fuel use, whilst renewable capacity has been rapidly expanding, reflects the last two decades of growth in electricity demand across all sectors of the economy driven by rapid economic and industrial growth (IEA, 2026). The industrial sector has consistently had the highest share of electricity demand over this period, standing at 44% in 2023, having grown significantly in absolute terms due to the continued growth of the non-metallic mineral products, basic metals, chemicals, textiles and food products sectors (UNFCCC, 2026a).

The commercial and public services and residential sectors have also seen substantial increases in electricity demand, given rapid urbanisation of the population (rising from about 29 million to over 70 million between 1990 and 2020 [UNFCCC, 2023]), and expansion of services (retail, offices, public services, ICT, hospitality) resulting in increased demand for appliances, heating and cooling systems and digital systems.

In June 2026, COP31 president, Minister Murat Kurum, announced the COP31 Action Agenda, which introduces an electrification target to raise the share of final energy demand met by electricity globally from just over 20% today to 35% by 2035 (UNFCCC, 2026b). Türkiye's own National Energy Plan projects the electricity's share of final energy consumption will rise from 21.8% in 2020 to 24.9% in 2035 (MENR, 2022). Achieving 35% electrification by 2035 would therefore require a substantial acceleration in end-use electrification beyond current plans.

Electrifying additional end-use activities will further drive-up demand for electricity in the country making it even more important to rapidly scale up solar and wind capacity, grid infrastructure and system flexibility so that the accelerated electrification is supplied with clean energy rather than fossil fuels.

Wind and solar capacity accelerating, additional boost needed to reach 1.5°C

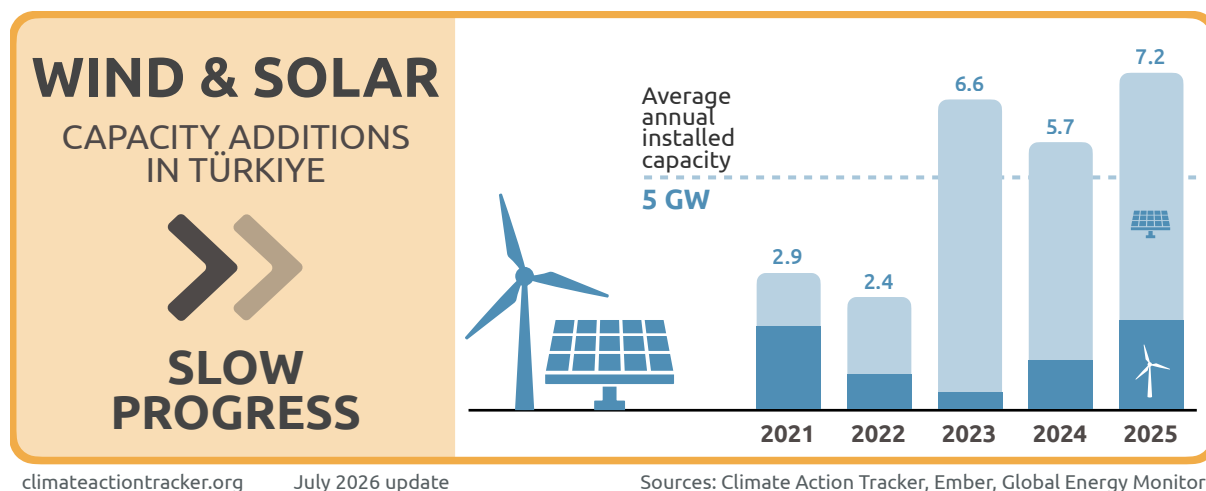


Figure 2 Wind and solar capacity additions in Türkiye's power sector.

While Türkiye has extensive potential to generate power through wind and solar, it would need to significantly ramp up capacity additions of both to align with a 1.5°C scenario. Türkiye would need to increase installed wind and solar capacity to 150 GW by 2035 (CAT, 2026), up from 40 GW in 2025 (Ember, 2026a). This would mean adding an additional 30 GW to its current 120 GW target for 2035.

Reaching this benchmark of 150 GW by 2035 would require generation capacity from wind and solar to increase by 8.6 GW per year from 2023 to 2030, and by 12 GW per year from 2031 to 2035 (CAT, 2026). Türkiye's renewables capacity increased by 7.15 GW from 2024 to 2025, the latest year with available data. This increase is closer to the required rate for annual increases but still not quite aligned. The trend of previous years is unclear, with much less capacity (2.4 GW) having been added in 2022 and 2023 to 2025 fluctuating between 5.7 and 7.2 GW, for example.

Türkiye has the potential for renewable energy in line with the level of capacity additions that would be needed for Türkiye to align with a 1.5°C scenario for both wind and solar.

According to the Türkiye Wind Energy Potential Atlas (REPA), the future potential capacity for land-based wind generation in the country is approximately 58 GW, and for offshore generation it is 21 GW (MENR, 2024a).

The equivalent study for solar, the Solar Energy Potential Atlas (GEPA), does not provide a similar estimate for total potential generation nationally, but the average annual total irradiation value is calculated as 1,527 kWh/m² (MENR, 2024b). This compares favourably to a country like Germany for example, which has an irradiation value of 1,014 kWh/m²/year (Çeçen et al., 2022). There is estimated to be over 120 GW of potential capacity available in Türkiye from rooftop solar sources alone (Ember, 2023a).

Türkiye may need to increase generation capacity further than the aforementioned CAT-derived wind and solar benchmark to make up for reduced hydropower capacity caused by a climate change-driven increase in drought observed in recent years (Ember, 2026b). One approach being promoted by hydroelectric operators is to remove limits on hybrid plant installations, such as by having floating solar panel arrays on dam water surfaces (AGBI, 2025).

The CAT-derived benchmarks referred to in this section should therefore be considered as the minimum capacity additions needed since they do not account for drought-driven reductions in hydropower capacity and assume energy demand projection at the lower end of the literature studies assessed.

Increasing reliance on coal contradicts climate goals and risks reliance on imports

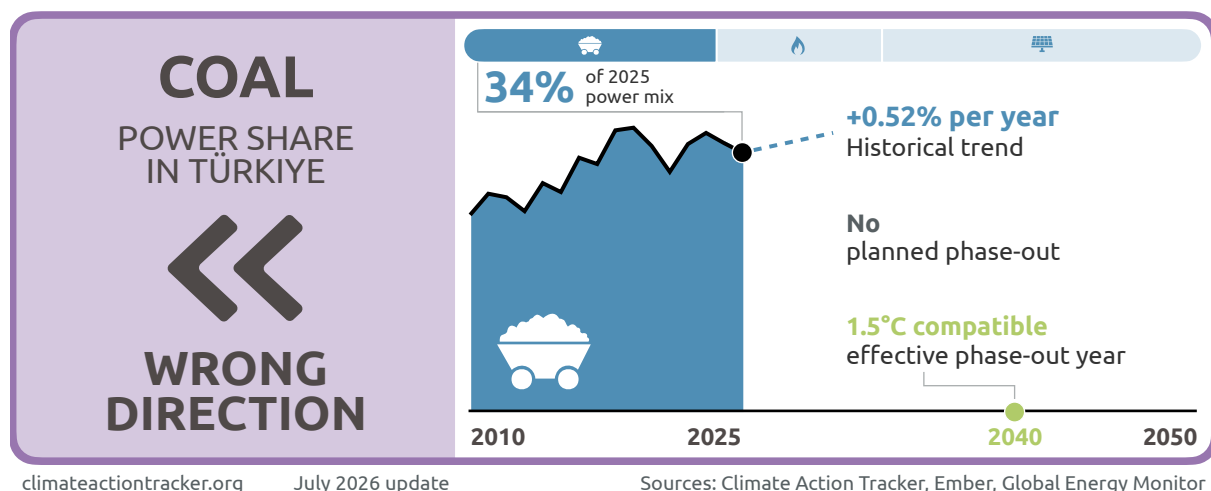


Figure 3 Coal as a share of Türkiye's total power mix.

Coal maintains a significant share in Türkiye's electricity generation mix, accounting for 34% in 2025. This stands in sharp contrast to what is needed to limit warming to 1.5°C, which would see Türkiye cut coal's share in electricity generation to single digits by 2030 and essentially phase it out by 2035 (Climate Action Tracker, 2026).

Coal in Türkiye's electricity mix has increased both in its share of the total power mix and in absolute terms of TWh in the past 10 years. Türkiye also became the largest producer of coal-fired electricity in Europe in 2024, when it overtook Germany (Ember, 2026b). Notably though, no new capacity has been installed in the last four years (Ember, 2026a).

There are a number of reasons for this increase. Hydropower energy output has become more variable, while at the same time electricity demand continues to rise. Previous investments in wind and solar have not been sufficient to cover the difference.

Simultaneously, since 2022 Türkiye has had access to cheap coal from Russia, which it has offered to Türkiye in response to international sanctions, during a period where fossil gas imports became more expensive (Reuters, 2024). On the flipside, the increase in coal use in the 2010s in preference to fossil gas was a deliberate strategy to reduce import dependence on both Russia and Iran (Carnegie, 2024). Türkiye also has a sizeable domestic coal supply making it a more secure energy source than gas (Ember, 2023b).

The best and cheapest way for Türkiye to reduce reliance on coal imports for its energy supply is to rapidly phase out of coal and build up wind and solar energy capacity. There are a variety of reasons for Türkiye to pursuing a coal phase-out:

- ▶ Reliance on coal is incompatible with a 1.5°C pathway and a phase-out is essential for Türkiye to meet its Paris Agreement commitments.
- ▶ New wind and solar generation has been cheaper than running existing plants on imported coal for years (Ember, 2021).
- ▶ Domestic lignite coal is generally not of a high enough quality to power coal plants efficiently, reducing their performance. This leaves supply highly dependent on imports, particularly from Russia, the dominant supplier. This reliance locks Türkiye into import dependence, undermining energy security and increasing price volatility (Ember, 2024).
- ▶ Declining investment interest, along with growing citizen opposition, has meant much of Türkiye's planned coal capacity extensions have already been shelved (GEM, 2024).
- ▶ Coal creates large negative health impacts for communities located near power plants (HEAL, 2022).

To capture these benefits, Türkiye would have to commit to a coal phase-out plan, and immediately halt new exploration, infrastructure development, and subsidies. Instead, the government continues to pursue all three of these things, continuing coal subsidies and long-term coal purchase agreements between public and private sectors, expanding existing coal fields and opening new ones, and continuing to push policies aimed at maintaining or increasing coal production (CAN Europe, 2026).

As more wind and solar capacity is added, a coal phase-out commitment in electricity generation (at the latest by 2040) accompanied by an implementation plan is crucial to ensure that new renewables capacity is used to eliminate Türkiye's reliance on coal.

The coal phase-out plan should include a just transition strategy, with region-specific economic plans for wage support, retraining programs and accelerated expansion of renewables in the same regions, as well as general economic diversification in these regions.

Fossil gas continues to play an evolving role, risking lock-in

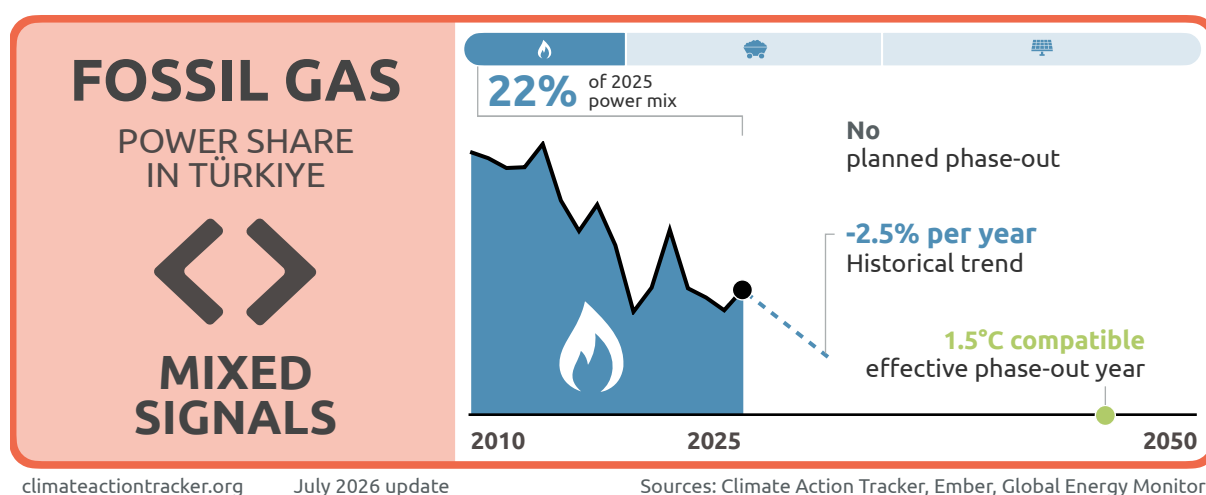


Figure 4 Gas as a share of Türkiye's total power mix.

While the share of fossil gas-powered generation in the power mix has fallen in the last 15 years from 46% in 2010 to 22% in 2025, it continues to play an important role. Though no new fossil gas capacity has been added since 2018 (Ember, 2026a), the current government policy is to support expanded domestic production (Daily Sabah, 2026). The use of fossil gas for electricity generation in Türkiye also increased in 2025, compared to the previous two years which marked historical lows of 18% in 2019, and 19% in 2024.

We can point to a couple of reasons for last year's increase. On the demand side, gas tends to substitute for decreased energy output from hydropower due to drought conditions, as occurred in 2025. This is worrying because reduced energy output from hydropower can now be seen to be a long-term historical trend (Ember, 2026b).

On the supply side, the discovery of the Sakarya gas field in the Black Sea has transformed Türkiye's fossil gas sector and reflects longer-term government policy. Production began in 2023, and supply from the field is expected to grow significantly in the coming years (Daily Sabah, 2026), with 2025 already seeing record extraction (AA, 2025b).

The country still depends on imports for the vast majority of fossil gas supply (95% in 2025 [Enerdata, 2026]), leaving the country reliant on other countries' policies and the global market. In part to address this, Türkiye is investing in the exploration for new fossil gas fields and aims to become an international fossil gas hub (Daily Sabah, 2026). The latest energy crisis has underscored the unreliability of fossil gas as a stable or secure transition fuel, instead marking a decisive turning point for the world towards accelerating the shift away from all fossil fuels. Türkiye therefore risks owning significant stranded assets if it pursues this policy.

Existing global fossil gas infrastructure already supplies the volumes of gas projected to meet global demand. Any addition therefore risks becoming a stranded asset. Aside from the risk of stranded assets connected to becoming a fossil gas hub, expanding domestic gas consumption also runs counter to Türkiye's Paris Agreement obligations and the International Court of Justice's ruling on countries' legal responsibilities to phase out fossil fuels (ICJ, 2025).

If Türkiye wants to align with the Paris Agreement and international law, it needs to focus on decreasing the share of fossil gas in the power mix, decreasing the expansion of domestic gas production, and committing to a phase-out plan with a phase-out date for fossil gas in the power sector of 2045 at latest (CAT, 2026).

2 Recent progress and challenges for power sector transformation

Recent progress on renewables rollout

Türkiye's rollout of wind and solar had been impeded by long permitting times and insufficiently attractive investment conditions, but recent years have seen progress in the regulatory environment. The uptick in capacity additions seen over the last three years, particularly for solar, may be attributed in part to the following improvements:

- ▶ Unlicensed plants, primarily built for self-consumption, have expanded rapidly after regulatory changes were introduced in 2022 which expanded opportunities for distributed solar generation. These plants accounted for 90% of new installations in the 2022-2025 period (Ember, 2025c).
- ▶ Regulatory reforms that aimed to cut the permitting process for new projects down from four to two years, along with other streamlining improvements (MENR, 2024c).
- ▶ Refinements to the Renewable Energy Resource Zone (YEKA) competitive auction model for large-scale wind and solar project tenders, including explicit price floors/ceilings, battery-storage integration, and some tenders with approximately 20-year guaranteed purchase arrangements (Ember, 2025b).

Implementation delays and technical challenges

While Türkiye has made progress in ramping up wind and solar rollout, implementation delays and technical challenges remain.

There is a backlog of YEKA-auctioned and unlicensed projects meaning that less than a quarter of the total capacity allocated through historical YEKA rounds has been brought online (Ember, 2025b).

Limits to grid capacity at the transmission level meant that 65% of grid connection applications for transmission-level unlicensed solar plants were rejected in 2024 and 2025 (Ember, 2025a). Applications for new capacity for storage-integrated wind and solar projects were also halted in 2023 (Ember, 2026b).

To tackle implementation challenges and grid-capacity constraints, a number of steps could be taken:

- ▶ Resolve permitting issues for storage-integrated projects already allocated, without compromising environmental and social considerations (Ember, 2026b).
- ▶ Cancel inactive projects and reallocate their capacity to either finalise existing projects, or free up space for new ones (Ember, 2026b).

- ▶ Secure sufficient financing, including from multilateral sources, for Türkiye's grid capacity to meet its 2035 wind and solar targets (Ember, 2026b). The government estimates that this would require USD 28 billion (AA, 2025c).
- ▶ Upgrade the electricity grid, including by building new substations and transmission lines, introducing high-voltage direct current corridors, and adding digital control systems, including through multilateral funding (World Bank, 2025). The government has also greenlit a comparatively large amount of battery storage capacity (Guardian, 2026), and the country has seen large increases in installations for self-consumption in the commercial and industrial market (PV Magazine, 2026).
- ▶ Implement regulations for hybrid systems, power plants that generate electricity from different energy sources and operate together by sharing the same transmission line. These systems could help bypass transmission constraints. Around 8 GW of capacity from such systems is available in the country (Ember, 2025a).
- ▶ Encourage and enable the continuation of widespread adoption of rooftop solar. This could help bypass some of the integration constraints in areas without saturated local transmission lines (Ember, 2025a).

Alongside these technical and implementation challenges, electricity demand in Türkiye is expected to triple by 2050 from 2022 levels (Shura, 2023a). To meet rising demand while also replacing fossil fuels, wind and solar capacity would need to be significantly ramped up.

To meet these capacity needs, Türkiye could explore offshore wind in addition to onshore capacity. Türkiye has a theoretical offshore wind potential of 75 GW and a 5 GW target by 2035, but it has not yet built any offshore capacity, as past tenders failed to draw bids due to insufficient technical measurement data (Ember, 2025b). In terms of offshore wind, plans are in place to provide such data in future (Ember, 2025b).



CAT Power sector analysis

The power sector plays a dual role in climate change mitigation: it is both a major source of CO₂ emissions and the critical key to decarbonising the energy end-use sectors. As electrification increases globally, renewables will be crucial to meet growing demand, while supporting energy access, affordability, and security, sustainable development, and global climate goals.

The CAT has further analysis on [power sector](#) decarbonisation:

- ▶ [1.5°C compatible benchmarks](#) for the power sector based on the need for rapid wind and solar rollout. Click on the flags for country specific analysis, including for [Türkiye](#).
- ▶ Evaluations of how countries are doing in terms of decarbonising their power sectors and reaching those benchmarks where available – this is available within the *Policies & action* tab of the [country pages](#).
- ▶ A [briefing](#) examining Chile's power sector transformation over the past decade, showing that large-scale renewable energy deployment can exceed expectations.



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CAT Consortium



The Climate Action Tracker (CAT) is an independent scientific project that has been tracking climate action since 2009. We track progress towards the globally agreed aim of holding warming well below 2°C, and pursuing efforts to limit warming to 1.5°C.

climateactiontracker.org



NewClimate Institute is an independent non-profit organisation that develops solutions to tackle climate change and drives their implementation worldwide. Through research, policy advice and knowledge sharing, we aim to raise the ambition for climate action and support sustainable development.

newclimate.org



Climate Analytics is a non-profit institute leading research on climate science and policy in relation to the 1.5°C limit in the Paris Agreement. It has offices in Germany, the United States, Togo, Australia, Nepal and Trinidad and Tobago.

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Institute for Essential Services Reform (IESR) is an energy and environment focused think-tank that aims to accelerate the energy transition by supporting sustainable mobility, green economy, and well designed climate change policy. IESR has experience mainly in Indonesia, but is expanding its focus to work in other regions and countries.

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