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What next for Turkish gas market liberalisation?

More than a decade ago, Turkey passed legislation intended to liberalise its gas market and align its legislation with European directives. In the thirteen years since that law was passed a number of key events have transpired in the Turkish gas market, but effective liberalisation remains a seemingly distant prospect. State-owned gas sales and pipeline monopoly BOTAS still has a market share of around 75%, and the Turkish regulator appears disinclined to abolish BOTAS' cross-subsidised sales, which make it virtually impossible for new suppliers to compete. But now a revision to the `visual_editor001` law is before the Turkish parliament, raising hopes that Turkey could seriously revisit the liberalisation process. This could prove important for Europe, as Turkey occupies a key strategic position between Europe and the gas resource-rich Caspian and Middle Eastern states. The turmoil in Ukraine and Turkey's neighbouring countries make it all the more important that Turkey can act as an effective bridge for non-Russian supply to Europe. Gas Strategies assesses the current state of affairs in the country's gas market and asks how the liberalisation process will fare this time around.

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