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THE ORGANIZATION OF TURKIC STATES' ENERGY POLICIES: NEOMERCANTILIST DYNAMICS AND NATIONALIST TENDENCIES

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Abstract

The main purpose of this paper is to examine the energy policies of the Organization of Turkic States (OTS) from a neo-mercantilist perspective and to analyse the emerging tendencies of energy nationalism within the organisation. The study seeks to explain the nature of the hybrid model that combines sovereignty-oriented policies with multilateral cooperation initiatives in the OTS's energy strategies, and to offer assessments of the possible directions in which this model may evolve in the future. The central research question addresses the extent to which the OTS's energy policies reflect a neo-mercantilist approach and how this approach generates an interaction between energy nationalism and regionalism. There is a limited number of studies in the literature that examine the concepts of energy nationalism and neo-mercantilism together; this paper, utilising qualitative research, document analysis, and case study methods, contributes to the field through its conceptual, theoretical, and case analysis dimensions.

Keywords

Organization of Turkic States, Nationalism, Energy Nationalism, Energy Security, Neo-mercantilism.

Resumo

O principal objetivo deste artigo é examinar as políticas energéticas da Organização dos Estados Turcos (OTS) numa perspetiva neomercantilista e analisar as tendências emergentes do nacionalismo energético no seio da organização. O estudo procura explicar a natureza do modelo híbrido que combina políticas orientadas para a soberania com iniciativas de cooperação multilateral nas estratégias energéticas da OTS, bem como apresentar avaliações sobre as possíveis direções em que este modelo poderá evoluir no futuro. A questão central da investigação incide sobre até que ponto as políticas energéticas da OTS refletem uma abordagem neomercantilista e de que forma essa abordagem gera uma interação entre o nacionalismo energético e o regionalismo. Existe um número limitado de estudos na literatura que examinem em conjunto os conceitos de nacionalismo energético e neomercantilismo; este artigo, recorrendo a métodos de investigação qualitativa, análise documental e estudo de caso, contribui para o campo através das suas dimensões conceptuais, teóricas e de análise de casos.

Palavras-chave

Organização dos Estados Turcos, Nacionalismo, Nacionalismo energético, Segurança energética, Neomercantilismo.

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THE ORGANIZATION OF TURKIC STATES' ENERGY POLICIES: NEOMERCANTILIST DYNAMICS AND NATIONALIST TENDENCIES[1]

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Introduction

Energy security has emerged as a strategic issue of global importance, while the institutional capacities of regional cooperation frameworks in the field of energy are gaining increasing significance. The role of such regional organisations is becoming ever more critical, particularly concerning energy production, transmission, and supply security. As one of these actors, the OTS has, since acquiring its institutional identity in 2021, moved beyond being a cultural and political cooperation platform to evolve into a multidimensional regional actor. The steps taken by the OTS to enhance its institutional capacity in the energy field have placed it in a prominent position in shaping energy-security-oriented models of regional cooperation across Eurasia.

Cooperation among member states in the supply, transportation, and security of energy resources has elevated the OTS to the centre of regional energy geopolitics. By bringing together both energy-producing states and strategically located transit countries under a single framework, the organisation has enabled the redefinition of energy policies on a regional scale. This diversity provides a solid basis for regional integration in the field of energy security and underscores the relevance of the present study. Indeed, the OTS functions not only as a platform for the distribution of economic interests but also as a laboratory in which concepts such as energy nationalism and neo-mercantilism can be tested within the theoretical framework of International Relations.

By examining the nature of the OTS's energy policies, this paper aims to analyse the organisation's strategic orientations and to address the question: "To what extent do the energy policies of the OTS bear neo-mercantilist characteristics, and how do these policies generate an interaction between energy nationalism and regionalism?" Methodologically, the study is designed as a case study based on a qualitative research approach and employs document analysis as a method of data collection and analysis. The period examined primarily covers 2021 onwards, when the organisation acquired its current institutional structure. This period was selected because, following the renaming

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of the Turkic Council as the OTS at the Istanbul Summit, the organisation began to develop its cooperation in the field of energy within a more clearly defined institutional framework.

Three main criteria are employed in selecting the documents used in the research: Institutional source, relevance to the research topic, and temporal scope. Accordingly, the analysis primarily examines summit declarations, strategy and vision documents, official statements concerning meetings of energy ministers, and documents relating to agreements, decisions, and cooperation initiatives in the field of energy issued by the OTS. As these documents directly reflect the OTS's official priorities, discourses, and policy orientations in the energy field, they constitute the principal primary sources of the study. These primary sources are supplemented by relevant academic studies and other secondary sources where necessary. The selected documents are evaluated through the conceptual framework of neomercantilism, energy nationalism, and regionalism. In this context, the analysis examines how and to what extent elements relating to the protection of national interests and the development of regional energy cooperation coexist in the OTS's energy-related decisions, discourses, and initiatives. In addition, by focusing on international developments such as the Russia–Ukraine War and crises in the Middle East, the study discusses the ways in which the OTS's energy policies have been reinforced through its responses to these developments. It also assesses how the organisation's policies and initiatives in response to these developments have been reflected in its strategic orientations in the energy field. In this way, the study goes beyond a theoretical discussion by providing an empirical analysis supported by concrete examples. In light of the findings, the overall character of the OTS's energy policies is discussed, and inferences are drawn regarding the organisation's potential future orientations.

The study's contribution to the literature lies in its simultaneous consideration of the OTS's energy policies from the perspectives of both energy nationalism and regional cooperation. Although existing studies on the OTS have addressed various dimensions, including the organisation's institutionalisation, regional cooperation, geopolitical position, and relations among its member states, the ways in which the OTS's energy policies are shaped by neomercantilism and energy nationalism, and how these tendencies coexist with regional cooperation, have not been sufficiently explained. Similarly, within the literature on energy policy, approaches emphasising national interests and state control and those focusing on regional cooperation and integration are generally examined within separate analytical frameworks. This creates a research gap in explaining how energy nationalism, grounded in the protection of national interests, and regional energy cooperation can coexist simultaneously within the same institutional structure.

This paper seeks to address this gap by treating the OTS as a case in which the interaction between these two tendencies can be observed. By bringing these two approaches together, the study analyses how a hybrid model operates and, in doing so, reveals the multidimensional nature of the OTS's energy strategies. It examines how regional energy cooperation is being developed under the OTS framework while member states continue to pursue the protection of their sovereignty over energy resources and infrastructure and their national interests. Within this framework, the study discusses neomercantilism

not only at the level of the nation-state but also as an analytical framework at the level of a regional organisation. It thereby seeks to demonstrate that national interest-oriented tendencies and regional cooperation in the OTS's energy policies are not necessarily mutually exclusive processes but can, under certain conditions, develop simultaneously. The originality of the study lies in analysing this relationship through energy policies on the basis of the interaction between neomercantilism, energy nationalism, and regionalism. Furthermore, while extending the nationalism literature into the field of energy policy, the article focuses on energy nationalism, an issue that has received insufficient attention in the International Relations literature, thereby contributing to addressing the conceptual and theoretical gap in this field.

Theoretical Background and Conceptual Framework

The production, distribution, and protection of energy resources are directly linked not only to economic dimensions but also to political sovereignty, geopolitical influence, and security strategies. In this context, energy is increasingly addressed in International Relations theories as an instrument of national power and geoeconomic influence. Particularly in cases where states shape their energy policies not through market mechanisms but in line with geopolitical interests and principles of national sovereignty, this tendency is often explained through the concepts of energy nationalism and neo-mercantilism. This section examines both the theoretical foundations of these two concepts individually and the points at which they intersect.

Concepts of Nationalism and Energy Nationalism

The emergence of nationalism as a political force in the modern era became particularly evident in Europe between the late eighteenth and early nineteenth centuries. During this period, peoples asserted their national identities against empires and monarchical structures. The French Revolution represented the decisive turning point in this process, as it placed the principle of sovereignty in the hands of the people rather than the divine rights of monarchs, thereby laying the foundation for the diffusion of nationalism (Hobsbawm, 1990, pp. 45–47). Political allegiance shifted from kinship and religious bonds to the nation, defined through common language, history, and culture. This transformation enabled the rise of modern nation-states, with nationalism functioning as both the ideological and institutional driver of this process (Breuilly, 1993, p. 54-55; Smith, 1991, pp. 20-23).

Nationalism is generally defined as a multidimensional ideology that prioritises the interests, cultural values, and identity of a nation, shaped by the pursuit of self-government or sovereignty. At its core lies the conviction that humanity is inherently divided into nations based on linguistic, cultural, or ethnic distinctions, and that legitimate political authority must rest with these nations. In this respect, nationalism operates not only as a form of identity consciousness but also as a socio-political movement that restructures political order (Calhoun, 2007, p. 211). Over time, diverse typologies of nationalism have developed across historical and geographical contexts, reflecting its layered and dynamic nature. Prominent examples in the literature include hegemonic

nationalism, particularistic nationalism, geopolitical nationalism, resource nationalism, anti-colonial nationalism, marginal nationalism, minority nationalism, ethnic nationalism, energy nationalism, and civic nationalism. These typologies demonstrate that nationalism is shaped not only by ethnic or cultural foundations but also by economic, geographical, and geopolitical interests.

Among these variations, *energy nationalism* is of particular relevance to this study. Energy nationalism refers to the tendency of states to consolidate sovereignty over natural energy resources and employ them in line with national interests. It manifests through political, economic, and ideological measures such as restricting foreign ownership, nationalising the energy sector, promoting domestic production, and securing energy supply. Energy nationalism thus operates not merely as an economic strategy but also as a means of redefining sovereignty and constructing political legitimacy. The phenomenon has been most visible in resource-rich states, particularly those endowed with oil and natural gas, where maximising economic gains and exercising full authority over resource management have remained central objectives. In this sense, energy nationalism legitimises direct state intervention in the energy sector and facilitates the adoption of nationalisation policies. Its historical trajectory highlights the institutional mechanisms through which states reinforce their control over energy.

From the mid-twentieth century onwards, energy nationalism has become especially evident in nationalisation policies within the oil industry. Countries such as Venezuela, Iran, Turkmenistan, Russia, and Bolivia pursued nationalisation to strengthen economic independence and bring energy revenues directly under state control. Venezuela, for instance, nationalised its oil sector in the early 2000s under President Hugo Chávez to redistribute resources and combat social inequality (Monaldi, 2020). Similarly, in 2006, Bolivian President Evo Morales nationalised the natural gas sector, framing it as an essential component of national sovereignty (Childs, 2016, p. 539; Kaup, 2010, p. 22). These cases illustrate that energy nationalism extends beyond economic calculations: it generates political legitimacy, expands foreign policy manoeuvrability, and strengthens state sovereignty. Nationalisation of energy assets, diversification of export routes, and the allocation of revenues to developmental or populist policies underscore the strategic role of energy nationalism in international relations.

In the contemporary era, however, energy nationalism is not confined to the policies of individual states. It increasingly acquires a collective dimension through energy-based alliances among states with shared historical experiences, cultural affinities, and regional interests. Such arrangements reconceptualise resource control as a form of shared sovereignty exercised by communities of states with common objectives. This trend is shaped by the pursuit of energy security, the reduction of external dependency, and the need for a united stance in geopolitical competition. Organisations such as the OTS or the Bolivarian Alliance for the Peoples of Our America exemplify solidarity-based frameworks that promote the collective management of energy resources. These formations redefine energy nationalism beyond the boundaries of the nation-state, transforming it into a strategy of collective sovereignty rooted in historical identity and regional solidarity. Thus, energy nationalism today functions not only as a tool of domestic politics but also as a central instrument of multilateral energy diplomacy, regional power dynamics, and identity-based cooperation.

Neo-mercantilism and the Politics of Energy Nationalism

Neo-mercantilism, as a modern interpretation of classical mercantilist thought, argues that economic instruments should be utilised to maximise the national interests of the state. Its origins lie in classical mercantilism, which was practised in Europe between the sixteenth and eighteenth centuries. The early mercantilist model sought to safeguard national wealth by placing trade and production under strict state control, promoting the accumulation of precious metals, and securing a positive trade balance. Neo-mercantilism modernises this logic by emphasising the use of economic power as a strategic instrument in the age of globalisation and growing interdependence. It does not confine state intervention in the economy to protectionist measures, but instead provides a comprehensive framework that conceives economic capacity as a source of power in international competition (Gilpin, 1987, pp. 25-30).

Representing a realist understanding of foreign policy, neo-mercantilism assumes that states employ economic instruments to strengthen national power. Its key premises can be summarised as follows:

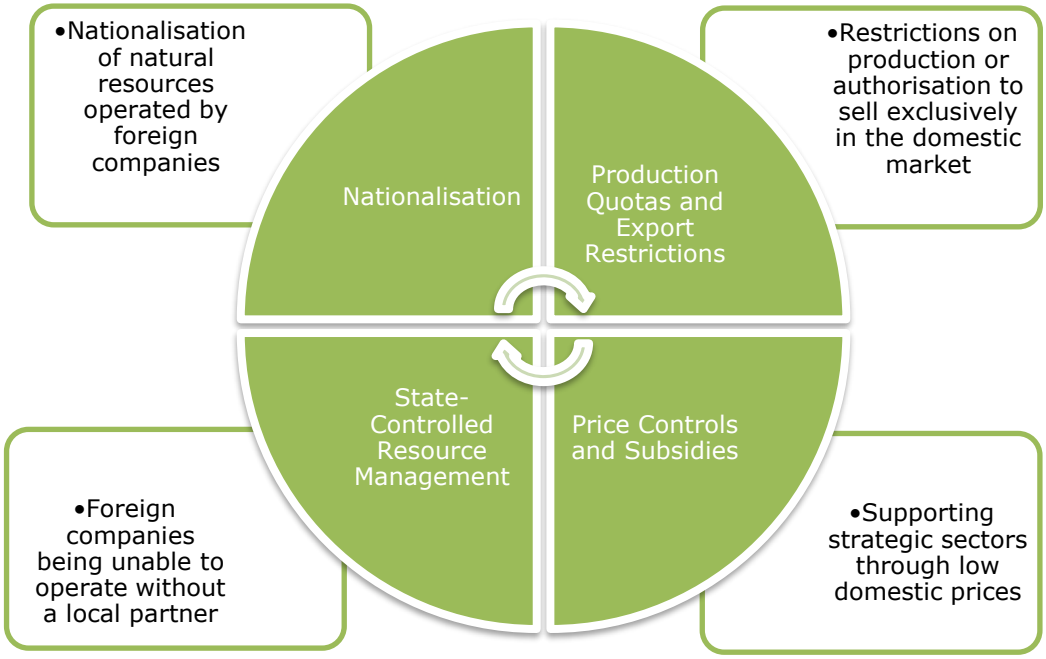
- The state is the primary actor in the international system, and economic activities are extensions of national security.
- The market mechanism is unreliable; strategic sectors such as energy, defence, and agriculture must be safeguarded through state intervention.
- External economic relations are viewed as a zero-sum struggle in which one state's gain constitutes another's loss.
- Energy and natural resources function simultaneously as economic and geopolitical instruments.

In this respect, neo-mercantilism provides a strong theoretical framework for analysing strategies through which states use economic tools to pursue national security, political autonomy, and foreign policy leverage. Its applications in international relations are visible in energy nationalism, trade protectionism, restrictions on foreign direct investment, and the expansion of state-owned enterprises. These strategies enable states not only to promote growth and efficiency but also to reduce dependence, consolidate sovereignty, and act more autonomously within the international system.

Within the field of energy, the neo-mercantilist lens is particularly valuable in explaining situations where strategic state logic overrides market rationality. For developing countries, this perspective justifies efforts to reclaim energy resources from foreign companies, channel revenues into public development, and localise the energy sector. For major powers, energy resources are used not only to secure domestic supply but also as levers of geopolitical influence and foreign policy. For instance, the European Union's attempts to reduce dependence on Russian energy reflect not simply diversification but also a bid to enhance its strategic autonomy. Similarly, the United States' shale revolution embodies a neo-mercantilist form of energy nationalism, aimed at energy independence. These examples demonstrate that energy security cannot be reduced to the balance of

supply and demand; rather, it forms part of long-term strategies shaped by geopolitical concerns. The strategic reframing of energy has generated transformative effects on global energy governance, as market competition increasingly gives way to state-driven interaction. In this way, energy is placed at the very centre of international power relations. Neo-mercantilism thus functions not only as a theoretical approach but also as an indispensable analytical tool for understanding contemporary energy politics. At this point, the following question arises: through which policies and instruments does neo-mercantilist energy nationalism manifest itself in enhancing state control over energy resources?

Figure 1. Forms of Implementation of Energy Nationalism



Source: This figure **was** prepared by the author of the study drawing on Stevens, 2008, p. 15; Childs, 2016, p. 75; Guberman et al. 2024, p. 1; Orazgaliyev, 2018

As indicated in Figure 1, neo-mercantilist energy nationalism manifests itself through a variety of instruments designed to strengthen state control over energy resources. This approach is evident in measures such as nationalisation in strategic sectors, resource control through state-owned enterprises and mandatory local partnerships, production quotas and export restrictions, as well as price controls and subsidies. In contrast to the principles of classical liberal economics, these practices rely not on the "invisible hand" of the market but on the visible intervention of the state. In this context, energy and mineral resources are redefined as strategic assets of geopolitical significance that extend beyond their purely economic functions.

Neo-mercantilist states aim to increase domestic production, to render investments in renewable energy strategic, and to promote the widespread adoption of energy-saving policies. Conceiving access to external resources as a domain of geopolitical competition, such states legitimise energy nationalism while theoretically grounding the proactive and interventionist roles of the state in the face of energy crises.

Particularly in periods when energy supply security is perceived to be under threat, steps such as the nationalisation of resources, the expansion of strategic reserves, or the restriction of foreign investors represent neo-mercantilist reflexes (Bremmer & Johnston, 2009, p. 45-46). This orientation points to a transformation in which the strategic rationality of the state replaces the invisible hand of the free market.

Table 1. Global Practices of Neo-mercantilist Energy Nationalism

Country	Practice	Explanation
Russia	Retention of Gazprom under state control	Political conditionality attached to energy exports; instrumentalisation of energy security
Venezuela	Nationalisation of oil companies	Direct transfer of PDVSA revenues into public funds
Turkmenistan	State monopoly over energy exports	Closed approach based on bilateral, highly controlled agreements with China and Iran
China	Strategic investment and import security	Long-term supply contracts through CNPC and Sinopec; pursuit of "energy diplomacy"

Source: This table was prepared by the author of the study drawing on Henderson & Mitrova, 2015, p. 10; Liao, 2021, 497-498; Monaldi et al. 2020, p. 15; Overland, 2013, p. 122-128

The examples in Table 1 illustrate the concrete manifestations of nationalist tendencies in energy policies across different countries. In Russia, the state's retention of control over Gazprom and the imposition of political conditions on energy exports demonstrate how energy security is employed as an instrument of foreign policy. Similarly, in Venezuela, the nationalisation of oil companies and the direct transfer of PDVSA revenues into public funds reveal that energy functions not only as an economic resource but also as a tool in the construction of political legitimacy. Turkmenistan's state monopoly over energy exports represents a closed and bilateral agreement-based, highly controlled approach, whereas China's long-term supply contracts and energy diplomacy conducted through state-owned enterprises such as CNPC and Sinopec indicate a pursuit of strategic autonomy in the global energy market.

Within this framework, energy nationalism is not confined to resource control alone. It is further reinforced through policies such as the establishment of strategic reserves (the creation of national stockpiles for use in times of crisis), the shaping of inter-state cooperation through energy diplomacy (bilateral or multilateral state-centred agreements for energy supply), the use of energy transit routes as instruments of

geopolitical leverage, and the pursuit of technological autonomy (the development of national technologies/localisation to reduce dependence on external actors in energy infrastructure). In this way, energy becomes more than an economic commodity; it is transformed into an instrument that strengthens bargaining power and sovereignty in international relations. This multidimensional approach moves energy nationalism beyond an economic reflex, situating it within a neo-mercantilist strategic framework.

The Energy Policies of The Organization of Turkic States: An Analysis Within A Hybrid Model of Energy

The practical manifestations of energy nationalism increasingly converge with neo-mercantilist tendencies. One of the most notable contemporary and regional examples of these tendencies is the OTS. The member countries of the Organisation, by virtue of their energy resources and the transport corridors through which these resources are conveyed, constitute a critical component of global energy networks.

This chapter examines both how energy policies are shaped within the institutional structure of the OTS and how energy nationalism provides the groundwork for neo-mercantilist strategies.

The Energy Profile of the Member States of the Organization of Turkic States

Bringing together full members such as Azerbaijan, Kazakhstan, Kyrgyzstan, Uzbekistan and Türkiye, as well as observer states including the TRNC, Hungary, and Turkmenistan, the OTS aims at strategic integration in areas such as joint infrastructure investments, knowledge sharing in renewable energy, and the transfer of energy-efficiency technologies (İpçioğlu & Petek, 2024, p. 124). Thus, the OTS is evolving beyond the idea of cultural unity into a structure that seeks regional integration in the fields of economy, energy, and transportation. Among the OTS members, which display diversity in terms of energy resources:

Azerbaijan; is a major producer of fossil fuels and stands out as a state with high energy autonomy. As of 2021, its proven natural gas reserves amounted to approximately 60 trillion cubic feet (tcf), covering production capacity from the Shah Deniz field in the Caspian Sea and other sites. While updated figures on oil reserves remain uncertain, the country is a regional exporter of both crude oil and condensates. In 2022, oil production reached 32.7 million tonnes, and natural gas production 35 billion m³. About 98% of its energy supply derives from oil and natural gas, while coal resources are limited (IEA, 2023, pp. 3-5).

Kazakhstan; ranks among Eurasia's richest countries in terms of oil, natural gas, coal, and uranium reserves. With fields such as Tengiz, Kashagan, and Karachaganak on the Caspian coast, the country is a major hub for energy exports. Its proven natural gas reserves are estimated at 2.5 trillion m³ (about 88 tcf), accounting for 0.5% of global reserves. Proven oil reserves stand at around 30 billion barrels (1.8% of global reserves) (EIA, 2025, pp. 7-8). Kazakhstan is the world's 9th largest coal producer, 17th largest

oil producer, and 12th largest natural gas exporter. In 2022, its energy mix consisted of approximately 50% coal, 25% oil, and 25% natural gas (IEA, 2023, pp. 11-13).

Uzbekistan; is one of the few states self-sufficient in natural gas, oil, and coal production. Domestic production supports the internal market while also enabling exports to the region (OECD, 2025). Its proven natural gas reserves stand at 1.1 trillion m³ (about 39 tcf), accounting for nearly 85% of total energy supply (IEA *6*). The Gazli Gas Field alone holds approximately 25 tcf of reserves. Oil reserves are estimated at around 600 million barrels, while coal reserves are about 1.9 billion tonnes (IEA, 2023, pp. 9-13). In the total energy supply, oil accounts for about 7% and coal for 8%.

Kyrgyzstan; bases its energy policy largely on hydropower. Proven oil and gas reserves are limited, and much of the fossil fuel demand is met through imports. Domestic coal reserves are primarily low-quality lignite. In the energy supply mix, oil accounts for 37%, coal for 26%, while natural gas is largely imported (IEA, 2022, p. 8).

***Türkiye*;** continues to rely heavily on fossil fuels. In 2023, its primary energy supply consisted of 29% oil, 26% natural gas, and 31% coal (IEA, 2023, p. 12). Russia, Azerbaijan, and Iran are the main natural gas suppliers, while coal is mostly imported and used for power generation (Esen, 2025). Although Türkiye possesses limited domestic reserves, it has positioned itself as a key regional energy transit hub. Through pipelines such as the Baku–Tbilisi–Ceyhan (BTC) and TANAP, it plays a pivotal role in delivering Caspian resources to Europe (Novikau & Muhasilovic, 2023).

***Turkmenistan*;** holding observer member status, accounts for approximately 5.5% of the world's natural gas reserves. The Galkynysh Gas Field is among the largest natural gas fields both in Turkmenistan and globally (EIA, 2025, p. 4). The field is of pivotal importance not only for Central Asian energy security but also for China's energy supply. The country's oil reserves are relatively limited (0.03%), while coal plays a negligible role in its energy supply. In March 2025, an agreement was concluded to deliver natural gas to Türkiye via Iran (AP News, 2025; Worldometer, 2025).

***Hungary's*;** energy supply in 2023 consisted of 32.6% oil, 30.5% natural gas, and 3.9% coal (IEA, 2023). Russia is the dominant supplier of oil and gas imports, while coal is used primarily in the form of lignite in limited quantities. Another partner of the Organisation, the *TRNC*; differs significantly from other OTS countries in terms of fossil fuel and energy profile due to its limited local resources and political status. To date, no commercially viable proven oil, gas, or coal reserves have been identified in the TRNC. Its hydrocarbon potential in the Eastern Mediterranean is closely linked to cooperation with Türkiye, particularly regarding maritime jurisdiction areas. According to the Ministry of Energy and Natural Resources of the Republic of Türkiye (2024, p. 12), the Turkish Petroleum Corporation (TPAO) has obtained exploration licences for oil and natural gas in the TRNC's continental shelf and has carried out several drilling activities, although production has not yet commenced.

In summary, according to the most recent data, among the Organisation's members, Turkmenistan and Kazakhstan stand out in terms of reserves, Azerbaijan and Uzbekistan occupy a middle position, while Türkiye, Hungary, and the TRNC are the weakest in terms of energy reserves. In natural gas, Turkmenistan and Azerbaijan are leading; in oil production, Kazakhstan dominates; in coal, Kazakhstan and Uzbekistan are the most

resource-rich. Countries such as Kyrgyzstan contribute mainly through hydropower capacity and mineral reserves that support infrastructure. The TRNC, unlike other OTS members, lacks domestic fossil fuel reserves, remains fully dependent on imports for its energy supply, and holds significance primarily as a geopolitical actor in the Eastern Mediterranean energy equation. However, the energy potential of OTS members should not be measured solely by the abundance of resources.

Their strategic locations as transit hubs also constitute a major asset. Türkiye acts as an energy corridor between Europe and Asia; Azerbaijan directly supplies gas to Europe; Kazakhstan and Turkmenistan possess the capacity to export to the Chinese market; Kyrgyzstan contributes through hydropower potential. This diversity forms the foundations of a regional energy security architecture (İpçioğlu & Petek, 2024, p. 124). Positioned along the Middle Corridor route stretching from the Caspian Basin to Europe and China, the OTS members hold the potential to develop collective strategies for transit security. In particular, the diversification of Turkmenistan's energy exports (Trans-Caspian, TAPI) expands the scope of this cooperation (Republic of Türkiye Ministry of Foreign Affairs, 2026). Yet, the effective utilisation of this potential depends on infrastructure investments, regional coordination mechanisms, and foreign policy alignment. With the advancement of institutional cooperation mechanisms, concrete projects may materialise. Achieving this goal, however, hinges on coordination capacity, balanced relations with external actors, and the sustainability of a long-term strategic vision. The OTS occupies a strategic position in the energy field, both in terms of resources and transit capacity, and its members are aware of their potential. Making energy cooperation a strategic priority in the institutionalisation process of the Organisation marks an important step. In terms of the distribution of resources, production capacity, and transit routes, the OTS possesses the potential to establish a common energy market.

The OTS Between Energy Nationalism and Neo-mercantilist Tendencies: A Hybrid Model of Regionalism

The relations that developed between the Central Asian Turkic republics, which gained independence in the post-Soviet period, and Türkiye have fostered solidarity based on shared language, history, and culture. Efforts towards cooperation began with the 1992 Summit of the Heads of State of Turkic-Speaking Countries held in Ankara. This process was institutionalised with the establishment of the Turkic Council in 2009, which in 2021 assumed the name the OTS (Purtaş, 2017, p. 92). At the 2021 Istanbul summit, the adoption of the *Turkic World Vision 2040* and the *Charter of the Organization of Turkic States* clarified the organisation's strategic orientation and broadened its scope with the accession of Turkmenistan, Hungary, and the TRNC as observer members (OTS, 2021).

The OTS has become the most concrete structure in which Turkic nationalism has been institutionalised at the regional level. The *Turkic World Vision 2040* explicitly defines common values, shared history, and a collective vision of the future (OTS, 2021). The themes set out in this document demonstrate that the principle of "one nation, many states" has been given a political framework. Shaped under Türkiye's leadership, the organisation both supports identity-based nationalism and generates a geopolitical

strategy. Although the political forms of nationalism differ across OTS member states, they draw on the same roots. This diversity limits efforts to standardise nationalism within the OTS but does not obstruct the pursuit of a collective identity.

The nationalist unity established by the OTS on the basis of cultural solidarity is reinforced by geopolitical nationalism. The organisation represents the transformation of identity politics into a regional strategy and aims to build a multidimensional network of cooperation among its members (Koçak, 2023, p.117). Energy is one such field, in which OTS members also display nationalist tendencies. These tendencies in energy policy are largely consistent with neo-mercantilist strategies. For instance, Turkmenistan maintains a state monopoly over energy exports, imposes strict foreign exchange controls, and restricts foreign companies' access to its energy sector in an effort to preserve political and economic autonomy. Kazakhstan, while appearing open to foreign investment, upholds state primacy in strategic fields and channels energy revenues into national development funds. Türkiye positions its ambition to become an energy hub in line with its strategic interests through regional transit advantages. In Azerbaijan, energy projects, though open to international cooperation, remain under political oversight through state-owned enterprises such as SOCAR. These examples illustrate that OTS members view energy resources as instruments of national power, aiming to sustain energy sovereignty by limiting external economic influence (EITI, 2025; U.S. Department of State, 2024b; Özdilek, 2026, p. 315; Vivoda, 2009, p. 522; U.S. Department of State, 2024b). In most OTS member states, energy companies remain directly managed or strictly regulated by the state.

In Azerbaijan, SOCAR; in Kazakhstan, KazMunayGas; and in Turkmenistan, Türkmengaz, are national energy companies through which resource control is maintained directly in the hands of the state. Such practices correspond directly to neo-mercantilist strategies, which envisage the management of energy resources under state control in line with strategic interests (Luong & Weinthal, 2010). In many OTS countries, foreign investment in the energy, communications, and defence sectors is subject to state approval, while local partnership requirements are imposed in critical projects. This implies that integration into the global market is circumscribed by national interests.

Within the OTS, energy nationalism also manifests itself in foreign policy. Turkmenistan seeks to diversify its energy exports by developing independent pipeline routes with actors such as China and Iran. Türkiye, for its part, seeks to reduce dependence on Russia and Iran by turning to Azerbaijani and Eastern Mediterranean energy resources (Ağır & Aksu, 2024, p. 117). Türkiye's strategy of establishing regional influence as an energy transit hub-through pipelines such as TANAP, TurkStream, Baku-Tbilisi-Ceyhan, and Baku-Tbilisi-Erzurum-represents a reflection of a neo-mercantilist foreign policy approach.

For instance, the transfer of gas to Europe via TANAP is considered not only an economic endeavour but also a geopolitical manoeuvre. Through this project, Türkiye and Azerbaijan project power in the realm of foreign policy (Novikau & Muhasilovic, 2023; TANAP, 2026). Energy wealth thus enables the OTS to develop a common ground in energy diplomacy. OTS energy diplomacy is expanding to encompass not only producer states but also consumer and transit countries, thereby fostering regional cooperation in the field of energy security (Oran, 2025, pp. 117).

Among OTS members, there are bilateral energy exchanges, joint energy projects, and regional connectivity initiatives. In these initiatives-reflecting nationalism in the energy sphere-Azerbaijan, Kazakhstan, and Turkmenistan are net exporters, whereas Türkiye, Hungary, Kyrgyzstan, and the TRNC are net importers. In the first nine months of 2024, Azerbaijan exported 7.3 bcm of natural gas to Türkiye (Azerbaijan Ministry of Energy, 2024). In March 2025, an agreement was signed between Turkmenistan and Türkiye for the delivery of natural gas via Iran (AP News, 2025). In addition, Turkmenistan transferred 857 mcm of gas to Azerbaijan under a swap agreement in 2022 (NEBIT-GAZ, 2023). Institutionally, the issue of energy cooperation within the OTS was first formalised at the First Meeting of Energy Ministers held online in 2021, followed by the establishment of the Energy Coordination Committee in 2023. These developments were supported by the goals of green energy and infrastructure integration outlined in the *Turkic World Vision 2040* (OTS, 2024). The institutionalisation of energy cooperation, the implementation of joint infrastructure projects, and the strengthening of sustainability-oriented policies are expected to contribute to regional energy security.

At present, a fully integrated energy market or multilateral energy trading system has yet to be established among OTS partners. However, member states are developing various projects and memoranda of understanding aimed at realising the infrastructures necessary to enable direct energy trade.

The enhancement of energy cooperation among member states is recognised as one of the core priorities of the OTS, as envisaged in its founding Nakhchivan Agreement, the *Turkic World Vision 2040*, and the Astana Declaration. Themes such as fossil fuels, energy infrastructure, renewable resources, and energy efficiency constitute the foundations of cooperation mechanisms among the member states (OTS, n.d.). Within the OTS, cooperation in the energy sector continues to be institutionalised, particularly through ministerial-level meetings. In this context, the Second Meeting of OTS Energy Ministers, held in Almaty, Kazakhstan, on 28 September 2022, marked a significant milestone. The meeting addressed issues such as the development of joint energy policies, technical cooperation on energy efficiency and clean energy transition, education and expert exchanges, joint projects, the draft 2023-2027 Energy Cooperation Programme, and the establishment of the Energy Cooperation Coordination Committee (OTS, 2022a). This meeting demonstrated a growing orientation not only towards the transportation and trade of fossil fuels but also towards cooperation on sustainable energy policies. Furthermore, the meeting between OTS Secretary-General Baghdad Amreyev and Kazakhstan's Minister of Energy, Bolat Akchulakov, on 13 September 2022 exemplifies the organisation's energy diplomacy efforts. This discussion focused on the OTS's vision of energy cooperation, prospects for project development in the energy sector, and the energy agenda within the preparations for the Samarkand Turkic Summit (OTS, 2022b). Such exchanges indicate that energy issues are addressed not only at a technical but also at a geopolitical and diplomatic level. Especially in the post-2021 period, the OTS has increasingly developed a multidimensional cooperation mechanism in the energy field, grounded in technical, strategic, sustainable, and diplomatic foundations.

Ministerial meetings on energy, international partnerships, regional integration objectives, and an emphasis on sustainability reveal that the OTS vision in this field is dynamic and multi-actor. OTS energy policies aim both at fostering integration across

the Turkic world and adapting to the global energy transition. Taken together, the Turkic states constitute the world's 14th largest economy and the 3rd largest energy supplier. Aware that harnessing this collective strength can unlock enormous potential and consolidate their position as key players on the global economic stage, they are intensifying institutional dialogue on energy within the OTS. To this end, regular meetings of Energy Ministers are convened; Energy Forums and joint communiqués are organised; calls for cooperation on natural gas, oil, and renewable energy are made; joint infrastructure projects are promoted; and interaction is fostered through transit and transportation initiatives. In this sense, the OTS constitutes a platform that is heterogeneous in terms of energy resources but united by converging geopolitical objectives, simultaneously supporting and transforming the energy nationalism of its members.

The diversity of energy resources within the organisation prevents energy policies from being reduced to a one-dimensional supply–demand relationship, instead transforming cooperation into a more complex field of strategic interaction. The OTS functions as a multi-layered platform that both reinforces and seeks to transform the inclination of its members to safeguard resource control and prioritise national interests-an orientation often referred to as "energy nationalism." As a form of regional organisation, it combines member states' desire to preserve sovereignty with the objective of reducing external dependence in the energy sector. This approach particularly reflects a neo-mercantilist tendency in areas such as energy supply security, the national control of transit infrastructure, and the development of domestic energy technologies. However, this neo-mercantilist framework does not imply a closed economic model; rather, it seeks to enhance regional solidarity in strategic sectors and to strengthen collective resilience against external shocks, without entirely rejecting foreign trade or investment.

Table 2. Analysing the OTS Through a Neo-mercantilist Lens

Neo-mercantilist Dimensions	Non-Neo-mercantilist Dimensions
The objective of energy supply security and reducing external dependence	Openness to international energy markets
National control of resources and emphasis on domestic technology	Cooperation with foreign investors
Creating competitive advantage through regional solidarity	Free trade and transit agreements

Source: This Table was prepared by the author of the study.

As shown in Table 2, the OTS should not be perceived as a fully closed bloc or an economic entity engaged solely in intra-organisational trade. In certain respects, it operates as part of the global economic order and in line with the principles of free trade. For instance, most of the OTS's energy projects are geared towards exports to non-member states (e.g., Europe, China). Pipelines, LNG projects, and electricity interconnections are typically integrated into global energy markets, reflecting openness rather than a neo-mercantilist "closed market" model. Moreover, OTS members engage in partnerships with international companies such as BP, Total, and CNPC, demonstrating that foreign capital is not entirely excluded even while maintaining state control. The transport and energy strategies of the OTS are also grounded in multilateral trade and

transit agreements designed to increase the revenues of transit states. Such open-network strategies diverge from the inward-looking protectionism typical of neo-mercantilism.

Alongside these non-neo-mercantilist features, the organisation simultaneously incorporates clear neo-mercantilist elements. Foremost among them, the OTS's energy cooperation documents highlight strengthening the energy security of member states and reducing dependence on Western- or Russia-centred energy supply networks as a priority, consistent with the pursuit of strategic autonomy. Furthermore, the continued predominance of the state in energy sectors-where exports and investments are channelled through national companies rather than privatisation-indicates that resources remain under national control. In producer states such as Azerbaijan, Kazakhstan, and Turkmenistan, this approach is reinforced by incentives for the development of domestic energy technologies, serving the aim of reducing external dependence in strategic sectors. The OTS also seeks to develop joint energy projects-such as pipelines and refinery investments-among its members, creating a "bloc effect" in global energy markets. In this way, it aims to generate a regional protective synergy while still operating within the rules of the global free market.

With these characteristics, the organisation, particularly in recent years, demonstrates a hybrid model of regional governance, marked by growing institutional capacity and strategic diversity. This hybrid structure enables the institutionalisation of energy nationalism in line with classical neo-mercantilist approaches, while simultaneously adopting an open stance towards integration with international markets. Neo-mercantilist approaches prioritise the interventionist role of the state in strategic sectors such as energy and emphasise the control of resources in line with national interests (Gilpin, 1987, p. 34). Within this framework, certain OTS member states utilise their energy resources as geopolitical leverage. In this sense, the Organisation seeks to form a regional line of defence in terms of energy security, elevating the protection of sovereignty over resources to a shared strategic priority. At the same time, the OTS refrains from evolving into a closed power bloc; rather, it also embraces liberal orientations such as diversifying energy supply security globally, promoting infrastructure investment, and expanding outward through energy trade. This transforms the Organisation from a mere energy coalition into a multidimensional integration platform, based on economic cooperation, transport corridors, and investment networks. Accordingly, while the OTS pursues state-centred strategic autonomy, it simultaneously adheres to a principle of flexible multilateralism that does not exclude cooperation with regional and global actors. This dual orientation distinguishes it both from classical regional organisations and from purely economic integration initiatives. With these attributes, the OTS can be positioned within contemporary international relations literature as one of the emerging examples of hybrid regionalism[2].

In conclusion, energy cooperation within the OTS, together with the member states' abundant hydrocarbon resources and strategic geographical positions, constitutes one of

[2] It is a concept in the international relations literature that denotes the increasingly multi-layered, multi-actor, and flexible character of regional integration processes, which cannot be explained within a single theoretical framework. The term is particularly employed to describe the complex and multifaceted models of regional governance that emerged in the post-Cold War era with the new wave of regionalism (Söderbaum, 2016, p.18).

the most critical pillars of regional integration. Although there are significant advantages for the development of energy cooperation among the OTS countries, there are also various structural and geopolitical challenges that may constrain the deepening of such cooperation. One of these challenges is the asymmetry in the energy profiles of the member states. This asymmetry makes the formulation of a common energy policy more difficult. For instance, Kyrgyzstan and Türkiye have more limited energy reserves than the other member states, and this asymmetric structure leads to differing expectations among the member states regarding the organisation. Secondly, the OTS's room for manoeuvre in the energy sphere is constrained by the presence and regional interests of Russia and China, both of which exercise considerable economic and geopolitical influence in the region. In particular, the long-standing ties that Central Asian countries have developed with Russia and China in terms of energy export routes, infrastructure connections, and access to external markets make it more difficult to establish a more autonomous and integrated energy cooperation mechanism within the OTS. This situation requires the OTS countries to develop regional energy cooperation not solely in accordance with intra-organisational dynamics, but also by taking broader geopolitical balances into consideration (Bölükbaşı, Bilici & Yücel, 2025, pp. 398-404).

Another obstacle to the institutionalisation of energy cooperation in the region is the inadequacy of physical infrastructure and logistics networks. Limited direct energy connections among the member states, together with the fact that existing export routes remain substantially linked to external actors and established transit networks, make it difficult to establish an integrated energy space within the OTS. Nevertheless, these geopolitical and infrastructural constraints do not merely restrict neomercantilist and energy nationalist tendencies; in certain respects, they may also reinforce them. Efforts to reduce external dependence, develop alternative export routes, and maintain national control over energy resources strengthen the emphasis on strategic autonomy and national interests in the energy policies of the member states.

The Russia–Ukraine War, crises in the Middle East, and disruptions to global energy supply chains have once again made energy security a priority, further reinforcing the visibility of these tendencies. At the same time, competition among actors such as Russia, China, the EU, and the United States over energy resources, routes, and projects in Central Asia and the Caucasus has increased the importance of strategic autonomy and diversification in the energy policies of OTS members. Thus, while the influence of external actors in the region and existing infrastructural dependencies constrain the deepening of energy cooperation within the OTS, they may also foster neomercantilist and energy nationalist tendencies by encouraging member states to strengthen their control over resources, routes, and energy infrastructure. This dual effect also helps to explain why regional cooperation and national interest-oriented policies can coexist within the OTS's energy policies.

Indeed, the OTS exhibits a hybrid economic approach that combines protectionist and sovereignty-oriented tendencies in strategic sectors with a pragmatic and outward-looking approach to international trade and investment. Today, the organisation pursues strategies centred on sovereignty and national interests alongside outward-looking and cooperation-based projects. In the energy sphere, the OTS represents a distinctive model of integration that combines national interest-based sovereignty-oriented policies with

collective strategies based on regional cooperation. Although the organisation's current strategy appears to reflect a hybrid model, the possibility that the OTS may shift towards a more neomercantilist or energy nationalist orientation in the future should also be considered. Such tendencies may become more pronounced, particularly if geopolitical risks and energy security concerns intensify. In this context, member states may seek to maintain tighter national control over their energy resources and strengthen policies aimed at strategic autonomy. Furthermore, if the OTS moves towards developing a more cohesive bloc-like position vis-à-vis major powers such as the West, Russia, and China, it may adopt more protectionist and nationalist policies in the energy sphere. Similarly, efforts by member states to develop their own energy technologies and reduce dependence on imports may reinforce nationalist and protectionist tendencies.

Statements by the leaders of the member states emphasising historical continuity, shared memory, and collective values play a critical role in defining "who" the OTS is. Such discourses contribute to the construction of the organisation as a distinctive actor within the international system (Güç, 2025, p. 413). Nevertheless, in the short to medium term, rather than moving towards a rigid form of energy nationalism, the member states are expected to maintain an approach that preserves state control over strategic sectors while continuing their integration with global markets and technology.

Conclusion

The OTS, through the strong foundation of regional cooperation it has established in the field of energy security, both safeguards the strategic interests of its member states and contributes to regional integration. By bringing together resource-rich producer countries (Azerbaijan, Kazakhstan, Turkmenistan) with strategically located transit states such as Türkiye, the OTS positions itself at the centre of regional energy networks and emerges as a noteworthy actor in global energy geopolitics. This position provides the Organisation with the capacity to both enhance energy supply security and diversify energy routes.

The energy strategies of the OTS displays a dual character. On the one hand, they support the sovereignty-based approaches of member states to keep energy resources under national control, reduce external dependence, and strengthen strategic autonomy. On the other hand, they reflect efforts to institutionalise regional cooperation in energy and to develop joint infrastructure projects. This dual process produces a complex and mutually reinforcing relationship between energy nationalism and regionalism. Member states seek to strengthen regional solidarity through joint pipeline projects, energy transportation, and investment agreements, while not relinquishing the protection of their national interests.

Geopolitical developments are among the key external factors shaping the direction and tone of the OTS's energy policies. The Russia–Ukraine war, instability in the Middle East, and disruptions in global energy supply chains have made energy security more of a priority for member states than ever before. Moreover, the struggle for influence waged by Russia, China, the European Union, and the United States over energy projects in Central Asia and the Caucasus pushes OTS members towards adopting a firmer stance against external pressures. In this regard, the quest for strategic autonomy constitutes a defining element of the Organisation's overall energy approach.

Member states' efforts to develop their own energy technologies, reduce import dependence, and strengthen national control over critical infrastructure reinforce the tendency towards energy nationalism. However, these policies do not amount to a fully closed or rigid economic model. The OTS adopts a hybrid approach that preserves state control in strategic sectors while sustaining integration with global markets and technology. This model enables the Organisation to safeguard national interests while simultaneously fostering international economic cooperation.

The continued need for international partnerships in financing energy projects, completing infrastructure investments, and transferring advanced technologies constitutes a structural barrier to the OTS pursuing a fully closed policy. For example, projects such as TANAP and Baku–Tbilisi–Ceyhan not only enhance the energy supply security of member states but are also implemented with the active participation of international investors and companies. This underlines the Organisation's tendency to remain an integrated actor in global energy markets. Moreover, its pursuit of alignment with global trends in renewable energy, energy efficiency, and green transition provides flexibility to its energy vision. Such projects extend beyond fossil fuel-based energy nationalism, creating a more sustainable and internationally cooperative policy space. This highlights the OTS's potential to act not only as an energy organisation focused on fossil fuel trade but also as a driver of regional energy transition and transformation.

The findings indicate that the energy policies of the OTS largely reflect the core elements of a neo-mercantilist approach-sovereignty-based control of resources, the goal of reducing external dependence, and securing competitive advantage through regional solidarity in global competition. However, the Organisation simultaneously departs from classical neo-mercantilism through its openness to international markets, its interest in foreign investment partnerships, and its support for free trade and transit agreements. This hybrid structure positions the OTS as a distinctive regional actor that institutionalises energy nationalism while employing multilateral cooperation as a strategic instrument. The way these two orientations are sustained in the coming period will be decisive for the Organisation's ability both to contribute to regional energy security and to consolidate its role as an influential player in the global energy market.

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