



# The New Sultanate

*Türkiye's pivot from West to East*



## STRATEGIC ANALYSIS REPORT

Ariana Betalleluz, Jairo Císcar, Jesús Rizo

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***The New Sultanate. Türkiye's pivot from West to East***

By Ariana Betalleluz, Jairo Císcar, Jesús Rizo  
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Center for Global Affairs & Strategic Studies  
University of Navarra  
Law School - International Relations

Campus Pamplona: 31009 Pamplona  
Campus Madrid: Marquesado Sta. Marta 3, 28027 Madrid  
<https://www.unav.edu/en/web/global-affairs/>

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## **EXECUTIVE SUMMARY**

President Erdoğan's Islamism has come to stay. Although bridging Europe and Asia through the Bosphorus, Türkiye's near future will revolve around the latter and, in particular, around the Middle East.

In regards to its neighboring European countries, territorial disputes with Greece and Cyprus will still be present, although no open war can be expected. Türkiye will keep claiming its sovereign and energy rights against both countries, erecting itself as the guardian of Turkic-Muslim populations and interests. From the EU perspective, this would make the Turkish accession process unresolvable in this report's time frame. From Türkiye's point of view, although potential accession presents positive and negative connotations, the latter are more determining, making accession not a priority for Turkish society and politicians. Belonging to NATO, however, is essential for Türkiye's security in its troubled region, just as it provides the Atlantic Alliance a privileged position in the Middle East, increasing their synergies and interrelation and making Turkish exit almost impossible. At the same time, Türkiye will increase its economic, cultural and diplomatic presence in the Western Balkans, fostering its development and regional integration.

The same will happen in the Middle East. Türkiye has historically played a pivotal role there, being a region with immense geostrategic significance due to its energy resources, political conflicts, and cultural diversity. Over the past few decades, Türkiye's role in the Middle East has evolved and expanded, as the nation sought to be a dynamic and influential player in the region. A main approach for Turkish involvement in the region is through diplomatic initiatives aimed at resolving regional conflicts, but often being sustained involving deployment of troops, such as in Syria. Regarding Central Asia, a Turkic-majority region, Türkiye will also foster its presence through economic and cultural projects, allying with global powers with interests in the region like U.S. To do so, Türkiye will need to use all the relevant tools at its disposition, from armed interventions to diplomatic summits. Iran is on the horizon as Türkiye's main competitor in the region, but they will need to balance their ambitions as per not to clash with increasingly consolidated players in the region, such as China. Türkiye is affronting key decades for the future of their global positioning, and the Middle East will be key for that.

This power projection will be further advanced, first, through its transformation into an energy hub between energy-surplus countries in the South Caucasus, the Middle East, and Central Asia; and energy-deficient countries in Europe. Türkiye will continue to decouple from Russia in terms of energy dependence, by diversifying its supply. It will also progressively acquire more relevance in global energy dynamics because of its dominance over transport pipelines that lie across the Turkish territory. Secondly, Türkiye's involvement in ongoing regional conflicts as either a mediator or competitor, depending on its own strategic calculus and security priorities, will strengthen its already relevant role in regional geopolitics. Importantly, the management of the Kurdish question will fundamentally determine Türkiye's near future and aspirations of becoming a medium regional power in the medium to long term. Among all plausible scenarios in this regard, a campaign of multidimensional repression that fosters Turkish regional power appears as the most likely.

## INTRODUCTION

Being at the crossroads of Eastern and Western civilizations, Türkiye is both affected by the two regions, and simultaneously extends its power projection over them. As a matter of illustrating its ‘pivotal’ character, Türkiye has suffered terrorism and the influx of millions of refugees from the Syrian war, but it is also a Member State of the North Atlantic Treaty Organization (NATO) and is negotiating its accession to the European Union (EU). Being between two different worlds as a regional power, under the twenty-year-long Recep Tayyip Erdoğan’s presidency, Türkiye is demanding and acquiring a greater role in regional politics and more autonomy regarding domestic and foreign affairs.<sup>1</sup>

In the midst of the hundred anniversary of the Turkish Republic, both in Erdoğan’s political Islamist narrative and in society, the reality of a splendid, Ottoman past still resonates and affects domestic and foreign politics. As it is well-known, its extension ranged from Algeria in the West to the Persian Gulf in the East, and from Vienna in the North to Yemen in the South.<sup>2</sup> Because of its historical and current relevance for Turkish politics, this report is internally organized according to its spheres of influence to the West and to the East, further explained later in this introduction.

Being a natural bridge between two worlds, having a growing economy and population of more than eighty million people,<sup>3</sup> trying to incarnate the brightest version of Islam, representing an opportunity for both Western companies and Eastern people and, even, portraying itself as a peaceful conflict mediator, are facts that, jointly, will contribute to the future empowerment of Türkiye.

As it has been already stated, this empowerment is only possible on the basis of Türkiye’s geographic location. The Western profile of the country is founded upon its occupation of the Çatalca peninsula (Thrace), where Turkish borders meet two EU Member States: Greece and Bulgaria. Access to the Eastern part of Türkiye is provided through the straits of Dardanelles and Bosphorus, hosting in between the inland Sea of Marmara. This body

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<sup>1</sup> Galip Dalay, “How Will Geopolitics Shape Türkiye’s International Future?,” *Chatham House - International Affairs Think Tank*, June 5, 2023, <https://www.chathamhouse.org/2023/06/how-will-geopolitics-shape-turkeys-international-future>.

<sup>2</sup> Malcolm E. Yapp and Stanford J. Shaw, “Ottoman Empire,” *Encyclopedia Britannica*, October 26, 2023, <https://www.britannica.com/place/Ottoman-Empire>.

<sup>3</sup> CIA, “Türkiye (Türkiye),” *CIA World Factbook*, October 16, 2023, <https://www.cia.gov/the-world-factbook/countries/turkey-turkiye/#introduction>.

of water is of strategic value, as it guarantees Türkiye the position of gatekeeper in the route vis-à-vis from the Aegean Sea (Eastern Mediterranean) to the Black Sea, where multiple geopolitical tensions arise amongst its riparian states: Ukraine, Russia, Bulgaria, Romania, and Georgia.

Moving eastwards, other Southern Caucasus neighboring states of Türkiye are Armenia and Azerbaijan. Despite sharing a physical border with the latter, Türkiye aligns itself with the Azeris given its strong ethnic, cultural, and historical ties.<sup>4</sup> Aside from being a relevant actor in Asia Minor, Türkiye is also a participant in the regional dynamics of the Middle East, given its furthest east and southernmost borders with Iran, Syria and Iraq, respectively. The ongoing civil war in Syria is one scenario in which Türkiye and Iran are engaged in a proxy contest, with Ankara supporting rebels against the Assad regime alongside the U.S.-led coalition and the Gulf states, and Teheran backing the Syrian government with Russia and Hezbollah.

There are two undergoing events in global dynamics with the potential of shifting the international system, namely the Russian war on Ukraine and the Israeli-Palestinian conflict. Türkiye's standing in both conflicts is complex, and yet relevant for its quest in the consolidation of its profile as a regional power, since it showcases the autonomy and preeminence it is seeking in foreign affairs. For instance, the stake that Türkiye has taken in the Russian war on Ukraine can be seen as pro-Western but without being anti-Russian, with ambivalence being the predominant trait of the approach. Just as Erdoğan has presented Türkiye as a peaceful mediator,<sup>5</sup> it has provided weapons to Ukraine<sup>6</sup> and has not joined major international sanctions against Russia outside the UN framework.<sup>7</sup> As for the Israeli-Palestinian conflict, Türkiye's intervention builds upon a fragile relationship with Israel. The legitimate humanitarian concerns raised by Ankara, and the corresponding disregard by Netanyahu, will likely constitute a turning point of 'Mavi Marmara incident' proportions. Both cases, as it will

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<sup>4</sup>Suzan Fraser, "AP Explains: What Lies behind Turkish Support for Azerbaijan," *Associated Press*, October 2, 2020, <https://apnews.com/article/turkey-territorial-disputes-azerbaijan-ankara-armenia-9a95d9690569623adedffe8c16f3588d>.

<sup>5</sup>Republic of Türkiye Ministry of Foreign Affairs, *Peaceful Resolution of Conflicts and Mediation*, n.d., <https://www.mfa.gov.tr/resolution-of-conflicts-and-mediation.en.mfa>.

<sup>6</sup>Jack Detsch and Robbie Gramer, "Türkiye Is Sending Cold War-Era Cluster Bombs to Ukraine," *Foreign Policy*, January 10, 2023, <https://foreignpolicy.com/2023/01/10/turkey-cold-war-cluster-bombs-ukraine/>.

<sup>7</sup>Yalin Akmenek, Gökçe Serez and Ayse Dilara Kacar, "Turkish Customs Blocking Certain Goods to Russia," *Baker McKenzie*, March 15, 2023, <https://sanctionsnews.bakermckenzie.com/turkish-customs-blocking-certain-goods-to-russia/>; European Parliament, *Resolution of 13th September 2023 on the 2022 Commission Report on Türkiye*, procedure 2022/2205(INI), 4<sup>th</sup> clause., [https://www.europarl.europa.eu/doceo/document/TA-9-2023-0320\\_EN.html](https://www.europarl.europa.eu/doceo/document/TA-9-2023-0320_EN.html).

be shown along this report, showcase Turkish stand towards global dynamics as pragmatic, ambivalent and assertive.

Taking into consideration its geopolitical status and the most pressing issues on Türkiye, the present strategic analysis report will analyze, firstly, Turkish main concerns and interests regarding the West, understood as the European spaces where its past influence was particularly relevant and, additionally, where territorial and influential quests are present, namely Greece, Cyprus and the Western Balkans. Complementarily, the analysis of Turkish accession process to the EU and its relations with NATO have been also included under Chapter 1, as well as their potential progress. Secondly, in Chapter 2, this report will study Turkish role and power projection in the East, hereby understood as the Middle East, on the one hand, where Türkiye and its Ottoman predecessor have traditionally exerted great influence; the Far East and, in particular, China, whose influence and relations with Türkiye are continuously growing; and, lastly, Central Asia, where the majority of Turkic population are located.<sup>8</sup> Lastly, this report will address the main features of Turkish own power projection through the analysis of two transversal dimensions, namely its role as an energy hub, and its engagement in ongoing regional conflicts, in Chapter 3.

On the one hand, Türkiye's power projection as an energy hub rises in the context of increased securitization of state interests, among which resource-related concerns have a predominant role. States are increasingly labeling energy and resources as strategic assets, given a generalized distress over resource scarcity, and overall instability of energy and resource markets. In light of the aforementioned Ukrainian war, Russia as a global oil and natural gas supplier has seen its credibility seriously diminished, and thus formerly dependent countries on its natural resources (including Türkiye) are determined to decrease their reliance on Russian resources. Türkiye is in a geostrategic position to become an alternative transit route for strategic energy assets, while taking advantage of this leverage as an energy hub from East to West for its own consolidation as a medium regional power.

Türkiye's participation in neighboring regional conflicts, on the other hand, is another cornerstone of its power projection strategy. Turmoil in the Southern Caucasus, the Syrian civil war and the Russian war on Ukraine, as well as the most recent revival of the Israeli-Palestinian

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<sup>8</sup>Encyclopaedia Britannica, "Turkic Peoples," *Encyclopedia Britannica*, November 1, 2023, <https://www.britannica.com/topic/Turkic-peoples>.



conflict all present Türkiye with opportunities to reassert itself as a regional mediation and stabilizer, in detriment of competing regional rivals.

All the aforementioned elements that will be studied through this report constitute cornerstones of Türkiye's near future. To illustrate this, two prospective analyses have been conducted in the medium to long term framework, encompassing a five to ten years span. This timeframe has been chosen considering the fast-paced changing dynamics of Türkiye, the volatility of the region that surrounds it, and ongoing paradigm shifts in international relations. The first prospective analysis, in Chapter 1, is developed on the Turkish potential accession to the EU, where a SWOT analysis has been conducted to identify possible strengths, weaknesses, opportunities and threats for Türkiye if the process was completed.

The second prospective analysis, developed in Chapter 3, relates to the management of the Kurdish issue by Türkiye, and how this could affect its consolidation as a regional power. For this particular, more exhaustive prospective analysis, three different plausible scenarios are presented, all of which are dependent on Turkish political, military and social management of the issue. It is worth mentioning that both prospective analyses conducted do not intend to predict or foresee the future, but to perform an examination exercise based on the profound and comprehensive knowledge of the present. Having followed a systematic methodology, all situations and outcomes therein must be understood as being plausible to a higher or lesser degree, and not exactly as likely or unlikely.

Türkiye, in essence, is demanding and acquiring a greater role in the world's chessboard, shifting away from its former cornerstone foreign policy of 'Zero Problems with Neighbors' to a more assertive approach. In this report, by analyzing systematically its current geopolitical relations and its power projection, it is sustained that, in fact, Türkiye will be a greater regional power in the medium and long term, particularly by fostering its Islamic side and becoming, according to the findings hereby presented, into a new Sultanate.

## **1. TÜRKIYE AND THE WEST**

As it has been stated in the previous introduction, Türkiye is at the crossroads of civilizations. Regarding the West, it has always had a pragmatic relation with it, heavily improved with the signing of the Ankara Agreement in 1953, that paved the way for Türkiye to join the European club (then, the EEC). Moreover, in 2005 negotiations started to attain Turkish accession to the EU but, since then, they have stagnated. This stagnation, as well as several factors that are studied through this Chapter, contribute to Erdoğan's pivot to the East. Despite this, relations with the EU are a keystone for Turkish domestic and foreign policy, so studying their current status and future prospects becomes essential.

As said in the previous introduction, the West is hereby understood as the European spaces where Turkish past influence was particularly powerful and where territorial and influential quests are present, namely Greece, Cyprus, and the Western Balkans. Additionally, the analysis of Turkish accession process to the EU and its relations with NATO have been also included under this Chapter, as well as their potential progress. In particular, the possible outcomes of territorial disputes in the Aegean Sea and Eastern Mediterranean will be analyzed, as well as Turkish interests and prospects in the Western Balkans.

### **1.1. A Question of Sovereignty and Maritime Boundaries: Eastern Mediterranean**

Since the birth of the Turkish Republic in 1923 by virtue of the Treaty of Lausanne, territorial disputes confronting Türkiye with Greece have been constant. Although it pretended to harmonize both countries' interests, it was not possible until 2016, when talks between them finally collapsed.<sup>9</sup> In regards to Cyprus, the recognition of the TRNC by Türkiye is fundamentally related to the discovery of hydrocarbons in the region and comes from a long history of ethnic and political disputes. These two conflicts are analyzed in this Chapter not only because they confront Türkiye to European countries, but because sovereignty and energy concerns merge in both, making them essential for the present regional power of Türkiye and its progress.

The creation of the East Mediterranean Gas Forum (EMGF) in 2016, to which Greece and Cyprus are founding members, and from which Türkiye was excluded, was a common

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<sup>9</sup>Ian Anthony and Michael Sahlin, "Maritime Disputes in the Eastern Mediterranean: Why and Why Now?," *Stockholm International Peace Research Institute*, October 23, 2020, <https://www.sipri.org/commentary/essay/2020/maritime-disputes-eastern-mediterranean-why-and-why-now>.

relevant factor that heavily contributed to the increase of tensions in both disputes.<sup>10</sup> In response to this, in 2019 Erdoğan signed an Memorandum of Understanding (MoU) with the Libyan Government of National Accord, delimiting their Exclusive Economic Zones (EEZs), disregarding Greek claims.<sup>11</sup>

Although it is developed in the following sections, Türkiye's accession process to the EU impacts the management and prospects of these disputes. Within this equation, a special place must be given to the current Israeli-Palestinian conflict, which has given even more strategic and geopolitical importance to the region, leading global powers to increase their presence there. Although their current presence is more related to the aforementioned conflict than to energy or maritime claims, Russia and China are nonetheless worth mentioning.

For Russia, reaching a warm-water sea was one of the main concerns that detonated the Crimean invasion in 2014 and the current war in Ukraine, although recently it had to withdraw almost its whole Black Sea Fleet due to a series of Ukrainian attacks.<sup>12</sup> Therefore, even if reaching the Mediterranean (necessarily through Turkish straits) will always be a concern for Russia, nowadays it does not pose any geostrategic menace to Turkish interests, moreover bearing in mind the ambivalence policy performed by Erdoğan we have already mentioned in the introduction.<sup>13</sup> China, for its part, will increase its presence in the region through its Belt and Road Initiative (BRI). Apart from its investments in Lebanon, Egypt, and Greece, among others, Türkiye is the main sponsor of the Trans-Caspian East-West-Middle Corridor Initiative (also known as 'The Middle Corridor'), an essential part of the BRI architecture.<sup>14</sup>

Ultimately, as it can be inferred from the aforementioned, two essential pillars of development coincide in the Eastern Mediterranean: sovereignty and energy. Upon these two, Türkiye will ensure its prominent future standing in the region by assertively demanding its

<sup>10</sup>Reuters, "East Mediterranean States Formally Establish Egypt-Based Gas Forum," *Reuters*, September 22, 2020, <https://www.reuters.com/article/us-mideast-energy-idUKKCN26D14D>.

<sup>11</sup>"Memorandum of Understanding between the Government of the Republic of Turkey and the Government of National Accord-State of Libya on Delimitation of the Maritime Jurisdiction Areas in the Mediterranean," *United Nations Treaty Collection*, adopted on November 27, 2019, entered into force on December 8, 2019, <https://treaties.un.org/doc/Publication/UNTS/No%20Volume/56119/Part/I-56119-080000028056605a.pdf>.

<sup>12</sup>Peter Dickinson, "Putin's Fleet Retreats: Ukraine Is Winning the Battle of the Black Sea," *Atlantic Council*, October 4, 2023, <https://www.atlanticcouncil.org/blogs/ukrainealert/putins-fleet-retreats-ukraine-is-winning-the-battle-of-the-black-sea/>.

<sup>13</sup>Mansur Mirovalev, "Turkish Neutrality: How Erdogan Manages Ties with Russia, Ukraine amid War," *Al Jazeera*, September 28, 2023, <https://www.aljazeera.com/news/2023/9/28/turkish-neutrality-how-erdogan-manages-ties-with-russia-ukraine-amid-war>.

<sup>14</sup>Republic of Türkiye Ministry of Foreign Affairs, *Türkiye's Multilateral Transportation Policy*, n.d., [https://www.mfa.gov.tr/turkey\\_s-multilateral-transportation-policy.en.mfa](https://www.mfa.gov.tr/turkey_s-multilateral-transportation-policy.en.mfa).

rights, cooperating in regional security and development and erecting itself as the guardian of Islam and, in particular, Turkic-Muslim populations.

### *Greece*

Essentially, the territorial dispute between Türkiye and Greece relates to the delimitation of territorial waters, national airspace, Exclusive Economic Zones and the use of the continental shelf, as well as the transit of energy resources through both countries, studied profoundly in Chapter 3.

For understanding the conflict, a relevant issue that must be taken into account is that Türkiye did not sign the 1958 United Nations Convention on the Continental Shelf, to which Greece was a party,<sup>15</sup> nor has signed the 1982 United Nations Convention on the Law of the Sea (UNCLOS), whereas Greece has. According to this, Greece claims to have sovereign rights over twelve nautical miles from its coastline, understanding it as a customary right. However, Türkiye claims it to be a violation of the Treaty of Lausanne, which limited the territorial waters to three miles from the coastline.<sup>16</sup> In any case, Greece extended its territorial waters to six nautical miles following the Law 230/1936, pretending however to extend it, as mentioned, up to twelve miles according to UNCLOS. In 1995, following its ratification by Greece, Türkiye declared the extension of its territorial waters as a perpetual *casus belli*.<sup>17</sup>

This confrontation has even entailed the militarization by Greece of some of its islands.<sup>18</sup> However, this will not probably trigger an open conflict between both countries, even despite previous Turkish ‘threats’.<sup>19</sup> Although Türkiye is more ‘independent’ in its foreign policy than many of NATO Member States, it is still part of it and it is a comfortable organization for Erdoğan. Risking Turkish membership, therefore, is not a likely scenario in future years, nor will Greece. Moreover, Turkish accession process to the EU must be added

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<sup>15</sup>“United Nations Convention on the Continental Shelf,” *United Nations Treaty Collection*, adopted on April 29, 1958, entered into force on June 10, 1964, <https://treaties.un.org/doc/Publication/MTDSG/Volume%20II/Chapter%20XXI/XXI-4.en.pdf>.

<sup>16</sup>“Treaty of Lausanne,” *United Nations Treaty Collection*, adopted on July 24, 1923, entered into force on August 6, 1924, art. 6, 2<sup>nd</sup> para., <https://treaties.un.org/doc/publication/unts/lon/volume%2028/v28.pdf>.

<sup>17</sup> Hellenic Republic Ministry of Foreign Affairs, *Territorial Sea - Casus Belli*, June 15, 2022, <https://www.mfa.gr/en/issues-of-greek-turkish-relations/relevant-documents/territorial-sea-casus-belli.html>.

<sup>18</sup>Republic of Türkiye Ministry of Foreign Affairs, *Militarization of Eastern Aegean Islands Contrary to the Provisions of International Agreements*, n.d., <https://www.mfa.gov.tr/militarization-of-eastern-aegean-islands-contrary-tp-the-provisions-of-international-agreements.en.mfa>.

<sup>19</sup>Reuters, “Erdoğan Accuses Greece of ‘Occupying’ Demilitarised Islands,” *Reuters*, September 3, 2022, <https://www.reuters.com/world/europe/erdogan-accuses-greece-occupying-demilitarised-islands-2022-09-03/>.

to this equation. Although it is not a strict priority anymore, it is unlikely that Türkiye would enter into war against an EU Member State. Therefore, given the fact that islands of Greek property are the majority, Erdoğan will keep claiming in favor of Turkish rights and against Greek militarization, although no open war nor physical appropriation are likely. Therefore, the reason for claiming Turkish rights resides more on guarding Turkish and Islamic interests than on actual security threats.

### *Cyprus*

In 1960 Cyprus gained its independence and, in that same year, both the Treaty of Alliance and the Treaty of Guarantee were signed by the U.K., Greece, Türkiye and Cyprus, trying to create mechanisms to avoid further disputes over the island. However, violence broke out between the Greek Cypriot majority and the Turkish Cypriot minority, leading to a United Nations peacekeeping deployment in 1964 (the so-called UN Peacekeeping Force in Cyprus or UNFICYP), and the establishment of the ‘Green Line’ dividing the island by virtue of the United Nations Security Council (UNSC) Resolution 186.<sup>20</sup> When in 1974 a Greek-sponsored coup tried to oust the elected Cypriot president, Türkiye deployed its troops under the pretext of protecting Turkic minorities. In 1983, being a third of the island under Turkish control, the independence of the so-called Turkish Republic of Northern Cyprus (TRNC) was declared, being currently recognized only by Türkiye. In 2004, the whole island entered the EU, although its *acquis communautaire* is suspended in the TRNC.<sup>21</sup> In 2017, under UN auspices, a round of negotiations started, aiming to reach a common agreement on uniting the island under a federal state, but the process failed.

Nowadays, Türkiye aims to maintain the two-states status quo, keeping around 40,000 military personnel on the island,<sup>22</sup> whereas Greece maintains around 1,000 troops and the UN another thousand of peacekeepers along the Green Line.

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<sup>20</sup>United Nations Security Council Resolution 186 (1964), *United Nations Digital Library*, adopted on March 4, 1964, 4<sup>th</sup> clause, <https://digitallibrary.un.org/record/112185>.

<sup>21</sup>CIA, “Cyprus,” *CIA World Factbook*, October 6, 2023, <https://www.cia.gov/the-world-factbook/countries/cyprus/>.

<sup>22</sup>Le Monde with AP, “Erdoğan Slams UN Peacekeepers for Blocking Cyprus Road Project,” *Le Monde*, August 22, 2023, [https://www.lemonde.fr/en/turkey/article/2023/08/21/erdogan-denounces-un-peacekeepers-for-blocking-cyprus-road-project\\_6102337\\_219.html](https://www.lemonde.fr/en/turkey/article/2023/08/21/erdogan-denounces-un-peacekeepers-for-blocking-cyprus-road-project_6102337_219.html).

As it can be inferred from the history and current situation of the dispute, reunification, at the moment, does not seem possible, although Erdoğan still speaks out in its favor.<sup>23</sup> Just as he requested the ease of Turkish accession process to the EU in exchange of allowing Sweden to join NATO,<sup>24</sup> this persistence may be also used as a negotiating tool, so any movement of less radicalness than this would be seen as a concession deserving compensation. Besides, the idea of safeguarding the interests of Turkic-Muslim populations of Northern Cyprus is present in Erdoğan's narrative as well, aligning with the image of Islam's guardian he aims to showcase. This proves the autonomy and increasing leverage Türkiye is gaining and the prominent role it will acquire.

However, Cyprus—and its hydrocarbons—are of significant importance for other actors as well. The U.K., for instance, holds two sovereign base areas on the island, and Russia has a long history of private entities' presence.<sup>25</sup> In addition to this, in the face of the present Israeli-Palestinian conflict, Cyprus and its whole Eastern Mediterranean region are acquiring greater relevance for the U.S. as well. In fact, the U.S.S. Dwight D. Eisenhower Carrier Strike Group has been relocated to the region, and a Terminal High Altitude Area Defense battery and several Patriot battalions deployed.<sup>26</sup>

Although reunification does not seem possible, in the medium and long term, confidence between the North and the South is likely to be improved by discrete, positive steps. For example, the RoC does not allow Turkic Cypriots to participate in the management of natural resources and, in particular, hydrocarbons (they do receive revenues, nonetheless). Because of the relevance of these resources, Türkiye will not enter into negotiations with the RoC to delimit their maritime boundaries.<sup>27</sup> In any case, Türkiye will perform its traditional bipolar role by, on the one hand, trying to go further in its accession process by reducing its

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<sup>23</sup>Euronews with AFP, "Erdoğan Demands International Recognition of Northern Cyprus," *Euronews*, June 13, 2023, <https://www.euronews.com/2023/06/13/erdogan-demands-international-recognition-of-northern-cyprus>.

<sup>24</sup>Hande Atay Alam and Christian Edwards, "Erdoğan Links Sweden's NATO Bid to Türkiye Joining the EU," *CNN*, July 10, 2023, <https://edition.cnn.com/2023/07/10/europe/erdogan-turkey-nato-eu-sweden-intl/index.html>.

<sup>25</sup>Jack Straw, "We Should Never Have Let Cyprus Join the EU," *POLITICO*, September 7, 2023, <https://www.politico.eu/article/cyprus-eu-vladimir-putin-russia/>.

<sup>26</sup>"Statement From Secretary of Defense Lloyd J. Austin III on Steps to Increase Force Posture," *U.S. Department of Defense Press Release*, October 21, 2023,

<https://www.defense.gov/News/Releases/Release/Article/3564874/statement-from-secretary-of-defense-lloyd-j-austin-iii-on-steps-to-increase-for/>.

<sup>27</sup>International Crisis Group, "An Island Divided: Next Steps for Troubled Cyprus," *International Crisis Group*, April 17, 2023, <https://www.crisisgroup.org/europe-central-asia/western-europemediterranean/cyprus/268-island-divided-next-steps-troubled-cyprus>.

demands on TRNC's recognition, whereas on the other, presenting itself as the sentinel of Turkic-Muslim populations interests.

## 1.2. Western Balkans: The Importance of Soft Power

The Balkans were occupied by the Ottoman Empire from the 14<sup>th</sup> century to the 20<sup>th</sup> century. Geopolitically speaking, they represent the transition between Europe and Türkiye and between Southern Europe and Central Europe. Therefore, the Balkans are a region of key importance for Türkiye. However, this section will be focused on the Western Balkans in particular, understood as comprising Bosnia and Herzegovina, Montenegro, Albania, Serbia, Kosovo, and North Macedonia, following the European External Action Service (EEAS) criterion.<sup>28</sup> Kosovo is hereby referred to as an autonomous entity, given Turkish individualized investments there.

Taking into account recent wars and ethnic cleansing, Turkish strategy in the region is based on political dialogue and economic integration. To this end, Türkiye leads the Southeast European Cooperation Process (SEECP), as well as trilateral consultation mechanisms with Bosnia and Herzegovina, Croatia, and Serbia, pursuing regional peace and stability.<sup>29</sup> Essentially, Türkiye aspires to earn the role of leader in the region, fostering integration and cooperation. Interestingly enough, Türkiye aims to gather this integration within the EU framework. Therefore, although minimal, if Turkish involvement in the region can affect its accession process, it would facilitate it. Following its aforementioned purpose, Ankara heavily relies on its soft power to increase its regional presence. Among others, the Turkish International Cooperation and Coordination Agency (TIKA),<sup>30</sup> invests 18% of its budget on the region. Other initiatives to bear in mind are the spread of the Yunus Emre Institute or the increasing presence of the Turkish Maarif Foundation, showing Turkish willingness to increase its presence in the region, focusing on Muslim-majority areas such as Bosnia and Herzegovina, Albania, and Kosovo. Needless to say, these initiatives are worldwide active.<sup>31</sup>

<sup>28</sup>Strategic Communications Division, "The EU and the Western Balkans: towards a Common Future," *European External Action Service*, March 16, 2022, [https://www.eeas.europa.eu/eeas/eu-and-western-balkans-towards-common-future\\_en](https://www.eeas.europa.eu/eeas/eu-and-western-balkans-towards-common-future_en).

<sup>29</sup>Republic of Türkiye Ministry of Foreign Affairs, *Relations with the Balkan Region*, n.d., <https://www.mfa.gov.tr/relations-with-the-balkan-region.en.mfa>.

<sup>30</sup>Turkish Cooperation and Coordination Agency, *Republic of Türkiye Ministry of Culture and Tourism*, [https://www.tika.gov.tr/en/page/about\\_us-14650](https://www.tika.gov.tr/en/page/about_us-14650).

<sup>31</sup>Aslı Aydıntaşbaş, "From Myth to Reality: How to Understand Turkey's Role in the Western Balkans," *European Council on Foreign Relations*, March 13, 2019,

Additionally, Erdoğan aims to foster trade and direct investment in the Western Balkans. Being the bloc's third trading partner,<sup>32</sup> Turkish contractors are incentivized to undertake investment projects there, in particular in the infrastructure sector. For instance, Turkish contractors participated in the construction of a highway between Serbia and Bosnia, the new Pristina International Airport, or the establishment of the Kosovo Electricity Distribution Company, currently owned by Turkish companies.<sup>33</sup>

In conclusion, Turkish interests on the Western Balkans show that, even though the East represents its main priority, it does not dismiss the West. That is why political involvement can be expected in the Balkans, as well as further Turkish economic and diplomatic investment, aiming to foster regional integration and cooperation.

### 1.3. Turkish Accession to the European Union: Not Even a Desire

When negotiations started in 2005, Turkish population and Erdoğan himself seemed to see accession to the EU in a very positive way.<sup>34</sup> This led Turkish Armed Forces and people to think of Erdoğan as a center-right politician in favor of Western values. In order to ensure this vision, Erdoğan followed European authorities' prescriptions to undermine the power of the military in public life. Soon after this, the Ergenekon-Sledgehammer trials allowed Erdoğan to definitely eliminate the possibility of a military coup and, jointly with the failure of the 2016 coup, heavily reduced its power. Having done this, hindrances posed by the EU and, in particular, Germany and France, gave Erdoğan the opportunity to change his position and, certainly, doing so without losing popular support. Consequently, although the application for joining the EU is still ongoing, it is not at the core of Turkish foreign policy anymore.

In particular, two issues have historically contributed to the opposition of the EU and, mainly, Germany and France: the Cypriot issue and the human rights record regarding Kurds.<sup>35</sup> As it has been already stated, it would be difficult - if not impossible - for Türkiye to access

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[https://ecfr.eu/publication/from\\_myth\\_to\\_reality\\_how\\_to\\_understand\\_turkeys\\_role\\_in\\_the\\_western\\_balkans/#ftnref7](https://ecfr.eu/publication/from_myth_to_reality_how_to_understand_turkeys_role_in_the_western_balkans/#ftnref7).

<sup>32</sup>Marina Vulović, "Economic Relations between the Western Balkans and Non-EU Countries," *Stiftung Wissenschaft und Politik*, pg. 2, July, 2023, [https://www.swp-berlin.org/publications/products/comments/2023C36\\_WesternBalkans.pdf](https://www.swp-berlin.org/publications/products/comments/2023C36_WesternBalkans.pdf).

<sup>33</sup>Kosovo Electricity Distribution Company, <https://www.keds-energy.com/eng/about-us/keds-profile/>.

<sup>34</sup>Ioannis N. Grigoriadis, "Türkiye's Accession to the European Union: Debating the Most Difficult Enlargement Ever," *The SAIS Review of International Affairs* 26, no. 1, Winter-Spring 2006, pgs. 147–160, <https://www.jstor.org/stable/26999305>.

<sup>35</sup>Soner Çağaptay, "Erdoğan's Empire: Turkey and the Politics of the Middle East," 4<sup>th</sup> ed., London: I.B. TAURIS, 2021, pg. 74.



the EU, and for European powers to accept its accession, if the Cypriot situation does not progress positively.

On the other hand, the Kurdish issue has always been a concern for the EU,<sup>36</sup> in particular regarding human rights violations, where little progress has been made.<sup>37</sup> Kurdish people, for their part, have tended to be supportive to the idea of Türkiye entering the EU, where they have traditionally seen an opportunity to improve their condition and have a say on their own future.<sup>38</sup>

All the aforementioned obstacles and the stagnation of the process have contributed to the fact that, nowadays, less Turkish people support the idea of joining the EU. Additionally, European powers do not seem to change their position in the near future. In this regard, although sovereignty disputes with Greece and Cyprus are relevant, the root causes for hindering Turkish accession are also related to the potential loss of decision-making power if Türkiye entered the Union, since it would become the Member State with the most seats in the European Parliament and, conversely, would diminish the power of the others. Apart from this, Muslim-majority population of Türkiye, its size, standard of living, large agricultural sector and geographic location may also favor the EU's rejection.<sup>39</sup>

However, synergies between the European Union and Türkiye are consistent. For instance, some authors argue that Erdoğan relies on the West to win elections. After the 2017 constitutional referendum, Erdoğan rebuilt Turkish financial links with Europe, underlining the importance of the deep financial and economic links that tie Türkiye with the West.<sup>40</sup> This reality shows that, although we can expect Türkiye to tilt towards the East, its West side is and will be structurally present, disregarding the fact that it joins or not the EU. It would be an error to state that Türkiye will turn its back to the West in favor of its Eastern partners, not only

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<sup>36</sup>European Parliament, *Resolution of 13th September 2023*, 16<sup>th</sup> clause.

[https://www.europarl.europa.eu/doceo/document/TA-9-2023-0320\\_EN.html](https://www.europarl.europa.eu/doceo/document/TA-9-2023-0320_EN.html).

<sup>37</sup>Suzanne Lynch and Jacopo Barigazzi, "Is Turkey Now Joining the EU? No, but the EU Is Engaging," *Politico*, July 13, 2023, <https://www.politico.eu/article/is-turkey-now-joining-the-eu-no-but-the-eu-is-engaging-nato/>.

<sup>38</sup>Kerim Yildiz, *The Kurds in Türkiye: EU Accession and Human Rights*, London: Pluto Press, 2005, pg. 28, <https://search-ebSCOhost-com.ezproxy.unav.es/login.aspx?direct=true&db=e00xww&AN=168058&lang=es&site=ehost-live&scope=site>.

<sup>39</sup>Çağaptay, *Erdoğan's Empire*, pg. 83.

<sup>40</sup>*Ibid.*, Prologue, pgs. 19-20.

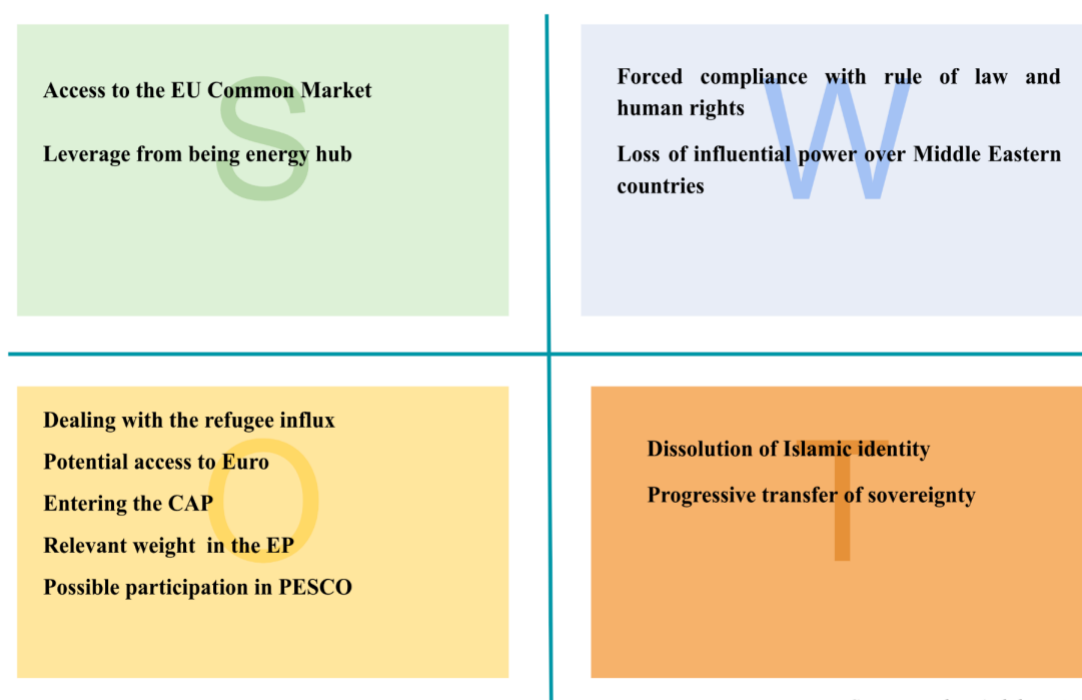
because of its dependence from the West, but also because Erdoğan has already shown that the West constitutes an important part of its foreign policy since 2005.

In conclusion, although Turkish-EU relations are important for both actors, and relevance will be sustained over time, Türkiye's accession to the Union is not likely for the next five to ten years. A tendency towards this has been identified in recent times, catalyzed by factors such as sovereignty disputes with Greece and Cyprus, the Kurdish issue and deeper fears of relocating the decision-making power by Member States. Above all of this, both Erdoğan and the Turkish population have tended to dismiss the importance of accession, being this both a cause and a consequence of Türkiye's pivot to the East.

#### 1.4. SWOT Analysis: Evaluation of Türkiye Becoming an EU Member State

Even if Türkiye's prospects for accession are negative, it is worth analyzing the relevant circumstances surrounding this EU enlargement, given the major alteration in regional geopolitics that it would constitute. The following chart showcases strengths, weaknesses, opportunities, and threats that would derive for Türkiye should it become a Member State, considering its increasingly Islamic, authoritarian profile opportunities and threats that would derive for Türkiye should it become a Member State, considering its increasingly Islamic, authoritarian profile.

SWOT Analysis: Turkey's accession to the EU



Source: authors' elaboration

On the *strengths* side, some economic factors have been identified as the main arguments for an accession, especially as Türkiye is aiming to expand their economic opportunities with the 27's block amidst the sanctions against Russia.

Türkiye might also see an *opportunity* in different fields, like the participation of the fast evolving Turkish military industrial complex in the Permanent Structured Cooperation (PESCO), entering the Common Agricultural Policy (CAP) scheme (agriculture constitutes a 6.5% of the country's GDP),<sup>41</sup> and even settling matters in relation to refugees.

As *threats*, the transferal of sovereignty to the European institutions, like the ones regarding the judiciary system or economic policies would be a difficult burden on the negotiations, and inconsistent with Ankara's stances in the past decades. This would be the case for the *weaknesses* identified in the chart as well, as they constitute vital interest for Türkiye, such as the Kurdish issue, so abandoning its policies on the matter is extremely unlikely.

According to this chart, even if there are apparently more opportunities for Türkiye if it accessed the EU than weaknesses and threats, the variables in these latter categories outweigh potential benefits. That is, considering Türkiye's evaluation of the PKK terrorist activity as an existential threat, Ankara will not concede on the current means that it employs in counter-terrorism operations out of human rights considerations. Similarly, Erdoğan's surging authoritative drift does not seem compatible with required rule of law systemic reforms that Türkiye would have to undergo in order to become a Member State.

### **1.5. Türkiye within NATO: Increasing Interdependence**

As studied in section 1.1, Erdoğan has occasionally employed the strategy of requesting the maximum at the beginning of any negotiation just to, afterwards, reduce his demands as a means of concession and, therefore, receive something in compensation. For example, it has been already mentioned that Erdoğan requested the ease of Turkish accession process to the EU in exchange of allowing Sweden to join NATO. However, in October, he ratified the

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<sup>41</sup>World Bank, *Agriculture, forestry, and fishing, value added (% of GDP) - Türkiye*, n.d., <https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=TR>.

protocol of accession and sent it to the Turkish parliament, receiving, it seems, several F-16s from the United States.<sup>42</sup>

In spite of this, both parties are aware that they need each other. Türkiye, on the one hand, relies on NATO to ensure its security in a troubled region and in front of Russian expansionism, whereas on the other hand, NATO relies on Türkiye for maintaining its strategic position in the Eastern Mediterranean, the Caucasus and the Middle East, as well as for mediating with Russia, given Turkish ambivalent role.<sup>43</sup> This mutual need, nevertheless, is not an obstacle for Erdoğan to enjoy a certain degree of autonomy, given his increasing authoritarianism and Islamism and the capacity of exerting veto. Although strategic autonomy would be higher outside NATO, the benefits of being within the Alliance are important for Türkiye, just as maintaining Türkiye within NATO is essential for the Alliance's strategic role. Therefore, increasing interdependence between NATO and Türkiye makes its exit highly unlikely in the next five to ten years.

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<sup>42</sup>Umut Uras, "Why Turkey Changed Its Stance on Sweden's NATO Membership," *Al Jazeera*, July 11, 2023, <https://www.aljazeera.com/news/2023/7/11/why-turkey-changed-its-stance-on-swedens-nato-membership-2>; Patrick Wintour and Lili Bayer, "Turkey's President Submits Bill to Ratify Sweden's NATO Membership," *The Guardian*, October 23, 2023, <https://www.theguardian.com/world/2023/oct/23/turkey-submits-bill-to-ratify-sweden-nato-membership>.

<sup>43</sup>Republic of Türkiye Ministry of Foreign Affairs, *Türkiye's Relations with NATO*, n.d., <https://www.mfa.gov.tr/nato.en.mfa>.

## 2. TÜRKIYE AND THE EAST

Continuing with the analysis based on the position of Türkiye at the crossroads of Europe and Asia, if Chapter 1 addressed Türkiye's relations with the West, this Chapter analyzes Turkish engagement with the East - in broad terms, the Middle East, Central Asia and the Far East (China). In this sense, Türkiye has historically played a pivotal role in the Middle East in particular, a region of immense geostrategic significance due to its energy resources, political conflicts, and cultural diversity.

Over the past few decades, Türkiye's role in the Middle East has evolved and expanded, as the nation sought to be a dynamic and influential player in the region. A main approach for Turkish involvement in the region is through diplomatic initiatives aimed at resolving regional conflicts, but often being involved also with troops. Türkiye has mediated in conflicts such as the Syrian civil war and has sought to foster dialogue between various Middle Eastern nations. This diplomatic approach has positioned Türkiye as a bridge between East and West and has earned it a reputation as a regional peacemaker, although also as a beacon for conflict. Türkiye's assertiveness in regional politics has not been without controversy. Its military interventions in Syria and Libya, as well as its engagement with various regional actors, have sparked international debate and sometimes caused tensions with its allies, from West to East. Its aspiration to be a leading regional power has led to complex relationships with countries like Iran, Saudi Arabia, and Egypt.

In the economic aspect, Türkiye's foreign policy and economy have been tied to the path Erdoğan chooses. Türkiye continues to make progress on stable growth, projected at 4% of the GDP by 2024, but at the same time faces high inflation, although the executive has promised to halve it from 66% to 33%.<sup>44</sup> According to the World Bank, Türkiye is the 19th economy of the world, well established, but fragile due to the volatility of its inflation. The country's dynamic industrial base has established it as a crucial economic partner for Middle Eastern nations. Its investments and trade relationships have enhanced economic interdependence in the region. Turkish construction firms, in particular, have played a

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<sup>44</sup>Huseyin Hayatsever and Ezgi Erkoyun, "Turkey Sets out Tough Economic Path in Policy Turnaround," *Reuters*, September 6, 2023, <https://www.reuters.com/world/middle-east/turkey-downgrade-economic-view-path-policy-orthodoxy-2023-09-06/>.

significant role in infrastructure development across the Middle East. As an example, the foreseen \$50bn. projects in Saudi Arabia.<sup>45</sup>

Türkiye's role in the Middle East encompasses diplomacy, economic partnerships, and military involvement. While its actions have been both praised and criticized, Türkiye's evolving role demonstrates its importance as a key player in the Middle East, with the potential to significantly influence the region's future dynamics. Türkiye's role is likely to remain central in shaping the region's trajectory.

### **2.1. Iran: A Future for Pragmatic Relations**

The relationship between Türkiye and Iran is a complex blend of cooperation and competition. While the precise nature of the rivalry has changed as the two nations' regimes have experienced some changes, and the degree to which Tehran and Ankara opposed one another in regional matters has gone in highs and lows, the two countries' policies toward each other have displayed a remarkable degree of consistency, and being the oldest rivalry in the Middle East, still one of the most relevant in the current era.

Their relations have never been straightforward since the 1979 Iranian Revolution, and a similar pattern can be observed upon delving deeper into history: distance, followed by recognition of mutual interests and the need for cooperation, in tandem with competition over neighboring regions and theaters, and then an eventual falling out due to conflicting interests and direct challenges. Geopolitical factors, trade ties, and cultural bonds underpin their interactions. While both nations share concerns about Kurdish separatism and regional stability, they have differing interests in Syria and Iraq. Economic links are robust, with substantial trade and energy cooperation, amounting nearly \$6.5bn. last year, according to the Turkish Ministry of Foreign Affairs.<sup>46</sup> Nonetheless, their relations are marked by periodic tensions, particularly over religious differences and influence in the Middle East. These dynamics showcase the intricacies of bilateral ties, which oscillate between collaboration and rivalry, reflecting the ever-evolving regional landscape in the Middle East.

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<sup>45</sup>Ercan Ersoy and Patrick Sykes, "Aramco Taps Turkish Firms for \$50 Billion Building Spree," *Bloomberg*, June 1, 2023, <https://www.bloomberg.com/news/articles/2023-06-01/saudi-aramco-taps-turkish-firms-for-50-billion-building-spree#xj4y7vzkg>.

<sup>46</sup>Republic of Türkiye Ministry of Foreign Affairs, *Türkiye-Iran Economic and Commercial Relations*, n.d., <https://www.mfa.gov.tr/economic-and-commercial-relations-with-iran.en.mfa>.

*Reaction if Iran Becomes Nuclear and the Renewal of JCPOA.*

If Iran were to acquire nuclear weapons, Türkiye's reaction would be influenced by several factors, including its national security concerns, regional dynamics, and its alliances. Historically, Ankara has maintained Iran's right to pursue peaceful research on and use of nuclear energy, it has also consistently promoted nuclear non-proliferation – having signed the Treaty on the Non-Proliferation of Nuclear Weapons in 1969 – and has regularly urged Tehran to cooperate with the International Atomic Energy Agency for inspections.

This approach is sustained by the following factors: firstly, Ankara has been consistent in its desire not to see further nuclear armament in its neighborhood, as a matter of strategic security. Even though Türkiye hosts U.S. nuclear warheads, under the nuclear sharing of NATO, it has never sought to achieve its own capabilities.<sup>47</sup> Furthermore, any Iranian nuclear ambitions are to be discussed within the North Atlantic Council about how to respond. NATO members collectively work on a coordinated strategy to address the situation and ensure regional stability, specially the U.S., that with Israel, see a nuclear Iran as an strategic threat. Through NATO's Nuclear Planning Group (NPG), the Alliance reviews and sets the common nuclear policy for NATO allies, except France. Secondly, a nuclear-armed Iran not only poses strategic challenges to Türkiye in terms of the power balance between the two countries, but also puts Türkiye in a vulnerable position if Iran's nuclear ambitions were to usher in a conflict between Iran and other powerful states, like Saudi Arabia. Such a war on Turkish borders would have substantial implications, from refugee intakes to nuclear disasters in close proximity. Thirdly, Ankara stands to lose out from further sanctions on Iran and to gain from any lifting of sanctions. Türkiye has no option but to trade with Iran; it shares a border with the country, purchases gas from it, and eyes a large market with so many opportunities to exploit.

The presence of a nuclear-armed neighbor would heighten Türkiye's security concerns. In response, Türkiye might consider enhancing its own security measures, such as bolstering its missile defense systems and intelligence capabilities, and to collaborate more deeply in nuclear deterrence measures.

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<sup>47</sup>“Turkey Overview ,” *The Nuclear Threat Initiative*, October 28, 2021, <https://www.nti.org/analysis/articles/turkey-overview/>.

On the renewal of the Joint Comprehensive Plan of Action (JCPOA, or Iran's nuclear deal),<sup>48</sup> the signatories have struggled to revive the agreement, which has been defunct since the U.S. withdrawal in 2018. Washington and Tehran reinstated talks to revive the agreement in April 2021, but negotiations have since been off and on, complicated by developments such as Iran's election of conservative cleric Ebrahim Raisi as President, Russia's invasion of Ukraine, and the 2023 Israeli-Palestinian conflict.

Iran's involvement in the two issues have earned them more sanctions. Just as certain UN-mandated provisions of the JCPOA were set to expire in October 2023, the Biden administration imposed new sanctions on Iran's ballistic missile and drone programs,<sup>49</sup> and the EU has continued to implement their own sanctions.<sup>50</sup> Moreover, Washington and Tehran still disagree on several issues related to rejoining the agreement, including the Islamic Revolutionary Guard Corps' (IRGC) designation as a terrorist organization, and U.S. officials say further nuclear advances by Iran could make returning to the original deal impossible. It is in a great interest for Türkiye to address the renewal of the JCPOA, as is for Türkiye's interest to have a stable Iran. Likewise, Türkiye has little option but to participate in trade with Iran, should the conditions allow, so the imposition of sanctions are in detriment of Türkiye economic ambitions. Furthermore, rising isolation of Iran paved the way for a more aggressive Iranian foreign policy which would leave Türkiye and Iran at further divergence as regards their approach to the Middle East.

Overall, Türkiye would continue to respond with a combination of diplomatic efforts, security measures, and cooperation with international partners to address the situation and mitigate any potential threats arising from Iran's acquisition of nuclear weapons. The specific response would depend on the evolving circumstances and Türkiye's assessment of its national interests and regional stability.

## **2.2. Iraq: An Ever-lasting Source of Instability**

Historically, Türkiye has maintained a significant influence with its southeastern neighbor because of economic interests and cultural ties with the Iraqi Turkmen population,

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<sup>48</sup>Kali Robinson, "Backgrounder: What Is the Iran Nuclear Deal?," *Council on Foreign Relations*, October 27, 2023, <https://www.cfr.org/backgrounder/what-iran-nuclear-deal>.

<sup>49</sup>Jennifer Hansler, "US Unveils New Sanctions on Iran's Missile and Drone Programs as UN Restrictions Expire | CNN Politics," *CNN*, October 18, 2023, <https://edition.cnn.com/2023/10/18/>.

<sup>50</sup>"Timeline - Iran: EU Restrictive Measures." *Consilium*, February 20, 2023, <https://www.consilium.europa.eu/en/policies/sanctions/iran/timeline-iran-eu-restrictive-measures/>.



and its involvement in Iraq has been marked by both cooperation and competition. On the one hand, Ankara has sought to enhance economic relations, primarily through trade and energy cooperation. Türkiye's energy imports from Iraq, particularly in the form of oil, have grown substantially, making Iraq an important partner for Türkiye's energy security. Additionally, Türkiye has participated in infrastructure projects and development efforts, thereby contributing to Iraq's post-conflict reconstruction.

However, Türkiye's military presence in northern Iraq, especially in the Kurdistan Regional Government (KRG) area, has been a source of tension. Ankara's operations against the Kurdistan Workers' Party (PKK) in the region have raised concerns about sovereignty and territorial integrity.<sup>51</sup> Türkiye attributes its operations and troop presence in Iraqi territory to the PKK's activities in the region. Despite all the calls of the Iraqi government, Türkiye seems determined to maintain its military presence in Iraq. If Türkiye and Iraq reach a compromise on this issue in the near future, somehow unlikely, Türkiye's policies towards the resolution of the Kurdish issue will be determined. This issue nevertheless seems difficult to resolve in the short term. This situation highlights the complex nature of Türkiye's involvement in Iraq, where it balances its security interests with regional stability.

Türkiye and Iraq also maintain disputes over the Tigris and Euphrates rivers, its water use and status according to international law.<sup>52</sup> While Türkiye considers the Tigris and Euphrates rivers as transboundary waters, Iraq argues that both are international rivers and the problem should be solved within the framework of international law. International rivers are those whose drainage basins are shared by two or more states,<sup>53</sup> or form a border between them. However, Türkiye argues that the Tigris and Euphrates are not as such, claiming that the catchment basins of both rivers are predominantly Turkish territory. Türkiye and the KRG have a more advantageous position in the water issue as upstream riparian states, while Iraq is in a disadvantageous position as a downstream state.

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<sup>51</sup>Jean Marcou, "Turkey's Military Engagement in Northern Iraq, a Never-Ending Story," *Centre Français de Recherche sur l'Iraq*, February 11, 2022, <https://cfri-irak.com/en/article/turkeys-military-engagement-in-northern-iraq-a-never-ending-story-2022-04-12>.

<sup>52</sup>"Turkey, Syria and Iraq: Conflict over the Euphrates-Tigris," *Climate Diplomacy*, <https://climate-diplomacy.org/case-studies/turkey-syria-and-iraq-conflict-over-euphrates-tigris>.

<sup>53</sup>"United Nations Convention on the Law of the Non-navigational Uses of International Watercourses," *United Nations Digital Library*, adopted on May 21, 1997, entered into force on August 17, 2014, pg. 3, [https://legal.un.org/ilc/texts/instruments/english/conventions/8\\_3\\_1997.pdf](https://legal.un.org/ilc/texts/instruments/english/conventions/8_3_1997.pdf).

The instability in Iraq, characterized by ongoing sectarian conflicts, terrorism, and political fragmentation, remains a significant concern. Türkiye's role in addressing these issues is critical, and its policies must be carefully calibrated to promote stability and cooperation, while respecting Iraq's sovereignty and territorial integrity. Türkiye's continued engagement in Iraq is likely to influence the overall stability and security of the Middle East.

In conclusion, Türkiye's relations with Iraq can be predicted to follow a period of ups and downs in the short and medium term due to the problems aforementioned. Apart from these issues, another factor that will determine Türkiye-Iraq relations is the extent of the Iranian influence in Iraq. After the U.S. withdrawal from Iraq in 2011, the Shi'ite-dominated governments in Iraq gradually came under the influence of Iran. These are indicators that will need to be monitored by Ankara.

### **2.3. China: Xinjiang and the Belt and Road Initiative**

The main point of conflict between Türkiye and China involves the Uighur population in the Chinese province of Xinjiang. Whereas China struggles to maintain its authority over the Muslim-majority population of the province, Türkiye aims to bring them under its sphere of influence by appealing to Islam.

Xinjiang, Central Asia and Türkiye itself represent a keystone on China's Belt and Road Initiative, given the role Türkiye plays in linking Asia and Europe. That is why, up to now, Türkiye has received Chinese investments in fields such as infrastructure, finance, energy, technology, and health.<sup>54</sup> However, the importance of Türkiye within the Chinese BRI seems to be less than expected. In 2015, Ankara signed with Beijing a MoU to align the BRI and the Middle Corridor Initiative,<sup>55</sup> although today, almost 10 years later, China investment in Türkiye during the years 2013-2020 was only 1.31% of total Chinese investments and only 0.8% of BRI projects had a Turkish focus.<sup>56</sup> It is also worth mentioning that Türkiye participates in the Shanghai Cooperation Organization (SCO) as an observer. This is an interesting feature because of NATO's membership of Türkiye, as in the 2022 Strategic Concept the organization

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<sup>54</sup>Ceren Ergenç and Deria Göçer, "China's response to Türkiye's volatile authoritarianism," *Carnegie Endowment for International Peace*, May 5, 2023, <https://carnegieendowment.org/2023/05/05/china-s-response-to-t-rkiye-s-volatile-authoritarianism-pub-89690>.

<sup>55</sup>Republic of Türkiye Ministry of Foreign Affairs, *Türkiye's Multilateral Transportation Policy*, n.d.

<sup>56</sup>Emil Avdaliani, "China's 2023 Trade and Investment With Türkiye: Development Trends," *Silk Road Briefing*, January 28, 2023, <https://www.silkroadbriefing.com/news/2023/01/25/chinas-2023-trade-and-investment-with-turkiye-trends/>.

considers that China poses *systemic challenges* to the Alliance.<sup>57</sup> However this engagement of Türkiye in the SCO could open a door for dialogue.

The Uighur conflict, characterized by allegations of human rights abuses against the Uighur Muslim population in China's Xinjiang region, has emerged as a significant point of contention in international relations. These concerns encompass reports of mass detentions, forced assimilation, and human rights abuses in Xinjiang,<sup>58</sup> and they have the potential to strain relations with China. In the last years, Türkiye has maintained an interest in Muslim communities around the world, often advocating for their rights and protection. The Uighur issue resonates strongly with the Turkish population due to shared cultural and religious ties. Türkiye hosts a significant Uighur diaspora and has granted asylum to Uighur refugees, so this historical context has set the stage for Türkiye's response to the Uighur conflict. Consequently, domestic political considerations and the sentiments of its population, particularly those with Uighur origins, have added to the pressure on the Turkish government to take a more assertive stance on the Uighur issue, although in the last years, Ankara stance on the refugee matter has hardened, also trying to manage the relations with China.<sup>59</sup>

Türkiye's public condemnation of China's actions in Xinjiang has led to public disagreements and diplomatic tension between the two nations, especially given that Ankara has been a vocal critic of the Chinese management of the conflict. In that sense, Türkiye's response to the Uighur issue must be seen in the context of its broader geopolitical interests. Balancing its ties with the Muslim world, its need for economic cooperation, and its broader partnerships, including China's Belt and Road Initiative, is a complex challenge, and an example of the delicate balance between humanitarian principles and geopolitical interests in international affairs.

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<sup>57</sup>NATO 2022 Strategic Concept, <https://www.nato.int/strategic-concept/>.

<sup>58</sup>Lindsay Maizland, "China's Repression of Uyghurs in Xinjiang," *Council on Foreign Relations*, September 22, 2022, <https://www.cfr.org/background/china-xinjiang-uyghurs-muslims-repression-genocide-human-rights>.

<sup>59</sup>Keir Simmons, Laura Saravia, and Alexander Smith, "What Once Were Safe Havens for Those Fleeing China Now Feel Dangerous," *NBCNews.com*, August 11, 2023, <https://www.nbcnews.com/news/world/china-uyghur-uyghur-Türkiye-oppression-rcna97238>.

#### **2.4. Türkiye and its environment: Cooperation, rivalries, and balance**

Official Development Assistance (ODA) has increasingly become a fundamental component of Türkiye's proactive foreign policy.<sup>60</sup> Aligned with the policy's goal of promoting a more peaceful and stable environment in neighboring regions, Türkiye has emerged as a proactive contributor to regional and global stability. As part of its strategy to leverage various soft power tools, taking on the role of a mediator in regional conflicts, Turkey has also increased its ODA to regions with conflicts and other sources of instability.

Türkiye's approach to development cooperation revolves around customizing its expertise and experience to the unique context and requirements of partner countries. This approach also involves aiding vulnerable populations impacted by conflict, emergencies, and disasters. As previously mentioned in the context of cooperation in the Western Balkans, TIKA plays a crucial coordinating role for all Turkish stakeholders engaged in development cooperation, encompassing line ministries, public institutions, Non-Governmental Organizations (NGOs), and the private sector. In bilateral cooperation, TIKA operates in over 150 countries, providing technical assistance for enhancing institutional capacity within the public sector and offering scholarships for educational opportunities in Türkiye.

Türkiye carries out development cooperation and humanitarian aid activities in various sectors and geographies. Its development aid covers health, education, agriculture, infrastructure, sustainable energy, water resource management, humanitarian aid, and many other sectors. Ankara focuses its development cooperation on promoting food security and nutrition; addressing unemployment; combating inequality; and advancing a development agenda conscious of the underlying role of peace, the rule of law and governance in achieving development goals. Türkiye conducts development co-operation activities, especially in geographies such as Africa, the Balkans, the Caucasus, the Middle East and Central Asia and aims to support the social, economic and environmental development of countries by implementing various projects in these geographies. The use of TIKA shows that Türkiye, and Erdoğan as a president specially, has taken foreign aid seriously and treated it as a proper

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<sup>60</sup>Turkish Cooperation and Coordination Agency, *Republic of Türkiye Ministry of Culture and Tourism*, [https://www.tika.gov.tr/en/page/about\\_us-14650](https://www.tika.gov.tr/en/page/about_us-14650).

foreign policy tool. Apart from the humanitarian implications of aid, ODA has been used to enhance Türkiye's visibility and prestige abroad.<sup>61</sup>

*Turkish Management of American, Chinese and Russian Rivalry in the Middle East*

Türkiye balances a delicate equilibrium in its relations with the three major powers and their interests in the region. With common and divergent interests depending on the case, this is a difficult balancing act, where Türkiye tries to sustain its own agenda to the benefit of its interests. Historically, Turkish-Russian relations have not been the smoothest ones. However, both countries have applied a policy of compartmentalizing their issues and collaborating wherever it is possible. They have clashed several times during the Syrian civil war, as per Türkiye support for rebels and Russian support for Al-Asad; and more recently over the war in Ukraine. Conversely, Russia will try to develop a full-scale and trustful cooperation with Iran, to keep the comprehensive support for the Syrian government, and to deepen the multifaceted partnerships with Türkiye, Saudi Arabia, Egypt, and other Member States of the Organization of Islamic Cooperation, given the constructiveness of their policy toward the Russian Federation.<sup>62</sup>

The main American interests in the region are maintaining the security of Israel and the oil of the Middle East, as well as deterring Russia and China from gaining influence on the region. As we have already mentioned, a nuclear Iran constitutes the main threat for the U.S. in the Middle East, once the Afghanistan War is over. As we have already explained previously in the document, a peaceful and controlled Iran is in the best interest of both Türkiye and the U.S. Although they are allies in NATO, and longtime partners, as to now, as it has been already mentioned, Turkish-American relations are not at their best. The financing of the YPG by the U.S. represents a red line for Türkiye, despite it being ignored sometimes, especially within the NATO framework. Another point of conflict is that of Fethullah Gülen living in the U.S.<sup>63</sup>

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<sup>61</sup>Yavuz Tüyoğlu, "Turkish Development Assistance as a Foreign Policy Tool and Its Discordant Locations," *Stiftung Wissenschaft und Politik*, April 2021, <https://www.swp-berlin.org/en/publication/turkish-development-assistance-as-a-foreign-policy-tool-and-its-discordant-locations/>.

<sup>62</sup>The Ministry of Foreign Affairs of the Russian Federation, *The Concept of the Foreign Policy of the Russian Federation*, March 31, 2023, [https://mid.ru/en/foreign\\_policy/fundamental\\_documents/1860586/](https://mid.ru/en/foreign_policy/fundamental_documents/1860586/).

<sup>63</sup>Anthony M. Stevens-Arroyo, "This Notable Pocono Resident Has Been Living Here in Exile since 1999: Moving Mountains," *Pocono Record*, August 20, 2021, <https://eu.poconorecord.com/story/opinion/columns/2021/08/20/opinion-fethullah-gulen-most-famous-resident-poconos/8208584002/>.

Recently, moreover, the U.S. has imposed sanctions against Türkiye, with the pretext of Turkish companies selling software to the Russian defense industry.<sup>64</sup>

And finally, Türkiye needs to take into account the rising involvement of China in the region, specifically with the BRI, as we have already mentioned. The brokering by China of the 2023 Saudi Arabia-Iran deal is a testament of the increasing effort the Chinese diplomacy is dedicating towards consolidating their position as a global actor.<sup>65</sup>

Türkiye needs to balance its policy between the three countries, as they can be benefited by having ties with all of them, but also are at the risk of being choked. Again, Türkiye is playing a strategic chess game with an uncertain outlook, where the stakes are high.

#### *Central Asia: A Place for Cooperation*

Central Asia represents a place of essential importance for Türkiye. As the Turkish Cooperation and Coordination Agency states, Central Asian countries and Türkiye consider themselves as one nation containing different countries, sharing common language, history and memory. Within these countries, TİKA comprises Kazakhstan, Tajikistan, Uzbekistan, Azerbaijan, and Kyrgyzstan. In fact, TİKA's own birth was due to the need of articulating social and economic projects in the region. To support this idea, some academics have coined the term 'Bayram Belt' to refer to Turkish will of influence in Central Asia.<sup>66</sup> 'Bayram' is a Turkic word for referring to an Islamic holiday, used therefore in all areas of past Ottoman influence and, in particular, Central Asia.

Within the U.S. 2022 National Security Strategy, independence, sovereignty and territorial integrity of Central Asia are fields where cooperation is desired, as well as resilience and democratic development. The C5+1 (Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, Uzbekistan and the United States) diplomatic platform is expected to be useful for advancing climate adaptation, improving regional energy and food security, enhancing integration within the region, and building greater connectivity to global markets. Being the Russian backyard, it seems clear that the United States will try to be more present in the region, whereas Türkiye presents itself as the Central Asian natural ally. Additionally, to this end, the United States will

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<sup>64</sup>Simeon Kerr et al., "US Targets China, Turkey and UAE in Latest Russia Sanctions," *Financial Times*, November 2, 2023, <https://www.ft.com/content/d5cf8b2f-27f0-42ee-b22b-695eca7122e1>.

<sup>65</sup>"Iran and Saudi Arabia Restore Ties," *The Iran Primer*, September 15, 2023, <https://iranprimer.usip.org/blog/2023/mar/10/iran-and-saudi-arabia-restore-ties>.

<sup>66</sup>Çağaptay, "Erdoğan's Empire," pg. 259.

try to out-compete China, ‘the only competitor with both the intent to reshape the international order and, increasingly, the economic, diplomatic, military, and technological power to do it.’<sup>67</sup> The Belt and Road Initiative, one of the Chinese strategic crown jewels, going through Central Asia, will face American competition aligned with discrete Turkish assistance.

The Middle Corridor, as a fundamental piece of the BRI, is also another source of cooperation in the region, particularly Trans-Caspian cooperation between Turkmenistan, Kazakhstan, and Azerbaijan. The Türkiye-Georgia-Azerbaijan-Turkmenistan-Afghanistan Transit Corridor Agreement, also known as the Lapis Lazuli Agreement, is also a powerful cooperation mechanism, especially for landlocked Afghanistan.<sup>68</sup>

In conclusion, Türkiye will keep fostering its role in Central Asia through initiatives such as TİKA, supporting, complementarily, cooperation with global powers and, in particular, the United States and China. In doing both, within an Islamic framework, Türkiye will acquire a greater relevance along Muslim populations in the region.

#### *Sunni Islam as a Source of Rivalry with Saudi Arabia*

Türkiye and Saudi Arabia, both major players in the Muslim world, are predominantly Sunni Muslim nations. While Sunni Islam provides a common religious identity, it has also been a source of rivalry between the two countries for several reasons, namely: that both of them seek to assert themselves as influential powers in the Middle East and the broader Muslim world, and religion is a factor that fuels their participation in various regional conflicts.

While both countries follow Sunni Islam, they often adhere to different interpretations and schools of thought within Sunni Islam.<sup>69</sup> Saudi Arabia follows a conservative Wahhabi interpretation, whereas Türkiye, under President Recep Tayyip Erdoğan’s leadership, has embraced a more moderate and liberal form of Sunni Islam. These ideological differences have at times contributed to rivalry. Both countries aspire to lead the Muslim world in various ways, whether through religious influence, economic power, or military alliances.

<sup>67</sup>“U.S. National Security Strategy”, October 2022, pg. 23, <https://www.whitehouse.gov/wp-content/uploads/2022/10/Biden-Harris-Administrations-National-Security-Strategy-10.2022.pdf>.

<sup>68</sup> Republic of Türkiye Ministry of Foreign Affairs, *Türkiye’s Multilateral Transportation Policy*, n.d., [https://www.mfa.gov.tr/turkey\\_s-multilateral-transportation-policy.en.mfa](https://www.mfa.gov.tr/turkey_s-multilateral-transportation-policy.en.mfa).

<sup>69</sup>Evangelos Venetis, “The Struggle between Turkey & Saudi Arabia for the Leadership of Sunni Islam.” *Hellenic Foundation for European and Foreign Policy*, February 2014, <https://www.files.ethz.ch/isn/176753/WORKING-PAPER-Venetis-Ev.pdf>

Türkiye and Saudi Arabia have taken opposing positions in the Qatar diplomatic crisis, with Türkiye supporting Qatar and Saudi Arabia leading the blockade. This dispute has added a layer of rivalry to their relationship.<sup>70</sup> While both Türkiye and Saudi Arabia share a common Sunni Islamic heritage, their competition for regional leadership, differing interpretations of Islam, involvement in regional conflicts, and economic interests have contributed to a complex and, at times, adversarial relationship.

*Türkiye as a Balancing Actor between Saudi Arabia and Iran*

Türkiye's strategic positioning as a balancing actor between Saudi Arabia and Iran in the Middle East is a difficult one that has many geostrategic implications. The region has long been characterized by the rivalry between these two major powers, more recently in the Houtis conflict.

Türkiye's historical neutrality in the Saudi-Iranian power struggle positions it as a trusted intermediary. It has consistently sought to establish diplomatic ties with both nations, actively pursuing a balanced foreign policy. Türkiye's diplomatic efforts have extended to mediating in regional conflicts, such as its involvement in negotiations related to the Syrian civil war and the Yemeni crisis. Even though these efforts have been made, Türkiye is not in the best relationships with both countries, but Türkiye has historically maintained a delicate equilibrium in its relations with Iran and Saudi Arabia. The newfound cooperation between the two nations, following the 2023 Saudi Arabia-Iran deal, is threatening with a reorganization of regional alliances, potentially undermining Türkiye's strategic position. The prospects of Iran and Saudi Arabia, major rivals until now, collaborating more deeply could push Türkiye to the sidelines as a main actor. This deal also would make less likely the achievement of a nuclear armed Iran, as this is still, and will be, a major red line in Saudi Arabia foreign and security policy. If Iran wages a nuclear arsenal, the Hashemite Kingdom will seek also to cover that strategic gap, further rising the tensions in the region, and diminishing Türkiye's options in the region.

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<sup>70</sup>Isabelle León, "Qatar Diplomatic Crisis: A Political Conflict toward Regional Dominance," *Global Affairs and Strategic Studies*, n.d., <https://www.unav.edu/web/global-affairs/detalle1/-/blogs/qatar-diplomatic-crisis-a-political-conflict-toward-regional-dominance-2>.



Until now, Ankara was able to adopt a negotiating position, but now, they might be forced by the duo to be more resolute.<sup>71</sup>

It is still early to have a complete picture of the relevance of the new deal in the years to come, but after Erdoğan reelection, it is clear that Türkiye will need to make major adjustments to its foreign policy to keep up with the ever-changing dynamics of the region and maintain its position as an active and influential regional player.

#### *Turkish Role within Iran-Russian Rapprochement*

The evolving dynamics of the Middle East have witnessed a notable development in recent years: the rapprochement between Iran and Russia. Türkiye's approach to the Iran-Russian rapprochement is a delicate balancing act. On the one hand, it seeks to maintain its relations with both Tehran and Moscow, recognizing their strategic importance in a wide array of areas, namely security cooperation and regional economic dynamics, mentioned previously. On the other hand, Türkiye's interests in the wider Western alliance, particularly its NATO membership, also play a pivotal role in shaping its stance on the partnership. This regional realignment has considerable implications for geopolitical power play, energy security, and regional stability. Türkiye, because of its location, plays a strategic role in facilitating or inhibiting this entente between Moscow and Tehran. Furthermore, Türkiye's aspirations to maintain influence in the region underscore the importance of its stance on the Iran-Russian partnership.

Energy politics form a critical dimension of this rapprochement. Turkish position as a transit hub for oil and gas pipelines, including the Baku-Tbilisi-Ceyhan pipeline, gives it considerable leverage.<sup>72</sup> Russia and Iran are both major energy players, and Türkiye's role in facilitating or obstructing energy transit routes significantly affects their cooperation. Türkiye's energy needs, particularly its natural gas imports, have driven it to cultivate relations with both Iran and Russia. The ambitious TurkStream gas pipeline project, which connects Russia to Türkiye, illustrates this energy dimension.

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<sup>71</sup>Hamoon Khelghat-Doost, "The Saudi-Iranian Accord: Turkey Navigating a New Regional Landscape," *Gulf International Forum*, May 17, 2023, <https://gulffif.org/the-saudi-iranian-accord-turkey-navigating-a-new-regional-landscape/>.

<sup>72</sup>"Turkish President: Baku-Tbilisi-Ceyhan Pipeline 'One of the Most Successful Energy Initiatives,'" *Agenda.ge*, November 11, 2022, <https://agenda.ge/en/news/2022/4405>.

Additionally, Türkiye's involvement in regional conflicts, notably in Syria and Libya, can impact the Iran-Russian relationship, so one alignment with one or both of these powers in regional conflicts can either bolster or challenge their partnership. For instance, Türkiye's strategic interests in Syria have intersected with the Iran-Russian alliance, primarily in the context of the Syrian civil war. While Türkiye has supported opposition groups, it has simultaneously engaged in diplomacy with Iran and Russia, leading to initiatives such as the Astana process. This dual approach underscores Türkiye's pragmatic pursuit of regional stability.

Nonetheless, Türkiye's role in the Iran-Russian rapprochement is not without challenges. Balancing relations with two influential actors can be delicate and competing interests may arise. Moreover, its ties with the Western alliance, particularly NATO, present a potential dilemma as it navigates its regional partnerships. Türkiye's strategic interests, coupled with its diplomatic ambitions, have positioned it as a pivotal actor within the Irani-Russian-Turkish triangular relationship, with far-reaching implications for the balance of power in the Eurasian region and beyond. As a key player in the Middle East, Türkiye's approach will continue to impact the evolving landscape of this strategic partnership, underscoring its relevance in the region's intricate geopolitics. Understanding the nuances of Türkiye's role is essential for comprehending the broader dynamics of the Middle East.

### 3. TÜRKIYE'S OWN POWER PROJECTION

The first two Chapters of this report have analyzed, respectively, Türkiye's positioning towards its Western and Eastern sides, as part of the pivotal nature of the country, derived from its geography. Additionally, Türkiye also takes geopolitical advantage of its location in the Anatolian peninsula for expanding spheres of influence. There are two transversal dimensions for power projection which Türkiye exploits to its favor, and will likely continue to do so in its consolidation as a medium regional power in the medium to long term: energy and participation in ongoing conflicts, as has been anticipated in the introduction.

As a result of the increasingly significant role that energy security plays in international dynamics, and given that it has always been a vital interest for Türkiye to ensure energy supply (a condition, in turn, based on its geography), it is natural that Ankara will take advantage of this alignment between domestic and international security concerns for its power projection strategy. Conversely, Türkiye does not remain oblivious to its volatile and conflictual neighborhood. In that sense, conflicts arising in the Southern Caucasus, Syria, Ukraine, and Israel are addressed in the present Chapter, from a Türkiye strategic standpoint.

In particular, the Kurdish issue deserves thorough study, given the intertwined domestic and foreign policy outcomes for Türkiye as it manages the historical controversy in the present day. Inevitably, social, political and security-related decisions adopted on the matter in the present will have repercussions in the future of Türkiye as it advances its goals of becoming a regional power. Hence, a prospective analysis comprising three different scenarios in a five to ten years span is included in this Chapter.

#### 3.1. Türkiye as an Energy Hub

In the aforementioned context of geopolitical competition over scarce energy resources, the role that these commodities have in Türkiye's power projection is analyzed in this section of the report. Türkiye's two-sided geostrategic positioning, on the one hand, is of relative disadvantage as an energy-deficient nation.<sup>73</sup> This lack of resources leads Türkiye towards elaborating a strategy for ensuring uninterrupted and stable supply as a matter of vital interest. On the other hand, Türkiye is located in a region adjacent to approximately 60% of the world's

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<sup>73</sup>Michael Klare, *Rising Powers, Shrinking Planet: The New Geopolitics of Energy* (New York: Metropolitan Books, 2008).

proven oil and natural gas reserves.<sup>74</sup> Thus Ankara is positioned as a key transit country between energy-deficient European countries, and energy-surplus states of the South Caucasus (e.g. Azerbaijan), the Middle East (e.g. Oman, in light of the recent deal reached between both parties), and Central Asia (e.g. Turkmenistan), offering the country a unique opportunity to become an energy hub.

In turn, this position would offer Türkiye the geopolitical leverage it needs to present itself as a reliable mediator between its two neighboring regions (and the East and West, more broadly), and thus further advance its placement as a medium regional power in the medium to long term. This time frame is taken considering political, logistical factors involved in the development of the necessary infrastructure that enables oil and natural gas trade, throughout the entire process from extraction, to processing, to storage, to transportation. At the same time, the present circumstances of energy security dynamics present Türkiye with an optimal context for bolstering its power projection by becoming an energy hub, for at least two reasons. First, in light of the Russian invasion of Ukraine, actors formerly heavily reliant on Russian fossil fuels (European countries such as Poland, Germany, Italy, among others)<sup>75</sup> share with Türkiye the concern for diversification of supply, taking Russia as an unreliable and hostile actor. Second, Türkiye's role as an energy hub based on transit pipelines is aligned with sustainability concerns as a priority in energy security policies.

#### *Resources, Demand, Transit and Supply Dynamics*

The current state of affairs of demand, supply and transit dynamics of energy resources in Türkiye is explained by its energetic profile as an energy-deficient country. Türkiye's domestic sources for oil and natural gas (the country's two most demanded commodities) are very limited, to the extent that its oil and natural gas production constitute a mere 7.4% and 0.7%, respectively, of the country's total energy production. This capacity is evidently not enough to meet the combined 60.8% that these commodities represented for Türkiye's primary energy consumption levels in 2021.<sup>76</sup> The lack of sufficient energy resources of its own makes

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<sup>74</sup>Republic of Türkiye Ministry of Foreign Affairs, *Türkiye's international energy strategy*, n.d., <https://www.mfa.gov.tr/turkeys-energy-strategy.en.mfa>

<sup>75</sup>Statista Research Department, "Dependence on Russian Gas in Europe 2021, by Country," July 2022, <https://www.statista.com/statistics/1201743/russian-gas-dependence-in-europe-by-country/>.

<sup>76</sup>EIA (U.S. Energy Information Administration), *Country Analysis Brief: Türkiye*, 2023, [https://www.eia.gov/international/content/analysis/countries\\_long/Turkiye/turkiye.pdf](https://www.eia.gov/international/content/analysis/countries_long/Turkiye/turkiye.pdf).

Türkiye heavily reliant on imports and foreign suppliers to meet its primary energy consumption demand.

Taking availability and affordability as two main dimensions of energy security analysis,<sup>77</sup> Türkiye's dependence on external supply entails a risk for its own energy security prospects. This is because exposure to geopolitical conflicts in energy-surplus neighboring regions may alter access to energy resources; likewise, Türkiye's energy dependence is *vulnerable* to price fluctuations in international energy markets.<sup>78</sup>

Further challenges are presented for Türkiye as its total energy consumption rises, following population and economic growth.<sup>79</sup> Türkiye has engaged in several contractual agreements with neighboring energy-surplus actors through BOTAŞ Petroleum Pipeline Corporation (BOTAŞ) for meeting its domestic energy demand. The attached investments to these projects, however, transcend the logic of satisfaction of internal consumption needs. Though Türkiye manifestly intends to contribute to regional and global energy security as a matter of energy and foreign policy – thus implying a mediating role for mitigating the geopolitical tensions in the region that affect energy security dynamics – the international strategy ought to be accompanied by risk-reduction measures at domestic level. Engaging in several investment and infrastructure projects is within this domestic realm of actions that have been taken by the Turkish government to reduce the inherent risks of import dependency.

Concretely, the most relevant long-term contracts (LTCs) are the ones held with Russia's Gazprom, the Azerbaijan Gas Supply Company (AGSC), and Iran's National Iranian Gas Company (NIGC). Provision of resources with these actors is channeled through several pipeline routes, namely BlueStream and TurkStream Natural Gas Pipelines with Russia; Baku-Tbilisi-Erzurum Natural Gas Pipeline and Baku-Tbilisi-Ceyhan Crude Oil Pipeline (BTE and BTC, respectively) with Azerbaijan; and the Iran – Türkiye Natural Gas Pipeline.

The transversal nature of these supply pipelines is the defining characteristic of transit dynamics in Türkiye' energy profile. In this sense, alongside the aforementioned pipelines,

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<sup>77</sup>Benjamin Sovacool and Ishani Mukherjee, "Conceptualizing and Measuring Energy Security: A Synthesized Approach," *Energy* 36, no. 8 (August 2011): 5343–55, <https://www.sciencedirect.com/science/article/pii/S0360544211004294>

<sup>78</sup>Ole Gunnar Austvik, "The Energy Union and Security-of-Gas Supply," *Energy Policy* 96 (September 2016): 372–82, <https://www.sciencedirect.com/science/article/pii/S0301421516302968>

<sup>79</sup>International Energy Agency. "Turkey 2021. Energy Policy Review". IEA, March, 2021, <https://www.iea.org/reports/turkey-2021>

other notable infrastructure projects include the Türkiye-Greece Natural Gas Interconnector (ITG), the Trans-Adriatic Pipeline (TAP), the Trans-Anatolian Natural Gas Pipeline Project (TANAP), and the Kirkuk-Yumurtalik Crude Oil Pipeline (Iraq-Türkiye Crude Oil Pipeline).

In the transition from being a *transit corridor* (a passive position in the regional geopolitics of energy) to an *energy hub* (entailing a more assertive and influencing role in its neighborhood and beyond, hence fulfilling foreign policy objectives),<sup>80</sup> Türkiye engages in the use of ‘pipeline politics’ as leverage in mediating current energy disputes in its surroundings.

#### *Evolution of Current Energy Disputes and Relation with Other Actors*

Such regional conflicts with an impact on Turkish energy geopolitics are the following. Towards the Eastern Mediterranean, Türkiye faces divergent sovereignty claims over Cyprus and particular resource-rich areas of the Aegean Sea against Greece, with entailing differences on the exercise of maritime rights and exploitation of EEZs, as has been addressed already. As it was mentioned in Chapter 1, Greece claims that it has exclusive rights for exercise of military, political, or economic control or influence over any island upon which it exercises sovereignty; whereas Türkiye believes Greece is using the small islands to expand its maritime border and conduct economic or military activities in Turkish waters.<sup>81</sup>

In the chessboard of pipeline politics, Türkiye holds leverage over Greece, given that it controls the flow of natural gas coming from the Caspian Sea into the Hellenic Republic through the ITG and TAP. Türkiye’s assertiveness in its interactions with Greece is also displayed in Cyprus, where interests over cultural and ethnic influence of both parties collide. Energy is an added dimension to the front. Just as Türkiye does not recognize certain Greek claims over EEZs, it exercised the same approach when the discovery of large gas reserves offshore Cyprus and within the latter’s EEZ was announced in 2018. Türkiye’s means of enforcement of its claims over the discovery sites<sup>82</sup> reflect its strong standing on energy-related contentious issues.

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<sup>80</sup>Mert Bilgin, “Turkey’s Energy Strategy: What Difference Does It Make to Become an Energy Transit, Corridor, Hub or Center?,” *UNISCI Discussion Papers*, no. 23 (2010): 113–28, <https://www.redalyc.org/articulo.oa?id=76715004007>.

<sup>81</sup>Giorgi Koberidze, “Disputed Islands in the Aegean Sea: The Ongoing Conflict between Greece and Turkey,” *The Foreign Policy Council*, January 18, 2023, <https://foreignpolicycouncil.com/2023/01/16/disputed-islands-in-the-aegean-sea-the-ongoing-conflict-between-greece-and-turkey/>.

<sup>82</sup>By sending military vessels and unilaterally starting the drilling of hydrocarbons. See

Further challenges arise as other security and sovereignty-related disputes in neighboring countries confront Türkiye with other Eastern Mediterranean regional players. The possibility of Turkish-Lebanese cooperation in energy security common challenges, for instance, is hindered by regional turmoil deriving from the Syrian civil war (since onshore pipelines would necessarily have to go through Syrian territory to reach Türkiye, unnecessarily exposing them to open violence).<sup>83</sup>

A second controversy relates to the international recognition of either the UN-endorsed transitional Government of National Unity (GNU) based in Tripoli, or the Osama Hammad-led Government of National Stability located in Tobruk, where the Libyan House of Representatives currently operates; it leads to a clash between Türkiye (which supports the former) and Egypt (which backs the latter as the legitimate authority of Libya). The latest rapprochement between the two parties throughout 2023,<sup>84</sup> however, takes place as Türkiye assumes the recent suspension of an energy exploration deal signed with the Tripoli government in October 2022. The agreement was reached within their bilateral delimitation of maritime boundaries over waters also disputed by Greece and Egypt.<sup>85</sup>

Relaunch of Türkiye-Egypt relations point out Türkiye's realpolitik if regional cooperation serves its ultimate goals of power projection through energy security dynamics. In terms of pipeline geopolitics, this pragmatic approach is translated into enhanced energy cooperation, as Turkish Foreign Minister Mevlüt Çavuşoğlu manifested intention towards reaching a long-term Liquefied Natural Gas (LNG) supply agreement with its Egyptian counterpart – which would probably be conducted through the extension of the Arab Gas Pipeline, which is set to reach the Turkish city of Kilis in Phase III of its execution.<sup>86</sup> Lastly, increasing proximity between Türkiye and Egypt could come as a means for Ankara to

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Stephen Delaney, “Will a Hydrocarbon Discovery in the Eastern Mediterranean Bring Peace to Cyprus?,” *Geopolitical Monitor*, January 14, 2020, <https://www.geopoliticalmonitor.com/a-hydrocarbon-discovery-in-the-eastern-mediterranean-could-bring-peace-to-cyprus/>.

<sup>83</sup>R. Salameh and R. Chedid, “Economic and Geopolitical Implications of Natural Gas Export from the East Mediterranean: The Case of Lebanon,” *Energy Policy* 140 (May 2020), <https://www.sciencedirect.com/science/article/pii/S0301421520301257>

<sup>84</sup>Dorian Jones, “International Report - Newly Reconciled, Turkey and Egypt Could Be a Force for Stability in Africa,” *RFI*, July 29, 2023, <https://www.rfi.fr/en/podcasts/international-report/20230729-turkey-egypt-diplomatic-relations-libya-ethiopia>.

<sup>85</sup>Reuters, “Libyan Court Suspends Energy Deal with Turkey,” *Reuters*, January 10, 2023, <https://www.reuters.com/business/energy/libyan-court-suspends-energy-deal-with-turkey-2023-01-10/>.

<sup>86</sup>Ahram Online Staff, “Egypt, Turkey FMS Agree to Upgrade Ties: Turkish Daily Sabah,” *Ahram Online*, March 20, 2023, <https://english.ahram.org.eg/NewsContent/1/1234/492070/Egypt/Foreign-Affairs/Egypt-Turkey-FMs-agree-to-upgrade-ties-Turkish-Da.aspx>.

counterbalance Cairo's participation in the EMGF, a platform in which trilateral cooperation between Egypt, Greece and Cyprus is enhanced precisely over energy security concerns.<sup>87</sup>

Facing its Eastern side, Türkiye finds itself reliant on gas imports from Russia. In the framework of its transition towards an energy hub, Türkiye has made it a policy priority to reduce its vulnerability by diversifying its supply sources and bolstering domestic energy production. Notably, these energy security concerns have been translated into an effective reduction on import dependency for Russian natural gas: if in 2010, Russian gas constituted up to 64% of Turkish gas consumption,<sup>88</sup> by 2022 Russia accounted for only 39% of the total Turkish natural gas imports.<sup>89</sup> The role of pipeline politics becomes evident in the particular Russo-Turkish energy relations, for these resources are provided by Russia through BlueStream and TurkStream pipelines across the Black Sea. Decoupling from Russian energy dependency is consequently a vital step in Türkiye's transformation into an energy hub, considering at least two strategic aims.

First, in the already addressed context of the Ukrainian war, it is in the interest of Türkiye not to be perceived as a collaborator with Russia in circumventing sanctions imposed by the European Union on Russian fossil fuels.<sup>90</sup> Second, this interest is shared by Türkiye with energy-surplus countries in the South Caucasus and Central Asia (concretely, Azerbaijan and Turkmenistan, respectively), since they are competitors to Russia in gas production.

#### *Türkiye in the Strategy of the European Union*

Turkish-EU interests in energy security are aligned across several strategic priorities: decoupling from Russia as a natural gas provider, diversification of supply, and transition to the use of more sustainable energy resources; all of which are pillars of the REPowerEU Plan

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<sup>87</sup> Sami Hegazi, "Egypt, Greece, and Cyprus Stress Coordination on Gas, Regional Issues," *Daily News Egypt*, September 23, 2023, <https://www.dailynewsegypt.com/2023/09/23/egypt-greece-and-cyprus-stress-coordination-on-gas-regional-issues/>.

<sup>88</sup> Mert Bilgin, "Energy and Turkey's Foreign Policy: State Strategy, Regional Cooperation and Private Sector Involvement," *Turkish Policy Quarterly* 9, no. 2 (Summer 2010): 81–92, [https://www.esiweb.org/pdf/esi\\_turkey\\_tpq\\_vol9\\_no2\\_mert-bilgin.pdf](https://www.esiweb.org/pdf/esi_turkey_tpq_vol9_no2_mert-bilgin.pdf).

<sup>89</sup> EIA, *Country Analysis Brief: Türkiye*, 2023, [https://www.eia.gov/international/content/analysis/countries\\_long/Turkiye/turkiye.pdf](https://www.eia.gov/international/content/analysis/countries_long/Turkiye/turkiye.pdf).

<sup>90</sup> Yeygeniya Gaber, "Turkey Can Become an Energy Hub-But Not by Going All-in on Russian Gas," *Atlantic Council*, December 7, 2022, <https://www.atlanticcouncil.org/blogs/turkeysources/turkey-can-become-an-energy-hub-but-not-by-going-all-in-on-russian-gas/>.



by the European Commission. In fact, the EU has openly embraced cooperation with Türkiye along these lines of action, with particular emphasis on decarbonization efforts.<sup>91</sup>

As the EU shows interest in reaching Southern Caucasus and Central Asian energy resources<sup>92</sup> as part of its own energy security strategy, Turkmenistan and Azerbaijan rely on Türkiye for becoming the bloc's alternative energy suppliers through the Trans-Caspian Pipeline Project (pending execution), a part of the Southern Gas Corridor (SGC).<sup>93</sup>

#### *Upcoming Steps: Securing Access and Positioning as an Energy Hub*

In the hostile environment of competition over scarce energy resources already described, upcoming steps for Türkiye to become an energy hub include a threefold approach. First, discoveries in the Sakarya site in 2020, within Türkiye's EEZ in the Black Sea, could be exploited to partially cover Türkiye's domestic needs - further reducing import dependency. Optimistic prospects even point out that Sakarya development has the potential to contribute around a quarter of Türkiye's future energy demand,<sup>94</sup> conditional to Turkish National Petroleum Company's (TPAO) capacity for drilling. Successful exploration of Sakarya would also enhance Türkiye's position in the highly competitive Black Sea basin, whose total reserves for undersea gas are unknown,<sup>95</sup> thus generating high expectations and fostering continuous exploration. Türkiye would not be, then, a mere transit route for foreign energy resources, but could start incorporating its eventual surplus (however small) into the export pipeline network already in place.

The second approach follows a trend in global energy security dynamics: concerns for sustainability in the production, distribution, and consumption of resources. Türkiye is at a privileged position, since its renewable energy production in 2021 accounted for 52.6% of the

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<sup>91</sup>European Commission. "Joint Communication to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions," May 18, 2022, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52022JC0023>

<sup>92</sup> European Commission. "Gas pipeline to the EU from Turkmenistan and Azerbaijan, via Georgia and Turkey," March, 2023 [https://ec.europa.eu/energy/maps/pci\\_fiches/PciFiche\\_7.1.1.pdf](https://ec.europa.eu/energy/maps/pci_fiches/PciFiche_7.1.1.pdf)

<sup>93</sup> Anna Matveeva, "A New Opening for EU–Central Asia Relations?," *Carnegie Europe*, April 13, 2023, <https://carnegieeurope.eu/2023/04/13/new-opening-for-eu-central-asia-relations-pub-89454>.

<sup>94</sup>Ana Saez and Kishore Thamilselvan, "Can Sakarya Pave the Way for Turkey's Gas Independence?," *S&P Global Commodity Insights*, April 25, 2023, <https://www.spglobal.com/commodityinsights/en/ci/research-analysis/can-sakarya-pave-the-way-for-turkeys-gas-independence.html>.

<sup>95</sup>Aura Sabadus, "Why the Black Sea Could Emerge as the World's Next Great Energy Battleground," *Atlantic Council*, March 30, 2021, <https://www.atlanticcouncil.org/blogs/ukrainealert/why-the-black-sea-could-emerge-as-the-worlds-next-great-energy-battleground/>.

country's total production capacity.<sup>96</sup> The South Marmara Development Agency (GMKA), for instance, estimates that the Bandırma Hydrogen Valley (HYSouthMarmara), will be producing green hydrogen at the volume of 500 tons per year.<sup>97</sup> The growth of renewables is of strategic value (as acknowledged in the National Energy Policy adopted in 2017),<sup>98</sup> since diversification of the energy mix (including nuclear energy) is yet another pathway for reduction of import dependency. Türkiye can simultaneously improve its domestic energy security structure - advancing towards decarbonization of its industrial output - and take advantage of global (and particularly European) impulse to renewable energies such as green hydrogen. This transition would further enhance Türkiye's role as an energy hub, given relative easiness for transport of green hydrogen through the same pipelines that currently transport natural gas.

The third and final approach is of continuous and farther reach of the energy hub as a power projection strategy. Türkiye is determined to position itself as the mediator between Eastern civilizations (geographically and culturally speaking) and the closest Western actor (the EU). Türkiye's recent ten-year long LNG supply agreement with Oman starting in 2025 is one element of Türkiye's overarching strategy for strengthening ties individually with Gulf states, characterized by engaging in a variety of cooperation efforts.<sup>99</sup> The diplomatic use of LNG as part of a broader energy-inspired Turkish foreign policy is also exemplified by Ankara's recent long-term agreement with Bulgaria. The deal allows for Sofia to use Turkish LNG terminals in a period spanning for thirteen years, with a shared goal of decoupling from Russian energy supply.<sup>100</sup> Importantly, it remains to be seen how this deal could affect overall relations and energy trade deals between Türkiye and the EU, being Bulgaria a Member State.

### 3.2. Türkiye's Role in Ongoing Conflicts

Additionally to the strategic use of energy as a power projection method, Türkiye is involved in regional conflicts as part of its broader power projection strategy. Starting with the

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<sup>96</sup>EIA, rep., *Country Analysis Brief: Türkiye*, 2023,

[https://www.eia.gov/international/content/analysis/countries\\_long/Turkiye/turkiye.pdf](https://www.eia.gov/international/content/analysis/countries_long/Turkiye/turkiye.pdf).

<sup>97</sup>Batuhan Aca, "Turkey's Hydrogen Ambition to Provide a Sustainable Alternative Energy Supply," *Politics Today*, August 14, 2023, <https://politicstoday.org/turkey-hydrogen-sustainable-energy-supply/>.

<sup>98</sup>Republic of Türkiye Ministry of Foreign Affairs, *Türkiye's International Energy Strategy*, n.d., <https://www.mfa.gov.tr/turkeys-energy-strategy>

<sup>99</sup>Sinem Cengiz, "Deciphering the Dynamics of Türkiye-Oman Relations," *Arab News*, February 4, 2023, <https://www.arabnews.com/node/2244536>.

<sup>100</sup> Al Jazeera Staff, "Bulgaria Signs Long-Term Agreement to Use Turkish Gas Terminals," *Al Jazeera*, January 3, 2023, <https://www.aljazeera.com/news/2023/1/3/bulgaria-signs-long-term-gas-agreement-with-turkey>.

domestic management of the Kurdish issue and its implications for Turkish foreign policy, the analysis comprehensively addresses ongoing conflicts in Nagorno-Karabakh, Syria and Ukraine, and the latest Israeli-Palestinian conflict, in relation to Türkiye's increasingly assertive (yet also mediating) action in neighboring 'Eastern' regions.

*Türkiye's Internal Struggle: The Kurdish Issue*

The Kurdish issue in Türkiye, and the Middle East more broadly, has deep historical roots. Developments of the 20<sup>th</sup> century, however, have been determinant in the current state of affairs of the ever-present regional question. Concretely, the Treaty of Sèvres (1920) and the subsequent Treaty of Lausanne (1923), respectively divided the territories of the defeated Ottoman empire, and formally established borders that split Kurdish-inhabited territories between modern-day Türkiye, Syria and Iraq.<sup>101</sup>

A complex array of historical frustrations, ethnic repression, socio-economic disadvantages, and lack of opportunities<sup>102</sup> of the Kurdish population in Türkiye, among others, are breeding grounds for radicalization and surge of terrorist activity as violent means to achieve political and social aims. Specifically, the Kurdistan Workers' Party (PKK) and by extension its military wing, the People's Defence Forces (HPG), is the paradigmatic example of the extremist drift of certain Kurdish factions towards extremism and violence within Türkiye. Notwithstanding this, because of the transnational nature of the Kurdish issue (both in terms of ethnic presence in several Middle East states, and trans-border terrorist activity by affiliates and proxies as well), however Türkiye manages the matter will have regional repercussions and vice-versa. Hence Türkiye faces a domestic challenge with relevant foreign policy and power projection ramifications.

**Scenarios: How could the management of the Kurdish issue affect Türkiye's quest for increasing its regional power?**

This section will provide a prospective analysis on the impact the Kurdish issue could have on Turkish increasing regional power and, in particular, regarding the governmental management of the Kurdish question in a ten-year time frame (2023-2033), a framework that

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<sup>101</sup>Othman Ali, "The Kurds and the Lausanne Peace Negotiations, 1922-23," *Middle Eastern Studies* 33, no. 3 (July 1997): 521–34, <https://www.jstor.org/stable/4283891>.

<sup>102</sup>Ömer Taşpınar, "The Root Causes of Turkey's Kurdish Challenge," *Brookings*, February 9, 2010, <https://www.brookings.edu/articles/the-root-causes-of-turkeys-kurdish-challenge/>.

allows for political and social shifts both in Türkiye and within Kurdish peoples and yet, at the same time, permits a realistic and plausible analysis.

As mentioned above, the Kurdish issue has been securitized under Türkiye's perception. Framed as the ever-present regional ethnic question with strong political, economic and security implications, the unresolved Kurdish matter at Türkiye's domestic level remains at the same time a existential dilemma, and an obstacle to its full consolidation as a regional power in the Middle East. Following this report's overarching argument of Türkiye's pivot to the East, three scenarios are presented as response to the main issue: how could the management of the Kurdish issue affect Türkiye's quest for increasing regional power? Each scenario has a different degree of plausibility and derives in distinct consequences for Türkiye's power projection strategy.

For the purposes of this analysis, the Kurdistan Workers' Party (PKK) and the People's Defence Forces (HPG) will be labeled as terrorist groups, following the criteria of the U.S. Bureau of Counterterrorism (Department of State),<sup>103</sup> and the Turkish Ministry of Foreign Affairs.<sup>104</sup>

The development of the Kurdish issue within Türkiye depends on a series of *drivers*, that will also determine ultimately what Turkish regional power is. The most important ones are the following: *i*) the repression exerted from the government against Kurds, that may vary from ethnic cleansing to social or political marginalization, dependent on various factors such as the PKK and the HPG activities or the political sign of the government; *ii*) the very insurgent activities of non-state actors, notably these two, which may vary from terrorist actions within Türkiye to crescent confrontation in Syria, from which they may launch campaigns against the Turkish-Syrian border; in fact, Turkish military operations in Syria are ultimately aimed to disarticulate the terrorists groups with potential action in Türkiye, and this presence has been enhanced or reduced according to the threats faced and, therefore, may suffer changes through this ten-year period; *iii*) the intention of the Turkish political class and society, both intertwined, which has changed over time; for instance, Erdoğan entered his first mandate reforming the educational system and allowing Kurdish media, and has even signed several ceasefires with the PKK, although in 2015 several of these reforms were reversed, whereas the CHP, the current main opposition party, is more inclusive towards Kurds and will run against Erdoğan

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<sup>103</sup>Foreign Terrorist Organizations, U.S. Department of State Bureau of Counterterrorism, n.d., <https://www.state.gov/foreign-terrorist-organizations/>.

<sup>104</sup>Republic of Türkiye Ministry of Foreign Affairs, PKK, n.d., <https://www.mfa.gov.tr/pkk.en.mfa>.

in the following 2028 presidential elections;<sup>105</sup> iv) Kurdish claims, which have varied along history and differ among the current Kurdish population,<sup>106</sup> will also determine Turkish management of the issue, since discrete claims like public representation or social reforms will not have the same effect on the Turkish government as deeper claims, such as self-determination. It is relevant to recall that this *driver* is not related to what the Turkish government will concede or is willing to concede to Kurds, but strictly to what their claims are.

In addition to these *drivers*, several *secondary uncertainties* have been identified, having less influence on the future but still relevant: i) the Syrian civil war, a fundamental field both for Kurdish terrorists activities and for Turkish military operations, would be active for twenty two years at the end of this prospective time-frame, a wide period of time for current warfare, therefore putting an end to the conflict from any side should not be seen as unlikely and would determine Kurdish actions and Turkish reaction; ii) closely related to the previous uncertainty, the refugee influx from Syria into Türkiye, as previously studied, has suffered variations since the beginning of the conflict and has been a source of challenge for Türkiye, therefore its size or potential links with PKK or HPG will determine how Türkiye acts and, consequently, its role in the region; iii) the 2028 presidential elections, falling in the middle of the time scope of this analysis and intrinsically linked with the third *driver*, will likely determine what AKP and CHP do, both during the electoral campaign and after the elections, although changes in each party's politics are not exclusively dependent on the elections.

Apart from the aforementioned *drivers* and *secondary uncertainties*, some *stable trends* have been observed, such as the demographic weight of Kurdish population within Türkiye, being now around sixteen million and amounting to 20% of the population,<sup>107</sup> numbers that will increase in the future, as well as their almost unanimous support to regionalist parties such as the Peoples' Democratic Party (2014 and 2018 elections) or the Peoples' Equality and Democracy Party (2023 elections).<sup>108</sup>

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<sup>105</sup>Karwan Faidhi Dri, "What Can Kilicdaroglu Offer Turkey's Kurds?," *RUDAW*, March 11, 2023, <https://www.rudaw.net/english/middleeast/turkey/110320231>.

<sup>106</sup>Kali Robinson, "Turkey's Growing Foreign Policy Ambitions," *Council on Foreign Relations*, July 11, 2023, <https://www.cfr.org/background/turkeys-growing-foreign-policy-ambitions>.

<sup>107</sup>Center for Preventive Action, "Conflict Between Turkey and Armed Kurdish Groups," *Council on Foreign Relations Global Conflict Tracker*, August 8, 2023, <https://www.cfr.org/global-conflict-tracker/conflict/conflict-between-turkey-and-armed-kurdish-groups>.

<sup>108</sup>Republic of Türkiye Supreme Electoral Council, *Decision 2023/1091 regarding the determination of the final results of the Presidential Election held on Sunday, May 14, 2023*, pg. 5, <https://www.ysk.gov.tr/doc/karar/dosya/45639002/2023-1255.pdf>.

Lastly, a ‘*black swan*’ to be considered is the launching of an extermination operation against all ethnic Kurds by the Turkish government. This event is highly unlikely given the previously mentioned Kurdish demographic weight and the political decisions undertaken by successive governments, none of which was aimed at ethnically destroying Kurdish population. On the other hand, a ‘*gray rhino*’ has been identified: because the Kurdish issue is of transnational nature, how do states in which there are Kurdish minorities manage domestically the matter (Iran, Syria and Iraq) could threaten Türkiye’s potential repressive actions - even by proactively confronting possible repression of Turkish Kurds. Finally, a ‘*silver lining*’ can be also highlighted: the improvement of Kurdish conditions in fields such as education and political representation could lead the Kurdish population to support Türkiye’s quest for power in the region, fostering its links with Kurdish-majority lands in the Middle East.

*Turkish multifaceted repression of Kurds reinforces its position in the region*

The first possible scenario that could occur is that Türkiye develops a comprehensive repression on the Kurdish population, eliminating an alleged domestic hindrance to regional grandeur and allowing for power expansion. Consequently, the domestic strengthening of Türkiye results in a more convincing power projection in its region and abroad. In order to reach this scenario, the following must happen:

Drivers	VIOLENCE AGAINST KURDS WITHIN TURKEY	INSURGENT ACTIVITIES OF PKK AND AFFILIATES	POLITICAL INTENTION	CLAIMS BY TURKISH KURDS
Possibility 1	Multidimensional violence	Increased actions in Türkiye	Elimination of Kurdish aspirations	Independent state
Possibility 2	Stabilization of current violence	Increased border pressure from Syria and Iraq	Tolerance towards Kurdish issue	Semi-autonomous region
Possibility 3	Restraint in violence	Increased presence of Türkiye in Syria	Openness by AKP or CHP	Increased political representation

In this first scenario, *i*) Kurdish population is presented as the main obstacle for the magnificence Türkiye is thriving for, since it constitutes an existential concern deeply related to the exercise of sovereign authority and territorial integrity. The government, likely under Erdoğan's rule, more authoritarian and nationalist, therefore undertakes a campaign of social marginalization, political isolation and ethnic displacement and cleansing. In this context, both as a cause and consequence of this violence, *ii*) Kurdish terrorist groups, notably the PKK and its military wing, the HPG, continue their actions in Syria, but increase their activity in Türkiye too, in particular in the southeast provinces of Sirnak, Hakkari and Diyarbakir,<sup>109</sup> but also in greater urban areas such as Ankara or Istanbul. Witnessing these events, *iii*) Turkish political class and society do not aspire to accommodate Kurdish aspirations, not even to tolerate them, but to eradicate them, disregarding the side of the government; although, as previously mentioned, an AKP's authoritarian rule is more likely to undertake this rhetoric.<sup>110</sup> Finally, *iv*) in times of such a conflict, Kurdish claims do not aim to attain an independent or autonomous government, but to increase their political representation and to put an end to the marginalization and ethnic discrimination campaign.

*Turkish shift from hard power to a more democratic influential approach strengthens its regional position*

Another possible scenario is that Türkiye downgrades its violent treatment of the Kurdish population, as part of a broader social and political shift towards influence through more democratic means. Türkiye increases its regional prevalence through a more diplomatic, dialoguing approach, substituting its hard power by an increasing soft power, emerging new spheres of influence and increasing its legitimacy towards the West. For this scenario to happen, the following circumstances must exist:

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<sup>109</sup>International Crisis Group, "Türkiye's PKK Conflict: A Visual Explainer," September 28, 2023, <https://www.crisisgroup.org/content/turkiyes-pkk-conflict-visual-explainer>.

<sup>110</sup>Serhat Tutkal, "As Elections Approach in Turkey, Erdoğan's Anti-Kurdish Rhetoric Fuels Repression," *Kurdish Peace Institute*, April 27, 2023, <https://www.kurdishpeace.org/research/democracy/as-elections-approach-in-turkey-erdogans-anti-kurdish-rhetoric-fuels-repression/>.

Drivers	VIOLENCE AGAINST KURDS WITHIN TURKEY	INSURGENT ACTIVITIES OF PKK AND AFFILIATES	POLITICAL INTENTION	CLAIMS BY TURKISH KURDS
Possibility 1	Multidimensional violence	Increased actions in Türkiye	Elimination of Kurdish aspirations	Independent state
Possibility 2	Stabilization of current violence	Increased border pressure from Syria and Iraq	Tolerance towards Kurdish issue	Semi-Autonomous region
Possibility 3	Restraint of violence	Increased presence of Türkiye in Syria	Openness by AKP or CHP	Increased political representation

In this second scenario, *i)* the Turkish government does not exert violence against Kurdish population, but changes its strategy to include them within Turkish political and social life, applying less restrictive measures against Kurdish politicians and society, but equally fighting and judging terrorists which, in this scenario, are clearly differentiated from Kurdish population by the government and seen as a threat for them. Within this new framework, *ii)* pressure on the Syrian and Iraqi borders can be expected, in particular in terms of increased migration and refugee influx. Besides, the PKK or its affiliated groups will seize the moment to increase pressure from Syria, seeking greater political unity among Kurdish-majority regions, but reducing their terrorist activity within Türkiye. Due to this more secure environment, *iii)* the Turkish political class showcases a more friendly intention towards the Kurdish population, in line with the previously mentioned strategy, according to which Kurdish press, politicians and people are embraced by the majority of Turkish society.

This shift in the political intention may come through different ways: *a)* a potential CHP's victory in the 2028 presidential elections will likely bring a new, friendly attitude towards Kurds; *b)* Erdoğan will likely face a strong CHP in the elections, so he will try to ensure as much votes as possible, probably by adapting the Kurdish cause within Turkish nationalism and, as he did at the beginning of his first mandate,<sup>111</sup> implementing some non-

<sup>111</sup>Faidhi Dri, "What Can Kilicdaroglu Offer Türkiye's Kurds?," <https://www.rudaw.net/english/middleeast/turkey/110320231>.



political measures to improve Kurdish conditions; *c)* apart from elections, other factors that must not be underestimated are the international community’s pressure, the increasing globalization and social interactions, that may induce Turkish society and, therefore, politicians, to adopt a closer attitude towards Kurds. Because of this new attitude, *iv)* Kurdish claims involve self-governing competences, as it has usually been, rather than a sound independent state or discrete political reforms. Even if not entire competences, further political participation and representation in the government can be expected.

*Turkish passivity towards the Kurds impedes its rising*

Lastly, as a half-way between the first and the second scenarios, a third outcome is plausible. Here, internal and external violence and social conditions contribute to the mismanagement of the Kurdish issue, constituting this the first security concern and an almost insuperable hindrance to Turkish rising. All these factors will contribute to situate Türkiye in a passive role, deteriorating its regional power. For this to occur, the following conditions must be met:

Drivers	VIOLENCE AGAINST KURDS WITHIN TURKEY	INSURGENT ACTIVITIES OF PKK AND AFFILIATES	POLITICAL INTENTION	CLAIMS BY TURKISH KURDS
Possibility 1	Multidimensional violence	Increased actions in Türkiye	Elimination of Kurdish aspirations	Independent state
Possibility 2	Stabilization of current violence	Increased border pressure from Syria and Iraq	Tolerance towards Kurdish issue	Semi-Autonomous region
Possibility 3	Restraint of violence	Increased presence of Türkiye in Syria	Openness by AKP or CHP	Increased political representation

In this last scenario, likely occurring within an inflationary economic framework,<sup>112</sup> *i*) violence against the Kurdish population from the Turkish government follows the same path, neither fostered nor restrained, but sticks to a stable pattern of political repression, marginalization and military fighting against the PKK and its affiliates. Therefore, Turkish intervention in Syria, efforts to assimilate Kurdish population with terrorists, and the PKK's and its affiliates' activities continue in Türkiye, along with a likely armistice in this ten-year time frame. Due to this continuation, *ii*) the PKK and the HPG increase pressure on the Syrian-Turkish border, both by terrorist actions and by fostering migration flows, likely forcing Türkiye to defend itself and to dedicate human and economic resources to its southeastern border. This stagnation of violence, *iii*) will end up in social exhaustion and tedium in regards to the Kurdish issue. After years of conflict and polarization, where no clear solution appears in the horizon, Turkish society starts to feel disaffected and indifferent towards the management of the Kurdish question, and so Turkish politicians, a fact that will be leveraged by the PKK and its affiliates as previously mentioned and that, lastly, *iv*) will provoke that Kurds increase the magnitude of their claims, even calling for an independent state of their own, being this through violent or peaceful means, which will find, as it is obvious, Turkish opposition.

#### *Conclusion of scenario building*

After the prospective study of how Turkish management of the Kurdish issue can affect its increasing regional power, the three studied scenarios can be framed as an inverse triangle. The top-right corner, the first plausible scenario, presents a Türkiye whose increasing grandeur is partially based on a comprehensive, multidimensional repression of the Kurdish population, whose elimination would entail a catalyst for growth within a nationalist and authoritarian framework. The top-left corner, the second plausible scenario, portrays an equally growing Türkiye whose growth is based upon soft power and public diplomacy, affected by international pressure and political openness, where new areas of influence appear particularly in the West. Lastly, the bottom corner, the third plausible scenario, showcases a stagnated situation that leads to a disaffected, passive and exhausted Türkiye, whose attitude towards the Kurdish issue is strictly tolerant, almost indifferent. This fact will be employed by the PKK and its affiliates to gain leverage and advance their agendas, provoking a deterioration of Turkish power in the region.

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<sup>112</sup>International Monetary Fund, "Republic of Türkiye," <https://www.imf.org/en/Countries/TUR>.

In all of them, the four selected *drivers* play an essential role, and so it is easily seen that the management of the Kurdish question will be a fundamental cornerstone of Turkish future power projection. However, the most plausible scenario is the first one. In light of the Turkish pivot to the East, as it has been sustained throughout this report, it is likely that Erdoğan (and Türkiye with him) keep framing the Kurdish issue within a nationalist debate, aiming to solve the question by an iron fist.

#### *Role of Iraqi Government and the Kurdish Regional Government*

The Kurdish issue analyzed from an Iraqi domestic standpoint differs from Türkiye's approach because, unlike the latter, autonomy has been granted to the Kurdish population through constitutional recognition of the Kurdish Regional Government (KRG) as a legitimate political entity.<sup>113</sup> This different legal configuration has repercussions in the common challenges confronted by Iraq, Syria and Türkiye in regards to PKK activities across the Iraqi-Syrian border.

Complex ties relate, for instance, the Kurdistan Democratic Party (KDP, main ruling party of the KRG), with Türkiye because of their common rejection of PKK - albeit on different foundations. While the KDP is more concerned with the preservation of the Iraqi-Syrian border as a matter of asserting the KRG's own sovereign authority, the PKK endorses a pan-Kurdish revolutionary dogma that dismisses border divisions.<sup>114</sup> Therefore, cooperation between the KRG and Türkiye in the fight against the PKK is circumscribed to their shared strategic interest. This situational partnership is a characteristic foreign policy tenet of Ankara. On the contrary, it would not be reasonable for Türkiye to increase cooperation with an officially autonomous Kurdish region - such a partnership would undermine the Turkish denial of self-government for Kurds within its own borders.

The current unstable condition of the Iraqi government, on the other hand, is taken advantage of by Türkiye to unilaterally launch counterterrorism operations, not necessarily counting with Iraq's consent. A case in point is Operation Claw-Lock, launched in April 2022, which targeted PKK fighters in northern Iraq. This lack of coordination (and implied lack of

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<sup>113</sup>Harith Hasan and Kheder Khaddour, "The Making of the Kurdish Frontier: Power, Conflict, and Governance in the Iraqi-Syrian Borderlands," *Carnegie Endowment for International Peace*, March 2021, p.1, [https://carnegieendowment.org/files/Hasan\\_Khaddour\\_XBORDER\\_Kurdish\\_Frontier.pdf](https://carnegieendowment.org/files/Hasan_Khaddour_XBORDER_Kurdish_Frontier.pdf).

<sup>114</sup>Ibid.

respect for Iraqi sovereignty),<sup>115</sup> further advances the argument that Türkiye acts on its own behalf and for its own benefit as a matter of foreign policy and power projection strategy in the region.

### *Syrian Refugees Influx into Türkiye*

Since the beginning of the Syrian war, around 4 million refugees have arrived in Türkiye, hosting the largest refugee population in the world (see image below, showing the ten-year trend in the number of Syrian refugees in Türkiye).<sup>116</sup> During the first period of war, refugees' integration was not a priority for Turkish officials, since the conflict was expected to end after a short period of time, but shortly after that and in front of the increasing influx of refugees, the government decided to relocate them offering some economic incentives. In fact, between 2021 and 2022, the cost of hosting them is estimated to be around \$50bn.<sup>117</sup> Just as the conflict was expected not to last this long, initially this influx was predicted to have a positive impact on fields such as labor and economic development, although it ended up increasing unemployment rates and suspending existing wages.

The situation of Syrian refugees in Türkiye is precarious, although the government aims to provide them with basic sanitation and education, with the assistance of the European Union Facility for Refugees in Türkiye (FRIT).<sup>118</sup> This situation was exacerbated by COVID-19 and, moreover, by the earthquakes that occurred in Southern Türkiye in February, exactly where the majority of refugees are located, which detonated a process of internal displacement. In spite of this, Turkish response to the Syrian crisis has been, and still continues to be, short sighted, meaning that, although social, health and labor measures have been effectively undertaken, they have not aimed at long-term integration, but at solving short-term problems.<sup>119</sup> To illustrate this, the success of initiatives such as 'Promoting Integration of Syrian Kids into the

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<sup>115</sup>Amina Ismail and Lena Masri, "As Turkey Intensifies War on Kurdish Militants in Iraq, Iraqi Are Civilians Suffering," *Reuters*, October 10, 2023, <https://www.reuters.com/investigates/special-report/iraq-turkey-airstrikes/>.

<sup>116</sup>"Türkiye," *European Civil Protection and Humanitarian Aid Operations*, October 9, 2023, [https://civil-protection-humanitarian-aid.ec.europa.eu/where/europe/turkiye\\_en](https://civil-protection-humanitarian-aid.ec.europa.eu/where/europe/turkiye_en).

<sup>117</sup>Semih Tumen, "The Case of Syrian Refugees in Türkiye: Successes, Challenges, and Lessons Learned," *Background Paper to the World Development Report 2023: Migrants, Refugees, and Societies*, April 2023, pgs. 3-6, <https://thedocs.worldbank.org/en/doc/>.

<sup>118</sup>"Türkiye," *European Civil Protection and Humanitarian Aid Operations*, [https://civil-protection-humanitarian-aid.ec.europa.eu/where/europe/turkiye\\_en](https://civil-protection-humanitarian-aid.ec.europa.eu/where/europe/turkiye_en).

<sup>119</sup>Semih Tumen, "The Case of Syrian Refugees in Türkiye: Successes, Challenges, and Lessons Learned," pgs. 6-11, <https://thedocs.worldbank.org/en/doc/>.

Turkish Education System' (PIKTES) is not at odds with the need for deeper long-term reforms, particularly given the fact that the Syrian conflict is not expected to end soon.

The pivot to the East presented through this report has been partially favored by this influx, as well as by Turkish engagement in the war, which harmed relations with the European Union, given Erdoğan's initial unwillingness to control migration flows to Europe.<sup>120</sup> However, the adoption of effective measures for managing the refugee influx and their settlement has contributed to reducing the impact of the crisis on the European Union.

In the near future, as Erdoğan has repeatedly stated,<sup>121</sup> hosting will continue, as well as the adoption of measures aimed at refugees' integration. The eleven-years long Syrian civil war does not seem to end soon, and Türkiye will stand for the Syrian civil population, following the ideal of becoming the guardian of Islam.

#### *Turkish Concerns in the Southern Caucasus Conflicts*

The origins of turmoil in the Southern Caucasus go back to 1991. Ever since then Azerbaijan has been contesting Armenian dominance over Nagorno-Karabakh, although the quest started in 1988, when both parts were still under the Soviet Union dominance. Whilst the territory is largely populated by ethnic Armenians, it was incorporated into Azerbaijan in the early 1920s by the Soviet Union. Even after the fall of the USSR and the consequent independence of these two South Caucasus states as separate republics, Azerbaijan still claims that Soviet incorporation of Nagorno-Karabakh is a source of sovereignty over the enclave.

Türkiye's involvement in the Nagorno-Karabakh conflict is multidimensional. It comprises a proxy confrontation with regional adversaries such as Russia and Iran, a diplomatic race against the U.S. towards achieving lasting peace, and a common ground with Israel (since they both support Baku), with which Türkiye finds itself increasingly apart. Türkiye's relationship with Azerbaijan, aside from its cultural foundations - they famously claim to be 'one nation, two states' - has also an energy security background. Azeri gas coming from the

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<sup>120</sup>Petros Violakis, 'Putting the Common Security and Defense Policy in the Eastern Mediterranean under Scrutiny: Türkiye's Conflicting Role,' *MDPI*, August 29, 2023, <https://www.mdpi.com/2076-0760/12/9/481>.

<sup>121</sup>Middle East Eye, "Erdogan: 'We will continue hosting refugees the same way we have done so far,'" YouTube video, 0:52, October 6, 2023, [https://www.youtube.com/watch?v=Q0\\_mFyfV4Vk](https://www.youtube.com/watch?v=Q0_mFyfV4Vk).

Shah Deniz gas field in the Caspian Sea is an strategic asset for Ankara in the already addressed plan for reducing energy dependency from Russia.

Türkiye therefore is presented with a challenge of managing a careful balance, considering its multifaceted interests in Nagorno-Karabakh. However, the strong support shown by Ankara to Yerevan in the two escalations of September 2020<sup>122</sup> and September 2023<sup>123</sup> against Armenia over the control of the enclave, constitute an example of Türkiye's seizure of opportunity to position itself as a regional mediator. This power play is facilitated by Russia's weakened position in the South Caucasus as it prioritizes the ongoing war effort in Ukraine, leaving a vacuum of influence to be filled.<sup>124</sup>

### *Turkish Concerns in Syrian and Ukrainian Conflicts*

Türkiye's power projection as a matter of foreign policy necessarily involves participation in the ongoing Syrian and Ukrainian wars, given their geographical proximity. The conflicts have in common at least two factors. First, that they both represent a competitive chessboard in the international community as to which stakeholder effectively brokers a peace agreement – such an achievement would be highly regarded and award diplomatic leverage for the mediator. Secondly, Russia acts as an assertive power in both Syria and Ukraine, therefore competing with Türkiye for regional hegemony in the Middle East and Black Sea areas, respectively. Türkiye's regional aspirations are further motivated by the U.S.' withdrawal from the Middle East under President Trump's isolationist policy.<sup>125</sup> This power vacuum situation, in turn, feeds back into the Russo-Turkish rivalry which, nonetheless, occasionally shifts towards closeness.

Turkish interest in the Syrian civil war, as it was for the Nagorno-Karabakh conflict, is multidimensional: it presents Ankara with fundamental sovereign concerns of territorial integrity (i.e. avoiding spillover and exacerbation of Kurdish claims for unification with the de

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<sup>122</sup>Max Seddon, "Azerbaijan Launches 'Anti-Terrorist' Operation in Nagorno-Karabakh," *Financial Times*, September 19, 2023, <https://www.ft.com/content/62d7923b-e68d-41ff-9ad6-428562389510>.

<sup>123</sup>Al-Monitor Staff, "Turkey's Erdogan Backs Azerbaijan's Offensive in Nagorno-Karabakh, as US, Russia Urge Restraint," *Al-Monitor*, September 19, 2023, <https://www.al-monitor.com/originals/2023/09/turkeys-erdogan-backs-azerbajians-offensive-nagorno-karabakh-us-russia-urge>.

<sup>124</sup>Mathieu Droin, Tina Dolbaia, and Abigail Edwards, "A Renewed Nagorno-Karabakh Conflict: Reading Between the Front Lines," *CSIS*, September 22, 2023, <https://www.csis.org/analysis/renewed-nagorno-karabakh-conflict-reading-between-front-lines>.

<sup>125</sup>Robinson, "Turkey's Growing Foreign Policy Ambitions," *Council on Foreign Relations*, [https://www.cfr.org/background/turkeys-growing-foreign-policy-ambitions?utm\\_medium=social\\_owned&utm\\_source=li](https://www.cfr.org/background/turkeys-growing-foreign-policy-ambitions?utm_medium=social_owned&utm_source=li).

facto autonomous Syrian region of Rojava),<sup>126</sup> and domestic security (in relation to PKK and Islamic terrorism of ISIS/Daesh, considered an existential threat to be eradicated). The ever-present concern for the management of refugee influx, which overlaps with and magnifies ethnic and religious tensions - already developed - are all sources for destabilization within Türkiye. A last source of potential concern for Türkiye in its relations with Syria is the similarities in their privileged position as transit hubs for oil. The country's current unstable situation, however, as well as several political, social, military and economic obstacles existent prior to the war, make competition with Türkiye as an energy hub a very unlikely scenario.<sup>127</sup>

Increasing Turkish assertiveness in dealing with these multifaceted issues led to a series of military incursions in the northern Syria for the sake of self-defense:<sup>128</sup> Operation Euphrates Shield (August 2016-March 2017), targeting the Islamic State, and Operation Olive Branch (January-March 2018), directed against the YPG.<sup>129</sup> Operation Peace Spring followed later, in October 2019. As Turkish Foreign Minister Çavuşoğlu acknowledged, the second intervention was part of a broader effort to push for the pacification of the country and its unification under a single Syrian state.<sup>130</sup> On this basis, rather than being part of a cooperative effort with Syrian 'legitimate representatives' for the eradication of a common terrorist threat, Türkiye's counter-terrorism operations will likely continue to the extent that achieving stability is in its own interest; it is a supportive yet not cooperative relationship.<sup>131</sup> It is evident, then, that Türkiye seeks to consolidate the role of 'stabilizer' of its proximities and beyond. By minimizing tensions with neighboring states, Türkiye will become strengthened both domestically and internationally, positioning itself as a reliable regional mediator.

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<sup>126</sup>Dania Koleilat Khatib and Ayman Saleh Al-Barasneh, "US-Turkish Relations in the Light of the Syrian Crisis (2011-2019)," chapter, in *The Syrian Crisis: Effects on the Regional and International Relations*, ed. Dania Koleilat Khatib, Prospectives on Development in the Middle East and North Africa (MENA) Region (Springer Singapore, 2021), 13–30. p. 17

<sup>127</sup>Vladimir Kukushkin, "Syria and Hydrocarbons: Present and Prospective Politico-Economic Issues", chapter in *The Syrian Crisis: Effects on the Regional and International Relations*, ed. Dania Koleilat Khatib, Prospectives on Development in the Middle East and North Africa (MENA) Region (Springer Singapore, 2021), 161-178.

<sup>128</sup>Ibid.

<sup>129</sup>Metin Gurcan, "Assessing the Post-July 15 Turkish Military: Operations Euphrates Shield and Olive Branch," *The Washington Institute*, March 26, 2019, <https://www.washingtoninstitute.org/policy-analysis/assessing-post-july-15-turkish-military-operations-euphrates-shield-and-olive>.

<sup>130</sup>Mevlut Cavusoglu, "The Meaning of Operation Olive Branch," *Foreign Policy*, April 5, 2018, <https://foreignpolicy.com/2018/04/05/the-meaning-of-operation-olive-branch/>.

<sup>131</sup>Republic of Türkiye Ministry of Foreign Affairs. *Relations between Türkiye-Syria*, n.d., <https://www.mfa.gov.tr/relations-between-turkiye%E2%80%93syria.en.mfa>

As for the implications of the Syrian civil war in Russo-Turkish relations, competition is undertaken through proxies. While Ankara backs the rebels alongside the U.S.-led coalition and Gulf States such as Saudi Arabia, Qatar, and Kuwait; Moscow supports the Assad regime next to Tehran and Hezbollah militias. Notwithstanding their discrepancies on the continuity of Bashar al Assad's regime, Russia and Türkiye initiated the so-called Astana process alongside Iran, to reach a peace agreement. Convenient rapprochement, again, is a driver of Ankara's policy towards Moscow. Wherever their interests collide, it is more pragmatic for Türkiye to engage with Russia upfront, equilibrating the balance of powers by remaining mutually in sight: the Astana forum seems closer to an undesired yet necessary agreement, where distrust prevails.<sup>132</sup> As Turkish decoupling from Russia progresses - in energy security terms, but also as part of an independent foreign policy - however, it is likely that Türkiye will see itself strong enough to take a step further and openly confront Russia regarding their overlapping interests in Syria and beyond.

In this sense, the Russian war on Ukraine is another conflict in which the two parties are opposing stakeholders. Russia's historical quest for ensuring access to warm water ports necessarily involves expansionist interests over the Black Sea as a route for power projection to Europe through the Mediterranean. This pursuit was translated into action with its annexation of the Crimean Peninsula in 2014, within Türkiye's sphere of influence (extensively based on the presence of Crimean Tatars of Turkic origins). If the immediate reaction to the annexation was vacillating on Erdoğan's side<sup>133</sup> (i.e., deciding not to join Western-led sanctions against the Kremlin), government policy has lately shifted towards manifest rejection of Russia's seizures of Ukrainian territory.<sup>134</sup>

As is the case for other ongoing regional conflicts, Türkiye presents itself as the most stable, legitimate party for leading mediation efforts. In the context of the Ukrainian war and its consequences for global food security, the Turkish negotiating capabilities were intended to be displayed in brokering a grain supply agreement - the UN-backed Black Sea Grain Deal.

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<sup>132</sup>Melike Janine Sökmen, Irene Martínez, and Nicolás de Pedro, "Russia, Iran and Türkiye, a Common Strategy in Syria?" May, 2018, [https://www.cidob.org/en/publications/publication\\_series/notes\\_internacionales/n1\\_196/russia\\_iran\\_and\\_turkey\\_a\\_common\\_strategy\\_in\\_syria](https://www.cidob.org/en/publications/publication_series/notes_internacionales/n1_196/russia_iran_and_turkey_a_common_strategy_in_syria)

<sup>133</sup>Soner Çağaptay and James Jeffrey, "Turkey's Muted Reaction to the Crimean Crisis," *The Washington Institute*, March 4, 2014, <https://www.washingtoninstitute.org/policy-analysis/turkeys-muted-reaction-crimean-crisis>.

<sup>134</sup> Ali Kucukgocmen, "Turkey Rejects Russia's Annexation of Ukrainian Territory," *Reuters*, October 1, 2022, <https://www.reuters.com/world/middle-east/turkey-rejects-russias-annexation-ukrainian-territory-2022-10-01/01/>.



Ankara's mediating advantage derives from its competences under the 1936 Montreux Convention. The treaty grants Türkiye authority to oversee maritime traffic across the Bosphorus and Dardanelles straits – effectively conceding it a gatekeeper position.

Notably, this bargaining leverage has been used by Türkiye to counter Russia's continuous play to exit and return to the deal depending on its own strategic calculations (i.e., supporting it for encouraging the lifting of Western sanctions, and withdrawing again as retaliation for Ukraine offensive attacks).<sup>135</sup> While the initiative ultimately failed in July 2023, it was nonetheless an example of the fine-tuned balance Erdoğan has managed to achieve by placing Türkiye between NATO (whose fundamental interest in the war is of contention of the Kremlin's expansionist behavior, bring Ukraine definitely under the Western 'umbrella', and deter Putin from taking further action), Russia, and Ukraine during the war.<sup>136</sup>

The question, however, remains whether Türkiye will be able to maintain neutrality if the conflict in Ukraine drags over time. Signs of wariness from Western allies are already a source of concern for Ukrainian politicians,<sup>137</sup> and diversion of priorities will likely increase as the ongoing Israeli-Palestinian conflict gains more attention. An added source of worry is the ammunition challenge and whether production efforts in Europe and the U.S. can be sustained as demand increases- again, both for Ukraine and Israel.<sup>138</sup> If taken that Türkiye will continue to project power through a pragmatic approach and mediation efforts, it is likely that Erdoğan will take advantage of possible diminished support by Western parties, and consolidate the image of Türkiye as a regional 'stabilizer,' as well as weapon provider. The latter possibility is backed by earlier supply of Bayraktar TB2 drones and other defensive material, for instance.

Should Türkiye strengthen its strategic alliance with Ukraine, the new partnership could impact its relations with other actors as follows: *i*) increased distance with Russia and assertion that Moscow does not hold as much leverage as it once did, inter alia, because of energy dependence links; *ii*) rapprochement with the U.S. as it sees Türkiye again as a Western partner

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<sup>135</sup>Alexandra Prokopenko, "Russia's Return to Grain Deal Is a Sign of Turkey's Growing Influence," *Carnegie Endowment for International Peace*, November 8, 2022, <https://carnegieendowment.org/politika/88349>.

<sup>136</sup>Soner Çağaptay, "Unpacking Turkey's Non-Binary Ukraine War Policy," *The Washington Institute*, March 7, 2023, <https://www.washingtoninstitute.org/policy-analysis/unpacking-turkeys-non-binary-ukraine-war-policy>.

<sup>137</sup>Veronika Melkozerova and Hannah Roberts, "Europe Can't Afford to Get War Fatigue, Ukrainians Tell Meloni," *POLITICO*, November 3, 2023, <https://www.politico.eu/article/russian-hoax-call-italy-pm-giorgia-meloni-sparks-anxiety-ukraine/>.

<sup>138</sup>Camille Grand, "A Question of Strategic Credibility: How Europeans Can Fix the Ammunition Problem in Ukraine," *ECFR*, April 18, 2023, <https://ecfr.eu/article/a-question-of-strategic-credibility-how-europeans-can-fix-the-ammunition-problem-in-ukraine/>.

in regional conflicts, exiting the Russian orbit; *iii*) realignment with NATO interests in the Black Sea, possibly overcoming distressed caused by Türkiye's purchase of S-400 air defense systems in 2019; and *iv*) relationship with the EU is not likely to change upon Türkiye's support for Ukraine, as each party's support for Kyiv differs in nature. The integrity of the EU and its democratic system is at stake in the war, whereas Türkiye's alliance with Ukraine is based on convenience to advance its own geopolitical aspirations.

### *Turkish Concerns in the Israeli-Palestinian Conflict*

Türkiye and Israel have a complex relation, in which historical (i.e., denial of Azeri genocide of Armenians in 1915) and geopolitical factors (inter alia, energy security considerations and defense cooperation efforts) have taken a predominant role. Nevertheless, under Erdoğan's presidency - marked by a distinctive Muslim discourse - the Israeli management of the Palestinian issue has been the main element in Türkiye's policy towards Tel Aviv. Turkish support for the Palestinian cause is founded upon a *solidarity*<sup>139</sup> framework. In the past decade, the most relevant event in the context of Türkiye-Israeli relations has been the Mavi Marmara incident of 2010, in which nine Turkish citizens were killed as the consequence of a raid by an Israeli special commando unit directed against a flotilla that attempted to break the naval blockade of Gaza. Turkish-Israeli relations froze at an all-time-low, with mutual recalling of diplomatic representations. Fragile reconciliation was reached in 2016.

The most recent events of October 7, however, could potentially entail another turning point for Türkiye-Israeli relations, especially considering Türkiye's proximity to Hamas.<sup>140</sup> Indeed, Erdoğan's anti-Israeli rhetoric has heavily intensified as retaliatory discourse given that the Israeli response to the attacks by Hamas are inflicting great destruction in the Sunni-Muslim majority Palestinian territory of the Gaza Strip. Also, Israel's rejection of Turkish proposals for a ceasefire and opening of humanitarian corridors, at the time of writing, have flamed hostilities. Recent declarations by the Turkish President have even accused Netanyahu of 'no longer [being] someone we can talk to',<sup>141</sup> claiming to bring Israel's alleged war crimes to the

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<sup>139</sup>Rich Outzen, "Erdogan Leans on Israel, Pushes for Post-War Role in Gaza," *Atlantic Council*, October 30, 2023, <https://www.atlanticcouncil.org/blogs/menasource/erdogan-gaza-hamas-turkey-israel/>.

<sup>140</sup>Ely Karmon and Michael Barak, "Erdogan's Turkey and the Palestinian Issue," *Perspectives on Terrorism* 12, no. 2 (April 2018): 74–85, <https://www.jstor.org/stable/26413315?seq=12>.

<sup>141</sup>Saskia O'Donoghue, "Israel-Hamas War: Erdogan Cuts Ties with Netanyahu as Israeli PM Rejects Call for Humanitarian Pause," *EURONEWS*, November 4, 2023, <https://www.euronews.com/2023/11/04/israel-hamas-war-netanyahu-rebuffs-pushes-for-gaza-humanitarian-pause-until-hostages-are-r>.

International Criminal Court (ICC).<sup>142</sup> This harsh discursive escalation, however, seemed far from plausible in the early days of war as Erdoğan originally offered to mediate between Israel and Palestine, vowing to reach a lasting two-state solution.<sup>143</sup>

From Türkiye's perspective, breaking relations with Israel might turn into strategic gains, such as the strengthening of Ankara's Sunni Muslim identity. Hence Türkiye's Islamic-based, soft power projection over the Middle East - where neighboring Iran also disputes religious predominance of Shi'a Islam - would be reinforced. The shift, nonetheless, is not exempt from risks. Türkiye cannot strategically afford to discard altogether its relation with Israel (and nor can Tel Aviv): Ankara's need for gas supplies and Israel's search for gas markets are mutually beneficial for trade and energy security.<sup>144</sup>

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<sup>142</sup>Anadolu Staff, "Türkiye Crossed out Netanyahu, Will Bring Israel's War Crimes to ICC: President Erdogan," *Anadolu Ajansı*, November 5, 2023, <https://www.aa.com.tr/en/middle-east/turkiye-crossed-out-netanyahu-will-bring-israel-s-war-crimes-to-icc-president-erdogan/3043485>.

<sup>143</sup>Esra Tekin, "Türkiye Ready to Mediate between Israel, Palestine, President Erdogan Tells Germany's Scholz," *Anadolu Ajansı*, October 12, 2023, <https://www.aa.com.tr/en/europe/turkiye-ready-to-mediate-between-israel-palestine-president-erdogan-tells-germanys-scholz/3017366>.

<sup>144</sup>Mert Bilgin, "Prospects of Natural Gas in Turkey and Israel," chapter, in *Contemporary Israeli-Turkish Relations in Comparative Perspective*, ed. Ayşegül Sever and Orna Almog (Cham, Switzerland: Palgrave Macmillan Cham, 2019), 195–215, <https://link.springer.com/book/10.1007/978-3-030-05786-2#toc>

## **CONCLUSION**

Being at the crossroads of Eastern and Western civilizations, Türkiye is both affected by the two regions, and simultaneously extends its power projection over them. However, in the next five to ten years, the future of Türkiye will rely particularly on the East, fundamentally due to President Erdoğan's political Islamism.

In regards to the West, territorial disputes with Greece and Cyprus will still be present, although no open war will occur. Türkiye will keep fighting for its rights against both countries, erecting itself as the guardian of Turkic-Muslim populations and interests and making Turkish accession to the EU unresolvable in this report's time frame. From Turkish perspective, however, this potential accession presents more determining negative connotations than positive. Additionally, Turkish presence in the Western Balkans and Central Asia will be fostered thanks to economic and cultural projects.

The role of Türkiye in the Middle East will continue to be one of high complexity, ongoing ambition, and permanent threat of being diminished. Going back to the Ottoman Empire, Türkiye has been a bridge between the East and the West and aspires to continue to be so. But the Turkish yearning is to consolidate the country as the main actor in the region. To do so, Türkiye will need to use all the relevant tools at their disposition, from armed interventions to diplomatic summits. Iran will keep being its main competitor in the region, but they will need to navigate swiftly with increasingly consolidated players in the region, such as China.

As a matter of power projection, Türkiye's profiling as an energy hub, between the broad geographical spheres of East (energy-surplus) and West (energy-deficient), will continue to determine the country's pivotal role amid civilizations. Another pillar of the new Turkish independent foreign policy approach is pragmatic participation in ongoing regional conflicts. Wherever there is a vacuum of power left by competing regional rivals, Türkiye is becoming more assertive to take their place. The Kurdish issue, on the other hand, will ultimately remain the most relevant.

Ultimately, Turkish increasing power projection towards its two sides, but looking closer at its East, fostered by Erdoğan's political Islamism, means that, in the following five to ten years, the world will witness the rising of a new Sultanate.

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