



Türkiye: Rise or Stall?

An overview of Türkiye's global and regional power status

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Executive Summary

Ryan Hoi Kit Leung

This public report provides an overview of Türkiye's power status regarding its global and regional influence. Written by a team of 10 analysts, the report investigates Türkiye in five areas and how it could influence its future ambition.

1. **History of Türkiye:** From the Byzantine to later the Ottomans, and finally the Republic of Türkiye, Türkiye has been a regional hegemony dominating from Southern Europe to North Africa. Its geographical advantages are largely responsible for its prosperity. As a corridor between the West and the East, it flourished under trade and commerce, while its enormous landmass and population supported the necessary economic and military expansion. Therefore, Türkiye has always had the potential for hegemony.
2. **Economic status:** As a rising developing economy, Türkiye's manufacturing and construction sector has led to decades of growth and prosperity. Yet, political interference in Central Bank's policies has triggered a worsening economic crisis since 2018, in which its national currency, the Lira, has lost a quarter of its value. Nonetheless, it is important to notice the growth of Türkiye's international investment, showing its economic influence and dominance in Africa and the Middle East.
3. **Military strength:** The Turkish Military has taken a more prominent role under Erdogan's assertive foreign policy. Following the ISIS insurgency, its forces have actively engaged in Syria. Additionally, under the security threat by Kurdish militants, the military is responsible for its border security. Ankara has also secured military alliances with the West, and countries in Central Asia and Africa, which establish its military footprint in nearby regions. Such alliances also boost Türkiye's defence industries by encouraging arms sales.
4. **Foreign relations:** By holding immense geopolitical advantages and cultural influence in the region, Türkiye managed to secure friendly relations with its regional neighbours. Crucially, under the new global bipolarity between the liberal West and the authoritative East, Ankara successfully maintained a balance between the two. It remained close with its western military allies, whilst promoting trade with the Chinese market. Erdogan's ability to navigate between the two global superpowers undoubtedly helped Türkiye expand its hard and soft power.



5. Socio-political crises: The political atmosphere of Türkiye, marked by years of military intervention and authoritarianism, had a glimpse of liberal democracy in the 2000s. Yet, President Erdogan's increasing dictatorial approach, especially in the aftermath of the Gulen Movement, led to the rise of political and social violence. More repressive measures toward dissidents and their citizens could challenge the government's credibility and legitimacy.



What are Türkiye's power status and regional influences historically?

Isti Miskolczy

The territory of what is today the Republic of Türkiye has been of utmost geopolitical and strategic importance since the existence of the Byzantine Empire (Eastern Roman Empire). Türkiye is not only situated on the borders of continental Europe and Asia but also connects the – traditionally – predominantly Christian and Muslim worlds. After the Byzantine Empire started its decline in the 14th century, the Ottomans [took over](#) its capital Constantinople in 1453 and transformed it into an empire that stretched from the Red Sea to around the Danube. However, they did not attempt to convert the non-Muslim population of mainland Europe. Instead, they exercised influence on them with their [special regional taxation system](#) involving the – very extensive, sometimes even [60-70 thousand members](#) large – army. The sultans of the Ottoman Empire controlled a country of around 20 million habitants until a slow decline in its influence and power reached an economic recession leading to the Turkish War of Independence in 1919. This is when the Republic of Türkiye (now: Republic of Türkiye) was created with [Mustafa Kemal Atatürk](#) being its first president. Today the country exercises power and regional influence under President Recep Tayyip Erdogan.

Being a transcontinental country (being part of both Europe and Asia), Türkiye's geopolitical advantages are numerous as opposed to many other European or Middle Eastern countries. The country shares borders with three seas (the Black Sea, the Mediterranean Sea, and the Aegean Sea) and eight countries (Greece and Bulgaria from Europe; Georgia, Armenia, Azerbaijan, Iran, Iraq, and Syria from Asia). As such all major land transport and trade routes, as well as gas pipelines between mainland Asia and mainland Europe, must go through either Russia or Türkiye. Thus, if one aims to exclude Russia from international trade for whatever reason, there is no option other than Türkiye, as the historic example of the [silk road](#) or the contemporary example of the Trans-Anatolian gas pipeline ([TANAP](#)) show. Türkiye also has access to many ports and control over the Bosphorus Strait (which it exploited during the latest Russia-Ukraine and Libya conflicts). The country's capital is Ankara, but its largest city and financial centre is Istanbul.

Türkiye currently has a population of around 85 million, which is expected to peak at around 100 million near 2060. With that, Türkiye (by population) is the second largest country in the Middle East (behind Iran's estimated 86 million people) and the largest country in the Balkans. Also, none of the members of the European Union is more heavily populated than Türkiye with only Germany being able to measure up with its 83 million people. Today ethnic Turks make up around 72 per cent of the population with the Kurds being the largest minority with around 12 per cent – a division that has constantly sparked conflict. Despite its local



insecurities, Türkiye remains a great regional influence in both Europe and Asia, which provides the country with a unique negotiating position in this respect.



What is the status of Türkiye's economy, domestic and internationally?

Domestic economic challenges

Ryan Hoi Kit Leung

Despite recent media coverage of the continuing economic crisis in Türkiye, the country had once been a rising economic power. As a developing country, its primary economic activities are centred on the manufacturing and construction industry, while also serving as an export-led country. Türkiye enjoyed a period of prosperity and stable economic growth in the 2000s. Nevertheless, the global financial crisis of 2008 opened a decade of financial instability. Eventually, due to numerous factors, the country entered an inflation crisis in 2018, which continues today.

Inflation

The Turkish financial crisis is a product of years of economic mismanagement. Türkiye has [relied](#) on high foreign borrowing to stimulate economic growth and also [failed](#) to generate a foreign trade surplus over the years. In 2018, the growth model finally collapsed under high foreign debt and the country officially entered an economic crisis. In the following years, the inflation rate fluctuated and saw a jump of [20 per cent](#) when the crisis erupted. The administration attempted to raise interest rates and seek [new foreign exchange](#) currency from China and Qatar. However, the Covid-19 pandemic hit Türkiye extremely hard and inflation spiralled out of control. Recently, it reached nearly [80 per cent](#), the highest in 24 years. The Turkish Lira lost a [quarter](#) of its value under inflation. The war in Ukraine and its domino effect on the world's energy and food market also contributed to the economic crisis. For an average Turkish citizen, the economic crisis of the country worsened the cost of living crisis, as the cost of food saw an [89 per cent](#) annual increase. For Turkish industries, the rising energy price also restricted their business recovery, as Türkiye remains reliant on foreign energy imports. As a result, Türkiye has suffered a severe economic crisis, with looming uncertainty over future recovery.

The government's economic measures and foreign agenda also contributed to the current crisis. President Erdogan refused to raise the interest rate when inflation first began. He even ordered the Central Bank of the Republic of Türkiye (CBRT) to reduce interest rates when the Lira starts to lose its value, and [firing officials](#) when they refused. To tackle the collapsing Lira, the CBRT had to sell its [foreign currency reserves](#) to support the local currency. Erdogan justifies his political intervention by standing on his [belief](#) that eventually, inflation would stabilise itself, while a cheaper currency will help boost the manufacturing industry. In regards



to raising interest rates, he remains reluctant and blames the crisis on [“foreign financial tools”](#). His unorthodox view that high interest rates cause high inflation has led to confusion in the international community. Given the signs of financial instability, foreign investment withdrew and in turn worsened the economic crisis. Thus, Türkiye has failed to reduce the impact of inflation and the country has entered a prolonged crisis under inappropriate and unreasonable administrative policies.

Türkiye’s recent foreign policy in the Middle East has caused a deterioration in relations with the West in general and the US in particular. Following the Syrian Civil War, Türkiye actively took part in an invasion of parts of northern Syria in cooperation with the Syrian National Army, with an aim to crush Kurdish forces. From [the US point of view](#), attacking the Syrian Kurds, Washington’s crucial allies in the fight against the Islamic State in Iraq and Syria (ISIS), was deemed unnecessary and ineffective for its operation in Syria. It affected Ankara-Washington relations over their competition in Syria. Furthermore, in the aftermath of the failed coup of 2016, an American pastor Andrew Brunson was arrested in Türkiye on charges of espionage. The US responded with economic sanctions, raising tariffs on steel by [50 per cent](#). Negotiations on a [100 billion USD trade deal](#) were also cancelled. Also, it included sanctions on [military hardware](#) after Türkiye purchased a Russian missile defence system in 2019. Although the US was not Türkiye’s major trading partner, their geopolitical friction restricted Türkiye’s future economic cooperation.

Economic growth

Certainly, the presidential intervention in the CBRT and the breaking of international norms in handling inflation contributed to the economic crisis. Still, it is important to note that Türkiye’s economy is continuing to show signs of growth. Its GDP rose by almost [100 billion USD](#), from 719 billion in 2020 to 815 billion in 2021. Its recovery and growth rate during the Covid-19 pandemic in 2021 was also the [highest](#) among all G20 countries. The unexpected trend can be explained by two major factors, namely its domestic consumption force and foreign investment opportunities.

Despite the Lira losing [44 per cent](#) of its value in 2021 and continuing to plunge today, Türkiye’s domestic consumption managed to grow against all odds. After years of decline, in 2021, consumer spending increased by [10.6 per cent](#) from 2020, reaching 451 billion USD. Although consumer prices remained high and unstable over the inflation crisis, domestic spending has recovered to a sustainable level. In times of instability, valuable and durable goods become the best investment to hold against the collapsing currency. [Car](#) and [property](#) sales followed the same trend of consumer spending to rise sharply in 2020 after years of recession.



Furthermore, the increasing hostility between the West and China has also favoured Türkiye's manufacturing sector. China has enjoyed decades of skyrocketing economic growth following its policy of Reform and Opening Up in 1978. Its modern project, the Belt and Road Initiative, also seeks to strengthen East-West economic ties. However, current political circumstances and deep-rooted ideological differences worsened its relations. Hence, European countries and the US have been seeking alternatives to China's market. Türkiye, being a developing manufacturing-led economy and a geographically closer country, is the favourite alternative. Its [top exports](#) are vehicles, machinery, iron and steel, all of which are crucial in Western economies, while its major trading partner is Germany and its European neighbours. Türkiye can, therefore, replace Chinese goods and maintain sizable growth over the coming decades. In addition, its [recent discovery](#) of the world's second-largest rare earth reserve could challenge China's dominance in its supply. As the element is important for high-tech industries, Ankara could take this opportunity to further diminish China's economic influence in the region. Thus, the new global competition between China and the West could create a beneficial circumstance for Türkiye to grow as a developing economy, despite domestic instability.

Conclusion

To summarise, Türkiye's domestic economy presents a curious case in the global economy. It has suffered a fierce inflation crisis under inappropriate political intervention by the nation's central bank. As a result, the Lira collapsed and foreign investments withdrew. Nonetheless, despite the staggering odds, Türkiye's economy managed to recover and grow, even during times of the global pandemic. Its major factors are the strong consumer force and foreign economic opportunities which kept the country's capital flowing and the influx of foreign capital. However, even though the nation seems to be recovering from the years of recession, the inflation crisis has made the currency more unstable and harder for the government to support its foreign ambitions. In the long term, it will be harder for the economy to reach higher levels with such an uncertain foundation. If Ankara wants to achieve its foreign ambitions, the country needs to reverse previous economic decisions and follow international norms on tackling inflation. Otherwise, the country will continue to suffer from continued inflation and a plummeting currency.

Türkiye's International Economic Relations

Antonio Visani

Türkiye began its integration into the global economy at the beginning of the 1980s, when it implemented neoliberal economic reforms aimed at achieving trade-led growth. This has led to a steep surge in the country's trade volumes since. Indeed, Türkiye's trade to GDP ratio [increased](#) from 17 per cent in 1980, to 41.3 per cent in 2000, and peaked at 71.2 in 2021, a 10 per cent increase since 2020. After the downturn caused by COVID-19, in 2021 Türkiye's



[exports](#) reached 225.4 billion USD, a 32.9 per cent compared with 2020. In other words, in line with the global trend, the Turkish trade volumes have recovered from the slowdown recorded during the pandemic. In 2021, Ankara's [top exports](#) were cars, delivery trucks, machinery, and refined petroleum. The main [export destinations](#) were Germany, the UK, the US and Italy. On the other hand, its imports were 271.4 billion USD, +23.6 per cent from the previous year. It mostly imported mineral fuel, oil and iron and steel from Germany, China, Russia and the US respectively. Thus, Türkiye's role in the global economy resembles an intermediate industry that assembles imported intermediate goods into finished goods. It is worth noting that, in the last two decades, Ankara's foreign trade pattern has gradually [changed direction](#). While EU countries make up the bulk of Türkiye's trading partners, their share has decreased from more than 50 per cent in 2000 to slightly more than 40 per cent twenty years later. North American states show an analogous descending pattern. On the other hand, the importance of MENA and the African region has grown, and import flows from China, Russia and Iran have considerably increased. The reason for this shift in trade patterns is twofold. The first reason is economic: the country's dependency on energy and intermediate goods is surging due to the expansion of its manufacturing industry. The second one is geoeconomic: Türkiye is diversifying its trade relations, to decrease Western countries' economic leverage and thus be able to carry out a more independent foreign policy.

With regards to Türkiye's Foreign Direct Investment (FDI) outflows, in 2021 they [reached](#) 5 billion USD, a 54 per cent increase since the previous year. It is noteworthy that, in the last two decades, Türkiye's investments abroad have recorded a large growth. Indeed, since 2002, they [surged](#) by 1,891 per cent -from 250 million in 2002- and they almost doubled since 2016. Moreover, even during the pandemic, the increasing trend did not stop: in 2020, they increased by 8.9 per cent compared with 2019. Focusing on [destination countries](#), it can be noted that, in the last 15 years, more than half of Türkiye's FDI went to Europe, followed by Asia, the Middle East, America, and Africa. This can be explained by the fact that EU and Asian countries are Türkiye's main trade partners. Indeed, there is a positive relationship between Türkiye's FDI outflows and host countries' market size, infrastructure facilities, and Turkish exports to target nations. The latter variable is explained by the fact that Turkish firms tend to invest in markets where they have previous experience through merchandise exports to improve the efficiency of their existing export activities. Moreover, target countries' natural resource endowment is a major determinant of Turkish FDI outflows: it has been estimated that a 1 per cent [rise](#) in this variable increases Türkiye's investments by 0.60 per cent. Thus, while Western countries remain the most important trade and FDI partners for Ankara, Türkiye's economic relations with Middle East and African countries have considerably improved in the last two decades. This is in line with the country's [new foreign policy activism](#) since 2002, which aims at building the image of Türkiye as a bridge between the West and the Middle East and Africa. The ultimate objective is political: enhancing Türkiye's prestige in the international political arena. The following paragraphs will thus focus on the deepening



economic relations between Ankara and the Middle East and Africa, explaining how Türkiye is using economic tools to achieve its foreign policy goal.

Türkiye's economic relations with the Middle East and Africa

From the 16th to the 18th century, economic relations between Türkiye and the Middle East and Africa [flourished](#). The stability and peace of the Pax Ottomana enhanced trade in the region, and Istanbul's economic connection extended not only to Libya, Tunisia, Algeria, but also Sub-Saharan countries like Sudan, Eritrea, and Ethiopia. However, after the demise of the Ottoman Empire, Ankara focused on the West, not paying significant attention to its neighbours to the South and East. Things changed after the beginning of the 2000s when the Justice and Development Party (AKP) came to power in the country. Since then, Türkiye has found a new interest in the Middle East and African countries and has aimed at increasing its influence in these regions.

The Middle East and North Africa (MENA)

The victory of the AKP in the 2002 parliamentary elections marked a deepening of the economic relations between Türkiye and MENA countries. There are two reasons for this shift. The first one is [domestic](#): the victory of the AKP marked a shift in national economic influence from the Turkish Industrialists and Businessmen Association (TUSIAD) to the Independent Industrialists and Businessmen's Association (MUSIAD) and the Confederation of Businessmen and Industrialists of Türkiye (TUCSON). While the former association represented the Western-oriented and pro-secular economic establishment, the latter consisted of the Islamic conservative bourgeoisie located in inner Anatolia, which was in favour of an increase in contact with the MENA region. The second reason is related to Türkiye's [foreign policy](#). The Middle East is a key strategic region in Ankara's struggle to increase its power in the international political arena. Indeed, (1) by deepening economic ties with MENA, Türkiye can gain access to the region's gas and oil resources and offset some of its reliance on Western markets that hinder Ankara's foreign policy independence. Moreover, (2) although Türkiye remains economically connected to the EU and the US, by expanding its influence in the MENA region, the country can enhance its image as a regional bridge-builder between the West and MENA, thus increasing its prestige on the world stage. Since the MENA region suffers from deep political instability, Ankara chose to pursue an economics-first approach rather than a military one to boost its clout in the region. Thus, in the last two decades, Türkiye's foreign policy goal has been aimed at establishing economic interdependence with MENA countries.

While Türkiye's total trade volume [rose](#) more than fourfold from 87.6 billion USD in 2002 to 496.6 billion USD in 2021, trade between Türkiye and MENA countries grew more than ninefold, from 7.3 billion USD in 2002 to 73.1 billion USD in 2021. Both exports and



imports show an upward trend, except during the 2008 financial crisis and the regional turmoil of 2013-2016 due to the Syrian civil war, ISIS, and the Yemen civil war. This increasing trend has been made possible by the cultural and geographical proximity, which allowed to achieve low trade costs between Türkiye and MENA countries. To date, the country has Free Trade Agreements ([FTAs](#)) with Israel, Palestine, Tunisia, Morocco, and Egypt. At the same time, FTAs with Lebanon and Qatar are under the ratification process. In general, Türkiye trades [more](#) with larger or more advanced MENA economies, such as Iran, the UAE, Iraq, Saudi Arabia and Israel. The fact that the main trade partners of the region are oil-exporting states is not casual. Indeed, Ankara mainly imports raw materials and energy commodities, and exports finished goods. Lastly, even if Gulf monarchies still hold a dominant position in MENA trade flows, Türkiye has succeeded in establishing trade relations with all MENA countries, which is not true for Gulf nations. This is in line with Ankara's goal of becoming a bridge-builder with good relationships with all countries in the area.

Similarly, although the majority of Turkish investments continue to flow to the EU, Türkiye's FDI in MENA countries has [surged](#) since 2002. While they were 100 million USD 20 years ago, they will reach 482 million USD in 2020. The Arab Spring did not stop the increasing trend. However, investment volumes have decreased compared with 2014, when Turkish outward FDI peaked at 2.3 billion USD. This might be due to the increase in the political instability of the region since that year, with the demise of the Türkiye-supported Morsi government in Egypt, the internationalisation of the Yemen civil war, and the Turkish intervention in the Syrian civil war in 2016. Focusing on the sectors of destination of Ankara's investments, it can be noted that the construction and contracting industry is the most important one. From 1972 to 2021, the total value of the projects undertaken by Turkish companies in the region [reached](#) 112.3 billion USD, according to the Turkish Contractors Association. For example, KAYI Construction has been active in Algeria and Iraq, where it has built residential complexes, power plants, hydrocarbons processing facilities, military infrastructure, and educational facilities. TAV Construction has completed infrastructure projects in Bahrain, Egypt, Libya, Oman, Qatar, Saudi Arabia, Tunisia, and the UAE. Even if Turkish investments are mainly directed to hydrocarbon-rich and industrialised countries, it is worth mentioning their large geographical spread to all nations in the region, like Türkiye's trade patterns.

Africa

Nowadays, Türkiye is trying to create an area of influence in Africa. Thus, Ankara is taking part in the new "scramble for Africa", which is seeing a long list of countries trying to increase their clout on the continent: Western powers, China, India, Japan, but also rival regional powers such as Qatar, the UAE and Saudi Arabia. Ankara's foreign policy activism in Africa is motivated on the one hand by the continent's untapped [natural resources](#) -not only oil and natural gas but also agricultural products like palm oil cacao, coffee, tea, vanilla and minerals such as diamond, cobalt and gold, which are essential raw materials for industrial



production-. Moreover, an increased influence in Africa would strengthen Ankara's say in the UN General Assembly, where African countries are the largest voting bloc. This, in turn, would increase Türkiye's overall image in the international system as a regional and global actor. On the other hand, Africa's rapid urbanisation and growing middle class represent an expanding [new market](#) for Turkish finished goods. Ankara's current engagement with Africa [started](#) in 2003 when the Strategy on Development of Economic Relations with African Countries was issued. Then, 2005 was declared the "Year of Africa" and in 2008 Türkiye became a strategic partner of the African Union (AU). Since his tenure as prime minister, Mr Erdogan has visited 31 African countries, more than any other non-African leader.

To foster Africa-Türkiye trade, Ankara, jointly with the African Union (AU), periodically [organises](#) economic forums. For example, in 2016, trade ministers from 42 African countries and more than 2,000 businessmen met in Istanbul to regulate and develop trade relations between Türkiye and the continent. Similar forums took place in 2018 and October 2021. Moreover, Türkiye's Foreign Economic Relations Board (DEIK) has so far opened 45 business councils in African countries to facilitate trade exchanges, and Türkiye has established 26 commercial consulates with the same aim. African countries that have signed [FTAs](#) with Ankara are Egypt, Morocco, Tunisia, Côte d'Ivoire, Ghana, Somalia, Rwanda, Mozambique and Mauritius. Agreement with Sudan is in the process of ratification, and ones with the Democratic Republic of the Congo, Seychelles, Cameroon, Chad, Libya, and Djibouti are in negotiations. As a result of all these measures, Turkish-African trade has [surged](#) from 4.1 billion USD in 2000 to more than 29.5 billion in 2021, a more than seven-fold increase. At the same time, Turkish imports increased from 2.7 billion USD in 2000 to 8.2 billion USD in 2021, and its exports grew from 1.4 billion USD to 21.2 billion USD. Türkiye's growth in export to the continent is [second](#) only to China. Even if, due to their historical ties with Türkiye, North African countries have higher bilateral trade with Sub-Saharan ones, the share has been gradually rebalancing over the last ten years. However, the Turkish-African exchange relation is [unequal](#). This is not only due to the large trade surplus that Ankara runs vis-à-vis African countries. Indeed, while the main Turkish exports to the continent are capital and intermediate goods such as steel bars and construction materials, the country's main imports from Africa are raw materials and minerals. In line with Ankara's goal of presenting itself as a leader of Muslim countries, African states that practice the same religion as Türkiye [have](#) 4 per cent additional trade than others. It is noteworthy to mention that African countries have stepped up their imports of Turkish military equipment, especially Unmanned Aerial Vehicles (UAVs) and armoured vehicles. This is because of their affordability and combat-tested success in Libya, Nagorno-Karabakh, and Ukraine. In particular, in 2021, Türkiye's defence and aerospace exports to the continent grew by 455 per cent since the previous year.

The same rapid increase can be observed also concerning Turkish FDI to Africa. Indeed, from less than 100 million USD in 2005, they [peaked](#) at more than 1.8 billion in 2019, after decreasing due to the pandemic to 1.5 billion USD in 2020. The leading industries for



FDIs from Türkiye were construction, textile and manufacturing. In other words, Turkish companies mainly invest in labour-intensive and low-value-added sectors, to use the local cheap labour force. Türkiye's focus on labour-intensive projects led it to be the principal job-creating foreign country in Africa. For example, in 2016 alone, Turkish firms created 30,000 jobs in the continent. This supports Ankara's narrative of a mutually beneficial partnership with Africa, highlighting its lack of a colonial past, and common religious and historical ties. While the majority of them flow to North Africa, the importance of East Africa is also growing. In particular, Türkiye has increasingly focused on expanding its influence in the Horn of Africa, the gate to the Red Sea and the Suez Canal, through which 12 percent of global trade passes. Ankara is Ethiopia's second main investor after China and, since 2011, has disbursed more than 1 billion USD to Somalia in investment and aid, becoming one of the key allies of the Mohamed Abdullahi Mohamed (Farmajo)'s government. Now, Turkish companies manage Mogadishu's main seaports and airports, where 80 percent of Somalia's revenues are generated.

Challenges to Türkiye's Geoeconomic Strategies

Türkiye's trade and outward FDI have considerably increased in the last two decades. In particular, Erdogan's government has focused its attention on the MENA region and Africa, without sacrificing its close relations with the West. This has allowed Ankara to achieve the economic goals of expanding and diversifying its sources of energy and raw materials and finding new export markets for Turkish firms. But, at the same time, it also made it possible for Türkiye to achieve important foreign policy objectives: augmenting the country's foreign policy independence from the West by diversifying its economic partners, increasing the country's prestige in the international arena as a bridge between the West and MENA, and expanding its clout over the Horn of Africa. Considering the political instability of African and MENA nations, as well as Türkiye's lack of capacity to project its military power in distant regions, employing economic tools to achieve these goals was the most efficient and effective strategy. However, the negative domestic macroeconomic condition may jeopardise the future developments of Türkiye's geoeconomic strategy. Indeed, the ongoing currency and debt crisis that started in 2018 may lead to a lack of economic resources for Ankara to keep its economic engagement with MENA and Africa expanding. Thus, even if Türkiye's strategy has been effective so far, it is unclear if it is sustainable in the long term.



How capable is the Turkish military generally?

Recent engagements

Louise Masson

Türkiye's hardening of its foreign policy and its desire to assert itself as a regional power has translated into mounting military engagements abroad. The proliferation of its military operations provides Ankara with a posture of strength.

Cyprus:

Located in the heart of the Mediterranean, Cyprus is a strategic island at the first sight of Turkish expansion. Since Operation Attila in 1974, the island has been separated into two entities, Northern Cyprus, recognised only by Türkiye, and the Republic of Cyprus which is recognised by the international community. The recent discovery of gas deposits in Cyprus' exclusive economic zone (EEZ) prompted Türkiye to strengthen its military presence in Cyprus with [30 000 Turkish soldiers](#) currently stationed in Northern Cyprus. Patrol boats are also regularly present in the Cypriot EEZ, under a policy of "fait accompli". In the face of the growing Turkish pursuit of power, the international community remains uneasy to address the topic, given decades of stalemate and diplomatic failure. Though Türkiye's ambition on the island has been a major barrier to future cooperation with the European Union, the supranational organisation also fails to reach a consensus on the issue. Thus, Cyprus will likely remain a divided state, while Türkiye will continue to seek ways of expansion.

Libya:

The Memorandums of Understanding between Türkiye and the Government of National Accord (GNA) of 26 November 2019 on military cooperation (the Protocol on Security and Military Cooperation), and the delimitation of maritime borders paved the way for Turkish military support in Libya. The [maritime delimitation agreement](#) extends the continental shelves of the two countries in the Mediterranean in order to establish continuity between the Turkish and Libyan maritime spaces, which join in the southeast of Crete. The Turkish military intervention had an important impact on the course of the conflict and resulted in the strengthening of GNA forces, demonstrating the strength of the Turkish military and capabilities. In 2019, Türkiye provided military equipment, including drones, to the GNA, despite the arms embargo on Libya, setting tensions with NATO and the European Union. Moreover, it sets up [intelligence and combat capabilities](#). By becoming an essential actor in the political and military scene in Libya, Türkiye is looking to increase its regional power status. Indeed, Libya represents a platform for Türkiye to expand its ambition and influence on the African continent.



Syria and Iraq:

Turkish offensives in Syria and Iraq have directly labelled the Kurdish populations in both countries as a national security threat. Given the historical pretext and nationalism amongst the Kurdish population, it challenges Türkiye's internal sovereignty in controlling the border. In particular, the PKK, also known as the Kurdistan Workers' Party, is viewed as a terrorist cell which poses a significant security risk to Türkiye. Therefore, Türkiye has had a [permanent military presence](#) in parts of northern Iraq and northern Syria since 2016 to combat the PKK and similar cells.

In Northern Iraq, Turkish offensives target the Kurdistan Regional Government. The latest engagement, Operation Claw-Lock, launched in April 2022, is part of a [series of military operations](#) against PKK positions in the Iraqi province of Duhok. Previous battles have helped secure Türkiye's position in the region (Operation Claw in 2019, Operation Claw-Tiger in 2020, Operation Claw-Lightning in 2021 and Operation Claw-Thunderbolt in 2021). Following a Turkish attack that killed at least 9 people, in the seaside resort of Zakho in Iraqi Kurdistan, Iraqi Prime Minister Moustafa al-Kazimi demanded the [withdrawal](#) of all Turkish armed forces from Iraq.

In Syria, Türkiye aims to prevent the formation of an autonomous Kurdish enclave (Rojava) on its southern borders led by the People's Defense Units (YPG), which have close ties to the PKK. For Erdogan, the Syrian battlefield is the way to eliminate any Kurdish threat. In order to do this, the country aims to create a 30km deep buffer zone on the Syrian side of the border. Thus, 3 major military operations were carried out since 2016 in northern Syria targeting the YPG, which caused condemnation from US and European allies. Indeed, the YPG are an instrumental force in the fight against the IS. Significantly, the [October 2019 Turkish incursion](#) in Rojava enabled Türkiye to gain control of a substantial area of the region, after US troops left the area. In May 2022, President Erdogan announced an [upcoming operation](#) in northern Syria. The President has instrumentalised the war in Ukraine as a way to gain terrain in Syria, using its veto against Finland and Sweden's membership in NATO as [potential leverage](#) against the West.

Security Cooperation and Türkiye's Defence Industries

Akshat Sharma

Africa:

African nations' efforts to diversify their security strategies have collided with Türkiye's expanding domestic material capabilities and hunt for new security allies. Türkiye wants to



increase its military cooperation and peacekeeping efforts across Africa. Numerous African nations have varying levels of security and defence cooperation in the fight against terrorism and organised crime. [30 African states](#) have signed security and defence-related agreements with Türkiye, and there are military attachés in [19](#) of these nations. In order to enhance the capabilities of its partners, Türkiye maintains military outposts in Somalia and Libya and frequently conducts military training. The largest Turkish military training facility abroad, [the Somali Turkish Task Force Command](#), was established in Mogadishu in 2017. Unmanned Aerial Vehicles (UAVs) manufactured by a number of different Turkish corporations are used by 15 African states. Large orders have been placed by Kenya, Tunisia, Uganda, Chad, and Senegal, giving Turkish companies a foothold in the African market. Between 2015 and 2021, Türkiye sold a [record](#) amount of weapons, with the majority of the shipments going to African nations. Additionally, Türkiye has provided assistance to five UN peacekeeping missions in Africa. From the naval standpoint, landmark naval visits such as the Barbaros Turkish Naval Task Group, and TCG HEYBELİADA corvette have been positive engagements between Türkiye and the continent. Türkiye, however, continues to [trail](#) behind the most important nations in the African regional market, such as Italy, France, Russia, USA, Germany and China.

Central Asia:

Türkiye wishes to improve its military relations with Central Asian states in the current context of the [Taliban government in Afghanistan](#), [Kazakhstan's political crisis](#) and the [Collective Security Treaty Organisation's](#) military engagements in the region. In 2013, the [Organization of the Eurasian Law Enforcement Agencies with Military Status](#) (TAKM), established to develop military cooperation to combat smuggling, terrorism and organised crime in Central Asia and the Caucasus, currently includes Kyrgyzstan, with added interest from Kazakhstan as well. The TAKM hasn't been that effective in bolstering relations between the member states in the region and mandates a revamp to sustain relevance and maximise potential. The "[Turan Army](#)" is a floating concept that has the potential to be the foundation of a military alliance between Türkiye and Central Asian states. It has gained relevance during multiple instances of cooperation between Türkiye and the states of Central Asia. However, this concept of a traditional military alliance is still far from the reality due to security concerns from other regional powers and a lack of diplomatic progress between the two regions. Near the Aegean city of Izmir, Türkiye is now holding its "[Efes 2022](#)" military training exercises. Two other Central Asian nations, Kazakhstan and Kyrgyzstan, are participating in the tournament in addition to traditional Türkiye's ally Azerbaijan. Military exercises between Uzbekistan and Türkiye have also been operational. There are no recorded instances of this happening in Tajikistan or Turkmenistan. In terms of arms, Türkiye has disproportionate trade volumes with the different Central Asian states. Türkiye supplies Turkmenistan (its strongest weapon market in the region) with Bayraktar TB2 UCAVs, [Deniz Han C-92 corvette](#), [patrol and fast missile crafts](#) as well as [Cobra and Ural Otokar vehicles](#). Kazakhstan purchases [the](#)



[ANKA drones](#), Otokar's Cobra, and [8x8 Arma vehicles](#) from Türkiye. Uzbekistan received the [Ejder Yalcin](#) armoured personnel carriers while the Kyrgyz republic purchased the [Bayraktar TB2 UCAVs](#). While this is not an exhaustive list of purchases made by the Central Asian republics, it presents an opportunity for landmark military cooperation in the future.

NATO:

The North Atlantic Alliance has significantly aided Türkiye's security and integration into the Euro-Atlantic region. Türkiye places a high value on NATO's contribution to upholding peace and stability in the Euro-Atlantic region and serving as a venue for military-political discussions of issues of mutual interest. Türkiye continues to make significant contributions to the activities run by NATO and the EU. Türkiye actively took part in 10 [US Army Europe exercises](#) in 2016 and played a vital role in the [NATO Response Force](#) (NRF). Almost all Turkish assets, whether manufactured domestically or exported, are produced according to NATO standards and include essential parts bought from Western allies. Importantly, NATO nations have been Türkiye's most important foreign arms suppliers. [Between](#) 2016 and 2019, Türkiye purchased or imported almost all of its primary weapons from NATO nations. Türkiye has the [seventh-highest](#) defence budget in NATO, spending about \$18 billion, or 1.75 per cent, of the total amount of money that NATO Allies spend on defence. Türkiye's army is the second largest in the Alliance and has more personnel than the combined military forces of all 20 Allies. There is therefore no significant alteration or transition in the technical/military character of the interactions even when NATO-Türkiye relations are tumultuous owing to any political or economic considerations. In light of the war in Ukraine, Türkiye's geographical proximity to Russia and its control of the gate of the Black Sea will only encourage more cooperation with NATO in coming years.

Defence Industries:

With the desire to establish itself as an essential power, Türkiye is developing a particularly ambitious arms program. But also, to strengthen Türkiye's strategic autonomy following the US export ban.

Türkiye's defence industry experienced significant sales growth during the last ten years, a full array of new defence products across a variety of fields, and an increase in self-sufficiency. The US and other major defence importers have expedited their goals of autonomy and self-sufficiency due to Türkiye's culture of mistrust. As a result, Türkiye will be able to make decisions about its foreign policy with more independence, especially regarding the Syrian and Nagorno-Karabakh contexts. Between 2010 and 2020, US arms exports to Türkiye [fell](#) by 81 per cent due to the growing scepticism of Türkiye among Western European and North American nations as well as the rapid growth of the country's defence sector. Türkiye was the third-largest recipient of US weapons in the world from 2011 to 2015, but between



2016 and 2020, Ankara fell to the nineteenth position. Following the announcement of its [2023 Vision](#) plan, which corresponds with the 100th anniversary of the republic's creation, Türkiye's defence industry has seen significant changes. One of the [top three](#) drone producers in the world is Türkiye. By maintaining an altitude of 11,594 metres for approximately 26 hours—well beyond the practical range of the majority of fighter jets—heavy Türkiye's [Akinci drone](#) surpassed Turkish aviation records. A series of [tactical drones](#) with multi-dimensional features and eventually a [steel-melting laser drone](#) with a 500-metre range were also released by Türkiye. President Erdogan unveiled a [10-year domestic space](#) programme that includes deploying the [first national observation satellite](#), sending Turkish astronauts into space, and visiting the moon by [2023](#). To maintain the security of the republic's trade and defence in the Mediterranean and Aegean sea, Türkiye will continue to expand its naval capability in accordance with its ["Blue Homeland"](#) naval strategy, which was first created in 2006. [Naval frigates](#), intelligence naval ships ([TCG Ufuk](#)), [corvette-class warships](#), [marine cannons](#), and [unmanned surface vessels](#) are examples of ambitious levels of indigenous naval defence production.



What is the state of Türkiye's diplomatic relations with its neighbours?

Developments on Türkiye's Foreign Policy

Alessia Mazuelos

Since the end of the Ottoman Empire in World War One, Türkiye was founded in 1923 and has “[pursued a secular, Western-aligned foreign policy](#)”, maintaining close ties with the European Union (EU) joining NATO. Nonetheless, Recep Tayyip Erdoğan's administration has attempted to “[deepen its ties with China and Russia](#)” and reinforce its ‘Islamic roots’ following the Justice and Development Party's (AKP) [identity and ideology](#). From the change of name to ‘Türkiye’ to the [assertive foreign policy](#) and diplomatic relations with the AKP, Türkiye's status in international affairs has shown a radical transformation with “[the rise of Islamist populism,](#)” the strengthening of economic and diplomatic ties with Europe, the aggressive militaristic capabilities in the Middle East, and its ultimate goal of rebranding the state into ‘[a free agent](#)’ and ‘[world power](#)’. After all, the geographic position of Türkiye grants it an immutable strategic standing and force between Asia and Europe and a “[pre-eminent political and military power in the Middle East and eastern Mediterranean](#)” regions.

Erdogan's Türkiye: Adalet ve Kalkınma Partisi

The Islamic-oriented AKP of President Erdogan, being in power since 2002, has caused drastic changes to global and domestic relations. Crucially, the foreign policy is under the doctrine of exploiting its geopolitical stance and taking it ‘[back and forth](#)’ between [Europe, the West and the US, and the Middle East](#). Using the term ‘[conservative democracy](#)’ to refer to his political agenda, Erdogan sought to comply with the EU membership guidelines through liberal reforms in Türkiye's domestic and foreign policy under the so-called “[agent of change](#)”, which many critically argue was a concealed “[civilian and democratically elected authoritarianism.](#)” Erdogan's foreign policy in Türkiye can therefore be divided in three significant periods as geopolitical consultant and retired foreign area officer, Colonel Rich Outzen, and BeyerFamily fellow and Turkish Research Program director at The Washington Institute, Soner Çağaptay have outlined in [The Center for European Policy Analysis \(CEPA\)](#): [1] “an initial period of aspirational multilateralism with a strong pro-EU tilt, [2] a subsequent era rooted in hard-power and hard bargaining, and support for the Muslim Brotherhood and a Middle Eastern tilt,” and [3] “a more nuanced and multilateral approach” to reduce growing tensions and conflict in both of its bridging regions: Europe and the Middle East.

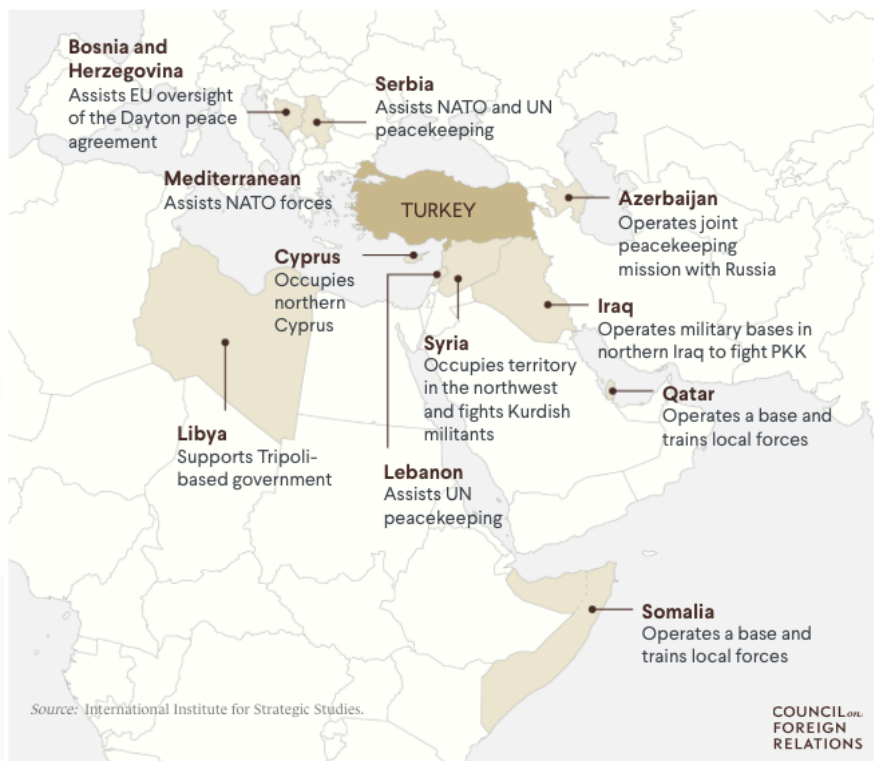
The “[zero problems with neighbours](#)” and “[strategic depth](#)” objectives posited and pushed by President Erdogan relied on the Turkish powerful military force, growing economy,



and maintaining strong socio-cultural relationships, namely on religion, with neighbouring nations. Some of Erdogan's earlier achievements include the strengthening of [Türkiye and Russia](#) relations, the diplomatic [reconciliation for Armenia](#) or the [Turkish mediation](#) with Israel and Syria. However, under the ongoing threats from the [Kurdistan Workers' Party \(PKK\) attacks](#) across its south-eastern border, the President abandoned the previous approach of ['collective security'](#) and multilateralism. Türkiye became increasingly authoritarian, limiting opposition and asserting a more aggressive foreign agenda under the approach of [unilateral realpolitik](#). It is often achieved with ['geopolitical vetos'](#), a defensive-offensive military foreign policy, as well as [control over media](#) and [prosecution or arrest of critics](#). However, the [Iranian changes in the Nuclear Deal](#), the [Taliban taking over Afghanistan](#) and recent Russian aggression in Ukraine put Türkiye in an inevitable 'stabilising role'. Thus, forcing Erdogan to contemplate the overlapping interests with the West and the United States with a ['joint mechanism'](#) that Erdogan and US President Joe Biden positively discussed at the [G20 Summit in Rome](#).

To summarise, Erdogan's foreign policy can be understood in two ways: [its military and diplomatic footprints](#). The International Institute for Strategic Studies map displays the military presence and interventions of Türkiye from Cyprus to Syria and Iraq depicting the ["critical security concern of the Turks"](#) that has provoked the crises and tensions in neighbouring regions.

Turkey's Military Presence Abroad





Regarding diplomatic relations, Türkiye's partnership with the West, especially the EU and NATO, has shifted numerous times from strengthening ties to rising tensions. What has spurred ties the most is the unconventional alliances Erdogan pursued with authoritarian states like China and Russia. For example, Türkiye [‘put cash flow first’](#) when joining the Belt and Road Initiative in 2015 and was dedicated to a [mutually beneficial relationship](#) during the pandemic, wartime and economic crisis. Turkish ambassador to China, Emin Onen, described China and Türkiye as [“two ancient civilisations acting as the westernmost and easternmost gateways to Asia.”](#) As for Russia, Türkiye's earlier purchases of Russian military hardwares in 2017 even triggered the US to respond with sanctions. Yet, its geostrategic advantages are too crucial for the West to abandon. Its proximity to Russia would greatly assist NATO's effort in countering the Russian threat. While its influence in the Middle East could help the West to stabilise the area. Hence, despite their conflicting political agenda, the West is willing to make concessions.

Nonetheless, under Erodgan's increasingly hawkish and non-aligned foreign policy, Türkiye has gained increasing global status in both regional and international affairs. Its militaristic diplomacy in regional affairs and strengthening both Eastern and Western relations successfully promote Türkiye's hard and soft power abroad. But for a nation trying to balance between the West and the East, the real question lies in whether [‘Erdogan’s populist instincts’](#) would be sufficient to lead Türkiye through the current geopolitical atmosphere.

Türkiye’s Foreign Policy and Bilateral Relations with the Middle East and North Africa (MENA)

Helen Psatha

Until 2013-14, Türkiye's Foreign Policy towards MENA was mainly in line with the ["zero problems with neighbours"](#) doctrine. In short, the country wished to maintain a good relationship with its MENA neighbours with the [intention of extending its role in the region](#). To achieve the above, Türkiye planned to exploit its [identity as a secular and democratic yet simultaneously Islamic state, an identity consistent with the aspirations of the Arab Spring](#). However, the [Türkiye-backed Muslim Brotherhood](#) and its affiliates predominantly [failed to remain in positions of political power](#), the most prominent example being [Mohamed Morsi's, \(President of Egypt 2012-13\), removal from office via a military coup](#) (see Türkiye – Egypt for more details). With the failure of the Arab Spring movements, Türkiye lost its opportunity to get a grip on the region through organisations such as the Muslim Brotherhood. Since then, Türkiye has been pursuing a more aggressive foreign policy, as evidenced by the unilateral military interventions in Syria, Iraq and Libya (see the relevant sections for more information). As a result, however, Türkiye found itself isolated from its MENA neighbours with whom it had conflicting interests precisely over gaining more influence in the region. Nevertheless, at the moment, [the country's struggling economy](#) in the face of the [upcoming elections](#) has led



Erdoğan to seek a policy of rapprochement with its previously estranged neighbours, such as Israel, Egypt and the Gulf states, with varying degrees of success. It is expected that Türkiye will continue in this vein until the 2023 elections. Through the policy of rapprochement, Türkiye's goal is to boost its economy and normalise its claims concerning the exploitation of natural gas in the Eastern Mediterranean. The following paragraphs briefly discuss Türkiye's bilateral relations with key MENA countries in an attempt to substantially illustrate the above narrative and add a bit more nuance to the puzzle of Türkiye's foreign policy.

Syria:

Until the outbreak of the 2011 Syrian Civil War, [Türkiye-Syria bilateral relations were presented as a success of Türkiye's "zero problems with neighbours"](#) policy and the two countries enjoyed an overall amicable relationship with significant [economic benefits](#). The Civil War constituted a turning point in the countries' bilateral relations as [Türkiye failed to persuade the Syrian President Bashar al-Assad to adopt a more sympathetic stance towards the Arab Spring Uprising](#) and initiate reforms, a course of action which would have furthered Türkiye's goal of gaining influence in the region. As a consequence, [Türkiye cut diplomatic ties with the Assad](#) regime and actively [supported both political and armed opposition](#).

Testament to Türkiye's aggressive foreign policy turn were the [four major military operations on Syrian territory](#), (1) 'Operation Euphrates Shield' (2016-2017), (2) 'Operation Olive Branch' (2018), (3) 'Operation Peace Spring' (2019) and (4) 'Operation Spring Shield' (2020). According to Türkiye's Ministry of Foreign Affairs, the aim of 'Euphrates Shield' was to [eradicate the presence of ISIS from the territories near the Turkish-Syrian border](#). The focus of the subsequent operation, however, was to [neutralise PKK/YPG elements in the city of Afrin](#) in north-western Syria. [Türkiye considers both the PKK and YPG terrorist groups](#) and, therefore, a threat to its national security. Erdoğan opposes the PKK's and affiliate groups' objective of creating an independent Kurdish state as the creation of such a state would shrink Türkiye's territory as well as population and lead to further instability and competition in the region. In service of the same goal, weakening the Kurds, Türkiye initiated Operation Peace Spring, aiming to [establish a 'safe zone' along the totality of Syrian territories adjacent to the Turkish border](#). On the other hand, [Operation Spring Shield did not exclusively target PKK/YPG affiliates](#). However, it was designed to further Türkiye's above objective.

Operation Euphrates Shield was labelled a success as Türkiye managed to [establish control over an area of 2,015 km²](#) in the al-Bab region. Operation Olive Branch was also successful as [Turkish forces supported by the FSA captured Afrin](#). Operations Peace Spring and Spring Shield also [increased Türkiye's territorial gains along the Turkish-Syrian border](#). However, despite the above, Türkiye's objective of creating a unified 'safe zone' along the border has not yet been achieved. [Türkiye has taken charge of education and healthcare in the occupied regions](#), while the [Turkish lira has been made their official currency](#). Additionally,



the [administration of the territories is the responsibility of Turkish officials](#) affiliated with cities across the Turkish border.

Thus, Türkiye's actions suggest that Erdoğan wishes to incorporate the occupied territories into Türkiye, which is consistent with his overall expansionist goals for influence over MENA. The operations also benefit Erdoğan's agenda of weakening the PKK and hopes of Kurdish independence. Therefore, Türkiye's bilateral relations with Assad's regime are unlikely to improve given the former country's continued support of opposition groups and territorial claims. Türkiye's military operations in Syria are also likely to continue with the justification that a 'safe zone' has not yet been created.

Iraq:

Türkiye – Iraq bilateral relations are tense. Such tensions are the product of Türkiye's unilateral military operations in Northern Iraq (most recent being Operation Claw-Lock which commenced in April 2022) and [Iraq's water insecurity which is exacerbated by Türkiye's damming projects](#). Regarding the former issue, Türkiye is concerned about the presence of the PKK in Iraq and wishes to establish a security corridor and push the PKK far from its borders in a similar fashion to Syria. While Iraq has been tolerant of the operations, in July 2022, it [accused Türkiye of launching a missile attack which resulted in the deaths of nine Iraqi tourists](#) and submitted a [complaint to the UN Security Council](#). Therefore, Türkiye – Iraq bilateral relations will remain tense as the issues responsible for the tension are complex, and it is not at the moment on Türkiye's agenda to resolve them. In addition, given that the two principal rivers in Western Asia, Tigris and Euphrates, originate in Turkish soil, Türkiye has leverage over Iraq, and it is also reasonable to expect that the latter would wish to maintain a relatively amicable relationship with the former.

Saudi Arabia:

Türkiye – Saudi Arabia bilateral relations had been put under strain over the 2018 assassination of Saudi journalist [Jamal Khashoggi](#) in Istanbul. In the aftermath of the assassination, [the narrative circulated in Türkiye pointed to the Saudi government itself as the mastermind behind the assassination](#). The Saudi government [denied any involvement in the incident](#) and, in retaliation, [boycotted Turkish imports](#). This [unofficial embargo was lifted](#) in 2022 after Mohammed bin Salman Al Saud's (MBS) visit to Türkiye. Both sides publicly declared the visit a success. [Türkiye even went on to transfer the Khashoggi case to Saudi authorities](#). As a result, Türkiye – Saudi Arabia bilateral relations have indeed improved and Türkiye has already been financially benefited by the lift of the unofficial Saudi embargo. Türkiye can be further financially benefited by a positively predisposed Saudi Arabia. Thus, having in mind the precarious economic situation Erdoğan has found himself facing in the 2023 elections it is reasonable to expect that Türkiye will encourage Türkiye – Saudi relations.



Israel:

Historically, Türkiye – Israel bilateral relations have experienced volatile fluctuations. For instance, Türkiye seems to be positively predisposed toward [Israel in being the first Muslim Majority country to recognise it in 1949](#), about one year after the latter’s official declaration of independence. However, Türkiye also [recognises Palestine](#) and has [supported Hamas](#) in service of the former country’s agenda of influencing Muslim states in the region.

Tensions over the Palestinian question culminated in 2010 with the Mavi Marmara incident. [Israel had imposed a naval blockade](#) on the Hamas-controlled Gaza. [Mavi Marmara](#) was a vessel part of a flotilla supposed to be delivering humanitarian aid to the said territory. When Israeli forces asked to inspect the vessels’ cargo, the flotilla refused to, resulting in Israeli forces boarding the vessels. The crew of Mavi Marmara [was composed of members of the Turkish charity Humanitarian Relief Foundation \(IHH\)](#), who were [reported to have attacked the Israeli forces that boarded the vessel](#). Israeli forces returned the fire in [self-defence](#). This incident resulted in the [death of nine activists](#). Türkiye condemned Israel’s action, and anti-Israel rhetoric ensued. The [Israeli ambassador to Türkiye was expelled](#), and the [Turkish ambassador to Israel was recalled](#). [Joint military exercises were postponed](#), and the two countries put a [stop to their cooperation in the field of energy](#).

However, as of 2022, Turkish-Israeli relations have improved. More specifically, in October 2022, Israeli President Isaac Herzog visited Türkiye. [No Israeli President has visited the country since 2008](#). In the aftermath of the visit, [Türkiye toned down its anti-Israel rhetoric](#). Through engaging with Israel, Türkiye aspires to normalise its claims for exploiting natural gas in the Eastern Mediterranean. However, the full restoration of Turkish-Israeli relations is unlikely in light of Israel’s links with Greece and Cyprus. The interests of Greece and Cyprus in the Eastern Mediterranean are contradictory to those of Türkiye. In fact, in 2020, [Israel signed an agreement with Greece and Cyprus for the creation of a natural gas pipeline \(EastMed\)](#) transferring gas from the Eastern Mediterranean to Greece via Cyprus, completely bypassing Turkish shores.

Türkiye – Israel bilateral relations are forecasted to continue in the same vein in light of Erdoğan’s keenness to pursue a policy of rapprochement. Given the failure of Türkiye’s plan to get a grip on MENA through the Arab Spring, it is expected that Türkiye will toughen its stance on Palestine and Hamas in order to come closer to Israel.

Iran:

In the context of MENA, Türkiye and Iran have contradictory interests in Syria and Iraq. Iran disapproves of Türkiye’s military operations in Syria and is the main [supporter of the Assad regime](#). [Iran is also assisting the PKK](#) in Iraq, which stalls and jeopardises Türkiye’s



military operations in Northern Iraq. However, their relations have shown signs of improvement, as evidenced by [Erdoğan's visit to Iran in July 2022](#). Such a move is consistent with Erdoğan's policy of rapprochement. Stable relations with Iran may benefit Türkiye in many ways. They might even lead to trilateral Iran-Türkiye-Russia cooperation in light of Iran and Russia's close ties. While the above could benefit Türkiye, it would also mean that it was explicitly chosen as a side and favoured Iran risking relations with those MENA countries who view Iran as a crucial antagonist, more notably Saudi Arabia and Israel. Hence, in light of the recent rapprochement with both Saudi Arabia and Israel, which has benefited Türkiye economically, the latter is expected to try to maintain this balancing act.

Egypt:

Türkiye and Egypt view one another unfavourably in light of the former country's vocal opposition to Egypt's President Abdul Fattah al-Sisi. The 2013 military coup that brought al-Sisi to power resulted in the downfall of the Turkophile President and member of the Muslim Brotherhood, Mohammed Morsi. Under al-Sisi, the [Muslim Brotherhood was outlawed and deemed a terrorist organisation](#). Prominent members of the organisation, including former President Morsi, were jailed. Türkiye, however, continued, to Egypt's displeasure, providing a platform to the Brotherhood by having them operate [media outlets in Ankara and Istanbul](#). November 2013 found Egypt expelling the Turkish ambassador, and Türkiye later on retaliated by expelling Egypt's ambassador. [The two countries maintain diplomatic relations at the level of Chargés d'affaires](#). However, the absence of ambassadors as heads of both diplomatic missions respectively is symbolic of the two countries' strained relations.

Türkiye and Egypt are also at odds over the natural gas dispute in Eastern Mediterranean. Notably, [Türkiye has been excluded from the EastMed Gas Forum](#) (EMGF), which essentially comprises a formal pathway of cooperation between Egypt and countries such as Greece and the Republic of Cyprus, with which Türkiye is also at odds over the issue of exploitation of gas in Eastern Mediterranean.

Conclusion: Al-Sisi's 2013 coup halted Türkiye's influence in Egypt, disrupted the former country's overarching plan for getting a grip over MENA through the Arab Spring and contributed to its regional isolation. Recent attempts at rapprochement are moving slowly, and no significant outcomes have been officially reported. Türkiye's exclusion of the EastMed Gas Forum is indicative of the country's diplomatic isolation and suggestive of the fact that Türkiye's attempts to exploit natural gas in the Mediterranean will be staunchly opposed by an entire block of countries united over the fact they view Türkiye as their antagonist. Rapprochement with Egypt would be beneficial for Türkiye in legitimising its exploration of gas in the Eastern Mediterranean. Hence, it is expected that Türkiye will continue pursuing a policy of rapprochement with Egypt.



Libya:

[Türkiye recognises and supports Khalifa Haftar's government](#) which also enjoys the support of the UN. Most notably, [Türkiye had intervened in favour of Haftar in the siege of Tripoli](#) in 2019. Türkiye continues to maintain a military presence in Libya. Türkiye's intervention and continued presence in Syria have benefited the former country financially in the form of [infrastructure contacts](#) and, in addition, put pressure on Egypt. Türkiye has benefited through its support of Hafatar's government and hence is unlikely to change allegiance or withdraw its military.

Qatar:

Qatar is Türkiye's closest MENA ally. Most notably, [Türkiye supported Qatar throughout the 2017-21 blockade](#) imposed on the latter country by Saudi Arabia, the United Arab Emirates (UAE), Bahrain, and Egypt. Türkiye also operates a [military base in Qatar](#). Türkiye-Qatar relations will continue to be cordial. It is unlikely that Türkiye would do anything on purpose to displease its closest ally in the region.



What domestic political and social problems is Türkiye facing?

Türkiye's Socio-political Background

Amna Bibi

The Turkish democracy which looked to be flourishing by the dawn of the 21st century has been agitated by the socio-political turmoil at home for almost a decade now. Modern Türkiye, has its ideological roots in secular modernism, and the Military, specifically, stands to guard those values following the legacy of Kemal Atatürk; the father of modern-day Türkiye, and subsequently, has historically held a [firm grip over Türkiye's politics](#). The Military started losing influence in national politics, and political parties, especially the newly founded and elected for the first time in 2002, the Justice and Development Party (AKP), claimed power. Since the birth of Modern Türkiye in 1923, its democracy has evolved from a single-party rule, towards a pluralistic multiparty democracy, while the military upheld a strong political control, as guardians of the secular values of modern Türkiye, restorers of order and peace. The Military has been very open about its political influence, and manifestations of this commitment to this role, can be seen in the history of indirect ('Post-modern Coup 1997), and direct (Coup d'états 1960, 1971, 1980) [interventions in the political process](#). Mired with the memories of persecution, curbing of civil liberties, and civil unrest, the military's political role has gradually weakened, and has come to a point of civil supremacy after the failed Coup attempt in 2016. This is widely hailed as a turning point in consolidating democratic power in Türkiye. At the same time, this democratic consolidation seems to be jeopardised by what is called '[Electoral Authoritarianism](#)' of the ruling AKP that has been ruling Türkiye for almost 20 years now. The AKP's first ten years in power saw liberal reforms, religious liberty, advocacy for minority rights (Kurds and economic growth. Its commitment to a liberal economic order, [sound macroeconomic policies, structural reforms](#) in the areas of trade liberalisation, privatisation, labour market, and banking sector, as well as increased democratisation under the EU accession talks in 2005, helped the country recover from the worst economic crisis to hit Türkiye since World War II. A surge in foreign direct investment (FDI) with average annual [GDP growth of 6.8 per cent](#), and [a decline in Inflation from 54pc to 8.8pc](#) between 2001 and 2007, successfully turned it into a leading emerging market.

Following the 2007 Constitutional Referendum on electoral reforms, allowing for the election of the country's President through a direct national vote instead of a parliamentary vote, [Recep Tayyip Erdogan became the first directly elected President](#), with an absolute majority of 52%, leading him a step closer to instating a Presidential system in the country. While a certain apprehension existed regarding AKPs position as a Center-Right party, and close ties with Islamist parties of the Right, pertaining to the fears of Islamist repression of



Turkiye's modern-secular order, [‘‘ The core of the problem did not lie with the AKP's ties to political Islam’’](#). Erdogan's true authoritarianism translates into a one-man autocratic rule, which first came into perspective, during the Gezi Park Protests of 2013. What started as peaceful localised protests against Urban development in Istanbul, became a nationwide revolt against the government's brutal crackdown on the demonstrations, aggravated by the increasing government control over the free press, freedom of expression and assembly. The Court Verdicts over 300 defendants of the famous [Ergenekon case](#) in August 2013 , including former military commanders, politicians, academics, and journalists, accused of being a part of a so-called ‘‘deep state’’, an alleged secularist ultra-nationalist group, having been part of a plot against the government, allowed Erdogan to further consolidate power and suppress dissent.

The 15th of July 2016 failed Coup attempt is unequivocally one of the most significant turning points in modern-day Türkiye's history. It dealt the military the worst setback to its ability to influence politics and served as a smooth segue for transitioning from the Parliamentary system to the Presidential system of government. The Erdogan government put the blame on Fethullah Gulen, a US-based Sunni cleric, whom [AKP remained an ally with](#) during the first 10 years of its rule, and his followers known as the Gulen Movement, for orchestrating the coup. What followed has been the biggest crackdown, [the so-called Purge](#), occasionally referred to as a ‘counter-coup’ by some Western observers, across the society from military ranks to teachers, judges, civil servants, academics, media outlets and journalists, law enforcement, and clerics. These purges took away one-third of [Türkiye's Military leadership](#). Five days following the coup attempt, President Erdogan declared a state of emergency in the country that lasted for two years and was finally lifted in July 2018. During this time over [1000 amendments were made](#) to the national constitution through 30 State Emergency Decrees, bypassing the legislature, encompassing almost 1200 articles in total, the majority of which have nothing to do with the original reason for instating the state of emergency. These amendments deal with education, health, administrative structure, social security, economy, internal security and defence. Furthermore, the Constitutional Court has declared itself to be unauthorised in pleas against the State of Emergency executive decrees, thereby placing these [executive decrees outside of judiciary oversight](#). The government also used State of Emergency executive decrees to impose a number of harsh sanctions on organisations and foundations, media outlets, businesses, and municipalities. These sanctions included dismissal, closure, property seizures, and the appointment of special administrators without any need for judicial approval. The [Constitutional Referendum of April 2017](#), approved 18 amendments to the constitution through a national vote, converting Türkiye from a Parliamentary to a Presidential republic, giving sweeping powers to the President including the appointment of ministers, budget, the appointment of senior judges and ability to instate certain laws by decree, declaring a state of emergency, and dissolving the parliament. Over the years, the government has doubled down on curtailing civil liberties of expression, association and assembly. A public reaction to this growing authoritarianism was seen in the re-run of [the 2019 Mayoral election of Istanbul](#), in which opposition candidate Ekrem Imamoglu defeated



AKP, ending AKPs 25 year rule in the city, a city that contributes over 27pc to the country's total taxes, and 40pc of GDP.

Social and Political Challenges in Türkiye

Yavana B

While Türkiye presents itself to the outside world as a secular, modern state, the domestic picture is somewhat contrary. President Erdogan has been accused of turning over Türkiye's democratic and secular credentials through his increasingly authoritarian rule. Türkiye ranks consistently low in human rights issues, including repression of journalists and human rights activists, femicide issues, and LGBTQ+ rights.

After a failed coup in July 2016 which killed at least 300 people, tens of thousands of activists, journalists, judges, and members of the armed forces were suspended or arrested. Türkiye maintains that the coup attempt is linked to exiled Turkish scholar [Fethullah Gülen](#) and the '[Gülen](#)' movement, whose members make up the majority of the arrested. Once political allies, relations between Türkiye's ruling Justice and Development Party (AKP) and the Gülen movement soured later, particularly after Ankara accused the movement of being responsible for the coup attempt. Many perceive the post-coup crackdown as a pretext used by the Erdogan government to quash dissent. The Gülen movement is now branded as a terrorist organisation by Türkiye as well as Pakistan and the Gulf Cooperation Council (GCC), despite the US and the European Union (EU) claims that defended the movement.

Few media outlets operate outside direct or indirect government influence and those that do often face heavy censorship or intimidation of their journalists. Freedom of speech in Türkiye is seen to be increasingly eroding, with lesser space for voices opposed to or critical of the government. A bill to combat "fake news" was [presented before Parliament](#) in March 2022. This bill would add the charge of "openly disseminating information that misleads the public" to the Turkish penal code. Since a clear definition of what constitutes fake news and disinformation is not spelt out, critics of this bill warn that it would turn out to be a government tool to control online and social media, a space relatively untouched so far. [Protests against the media bill](#) followed, but there is no possibility of the bill being withdrawn or modified.

Among several arrests, the case that perhaps achieved maximum international attention was that of the prosecution of Turkish activist and philanthropist [Osman Kavala](#). Kavala is charged with orchestrating the nationwide anti-government protests of 2013 (better known as the Gezi Park protests) as well as the failed coup attempt of 2016, both charges he denies. Kavala gained international support, with the European Court of Human Rights ordering his immediate release. The government continues to ignore this ruling.



Türkiye also has [high femicide rates](#), with about 2500 cases of femicide reported between 2010 and 2020. Most cases of femicide go unreported, suggesting that the official rate may not portray an accurate picture of the situation. The Turkish government also comes down heavily on groups that aim to aid victims or raise awareness of the issue. In June 2022, a prominent anti-femicide group “We Will Stop Femicide Platform” was [prosecuted](#) for indulging in practices that “threaten traditional family values”. The group had been campaigning against the murder and abuse of women since its foundation in 2010. In March 2021, President Erdogan [withdrew Türkiye](#) from the Istanbul Convention, a treaty that requires signatory nations to create laws to prevent and prosecute violence against women. Türkiye remains the only nation to have withdrawn from the treaty. The following large-scale protests against the decision were quickly put down. Türkiye’s ruling Justice and Development Party (AKP) is accused by several organisations of covering up the issue of femicides in the country to present a rosier picture abroad.

The AKP’s conservative ideals have also brought severe criticism from the LGBTQ+ community. The Istanbul pride parade, an annual event since 2003, was [banned](#) in 2021 and 2022, and several attempting to defy the ban were arrested this June. Homosexuality is not illegal in Türkiye, but the social sentiment towards it is one of widespread hostility. During the Covid-19 induced lockdown, the government banned several protests stating the pandemic, but several groups have accused the authorities of using the pandemic to selectively ban protest movements, including the LGBTQ+ one. Türkiye was established as a secular and modern republic by the country’s first president Mustafa Kemal Atatürk, but recent years have seen the steady growth of the political Islamist government which is increasingly seen as eroding the country’s secular credentials.

Türkiye currently hosts the largest number of refugees in the world, most of them Syrians fleeing their civil war. According to the government, the total number of registered Syrians under Temporary Protection (SuTPs) is [3.7 million](#) as of February 2022. Like any other refugee population, those seeking asylum in Türkiye too face immense difficulty in assimilating among the Turkish people. Instances of outright violence against and murder of Syrian refugees have been recorded, and the general public sentiment regarding refugees is antagonistic. In [January 2022](#), eight people were arrested for stabbing and killing a 19-year-old Syrian refugee in Istanbul. To add to the troubles, political parties in Türkiye openly issue statements that condone violence against refugees and suggest that Syrians should be sent back to their country. Members across the political spectrum have blamed, in part, the overwhelming refugee population for Türkiye’s spiralling economic crisis. This trend is certainly not restricted to Türkiye and has indeed been seen in several European countries, but the fallout from such attitudes can be drastic.

All these foil the notion of a modern, stable, and socially cohesive state that Türkiye attempts to portray. Its bid for EU membership, stalled for decades, will continue to be in limbo



as long as its human rights situation does not improve. Other countries are bound out to call Türkiye out on its repressive domestic activities. Concerns regarding rule of law and human rights will impede Türkiye's hopes of elevating its status and becoming a regional power.



Conclusion

Ryan Hoi Kit Leung

To summarise, Türkiye is experiencing rapid growth internationally. Ankara successfully took the current global political atmosphere to its advantage. Using the war in Ukraine, Türkiye emerged as the mediator of the crisis. Aware of Türkiye's crucial geostrategic strengthening, the West was willing to make compromises favourable to Erdogan. On a broader political landscape, following the decline of Western influences in Africa and the East, Türkiye managed to fill in the power vacuum by establishing security and economic ties. Based on their shared cultural and religious values, Ankara expanded its hard and soft power in the region, making it a regional hegemony.

Furthermore, it has developed a high level of hard power. Its military forces have engaged in combat over the Middle East, countering the threat from ISIS and regional Kurdish militants. The strength of the Turkish military is further recognised by its neighbour in the form of security alliances. Its military presence has now spread across continents, projecting its hard power abroad. Additionally, seeing the success of its military operations, regional countries have expressed interest in the Turkish defence sector. For instance, the Bayraktar TB2 drones performed effectively against Russian forces in Ukraine. It helped stimulate Türkiye's growing defence industries.

However, despite its massive military and diplomatic expansion, Türkiye is lacking a stable political and economic foundation to sustain its foreign agenda. The President's populist approach to politics has destabilised the parliamentary system of the Republic. Using the Gulen Movement to impose a dictatorial rule has shifted Türkiye to an unchecked presidential system. Albeit the lack of political opposition gave Erdogan the necessary power to push his hawkish policies, the absence of political opposition could very much leave the system imbalanced. Such problems as demonstrated by his unorthodox intervention of the Turkish Central Bank have thus far become the main factor for the worsening inflation crisis. Despite the country remaining economically productive, the continuing crisis has led to a sharp decline in foreign investment, which limited the prospect of its economy. Therefore, with Erdogan's increasing authoritative measures, Türkiye would be limited by its domestic constraints. If Türkiye has the ambition to rise as a global hegemony like its historic predecessor, it must tackle the existing authoritative difficulties and economic weaknesses.

