

SETA SECURITY RADAR

TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2024

Seeking Strategic Stability in a World of Conflict



Edited by
Murat Yeşiltaş
Bilgehan Öztürk

SETA | REPORT

December 2023

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SETA Publications 240
ISBN: 978-625-6583-13-9

Layout: Erkan Söğüt, Said Demirtaş
Print: Turkuvaz Haberleşme ve Yayıncılık A.Ş., İstanbul

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FOREWORD



Burhanettin Duran
SETA General Coordinator

In 2023, the international system has observed multiple unexpected events and strategic shifts. Election periods in major nations have affected global dynamics and triggered geopolitical changes. Pivotal elections – from the United States to Russia – set for next year contribute to multifaceted global challenges that have altered the international stage, intensifying geopolitical tensions and uncertainty. The strife in Ukraine, the Taiwan dispute, Iran’s nuclear program, and the Israeli-Palestinian conflict were among the main determinants of international dynamics, affecting regional and extra-regional countries alike. Following uncertainties in energy prices and challenges posed by climate change might also drive further uncertainty in international politics.

Accordingly, the global powers’ sphere of influence becomes subject to question. Challenges faced by the U.S. regarding its global standing and China’s growing influence suggest potential shifts in global power positioning and regional dynamics, while it is acknowledged that China is yet to militarily balance the U.S. Ongoing conflicts like the Russia-Ukraine war, Israeli-Palestinian conflict, and the crisis in Yemen, along with potential conflicts in the Middle East involving Israel, Iran, and the Hezbollah, continue to aggravate regional uncertainty and unpredictable outcome.

The eruption of the Israeli-Palestinian conflict in the Middle East and its continuation, costing thousands of civilian lives, created a more volatile environment and a pause in normalization efforts. The risk of increased instability, escalation,

and the likelihood of an anti-Israeli political bloc forming could prompt the U.S. to reconsider its withdrawal from the Middle East. Houthi missile attacks on Israel-bound vessels through Bab al-Mandab may lead to direct conflict with the U.S. This also raises the risk of re-escalation of Iran's tensions with Saudi Arabia and the United Arab Emirates (UAE). Additionally, if Israel turns its attention to Hezbollah, after Gaza's objectives, it could trigger a conflict reminiscent of 2006. It further heightens the potential for missile attacks by Iran's proxies on U.S. bases in Iraq, and raises concerns about a Middle East nuclear arms race due to the unresolved issue of Iran's nuclear program.

At this stage, Türkiye re-emerges as a focal point for the crises, assuming a heightened sense of security needs and responsibility on the international stage. Building on the efforts from the preceding year, Türkiye has pursued normalization with its neighbors, especially with the Gulf countries, while asserting its presence on the global stage. After the election period, Türkiye adopted a regional foreign policy, prioritizing the economy as normalization being pivotal. On the other hand, the issue of terrorism continued, shaped by challenges in the relations between Türkiye and the United States. Türkiye's relations with the U.S. and Europe remain subject to change based on the shifts in the geopolitical dynamics and global crises.

In line with these dynamics, reflecting a challenging environment with multiple crises and complexities, Türkiye's foreign policy is evolving with nuanced geopolitical implications toward 2024. Turkish-American relations are expected to play a pivotal role in 2024 due to several unresolved issues – from terrorism to defense. Also, Türkiye-Europe relations in 2024 are expected to extend the tone set in 2023, with some positive developments, such as the rapprochement between Türkiye and Greece. Nevertheless, the rise of far-right ideologies in Europe and the ongoing war in Ukraine may bring forth other dynamics.

The latest SETA Security Radar explores significant events shaping Turkish foreign, security, and defense policies in 2023. The analysis focuses on the interactive elements of Türkiye's evolving strategic context, aiming to predict its foreign policy trajectory in 2024.

Thanks to the entire foreign policy team for their contribution.

TÜRKİYE'S GEOPOLITICAL OUTLOOK: Seeking Strategic Stability in a World of Conflict



Murat Yeşiltaş



Bilgehan Öztürk

01

SUMMARY OF 2023

1

The global landscape of 2024 is a complex mosaic of geopolitical shifts, strategic uncertainties, and simmering conflicts that have their origins in the preceding year. With over 4 billion people engaged in key elections across major nations, the ripple effects of these choices will reverberate worldwide. From the United States and Russia to India and Taiwan, each ballot casts a shadow on the international stage, amplifying geopolitical tensions and injecting further unpredictability into the global arena. These political transitions occur against a backdrop of multifaceted international challenges. Issues like Ukraine's strife, the Taiwan dispute, Iran's nuclear program, the Israeli-Palestinian conflict, and the impacts of climate change loom large, presenting potential triggers for profound shifts in international dynamics. Moreover, the resurgence of conflicts, with some 78 reignited or previously frozen disputes now active, underscores the volatility defining our global landscape.

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Amid this uncertainty, the positioning of global powers is undergoing notable scrutiny. The United States faces challenges to its global standing across military, economic, and diplomatic spheres. China, while not an immediate military equal, poses targeted threats, potentially reshaping regional dynamics. Meanwhile, Russia's ambitions in Ukraine persist but achieving them remains elusive. In the Middle East, the Israeli-Palestinian conflict remains a focal point, its prolonged nature risking broader regional instability. Similarly, Yemen and the specter of conflicts between Israel, Iran, and Hezbollah paint a picture of escalating tensions with far-reaching consequences.

2

Within this intricate international tapestry, Türkiye's foreign policy stands at a critical juncture. Recent years have seen a nuanced approach, marked by efforts to normalize relations with neighbors and assert Ankara's presence on the global stage. However, challenges remain, particularly in Turkish-American relations, shaped by issues like the YPG in Syria. Looking ahead, the trajectory of Turkish-American and Turkish-European relations remains subject to evolving dynamics, influenced by ongoing conflicts and regional realignments. The situation in Ukraine and Türkiye's multifaceted relationship with Russia are poised to be pivotal factors shaping Ankara's foreign policy.

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In essence, the global picture is painted with complexities, presenting a dynamic and challenging environment for Türkiye's strategic positioning. While crises abound in the region, each carries nuanced geopolitical implications, shaping the choices and constraints within Türkiye's evolving regional and international outlook.

INTERNATIONAL ENVIRONMENT

The events of 2023 have significantly diversified potential geopolitical and strategic scenarios for 2024. The trends that either started in 2023 or had been already underway throughout 2023 will inevitably reverberate well into 2024. To begin with, over 4 billion people will participate in elections throughout the year, highlighting critical ballots in the United States, Russia, the United Kingdom, India, Taiwan, and Bangladesh. Each of them carries significant geopolitical weight, either on their right or on being at the center of a hotspot. Elections will arguably exacerbate the already polarized domestic environments and contribute to the uncertainty and instability in the international arena at least until the polls are over. Even after the elections, depending on the geopolitical and international tendencies of the winners, the countries going through elections will not necessarily achieve stability given the likelihood of incoming governments recalibrating the existing geopolitical alignment of the country, to mention one of many possibilities.

Furthermore, key issues like Ukraine, Gaza, the Taiwan dispute, Iran's nuclear program, the Israeli-Palestinian conflict in the Middle East, uncertainties in energy prices, and unforeseen developments due to climate change might instigate shifts that deeply impact international politics. Over the past 24 months, 78 conflicts have either reignited entirely or seen previously frozen wars re-entering active conflict phases. This is one of the most prominent facts defining the conflict landscape within the international system.

The uncertainty surrounding systematic changes and transformation remains, with the U.S. position playing a pivotal role. A serious challenge to the global standing of the U.S. persists across various domains. While China may not presently balance the U.S. militarily, it holds the potential to do so in specific sectors in the near future. This prospect could grant China a regional balancing power

against the U.S. Furthermore, a notable assault on the U.S. military presence in the Middle East has surfaced, particularly post-Oct. 7, jeopardizing its position.

Financially, the U.S. leads as one of the largest economies. Yet, the global economic landscape continues to witness significant challenges to U.S. hegemony, notably from regional powers. Diplomatically, the moral ascendancy of the U.S. appears diminished, especially during the Gaza conflict, eroding American diplomacy's credibility. The Joe Biden administration's goal of establishing a rules-based international order has faltered, fostering justification for unruly behavior by other global actors.

Another systemic concern is Russia's continual occupation of Ukraine. Russia's unchanged geopolitical objectives aim to transform Ukraine into a Black Sea-closed state. With Finland's NATO membership and the possibility of Sweden's NATO accession, Russia's goal has intensified. Yet, Russian President Vladimir Putin is unlikely to achieve this ambition by 2024. Consequently, a stagnant battleground emerged in the Ukrainian conflict, with a disparity between high operational intensity and Moscow's inability to achieve its geographical aspirations. The war in Ukraine is at a stalemate. While the West offers substantial military aid to Ukraine, it has not decisively shifted the situation on the ground against Russia. A military breakthrough for either side is not within sight. The fact that the most traditional elements of warfare such as geographical/territorial depth, sustainability of manpower, and ammunition have become the dominant determinants in the war for some time, making an outright military victory for Ukraine more implausible by the day. The implications of the stalemate are not equally distributed between the parties. The prolongation of the war works relatively better for Moscow than Kyiv. Diplomatic progress remains stagnant, inhibiting Ukraine's advancement toward peace negotiations, hinging on the complete withdrawal of Russian troops from Ukrainian territory. The Ukrainian peace plan appears to be entrenched while foreseeing a continuation of the current status quo in 2024, with the U.S. presidential elections possibly influencing the Ukrainian process. Likewise, Russia's upcoming election is unlikely to disrupt Putin's presidency and will consolidate his power unless an unforeseen event alters the trajectory. This may impact Russia-Europe relations, especially if former U.S. President Donald Trump secures a victory, potentially empowering Europe's autonomous stance on Ukraine.

MIDDLE EAST

Beyond Ukraine, the Israeli-Palestinian conflict represents a significant front in the Middle East. The prolonged nature of Israel's attacks in Gaza hints at its continuation, risking more civilian casualties and a potential spread of conflict to neighboring nations. While Israel might achieve military victories, it could

face strategic losses regionally. The prolonged conflict threatens the foundations laid by normalization and the Abraham Accords. The ongoing Israeli onslaught and the sheer violence inflicted on Gazan civilians increase the risk of regional instability and escalation. The risk of confrontation between Israel and Egypt increases by the day at least on the specific question of pushing Gazan civilians toward the Egyptian border. Even if the kinetic invasion and bombardment of Gaza stops, there will be consequences in and for the region. Postwar, Israel's expanding security strategies could include Syria and Iraq, which may heighten tensions with Iran. In addition, the normalization process between Saudi Arabia and Iran will be negatively affected by the ongoing escalation in Gaza, if not the process between Arab countries and Israel. The likelihood of forming an anti-Israeli political bloc in the region looms large, potentially prompting the U.S. to reconsider its Middle East withdrawal strategy and possibly increase its military presence. A Trump administration could alter this dynamic, fostering a new alliance between the U.S., Israel, and Saudi Arabia.

Yemen remains another conflict zone likely to escalate. The Houthis' firing missiles targeting Israel-bound vessels passing through Bab al-Mandab risk a direct engagement between the group and the U.S. through a regional coalition to counter the former. This in return also runs the risk of re-escalation between the Houthis in Saudi Arabia and the United Arab Emirates (UAE). Furthermore, it is only natural for Israel to turn to Hezbollah in Lebanon once it deems its military objectives in Gaza have been achieved. This might trigger a direct conflict between Israel and Hezbollah similar to the one in 2006. In case of a direct conflict, a discernible increase in missile attacks by Iranian proxies on U.S. bases in Iraq would be on the cards. On the other hand, the unresolved issue of Iran's nuclear program could prompt a Middle East nuclear arms race, potentially drawing Saudi Arabia and Türkiye toward this axis. All these dynamics point to and force all actors to rethink the MENA region in the sense that the decades-long order, dynamics and underlying assumptions there are not sustainable. Papering over the Palestinian question by normalization between Arab countries and Israel along the lines of the Abraham Accords backfired spectacularly in the form of the Oct. 7 incursion. The cost of Israel's ongoing war in Gaza holds paramount importance for these scenarios. Türkiye's role in these dynamics remains intertwined, necessitating a dynamic foreign policy in a highly competitive and aggressive regional environment in 2024. Contrary to expectations, the region might witness a resurgence of competitive and aggressive processes.

TURKISH FOREIGN POLICY

Describing 2023 as a relatively quiet year for Turkish foreign policy would exclude the events of Oct. 7 and their aftermath. The trend of normalization, ongoing since

the general elections in May, played a pivotal role in determining the overarching course of Ankara's foreign policy. Despite unresolved issues, emphasis was placed on minimizing potential conflicts and prioritizing common interests. In the post-election period, President Recep Tayyip Erdoğan opted for a regional foreign policy, centered on Gulf country relations, making the economy a primary focus. To mitigate security risks from Syria, ministerial-level talks with the Assad regime were initiated. Noteworthy strides were made in normalizing relations with Israel and Egypt. Erdoğan's robust support for Azerbaijan in liberating Karabakh also bolstered Türkiye's status as a geopolitical player in 2023. He also sought to mend Türkiye's ties with the West, aimed to chart a new course in Turkish-American relations and maintained a balanced stance in the Ukraine conflict. The year concluded with the pivotal Türkiye-Greece summit, marking another significant foreign policy step.

HEADING TO 2024

Turkish-American relations are poised to dominate the discourse in 2024 due to several unresolved issues. Foremost among these is the persistent U.S. support for the PKK terrorist group's Syrian wing YPG. Notably, no substantial shift is anticipated in U.S. strategy on Syria, indicating continued support for the YPG in the country's northeast. This poses a growing challenge for Türkiye as the YPG strengthens its military capabilities and international networks. Recent actions, like the implementation of a so-called new constitution renaming the region as the Democratic Administration of Northern Syria, highlight the urgency for Turkish action. Failure to address the YPG issue in 2024 could escalate into a broader strategic challenge for Türkiye. Furthermore, other facets of Turkish-American relations suggest an eventful year ahead. Positive developments in F-16 sales and a favorable decision by Türkiye's Parliament regarding Sweden's NATO membership could influence the military and defense dimensions of Turkish-American relations. However, dynamics such as Israel's war in Gaza and Türkiye's stance on this matter might negatively affect Turkish-American relations. The prospects of an imminent reconciliation between Israel and Türkiye appear dim, potentially introducing an adverse element to Turkish-American ties.

Regarding Türkiye-Europe relations, 2024 is expected to continue the tone set in 2023. The European Union dimension may not witness a revitalization, but the post-election atmosphere is likely to persist. For years, the relations have been falling victim to politicization, securitization and showdown in relations. The ongoing Ukraine conflict holds significant sway over Türkiye-Europe relations, demanding a strategic approach from Türkiye given the uncertainties of the conflict's trajectory. While security concerns, notably migration, reinforce the rationale for cooperation, economic interdependence indicates stable Türkiye-Europe relations in 2024.

The reconciliation between Türkiye and Greece and their increasing collaboration in the Eastern Mediterranean energy domain is poised to influence Türkiye-Europe relations positively. It is important to note that the nature of Türkiye-Greece bilateral relations has transformed, thanks to the ongoing normalization efforts. It is safe to argue that Türkiye-Greece relations are now a foreign policy issue rather than geopolitics. The latter was the determining force in Türkiye-Greece relations in recent years, before the February earthquakes in Türkiye. However, the rise of far-right ideologies in Europe might influence national politics and foreign policies, potentially leading to anti-Türkiye sentiments within the European Union. Hence, developments in this realm warrant close monitoring. On the other hand, the war in Ukraine made it once more clear that Europe cannot ignore Türkiye, quite the contrary. War in Ukraine with all its various dimensions, ranging from supplying weaponry to Kyiv to seeking de-escalatory avenues with Russia, recapitalized Türkiye's indispensability for Europe's security. Although highly unlikely, Europe's best bet to achieve its strategic autonomy from the U.S. and ensure its long-term stability and security goes through a sincere alliance with Türkiye, which would entail nothing short of a full European Union membership for Ankara.

The ongoing Ukraine war remains one of the foremost international concerns in 2024, significantly affecting Türkiye due to its proximity and vested interests. The pivotal question revolves around whether the U.S. and European countries will sustain military aid to Ukraine. Continuation of such aid ensures Ukraine's capacity to sustain the conflict, while a cessation could alter the war's course, potentially favoring Russia. Consequently, Turkish foreign policy stands to be influenced by the potential outcomes of the Ukrainian conflict. Erdoğan's recent statements during his visit to Hungary and the prospect of a renewed summit between Erdoğan and Russian President Vladimir Putin underscore the importance of issues like the grain corridor deal. Given Türkiye's multifaceted relationship with Russia in Syria, the South Caucasus, Libya, and energy, Moscow-Ankara relations will remain a critical focus in 2024.

With a long-term vision, Türkiye favors the inclusion rather than exclusion of Russia in a post-war settlement for it to be a viable one. For a stable and viable "grand geopolitical deal" between Europe and Russia, it is better to make Russia an integral part of the European security architecture. This is of course based on the assumption that there would be no "military solution" in the war given the depletion of military hardware in Europe to be supplied to Kyiv and the likelihood of approval of a defense budget at U.S. Congress is uncertain.

In the Middle East, normalization will persist as a crucial element of Turkish foreign policy. However, the term "normalization" between Türkiye and the

Gulf countries may become obsolete, indicating a burgeoning consensus on this front. A new regional consensus might emerge, uniting Türkiye, Saudi Arabia, the United Arab Emirates (UAE), and Qatar, especially in defense cooperation, potentially evolving into a strategic alliance. Despite this, the unresolved Gaza issue could engender a broader environment of instability in the Middle East in 2024, affecting Türkiye and the entire region. Consequently, countries, including Türkiye, may redirect more efforts toward Gaza. On the other hand, whether the rapid response of the U.S. to the Oct. 7 attack – in the form of deployment of carrier strike groups in the region – entails “America being back” in the region is yet to be seen. If that proves to be the case, all regional actors including Türkiye would have to revisit their decade-long foreign policy orientation, which had been crafted in the era of gradual withdrawal or absence of the U.S. in the region. Central Asia holds another significant dimension for Türkiye in 2024, especially concerning relations within the framework of the Organization of Turkic States (OTS). Initially focused on economic cooperation, this partnership is expected to evolve into a more strategic political venture, prompting Türkiye to pursue a foreign policy that secures its position in the Central Asian equation.

In the realm of great power rivalry, following the San Francisco summit between Joe Biden and Xi Jinping, the U.S., and China seem to have agreed on embarking on a de-escalatory phase due to the high stakes as well as a high level of interdependence between the two. This entails a greater role for middle powers and regional actors in regional hotspots, which is not necessarily conducive to stability. However, despite the de-escalatory atmosphere post-San Francisco summit, Xi’s warning to Biden that China would reunify Taiwan with the mainland¹ poses the risk of scrapping whatever understanding both parties may have on de-escalation.

Overall, Türkiye’s strategic environment will be characterized by dynamism and diversity, culminating in a somewhat constraining regional atmosphere that ultimately poses challenges to Türkiye’s new regional and international orientation. There are crises surrounding Türkiye’s vicinity geographically, but the geopolitical implications and meaning of each varies.

In this latest edition of SETA Security Radar, we delve into the significant events that have molded Turkish foreign, security, and defense policies throughout 2023. Our analysis centers on the interactive aspects of Türkiye’s evolving strategic environment. By closely examining the key dynamics of 2023, we aim to forecast the trajectory of Türkiye’s foreign policy in 2024.

¹ “Xi warned Biden during summit that Beijing will reunify Taiwan with China” NBC News, December 20, 2023, <https://www.nbcnews.com/news/china/xi-warned-biden-summit-beijing-will-reunify-taiwan-china-rcna130087>

2024: The Year of Stand-By in Türkiye-U.S. Diplomatic Ties



Gloria Shkurti Özdemir

02

SUMMARY OF 2023

- 1 Negotiations regarding the purchase of F-16s and the NATO membership of Finland and Sweden were central topics.
- 2 The U.S.' sustained support for the YPG/PKK remained the primary point of diverging in Türkiye-U.S. relations.
- 3 The conflict in Gaza has once again positioned Türkiye and the U.S. on opposing ends of the geopolitical spectrum.

2023: A YEAR OF PRAGMATIC ENGAGEMENT

In 2023, Türkiye continued the policy of enhancing its strategic autonomy by decreasing dependence on external powers, including the U.S. Within this framework, the Türkiye-U.S. relationship in 2023, much like in previous years, has been characterized by a blend of notable divergences and ongoing cooperation in key areas. Throughout the year, dialogue between the leaders of both nations remained open, underlining the pragmatic nature of their interactions. Indeed, this pragmatism is a consistent theme in their bilateral relations, continuing to define their dynamic in 2023. Supporting this perspective, in June 2023, National Security Advisor Jake Sullivan, during a CNN interview, acknowledged Türkiye's independent foreign policy trajectory and the possibilities for cooperation between the two states, especially in terms of the F-16 fighter jets.¹

During this period, several key issues have significantly influenced Türkiye-U.S. bilateral relations. These include discussions around the F-16s purchase, NATO's expansion with Finland and Sweden's membership, and the U.S. stance toward the PKK. Despite the productive and positive collaboration between the presidents and foreign ministers of the two countries, it is critical to acknowledge that the continued antagonism toward Türkiye in the American Congress remained persistent throughout 2023. This has adversely affected various aspects of the bilateral relations. Moreover, the recent conflict between Palestine and Israel, which began on Oct. 7, has also emerged as a critical factor. This conflict has particularly impacted Türkiye-U.S. relations due to their contrasting positions. Yet, it is important to state

¹ Fareed Zakaria, "Interview with National Security Adviser Jake Sullivan; Interview with Copenhagen Consensus Center President And Founder Bjorn Lomborg", CNN, (June 4, 2023), <https://transcripts.cnn.com/show/fzgps/date/2023-06-04/segment/01>, (Accessed: December 18, 2023).

that despite these diverging issues, both nations have managed to maintain cooperation across various domains through pragmatic policymaking. Against this backdrop, Türkiye and the U.S. maintained their Strategic Mechanism Dialogue with meetings on Jan. 18 and June 23. These sessions focused on national security and other key areas, including the significant rise in bilateral trade, highlighting a renewed effort to bolster economic ties and capitalize on new opportunities.

In summary, 2023 stands as a year where balance defines the bilateral relations between the U.S. and Türkiye. Both countries have shown a heightened willingness to collaborate, yet their actions were still bound by certain constraints, especially the anti-Türkiye position in Congress.

DYNAMICS OF TÜRKİYE-U.S. RELATIONS

The relationship between Türkiye and the U.S. has largely remained stable over the years, with many issues being closely tied to national security concerns. In 2023, this dynamic was notably influenced by three key issues: the U.S.' ongoing support for the YPG/PKK, the acquisition of F-16 fighter jets, and NATO-related matters, particularly amid the Ukraine-Russia conflict and the prospective NATO membership of Sweden and Finland. These factors are often intertwined, affecting the bilateral ties in multifaceted ways. Moreover, issues such as security in the Eastern Mediterranean have periodically gained prominence, further influencing the diplomatic ties between the two nations. However, a significant development towards the end of 2023, notably the Israel-Palestine conflict, has had a profound impact on the Türkiye-U.S. relations.

U.S. Support for YPG: A Persistent and Critical Point of Divergence

For years, the U.S. has offered both financial and strategic backing to the YPG, the Syrian extension of the PKK, and a significant element of the Syrian Democratic Forces (SDF). This support has consistently been a critical concern for Türkiye, as it poses a direct and substantial threat to its national security. In this light, the U.S. policy toward the YPG greatly influences bilateral relations and continued U.S. support for the group throughout 2023 has served as a primary point of contention in diplomatic ties.

As reported, the U.S. continued its financial support to the YPG in 2023. The Department of Defense's Fiscal Year 2024 Budget Request allocated \$398 million for the Counter-ISIS Train and Equip Fund (CTEF), with \$156 million of this amount to be provided as support to groups in Syria,

classified under the Vetted Syrian Groups and Individuals (VSGI), including the YPG/PKK terrorist organization.² Notably, however, this funding represents a decrease from the previous fiscal year, when the Department of Defense requested \$542 million for the CTEF, with \$184 million of that intended for the VSGI.³

One other development that stirred fractions between the U.S. and Türkiye took place in March 2023, when the U.S. Joint Chiefs of Staff Chairman, Mark Milley, traveled to the PKK/YPG-occupied region in northeast Syria, to visit the U.S. troops located in the American base there. In the same context, Türkiye's concerns about its national security remained heightened when, a week later, Gen. Michael Erik Kurilla, the commander of the U.S. Central Command (CENTCOM), also visited the region, reportedly meeting with both American forces and SDF leaders.⁴

Another step taken by the Biden Administration that has harmed the bilateral relations came on Oct. 14, 2023, when President Biden renewed the "National Emergency with Respect to the Situation in and in Relation to Syria." This executive order asserted that Türkiye's military actions in northeastern Syria impede the defeat of ISIS, endanger civilians, and threaten regional and U.S. security.⁵

Lastly, in October, another significant event with the potential to escalate tensions between the U.S. and Türkiye occurred when the former downed a Turkish drone, labeling it a "threat" to their forces in Syria. This incident coincided with Türkiye's operations against PKK/YPG targets, following a PKK-claimed suicide bombing in Ankara. Although Türkiye's response has been comparatively measured, President Erdoğan emphasized that the incident is firmly etched in the nation's memory and appropriate measures will be taken at the appropriate time.⁶

2 United States Secretary of Defense, Fiscal Year 2024 Budget Request, (March 2023).

The National Defense Authorization Act (NDAA), encompassing the Department of Defense's fiscal year budget, has not yet been enacted into law. However, given the versions approved by both the House and Senate, it is anticipated that the allocated amount will remain unchanged.

3 United States Secretary of Defense, Fiscal Year 2023 Budget Request, (April 2022).

4 U.S. Central Command, Twitter, (March 11, 2023), <https://twitter.com/i/web/status/1634552733913980930>, (Accessed: December 19, 2023).

5 Briefing Room, "Notice on the Continuation of the National Emergency With Respect to the Situation in and in Relation to Syria", White House, (October 12, 2023), <https://www.whitehouse.gov/briefing-room/presidential-actions/2023/10/12/notice-on-the-continuation-of-the-national-emergency-with-respect-to-the-situation-in-and-in-relation-to-syria-3/>, (Accessed: December 17, 2023).

6 "Türkiye Will Do What is Necessary After US Downing of Drone", Daily Sabah, (October 18, 2023). <https://www.dailysabah.com/politics/war-on-terror/turkiye-will-do-what-is-necessary-after-us-downing-of-drone>, (Accessed: December 17, 2023).

F-16 Purchase and NATO

Discussions on F-16 acquisitions and NATO-related issues, particularly against the backdrop of the Ukraine-Russia conflict and the prospective NATO memberships of Sweden and Finland, have generally progressed constructively, predominantly at the presidential level, augmented by increased diplomatic engagement from the respective foreign ministers. However, this collaborative spirit has not been equally echoed at the congressional level.

Although Washington maintains that the F-16 deal, Finland's and, especially, Sweden's NATO accession, are separate issues, several of Biden's statements and Congressional opposition have made it clear that Sweden's NATO bid is a prerequisite for the F-16 sale.

With Sweden's NATO accession protocol submitted to the Turkish parliament for ratification, and F-16 purchase being discussed in the Congress, it can be said that the issue is at an impasse. In this regard, President Erdoğan recently emphasized the need for simultaneous steps by both countries, expecting U.S. Congressional action on the F-16 sale before Türkiye ratified Sweden's NATO bid.⁷

OTHER KEY DYNAMICS IN TÜRKIYE-U.S. BILATERAL RELATIONS

In 2023, the Eastern Mediterranean remained a friction point between the U.S. and Türkiye, particularly over the docking of U.S. naval vessels, namely USS San Juan and USS Arleigh Burke at a Greek Cypriot Administration (GCA) port and the suspension of a U.S. military embargo against the GCA. Türkiye criticized these actions as biased and destabilizing, potentially impeding a fair and sustainable solution in Cyprus.

Furthermore, in 2023, the Israel-Palestine conflict strained the relations between Türkiye and the U.S. Specifically, the U.S.' staunch support for Israel contrasted with Türkiye's call for restraint on both sides, a difference also evident in their U.N. voting patterns, hinting at growing divergence.

OUTLOOK FOR 2024: POSSIBLE CHALLENGES AND SCENARIOS⁸

As we embark on a new year, the key dynamics shaping bilateral relations in 2023 will likely persist into 2024. However, opinions vary on the future tra-

⁷ "Erdoğan Expects Steps From US On F-16 Sale For Sweden NATO Accession", Aljazeera, (December 6, 2023), <https://www.aljazeera.com/news/2023/12/6/erdogan-expects-steps-from-us-on-f-16-sale-for-sweden-nato-accession>, (Accessed: December 17, 2023).

⁸ I would like to express my gratitude to Çağrı Erhan, Richard Outzen, Matthew Bryza, Yunus Paksoy, and Yusuf Erim for their insightful feedback and contributions to this section.

jectory of these relations. A prevalent view suggests that the bilateral ties are likely to retain their pragmatic nature, steering clear of major crises but not significantly deepening mutual engagement. As Richard Outzen notes, individual dynamics impacting these relations do not in themselves create a bilateral crisis, but collectively they signal ongoing friction and distance. Outzen observes that overlapping interests in trade, the Ukraine conflict, and regional normalization (Türkiye's relations with Armenia, Greece, and Arab countries) suggest the maintenance of polite and functional relations. Yet, 2024 is not expected to be a year marked by increased warmth or convergence. It is likely to be another year of challenging partnerships, with potential missed opportunities.

Conversely, some experts hold a more optimistic view of Türkiye-U.S. relations. For instance, Matthew Bryza suggests that while current issues like the war in Gaza appear to be significant points of divergence, over time, Türkiye and the U.S. may align more closely. This alignment, according to Bryza, could occur as President Biden and Secretary of State Blinken grow increasingly impatient with Israel's war crimes against innocent Palestinians. Despite President Erdoğan's strong rhetoric, distancing himself from Netanyahu and the Israeli political leadership, Bryza believes that a period might emerge post-conflict when Israel, Hamas, and the U.S. could welcome Türkiye's mediation, similar to its successful efforts in the Russia-Ukraine conflict.

As highlighted earlier, the key dynamics shaping bilateral relations are likely to persist through 2024. The probable continuation of U.S. support for PKK/YPG is anticipated to remain a contentious issue in these relations. Çağrı Erhan has noted Türkiye's vocal dissatisfaction with its ally, the U.S., especially regarding its support for PKK/YPG. Erhan stated that this was further echoed in Türkiye's latest National Security Council meeting statement, which declared, "Actions aimed at defense against terrorists and undermining the fundamentals of alliance law have been meticulously noted, emphasizing that no effort can alter the fate of terrorist organizations targeting our country."⁹ This statement underscores an ongoing divergence with the U.S., which, as Yusuf Erim suggests, is expected to remain a prominent point of contention between the U.S. and Türkiye in 2024.

Another critical aspect in international relations is the intertwined nature of the potential sale of F-16s to Türkiye and Sweden's NATO membership, with each seen as a conditional factor for the other's realization. In this context, Erhan posited that even if the Turkish parliament endorses Sweden's NATO membership, there's no assurance that the U.S. Congress will reciprocate by approving the sale of F-16s to Türkiye. Outzen also highlights ongoing challenges, noting

⁹ "29 Kasım 2023 Tarihli Toplantı", Milli Güvenlik Kurulu Genel Sekreterliği, (November 29, 2023), <https://www.mgk.gov.tr/index.php/milli-guvenlik-kurulu/mgk-toplantisi-basin-aciklamalari/son-toplantinin-basin-aciklamasi>, (Accessed: December 20, 2023).

that continued PKK activities in Sweden and the U.S. Congress's suspension of major arms sales to Türkiye suggest that Sweden's NATO accession lacks both a diplomatic basis (in terms of meeting trilateral memorandum obligations) and a political reciprocation from Washington. Yet both Bryza and Erim, argue that the F-16s sale to Türkiye would be preferable to be finalized in 2023. Bryza stated that it would help "to get Türkiye-U.S. relations back on track by taking the poison out of the controversy over Türkiye's purchase of the Russian S-400 air defense system and the Trump administration's response by banning Türkiye from the F-35 fighter program." Erim further contends that if Türkiye doesn't acquire the F-16 or an alternative like the Eurofighter Typhoon, it might explore other options. Such a move could exacerbate the existing rift between Türkiye and the U.S., further straining bilateral relations.

The war in Gaza is perceived as a pivotal, and possibly the most critical, factor influencing bilateral relations for 2024. Erhan suggests that due to Türkiye's opposition to Israel's international law infringements in Gaza, it is improbable that the U.S. Administration and Congress, staunchly supportive of Israel, will be open to enhancing cooperation with Türkiye. Erim adds that this largely hinges on the tenure of Israel's Prime Minister Benjamin Netanyahu. He proposes that Netanyahu's potential departure and a cessation of the conflict could positively alter the situation. In line with this, Bryza posits that Türkiye might emerge as a key mediator in resolving the conflict, thereby significantly improving its relations with the U.S.

Economic relations are a crucial aspect of bilateral ties. In recent years, there has been an increase in trade between the two nations, but concerns loom over the U.S. Treasury's stance towards Turkish firms and banks, especially those engaging with Russia or linked to Hamas. These potential U.S. actions, argues Erim, could significantly harm the Turkish economy, as widespread sanctions against key Turkish institutions would detrimentally impact both the national economy and its efforts toward recovery.

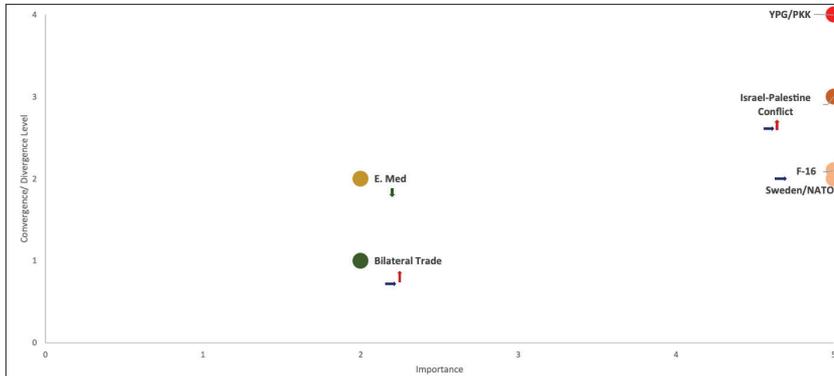
Regarding the Eastern Mediterranean, there are promising signs, particularly with the improving relations between Türkiye and Greece. This enhancement in relations is likely to be viewed positively in Washington, which prefers to avoid conflict in the region. This positive development in Türkiye-Greece relations is expected to influence the broader bilateral dynamics favorably- including here in terms of the U.S. Congress.

One last issue that will have a profound effect on Türkiye-U.S. relations in 2024, will be the Presidential elections in the U.S.. Yunus Paksoy suggests that while the fundamental issues straining ties are likely to persist regardless of the U.S. president, there's a perception that former President Donald Trump had a more forthright and personal rapport with President Erdoğan compared to President

Biden. Paksoy notes that while Trump’s potential re-election doesn’t guarantee improved relations, Biden’s limited direct engagement with his Turkish counterpart over the past three years doesn’t bode well for Ankara, should Biden secure another term. Erhan and Outzen point out the lukewarm relations between the two presidents, noting the lack of official visits, and do not anticipate any warming of relations as Biden approaches re-election. Erhan further adds that any member of the Senate and the House of Representatives in the U.S., driven by the desire to gain votes from ethnic lobbies, may adopt a distant or even hostile stance and rhetoric towards Türkiye. Contrarily, Bryza does not foresee Türkiye being a prominent issue in the U.S. presidential campaign, expecting the current situation to persist. Lastly, Erim argues that the relationship between the two states will be on cruise control with Ankara following a policy of wait and see. He argues that Biden’s re-election would continue the institutionalization of the Türkiye-U.S. relationship, whereas Trump’s return might revive leadership-focused diplomacy, given his close ties with President Erdoğan.

Lastly, Figure 1 summarizes the key dynamics in Türkiye-U.S. relations from 2023 to 2024, using a scale of 1-4 for convergence-divergence and 1-5 for importance.¹⁰ Key issues like the YPG/PKK, Israel-Palestine conflict, F-16s purchase, and Sweden’s NATO bid are crucial and expected to follow 2023’s trend in terms of convergence/divergence. The Gaza conflict, on the other hand, might increase divergence unless the U.S. policy shifts. The East Mediterranean issue could become a convergence point, while bilateral trade might face challenges if the U.S. imposes sanctions. Yet, it can still be argued that the discourse between the two nations appears more conciliatory compared to previous years, potentially opening avenues for increased cooperation

Figure 1: Charting Türkiye-U.S. Relations for 2024



Source: Compiled by the author

10 1- Convergence, 2- Agreement, 3- Disagreement, 4- Divergence ; 1-Not at all important, 2- Slightly important, 3- Important, 4- Fairly important, 4- Very important.

TÜRKİYE-EU RELATIONS: Developments and Projection



Murat Aslan

03

SUMMARY OF 2023

- 1 Türkiye is committed to candidacy as the strategic vision.
- 2 The EU is more prone to a special status for Türkiye in the frame of a good neighbor.
- 3 Global and regional developments determine the course of a Turkish-EU rapprochement that could serve the interests of both countries.
- 4 The positive developments for a visa-free regime for Turkish citizens, updating the customs union, and boosting trust among the parties would be on the agenda.
- 5 Türkiye-Greece rapprochement may contribute to consolidating relations between Türkiye and the EU.
- 6 On the other hand, the EU may be insistent on tearing the Turkish-Russian relations although Türkiye may be an appropriate conduit to ease the potential Russia-West escalations.

POLITICAL & SECURITY / MILITARY PERSPECTIVE DEVELOPMENTS

Türkiye-EU relations can proceed per the bilateral synchronization of EU institutions. However, developments due to the acts of third parties hold prominence in explaining and understanding it. In this sense, global and regional developments and escalations that diffuse to the security of the Transatlantic region, determine the design of Türkiye-EU ties. For instance, the Russian aggression on Ukraine has become a major security concern, especially for Eastern European members of either the EU or NATO. This war indicated the probability of an augmented conflict through a conventional and unconventional escalation in the Western hemisphere. As a result, the EU prioritized security, which would cover the inclusion of Türkiye into the EU landscape. The EU, together with NATO, increased the high alertness to a probable escalation at the Eastern front but through specific demands from Türkiye.

The primary step that Türkiye is expected to take is complying with the sanctions applied on Russia, as was clear in the Nov. 29 Joint Türkiye Report of the EU. For this purpose, the statement of the EU institutions emphasized a call to Türkiye to attain the policies of the Western hemisphere on Russia through strict cohesion. On the other hand, the war in Ukraine has become protracted, requiring appropriate mediation or facilitation. Türkiye became a channel to communicate with the Russian leadership due to the practiced and proven interaction of President Recep Tayyip Erdoğan and President Vladimir Putin. The Grain Corridor Deal, which was a success story, and was expected to be in 2024, pointed out the functionality of Turkish-Russian relations in the way to hope managing the impacts of the conflict.

Perceived Russian threat to the Western hemisphere, the EU has spearheaded a European military buildup for the sake of security and sustainable sta-

bility in the continent. The fact that Europe is not underprepared for any conventional or unconventional escalation, makes Türkiye in the NATO alliance an essential multiplier to augment it with established military and security capabilities. EU's Türkiye perception, then, is transforming itself to a security-oriented interpretation. Türkiye presents a great landscape to complement the resilience of the European defense. In this sense, the Swedish NATO membership, which is pending the parliament's approval, appears to be the primary constituting step to set resilience. The positive development in this proceeding, on the other hand, can be a bargaining chip to expand Türkiye-EU-U.S. relations.

Türkiye's EU candidacy, which is similar to the Swedish nomination to NATO, is a long-standing, particular feature of the Turkish-EU resonance. Despite the continuous circulation of negativity and steps against the Turkish membership status, the EU considers Türkiye as a non-ignorable neighbor and partner. The markets and economic exchange could be a praising dynamic while the interconnectedness of both actors pushes each other to set a *sui generis* landscape. On the other hand, the "aging" continent experiences a dilemma of either excluding or embracing Türkiye for the sake of European interests.

The Greeks and Greek Cypriots have been a parameter to assess the Türkiye-EU relations. The solidarity clause of the European Union Convention requires a commitment of EU member states to favor the interests of these two actors. In this sense, the Eastern Mediterranean and the status of the island of Cyprus have been the most circulated conditions to expand the relations with Türkiye. Nevertheless, the 27 member states of the EU have contradicting interests once Türkiye becomes the "other" competing or cooperating state actor. Once there exists a demand to sanctify or push Türkiye and search for any political concession of the EU, the member states are usually divided. For this reason, Greeks and Greek Cypriots are being marginalized from the acts but included in the words of the EU decision-makers. The Turkish-Greek normalization through a positive agenda, solidified on Dec. 7, 2023, in Athens, is promising to alleviate potential tensions and praise an optimistic engagement.

In relevance to the Greek and the Greek Cypriot heading of the relations, the Eastern Mediterranean Sea becomes an attempt to attain both the political and energy quest of the Europeans. Energy appears as the hotspot of the European quest after sanctions were not well-applied to Russia. However, the emerging reality is that Europe must have alternative energy sources to satisfy its markets. Other than Libya, which was also a cause of dispute between Türkiye and the EU, the Eastern Mediterranean energy reserves remain an appropriate source. Once Türkiye activates the energy search and drilling activities,

the probability of military escalation scares the European decision-makers to be deprived of the Eastern Mediterranean gas reserves in the future. Given the fact that the Caucasian energy resources have to follow the Turkish sovereign land and sea corridors, a probable military confrontation in either the Aegean Sea or the Eastern Mediterranean will endanger the major supply routes. As a result, the political and military dimensions of Türkiye-EU relations also cover energy and relevant economic spheres.

SOCIETAL DEVELOPMENTS

The illegal-irregular migration has become the major term of both entities, Türkiye and the EU. The Türkiye-EU deals signed on Dec. 16, 2013, and March 7, 2016, aimed at preventing irregular immigration at the expense of receiving qualified ones from the refugees settled in Türkiye. The deal was suspended during the COVID-19 pandemic, while the EU continuously demanded an extension. The 2023 elections in Türkiye indicated that public opinion is against accepting further refugee waves, which were beyond the absorption capacity. The Nov. 19 joint press conference of the EU commissioner responsible for expansion, Oliver Varhelyi, and the Foreign Political and Security Policy chief, Josep Borrell, worded a quest to rearrange this deal. On the other hand, the EU's unkept promises of a visa-free regime, financial aid restarting membership negotiations, and updating the Customs Union Agreement have become the major impediments to continuing the immigration deal.

Together with the discussions on immigration, the EU pledges that Türkiye's designated demands to review the irregular immigration deal require a long bargaining process. Türkiye's commitment to EU membership is still away from the agenda though. The short-term arrangements, as mentioned above, are in the mouths of the political leadership. In this sense, Türkiye expects a visa-free regime for the Turkish citizens, which was a clear promise after the first deal. The EU expects compliance with the EU regulations in 14 different fields, though; Türkiye is insistent that there exists no barrier to the visa-free regime. The Customs Union, as the second term, presents a mutually beneficial field that should be arranged. Such a move will promote the trade and financial resonance that business would offer a spillover effect on the relationship of both.

DYNAMICS OF TÜRKİYE'S EU POLICY

Türkiye will be committed to EU membership as the strategic vision. Nevertheless, the negative attitude of the EU to repel the Turkish membership quest

may push Türkiye to review the alternative options for the sake of existential interests. The agenda of 2023 will continue to be the focus in the short run. In this sense, the Turkish agenda will lean on a “win-win” strategy expecting the EU to start fair and just treatment based on transparent policies. In this sense, Türkiye will observe the following dynamics:

- A progress in candidacy status,
- Inclusion of Türkiye to the EU institutions and mechanisms to respond to the global and regional challenges through a coordinated and integrated course,
- More technical cooperation and interaction to surpass the political stalemates,
- Marginalizing and excluding the terror networks from the EU that pose existential threats to Türkiye.
- Eradicating social, cultural, and business barriers to have access to the EU markets and vice versa.
- Expanding the cooperation to the security field to efficiently promote both EU and Türkiye’s security.

HOW COULD THE CURRENT DYNAMICS EVOLVE IN 2024?

Türkiye and the EU are well aware of the challenges and projections regarding the political, security, energy, and societal spheres. The recent year indicated that either fluctuations or a very low profile of relations would harm the interests of both. The fragility and vulnerability due to global and regional potential escalations require both actors to align their policies in a way to realize a “win-win strategy.” In this sense, the EU will observe the course of the Russia-Ukraine War and push Türkiye to comply with the prerequisites of European interests. However, Türkiye will expect fair compensation for this pledge. Regarding Türkiye’s EU membership, the bloc will not be interested in a fast-track process of furthering membership negotiations and establishing a special partnership status instead. The specific European strategy may satisfy Türkiye’s short-term goals but the long-term Turkish quest will not change in the way to become an EU member.

The other issues such as Turkish-Greek relations or the Cyprus issue may be on the European table as much as the Greeks attract European support. Given the fact that Europe is squeezed off the Greek and Greek Cypriot demands, there will be a check-and-balance approach that will address both Türkiye and Greece. On the other hand, the Cyprus issue is at the risk of being marginal-

ized per a positive agenda on the Turkish-Greek rapprochement. The Greek Cypriot refusal of the 2004 Annan Plan is still in the fresh memories of the Europeans and they will likely pretend to listen to the Greek Cypriot arguments but ignore them.

The year 2024 will be tense in terms of refugee flows and the activities of the PKK and the Gülenist Terror Group (FETÖ). The EU has listed the PKK as a terrorist organization while the FETÖ is expanding its base in the continent. This issue in question will be a concern for the Turkish public and decision-makers. Conversely, another deal on preventing irregular migration appears to be a challenging heading due to the expanding reactions of the Turkish public as was seen before the 2023 elections. Energy is the most promising field in which both parties can cooperate not limited to hydrocarbon resources. There may be joint projects of generating cost-effective and green energy resources and their transit to the European market. In this field, hydrogen and natural gas are the potential resources, on which both actors can collaborate.

PROSPECTS OF THE EASTERN MEDITERRANEAN REGION			
ISSUE	EU	TÜRKİYE	POTENTIAL OUTCOME
Political issues, Candidacy	Strategic membership within a good neighborhood	Full membership vision	A long process of negotiations
Security	Persuade Türkiye to comply with the EU policies	Expect the EU to compensate for the losses, Respect and accept the Türkiye's security concerns, Expect the EU to eradicate the terror networks targeting Turkish interests	Trust is the essential conditionality, There must be direct security communication, which is a lack.
Energy	The Eastern Mediterranean Sea is the essential component of the energy quest. Türkiye should facilitate the energy transfer from the Mediterranean and Caucasus.	The rights of Türkiye and Turkish Cypriots must be observed through fair and just treatment. Türkiye is positive to energy lines towards Europe.	Expect cooperation and mutual gain. Israel's aggression on Gaza may delay the overall process.
Societal	Comply with the EU demands per the previous deal to prevent irregular immigration.	Türkiye is not a depot of irregular immigrants. International law should be respected. Joint physical efforts may impede irregular immigration. Encourage public-to-public relations. Promises should be kept regarding the visa-free regime.	Favorable terms must be on the agenda to have Türkiye accept any deal. A visa-free regime is an urgent issue to be gradually resolved.
Economic	Business should be facilitated and promoted.	Türkiye expects an update in the customs union.	A negotiation process may be on the agenda, compliant with the candidacy negotiations.

TÜRKİYE AND THE MIDDLE EAST: A Challenging Year*



Murat Yeşiltaş

04

* Contributors: İsmet Horasanlı, Zehra Gündüz

SUMMARY OF 2023

- 1 Türkiye's normalization process towards the Gulf countries rapidly continues, this process moving towards consolidation and strategic cooperation.
- 2 Türkiye has strengthened its ties with Arab countries in the Middle East, particularly with the Gulf nations, through increased cooperation efforts and new agreements. However, the rising uncertainty in the region due to the eruption of the Hamas-Israel conflict on Oct. 7 introduced unexpected strategic changes and led to a pause in the normalization efforts with Israel.
- 3 After the U.S. reduced its military presence in the Middle East, China and Russia strengthened their presence by signing several agreements with countries in the region. However, after the events of Oct. 7, the active involvement of the U.S. in the region has increased the potential for a new escalation atmosphere in the region.
- 4 Türkiye has been conducting conventional and decapitation operations to eliminate terrorist elements in Northern Iraq and Syria. These efforts heightened after the bomb attack in front of the Ministry of Interior on Oct. 1, prompted by Hakan Fidan's statement emphasizing Türkiye's security and required actions.

INTRODUCTION

In the year 2023, the Middle East witnessed multiple crises affecting Türkiye and requiring it to adapt to these unexpected strategic changes. After the election period in Türkiye, President Erdoğan's official visits to Saudi Arabia, the United Arab Emirates, and Qatar marked an enhancement of the relations, resulting in additional economic, political, geopolitical, and strategic agreements. After the U.S. reduced its military presence in the region, other actors, particularly China and Russia, have focused on the region. Indeed, China and Russia have signed agreements with countries in the region. Türkiye has taken concrete steps to open the Zangezur corridor while emphasizing the normalization process with both Israel and Arab countries. Iran, which is uncomfortable with this situation, has made various attempts to prevent the opening of the Zangezur corridor but has failed to take a concrete step. On the other hand, the strengthening of the U.S. presence in the Red Sea and the Eastern Mediterranean has become an alarm for the Iranian proxy forces.

In 2023, as another main dynamic in the Middle East concerning Türkiye, Türkiye's counterterrorism efforts focused on northern regions of Iraq and Syria and intensified after the terrorist attack in front of the Ministry of Interior on Oct. 1.

Accordingly, five dynamics have been dominant in Türkiye's approach to the Middle East during 2023: normalization, cooperation with the Gulf countries, counterterrorism efforts, the Hamas-Israel conflict that started on Oct. 7, and geopolitics.

Türkiye's main objective in its foreign policy towards the Middle East was the completion of the normalization process and advancement of the ties with the countries in the region with a focus on more strategic and economic deals. As a result of a series of initiatives, while progress was made in cooperation with

the Gulf region, the black swan event, the Israel-Hamas conflict, has disrupted normalization with Israel and brought about uncertainty to the region.

MAIN DYNAMICS

Normalization

Normalization was one of the main strategic orientations in Turkish Foreign Policy towards the Middle East during 2023. Türkiye has been navigating a changing geopolitical dynamic, coupled with multiple crises in the Middle East. In this volatile environment, Türkiye seeks to strengthen regional ties and pursues normalization with a constructive stance while securing its national interests. Efforts have been directed towards normalization of the relations with Syria & Egypt and deepening the already improving ties with Gulf countries ... On the other hand, the improving normalization with Israel has stalled due to the conflict with Hamas starting on Oct. 7th. Despite the normalization process between Israel and Arab nations & Türkiye is on pause, the ongoing war may position Türkiye as a potential ally for Gulf nations in terms of regional security, enhancing cooperation and increasing Türkiye's impact in the region.

Cooperation With the Gulf Countries

Türkiye has entered a process of normalization with the Gulf countries after 2020, which has led to increased cooperation in different fields. Türkiye's cooperation with the Gulf countries takes place in various fields, the most important of which are trade, investment, defense industry, communication, and energy. Türkiye is building good relations and started cooperation with all Gulf countries but three countries such as Saudi Arabia, UAE and Qatar come to the forefront regarding the ongoing bilateral relations. Qatar has the highest level of cooperation with Türkiye among the Gulf countries. Therefore, unlike the other Gulf countries, it is not about consolidating cooperation, but rather strengthening the already consolidated cooperation. It should not be forgotten that Türkiye also has very good relations with other Gulf countries other than these three. Türkiye has previously exported UAVs and UCAVs to the UAE and Qatar, as well as Bahrain and Kuwait.

Counter-Terrorism

After 2014-2015, when Türkiye faced serious terrorist threats from Syria and Iraq within its borders, Türkiye started cross-border operations to eliminate the source of these threats. Accordingly, Türkiye's counterterrorism efforts had been focused on the northern regions of Iraq and Syria, and operations were organized, where terrorist elements had established nests. These operations increased

in 2023 after the bomb attack in front of the Ministry of Interior on Oct. 1.¹ As a matter of fact, after this incident, Foreign Minister Hakan Fidan said in a statement: *“All infrastructure, superstructure, and energy facilities belonging to the PKK/YPG in Iraq and Syria are the legitimate targets of our security forces and intelligence elements from now on. I advise third parties to stay away from PKK/YPG facilities and individuals.”*² Following this statement, the Turkish Armed Forces carried out serious operations both in Iraq and Syria, which have continued in both conventional and decapitation forms. As a response to the terrorist attack, on Oct. 5th, many targets belonging to the separatist terrorist organization were destroyed, primarily in the Tel Rifaat, Jazira, and Derik regions of northern Syria.³

October 7

Almost until mid-year, Türkiye's position aligned with election and post-election dynamics. However, the outbreak of the Hamas-Israel conflict on Oct. 7 triggered an unexpected strategic change—a black swan event—in the Middle East. Despite the conflict not being a direct Foreign Policy issue of Türkiye, it became a strategic issue for all the nations in the region, creating a heightened uncertainty in the Middle East. The conflict marked a return to escalation from de-escalation in relations with Israel. Türkiye's immediate response to the crisis was shaped by a priority on stability and conflict resolution between the two sides. The conflict prompted Arab nations to intensify cooperation and emerged the potential to enhance regional diplomacy, leading to the gathering of the nations under the Organization of Islamic Cooperation (OIC) and The Joint Arab Islamic Extraordinary Summit in Riyadh, Saudi Arabia. Though no effective resolutions were reached, the summit reflected a joint stance condemning Israeli aggression in Gaza and in the West Bank.

Geopolitical Dynamics

In terms of regional dynamics, the Middle East region has always remained dynamic and Türkiye has been an important country in this regard. In this context, the most important issue that has come to the forefront in recent times has been the withdrawal of the U.S. from the region and related developments. After the U.S. decided to partially withdraw its troops from the

1 İçişler Bakanlığı, “Basın Açıklaması”, <https://www.icisleri.gov.tr/basin-aciklamasi-01>, [Accessed on : December 20, 2023]

2 TRT Haber, “Hakan Fidan: PKK/YPG'nin kontrolündeki tüm tesisler artık meşru hedef”, <https://www.trthaber.com/haber/gundem/bakan-fidan-pkkypgnin-kontrolundeki-tum-tesisler-artik-mesru-hedef-800584.html>, [Accessed on: December 20, 2023]

3Ministry of Foreign Affairs. “No: 246, 6 October 2023, Press Release Regarding Operations Against PKK/YPG Terrorist Targets in Iraq and Syria.” [Accessed on December 21, 2023]. https://www.mfa.gov.tr/no_-246_-irak-ve-suriye-de-pkk-ypg-teror-hedeflerine-yonelik-operasyonlarimiz-hk.tr.mfa

region in early 2021, it was observed that Chinese influence increased. Besides China and Russia, Iran was another country that wanted active involvement in the political developments regarding the Gulf region. With the help of China Iran took significant steps to normalize its relations with Arab Gulf countries particularly Saudi Arabia.⁴ In terms of regional dynamics, the Hamas-Israel war was a turning point. On the one hand, this development led the U.S. to become actively involved in the region again, and on the other hand, it strengthened cooperation between Islamic and Arab countries.

Future Prospect

While it can be said that normalization with Gulf countries has already been completed with the advancements in the last years, Türkiye's policies towards the region are expected to evolve into a more strategic approach, prioritizing economic interests in the following year with an enhancement in defense cooperation. Accordingly, in 2024, Türkiye will start implementing the agreements it has signed with the Gulf countries and take concrete steps in these areas of cooperation. These concrete steps include the launch of the Türkiye-UAE "High-Level Strategic Council" and the opening of Baykar's factory in Saudi Arabia. Thus, the normalization process towards the Gulf countries will be consolidated. Following the recent developments, the countries in the region will experience shifts next year in their policies due to heightened uncertainty since Oct. 7. It is expected that the relations between Türkiye and Arab nations will advance through shared stances whereas the progress of diplomatic ties with Israel has stalled.

In the context of geopolitical dynamics, given Iran's attitude, it will make every effort to prevent the opening of the Zangezur corridor. However, considering that the necessary agreements have already been signed, it is understood that Iran will not be able to take a concrete step to create an obstacle in this regard. After Oct. 7, the active involvement of the United States in the region has made frictions with the Iranian proxy forces more likely. Indeed, after the Iranian-backed Houthis organized attacks on oil tankers, the U.S. formed a "maritime coalition" in the Red Sea to ensure the safety of oil tanker transit. On the other hand, Russia and China's increased involvement in the region is likely to increase tensions in the region.

Regarding counter-terrorism in 2024, the active operation of Türkiye in Northern Iraq and Syria will continue and it is highly expected that Türkiye will be focusing on the weakening and elimination of PKK/YPG.

⁴ Mersiha Gadzo, "Changing Global Order: China's Hand in the Iran-Saudi Deal" <https://www.aljazeera.com/news/2023/3/11/changing-global-order-china-restores-ties-with-iran-and-saudi>, [Accessed on: December 19.2023].

SYRIA: The Uncertain Future



Kutluhan Görücü

05

SUMMARY OF 2023

- 1 In the wake of a terror attack against the Interior Ministry compound in Ankara, the Turkish Armed Forces launched comprehensive ground and aerial operations against terrorist targets in northern Syria.
- 2 The Arab Contact Committee suspended normalization with the Assad regime for failing to take additional steps toward normalization despite its readmission to the Arab League.
- 3 President Erdoğan stated that it was impossible for Türkiye to leave Syria despite his openness to getting in contact with Bashar Assad. Assad responded by ruling out any meeting on Erdoğan's terms.

2023 IN A NUTSHELL

It is possible to say that the latest trends in Turkish-Syrian relations included the regime's normalization efforts with the Arab states and Türkiye as well as an uninterrupted crackdown on the terrorist organization PKK/YPG. In this context, there was an uptick in statements reflecting normalization efforts between the regime and Türkiye in the early days. However, the Turkish election encouraged the regime to adopt a wait-and-see policy as opposition leaders in Türkiye pledged to appoint an ambassador to Damascus unconditionally and create channels of direct communication. Although President Recep Tayyip Erdoğan got reelected, Bashar Assad refrained from taking positive steps toward normalization — which was also the case in his relations with the Arab states. Accordingly, there was almost no mention of the normalization process in the latter half of the year.

By contrast, major developments took place regarding normalization between the regime and the Arab states. Having slowly reestablished contact with the regime over the last several years, the Arab states allowed the regime to rejoin the Arab League in May — partly due to the devastating earthquakes in February 2023. Saudi Arabia, Jordan, Iraq, Lebanon, and the Arab League formed the Arab Contact Committee to communicate normalization. Whereas the Arab states had started discussing the timeline for reopening their embassies in Damascus, the regime's inability or unwillingness to meet expectations within the framework of normalization undermined that process. Consequently, the Arab Contact Committee decided to suspend normalization with the regime, citing its failure to take the steps outlined in the roadmap.

Türkiye's counterterrorism campaign in Syria continued in 2023 according to the rules of engagement that the country previously established.

In this sense, the Turkish government resorted to leadership decapitation and targeted the organization's financial resources despite bringing up the possibility of a ground operation regularly. In this context, it is possible to argue that the most significant development was Türkiye's decision to launch a comprehensive armed drone operation upon establishing that the terror attack against the Interior Ministry compound in Ankara originated in Syria. It was particularly noteworthy that the country targeted the organization's financial resources including oil fields. One could argue that the 2023 operation was similar (yet more comprehensive) to the operation Türkiye launched in Syria and Iraq following a terror attack in Istanbul the previous year.

MAIN DYNAMICS

Normalization Between the Regime and the Arab States

It is possible to say that the regime and the Arab states took initial steps toward normalization as early as 2018. The Syrian opposition's removal from all relevant regions, except Idlib, largely established that the regime would survive, leading the regional players to adapt to the changing circumstances. The first country to reestablish contact with the regime was Jordan following the regime's retrieval of Daraa and its outskirts.

Shortly after Jordan began to contact the regime, in late 2018, the United Arab Emirates reopened its embassy in Damascus. Bahrain soon followed suit. It is important to underline that Bahrain's decision was directly influenced by the UAE. Accordingly, the UAE arguably took that step by itself and was not in agreement with the majority of the Arab League's members. Keeping in mind the state of affairs at the time and Operation Spring Shield, the country's decision to repair its relations with the regime was possibly informed by anti-Turkish sentiment. Indeed, the UAE allegedly offered to pay the regime \$3 billion to attack Idlib.¹

Therefore, even if the UAE were to disagree with the Arab countries on that point, it is possible to note that other Arab states, too, decided to pursue normalization with the regime. The only possible exception is Qatar, which notably did not veto Syria's re-admission into the Arab League. In this sense, the regime's return to the Arab League could be seen as the Arab countries giving normalization a chance. Two major issues are known to have influenced that

¹ David Hearst, Mohammed bin Zayed pushed Assad to break Idlib ceasefire, Middle East Eye, 8 April 2020, <https://www.middleeasteye.net/news/abu-dhabi-crown-prince-mbz-assad-break-idlib-turkey-ceasefire>

decision: ending the delivery of illicit drugs to neighboring countries and the repatriation of Syrian asylum seekers.²

In exchange, the regime expects the Arab states to lobby for the easing of U.S. sanctions and investments in Syria. Whereas the question of investment seems easier to address, it remains impossible for the United States to ease sanctions shortly. One could argue that the regime would have to officially accept PKK (also known as the Syrian Democratic Forces or SDF) to make that possible. That, in turn, might amount to crossing the 'red line' from Türkiye's standpoint.

Consequently, the Arab Contact Committee suspended the talks in September due to the regime's failure to meet the Arab states's demands. Notwithstanding, the regime activated its embassy in Saudi Arabia on Dec. 17.³ At this point, it is possible to observe that there are differences of opinion within the Arab Contact Committee. In particular, Jordan remains deeply concerned about drug trafficking from regime-held areas and even considered military options – a point made at the foreign ministerial level.⁴ Therefore, the Committee members' threat perceptions and, by extension, approaches tend to differ.

The Normalization Process Between Türkiye and the Regime

Just like the Arab states, Türkiye prioritizes two issues in its normalization efforts with the regime: the fight against PKK/YPG and the repatriation of Syrian asylum seekers. The regime, in turn, identifies the withdrawal of all Turkish forces from its territory as a precondition. It is no secret that Türkiye cannot take that step unless and until the terrorist presence in Syria ceases to exist. Indeed, that point was made at the presidential level.

Since Türkiye cannot meet that precondition, the normalization process's progress hinges on a concession by the regime. Furthermore, there are serious questions regarding the regime's ability and willingness to meet Türkiye's demands. Indeed, the regime does not want dissidents, who fled Syria, to return to their country because it maintains that keeping that group out is the only way to govern Syria.

2 Maya Gebeily, Arabs bring Syria's Assad back into fold but want action on drugs trade, Reuters, 10 May 2023, <https://www.reuters.com/world/middle-east/arabs-bring-syrias-assad-back-into-fold-want-action-drugs-trade-2023-05-09/>

3 Omer Koparan, Syria's Bashar al-Assad regime appoints ambassador to Saudi Arabia after 11 year hiatus, Anadolu Agency, 6 December 2023, <https://www.aa.com.tr/en/middle-east/syria-s-bashar-al-assad-regime-appoints-ambassador-to-saudi-arabia-after-11-year-hiatus/3074985>

4 Zeena Safi, Becky Anderson, Arab League may have enough votes to bring Syria back into the fold, CNN, 5 May 2023, <https://edition.cnn.com/2023/05/04/middleeast/syria-jordan-arab-league-intl/index.html>

With regard to the fight against PKK/YPG, it is possible to observe that the regime's military capacity remains inadequate. One could argue that the regime (and, by extension, Russia and Iran) cannot target the group as long as it stays under the U.S. security umbrella. Let us recall that the United States killed a large number of Russian mercenaries, who attempted to head to the northeast of Deir Ez Zor, with airstrikes.⁵

The dialogue between Türkiye and the regime started with Foreign Minister Mevlüt Çavuşoğlu's Aug. 11, 2022, announcement that he was in contact with the regime's foreign minister, Faisal Mekdad. Most recently, the two parties, together with Iran and Russia, created a quadripartite mechanism. The May 10, 2023, meeting of their foreign ministers represented a concrete step within that context.⁶ Whereas the parties reached a consensus regarding the creation of a roadmap, the meeting did not yield any meaningful results. Moreover, Bashar Assad issued negative statements regarding the normalization process following President Erdoğan's re-election in Türkiye. There has been no further progress on that front ever since.

Türkiye's Counterterrorism Campaign and Potential Military Operation

Türkiye's fight against PKK/YPG changed its course in the wake of Operation Peace Spring in October 2019. It is important to note that any Turkish ground operation against Syrian regions (except for Tal Rifaat) would run the risk of U.S. sanctions. Meanwhile, Tell Rifaat remains under the protection of Russian- and Iranian-backed Shia militias as both countries believe the region to be strategically important for Aleppo's safety. Hence Türkiye attempts to fight terrorism with new methods since 2019.

Since 2020, Türkiye developed a new type of military engagement by neutralizing PKK/YPG members in Syria with armed drones. Those operations gained momentum in 2021 and took place more and more frequently in 2022 and 2023. At the same time, the country has been targeting oil fields in PKK/YPG-held territories since 2022.

In the wake of a terror attack in Ankara, the Turkish military conducted an aerial operation on Oct. 5, targeting the terrorist organization's financial re-

⁵ Julian Borger, Marc Bennets, Scores of Russian mercenaries reportedly killed by US airstrikes in Syria, *The Guardian*, 13 February 2018, <https://www.theguardian.com/world/2018/feb/13/russian-mercenaries-killed-us-airstrikes-syria>

⁶ Russia, Syria, Turkey and Iran hold high-level talks in Moscow, *Al Jazeera*, 10 May 2023, <https://www.aljazeera.com/news/2023/5/10/russia-syria-turkey-and-iran-hold-high-level-talks-in-moscow>

sources including oil fields and natural gas facilities. Indeed, Türkiye's air-strikes reportedly cost the organization more than \$1 billion.⁷

Predictions Regarding the Transformation of Main Dynamics in 2024

Türkiye continues to expand the scope of its counterterrorism campaign every year. In particular, the country has been targeting the organization's senior members and, since 2022, its financial resources including oil fields. There is reason to believe that the Turkish government will continue to implement the same strategy in 2024 with some new tactical moves.

Türkiye has been unable to launch a ground operation against PKK/YPG since October 2019 because two global powers continue to protect the group as mentioned above.

Another important reason has been the economic challenges that Türkiye faced since 2020. It is possible to argue that Turkish decision-makers continue to wait for the right time to confront the threat of U.S. sanctions. Furthermore, some analysts maintain that a potential political change in the United States could alter the nature of Türkiye's relations with the U.S.

Nonetheless, President Erdoğan stated on Oct. 1 that "our strategy of defending our southern border with a security zone no less than 30 kilometers deep and of keeping under control all activities beyond it." He added that "our new steps remain a question of preparation, timing and circumstances."⁸ His emphasis on timing and circumstances was particularly relevant to the question of economic hardship and the broader state of affairs. Provided that Türkiye is expected to focus on economic recovery and curbing inflation in 2024, it is possible to argue that a Turkish ground operation remains unlikely.

Although Türkiye's normalization talks with the regime got off to a strong start in 2023, it is possible to observe that the contacts stopped in light of the election results. As discussed in greater detail above, what the country stands to gain from normalization with the regime seems limited and doubtful. Moreover, the regime's request for the Turkish military's withdrawal seems impossible to accept.

At the same time, normalization remains crucial to the Turkish-Russian relations. Specifically, Russia seeks to re-integrate the regime into the interna-

7 Şarkul Avsat, Türkiye'nin hava operasyonları nedeniyle SDG'nin kontrolündeki bölgelerde meydana gelen zarar 1 milyar doları aştı, 23 October 2023, <https://turkish.aawsat.com/arap-d%C3%BCnyasi/4622991-t%C3%BCrkiye%E2%80%99nin-hava-operasyonlar%C4%B1-nedeniyle-sdg%E2%80%99nin-kontrol%C3%BCndeki-b%C3%B6lgelerde>

8 Cumhurbaşkanı Erdoğan: Bu sabah iki caninin etkisiz hale getirildiği eylem, terörün son çarpınışlarıdır, Anadolu Agency, 1 October 2023, <https://www.aa.com.tr/tr/gundem/cumhurbaşkanı-erdogan-bu-sabah-iki-caninin-etkisiz-hale-getirildiği-eylem-terorun-son-cirpinislaridir/3005113>

tional community to lower its costs and consolidate its symbolic victory. Accordingly, it wants Türkiye, the most prominent player on the ground and in the region, to pursue normalization with the regime.

Although Bashar Assad continues to make anti-Turkish statements, it is possible to argue that whether normalization talks between Türkiye and the regime will resume shall be decided at a meeting between President Erdoğan and Russian President Vladimir Putin. Another important point is that the appointment of Hakan Fidan, who has been involved in the normalization process as head of the National Intelligence Organization (MIT) and held talks with his counterparts within the regime in that capacity, as Türkiye's new foreign minister might serve as a catalyst.

Observers have noted that normalization between the Arab states and the regime gained momentum and reached a certain level in 2023. Despite the Arab Contact Committee's decision to suspend the talks, the regime rejoined the Arab League and, most recently, attended the joint summit of the Organization of Islamic Cooperation and the Arab League – which offers insights into the current direction.

It is possible to say that Jordan has been an outlier in this regard, as it remains the only country that has vital problems with the regime within the context of drug trafficking, border security, and the repatriation of Syrian asylum seekers. It is no secret that the regime considers Jordan an important market – especially for the drug trade. At the same time, Jordan is located on a commercial route. That is why one could expect the dispute to continue in 2024.

SOUTH CAUCASUS: Risks and Opportunities



Mehmet Devrim

06

SUMMARY OF 2023

- 1 Azerbaijan launched a swift counterterrorism operation on Sept. 19 ending the 30-year occupation of its territory within 24 hours. The Nagorno-Karabakh regime dissolved, and many Armenians left Azerbaijan for Armenia in the following days and weeks. This was followed by rapid progress in confidence-building measures and bilateral ties between Baku and Yerevan.
- 2 The EU formally accepted Georgia into the EU candidate program.
- 3 The Zangezur and Middle Corridor question has become the main question of the region, with Türkiye, Georgia, Iran, Azerbaijan, and Armenia wanting to become part of it to some degree or another.

INTRODUCTION

Over the years the South Caucasus has gradually evolved from a fringe region to a key issue for Europe and Asia alike. Part of China's Belt and Road Initiative (BRI) it is the shortest and fastest way to build a stable connection between Europe and China and everything that lies in between, but has also been marred by conflict making it risky for stakeholders. 2023, while being ripe in tension, saw a rapid change of dynamics in the latter half of the year, not only giving 2023 as a whole a positive spin but also improving the prospect of 2024 to increase the stability in the region as a whole. The core development in the region that has spurred this positive change was the solution to the Karabakh issue. While it still isn't solved permanently, the issue looks to be contained enough that it will not lead to a new conflict in the foreseeable future.

STABILITY

The first half of 2023 progressed tense, but relatively stable. The second half, however, saw rapid shifts in the dynamics governing the entire region. Starting on Sept. 19, Azerbaijan launched a counterterrorism operation into the remaining pockets occupied by Armenian forces in the Karabakh region of Azerbaijan ... The build-up to the operation took place over months, with multiple instances where questions arose about whether the two states would go to war or not while regularly accusing each other of war build-ups.¹ In the aftermath of the operation, almost the entire Armenian population of the re-

¹ "Azerbaijan and Armenia accuse each other of military build-up", Reuters, September 7 2023, <https://www.reuters.com/world/russia-says-its-working-with-both-armenia-azerbaijan-tensions-rise-2023-09-07/>

gion left the region and migrated to Armenia.² While it is regrettable that the conflict had to escalate again and that so many Armenians left their homes, it also solved the problem of the region at its root. Azerbaijan remains committed to letting the former residents return to their homes, but it seems unlikely that many will be willing to make such a radical change again. The event can be seen as a trigger for everything that followed soon after.

INTERNAL AND EXTERNAL DYNAMICS

The internal and external dynamics in the South Caucasus region can be grouped into three concepts: Normalization, Regionalism, and Diversification. Normalization is the process started by South Caucasian countries to let go of their grievances and have a normal, maybe even fruitful, relationship with each other. We can see this in Armenia and Azerbaijan mentioned earlier, but also between Türkiye and Armenia on the one hand and Iran and Azerbaijan on the other.

The second major dynamic reigning in the South Caucasus region is regionalism. This dynamic is led by Türkiye, Iran, and Russia, the three larger countries of the region. It defines their process of reducing the negative influence extra-regional interventionism has on the stability and prospects of the region. One example here would be the interference of regional external powers in the Azerbaijan and Armenia peace process. The EU tried functioning as a mediator, but the EU attempts failed in Grenada as the EU refused to let Türkiye participate in the talks while also explicitly supporting Armenia ultimately leading to Azerbaijan refusing to participate. Similarly, France and India are now interfering in the Azerbaijan and Armenia peace process by increasing arms sales to Armenia which are seen as a threat by Azerbaijan.³ This could ultimately lead down a path where Armenia might either attempt to invade Azerbaijan again or at least look like it wants to, inviting a preemptive or preventive strike by Azerbaijan. The peace process has hence been taken into the hands of regional countries with major developments taking place during the South Caucasus Cooperation Platform. Following the summit, Armenia announced the “Crossroads of Peace” initiative, and, as of this December completed a prisoner exchange with Azerbaijan and announced more confidence-building measures.⁴ The South Caucasus Cooperation Platform is a push

2 “Azerbaijan must let ethnic Armenians return to Nagorno-Karabakh: UN court”, Al-Jazeera, November 17 2023, <https://www.aljazeera.com/news/2023/11/17/azerbaijan-must-let-ethnic-armenians-return-to-nagorno-karabakh-un-court>

3 “President of the European Council Charles Michel made a phone call to Ilham Aliyev”, President of the Republic of Azerbaijan, October 7 2023, <https://president.az/en/articles/view/61511>

4 “Armenia, Azerbaijan agree to take steps towards normalization”, Al-Jazeera, December 8 2023, <https://www.aljazeera.com/news/2023/12/8/armenia-azerbaijan-agree-to-take-steps-towards-normalisation>

towards more regionalist policies by the participating members, with Iran, Türkiye, Azerbaijan and Russia visibly displeased by the negative interference of extra-regional states. In its second summit in October this year it brought together Russia, Iran, Türkiye, Azerbaijan and Armenia, whereas Georgia was boycotting the platform due to Russian participation. Positive influence seems somewhat welcome. After the EU formally accepted Georgia as a membership candidate, the Turkish embassy in Tbilisi wrote a celebratory tweet.⁵

The last relevant dynamic is Diversification, referring to the diversification of roads and relations. However, it can also be referred to as “beyond regional cooperation”. The earlier-mentioned development of Georgia’s EU candidate-ship is Georgia’s attempt to diversify its partners. Türkiye and Azerbaijan invest major funds into the Organization of Turkic States. Iran has its axis of resistance and Armenia is looking for new partners after it felt abandoned by Russia. This is all driven by roads. The South Caucasus is located in a key region between Europe and China. As part of the Belt and Road Initiative China is diversifying its transport routes to Europe, one of which is the Middle Corridor. It is the shortest path and the closest to the ancient Silk Road. However, as the region is marred by conflict, stakeholders preferred other routes. To bring investors the region needs to have a semblance of stability.

PROJECTING THE FUTURE: NORMALIZATION, DIVERSIFICATION, REGIONALIZATION

Three major issues in the South Caucasus hold significant sway over its prospects. One is the relationship between Armenia and Azerbaijan, which continues to be tense but has seen significant progress especially after the solution of the Karabakh issue. Another is the continued occupation of parts of Georgia by Russia. Lastly is the issue of corridors with the Zangezur and Middle Corridors positioning themselves as central issues.

With regards to Georgia, the country has been occupied by Russia since 2008. It is discontent with being occupied but doesn’t seem to have the will to take active steps against it.⁶ The conflict is likely to remain frozen for the foreseeable future as Russia’s interest is undividedly focused on Ukraine. Georgia will likely focus on fulfilling the EU membership conditions.

⁵ The Turkish Foreign Ministry has at this point made no formal statement but the Twitter account of the Turkish embassy in Tbilisi celebrated the decision, Turkish Embassy Tbilisi on Twitter, December 14 2023, <https://twitter.com/TCTiflisBE/status/1735362203224572051>

⁶ “Kremlin says EU decision on Ukraine, Moldova, Georgia attempt to ‘annoy Russia’”, Anadolu Agency, December 15 2023, <https://www.aa.com.tr/en/asia-pacific/kremlin-says-eu-decision-on-ukraine-moldova-georgia-attempt-to-annoy-russia/3083482>

Armenia on the other hand has made it clear it wants to diversify its relationships and allies. France, India, Iran, the EU, and the U.S. have stepped up as potential allies. Armenia is unlikely to completely break off the link to Russia, but it certainly is more sprinting away than just drifting from Russia's sphere of influence. France and India have announced arms transfers to Armenia, but their geographical distance puts limits on the impact they can have on the region.

Iran is a different matter. A 25-30% of Iran's population are ethnic Azerbaijanis and any issue that could give rise to ethnic nationalism or separatism in northern Iran could be an existential threat to the country. But this threat also puts a significant restraint on open Iranian actions against Azerbaijan. Following the tensions of 2023 and the resolution of the Karabakh question, Iran will want to redefine its relationship with Azerbaijan and decrease tensions while increasing cooperation. A first indicator of this was the announcement after the Second South Caucasus Cooperation Platform summit, that the two countries agreed to construct the corridor connecting Azerbaijan and its exclave Nakhichevan through Iran rather than Armenia.⁷ This trend is likely to continue as possible sources of tension are diminishing.

Regardless of the outcome of the Ukraine war, the Russian influence in the South Caucasus will continue to decrease in 2024. The war has revealed the limits of Russia.

In the South Caucasus, Azerbaijan and Türkiye were the big winners. Military gains aside, the two countries have deepened their relationship with each other but also those with other Turkic States through the Organization of Turkic States. Azerbaijan has strengthened its bilateral ties with the Turkish Republic of Northern Cyprus and Uzbekistan. It is to be expected that both Azerbaijan and Türkiye will increase their bilateral ties with the Central Asian Turkic states and also make regional connections. The Middle Corridor, if it gains traction, would be a regional connection between the South Caucasus and Central Asia. We can expect more developments in this regard in 2024 where Central Asian and South Caucasian countries get closer and inter-regionally connected.

Something to watch out for in 2024 could be the annulment of the dissolution of the Nagorno Karabakh republic.⁸ The former government of the

7 "Azerbaijan drops Armenian land corridor plan, looks to Iran - Aliyev adviser", Reuters, October 25 2023, <https://www.reuters.com/world/asia-pacific/armenia-says-pashinyan-aliyev-talks-cancelled-after-baku-pulled-out-tass-2023-10-25/>

8 "Nagorno-Karabakh Separatist Leader Says Dissolution Decree Not Valid", Radio Free Europe, December 22 2023, <https://www.rferl.org/a/armenia-azerbaijan-separatists-decree/32743775.html>

Karabakh forces in Azerbaijan has decreed that their earlier decree of dissolution was made under duress and hence was void. This is certain to “annoy” Azerbaijan. It is unlikely that it will turn out to become a major issue soon as all Karabakh Armenians leave the region but can be considered a spark in the tinderbox. Keeping a close eye on how the issue develops, whether the Armenians who left Karabakh start a new life in Armenia and settle down, return to Azerbaijan or develop extremist thoughts is going to be a defining factor of the Azerbaijan-Armenia relationship.

Within this scope, the main subject of 2024 for all countries involved will likely be consistent with three main issues. Strengthening bilateral ties with each other while engaging in confidence-building measures, increasing regional cooperation, and making attempts beyond regional cooperation.

EASTERN MEDITERRANEAN: Developments and Projections



Murat Aslan

07

SUMMARY OF 2023

- 1 The Gaza war escalated in the region endangering stability.
- 2 Energy-related undertakings were promising and could promote region-wide cooperation.
- 3 The Gaza War polarized the region and weighed risks.
- 4 Except for Israel, the Eastern Mediterranean countries and close neighborhoods may continue to promote constructive dialogue.

SECURITY / MILITARY DEVELOPMENTS

The Gaza -War was the primary security and military challenge in 2023. The Oct. 7 attack started a new era in Palestine. Israel preferred aggression with indiscriminate targeting of urban and civilians. The civilian casualties, including the children and women, have been a trauma for the international community if there exist rules of war. The destruction of overall Gaza presented the cost of any war and multiplier risks emerging in the long run. The other region-wide known problems were manageable in the Eastern Mediterranean.

POLITICAL AND ENERGY DEVELOPMENTS: POLITICAL DEVELOPMENTS

Türkiye's normalization efforts with Israel and Egypt were the primary political development in the Eastern Mediterranean. Türkiye and these two countries developed diplomatic relations by appointing Ambassadors.

Israel was the country with great prominence for Türkiye due to political, economic, and military aspects. The same argument is valid for Israel because the normalization process with the Gulf countries could only be complemented by another normalization with Türkiye. Given the energy resources in the Israeli exclusive economic zone (EEZ), Türkiye offers a cost-effective gas transit to Europe and a proximate market for Israeli gas exports. In this sense, both countries concluded a process of meetings, and appointed ambassadors, Irit Lillian and Şakir Özkan Torunlar, on 27 December 2022 and 12 January 2023 respectively.¹ The meeting of Erdoğan and Netanyahu in New

¹ Mucahit Aydemir, "New Turkish ambassador presents credentials to Israeli president", 11 January 2023, <https://www.aa.com.tr/en/middle-east/new-turkish-ambassador-presents-credentials-to-israeli-president/2785060#:~:text=Ambassador%20Şakir%20Özkan%20Torunlar%20was,presented%20his%20credentials%20to%20Herzog>, accessed on 8 December 2023.

York sidelined with the U.N. General Assembly, was a turning point when Erdoğan stated the probability of partnership with Israel in searching and drilling energy resources on Sept. 22, 2023.² This development built optimism, although Greece and Greek Cypriots monitored the impact of Israeli–Turkish rapprochement if they could be sidelined. Nevertheless, the Oct. 7 attack of Hamas challenged the hopes after the Netanyahu-led Israeli government indiscriminately targeted the Palestinian civilians in Gaza. The high toll of the child, women, and innocent killings polarized both countries and shifted away from the agreed steps. Erdoğan’s clear statements accusing Israel of committing war crimes and Israeli media propaganda strained the relations, postponing the expectations of a “without-Netanyahu” era.

The normalization with Egypt is the other leg of the Turkish foreign policy in the way to normalize. The shared interests of both countries thrust the disagreements through long-term negotiations. The February 6th Earthquakes augmented the normalization by the visit of Egyptian Foreign Minister Samih Sukri.³ The normalization process was smoothly managed by both parties afterward with a designated agenda, signaling no threat or risk for the third parties.⁴

Egypt was so concerned about the presence of the Egyptian Muslim Brotherhood in Türkiye that the Brotherhood voluntarily announced the closure of their broadcast studio in Türkiye.⁵ The other dimensions were Libya and delimiting the maritime zones. Türkiye was the competing actor for Egypt in Libya, though; the maritime zone delimitation of both Libya and Türkiye was carefully demarcated without any incursion into Egyptian interests. Meanwhile, the Turkish continental shelf at the Eastern Mediterranean Sea presented a positive incentive to Egyptians if compared to Greek–Egyptian delimitation since “it would have granted Egypt a sizable maritime concession.”⁶ Hence, “geopolitical considerations regarding the Eastern

2 Times of Israel, “Erdoğan says hopes to soon start work with Israel on energy drilling, networks”, 22 September 2023, <https://www.timesofisrael.com/erdogan-says-hopes-to-soon-start-work-with-israel-on-energy-drilling-networks/>, accessed on 8 December 2023.

3 BBC, “Mısır Dışişleri Bakanı Şükri 10 yıl sonra Türkiye’de: Normalleşme süreci hızlanacak mı?”, 28 February 2023, <https://www.bbc.com/turkce/articles/cglj3x0kv94o>, accessed on 8 December 2023.

4 Doaa El bey, “New warmth in Egypt-Turkey relations?”, 10 March 2023, <https://english.ahram.org.eg/NewsContent/50/1201/491330/AlAhram-Weekly/Egypt/New-warmth-in-Egypt-Turkey-relations.aspx>, accessed on 6 December 2023.

5 Euronews, “Müslüman Kardeşler’in yayın organı Mekameleen TV, Türkiye’deki yayınlarını durdurma kararı aldı”, 30 April 2023, <https://tr.euronews.com/2022/04/30/musluman-kardesler-in-yay-n-organ-mekameleen-tv-turkiye-deki-yay-nlar-n-durdurma-karar-ald>, accessed on 8 December 2023.

6 Ali Bakir, “Egypt-Turkey normalization: Ankara’s perspective”, 12 April 2023, <https://www.atlanticcouncil.org/blogs/menasource/egypt-turkey-normalization-ankaras-perspective/>, accessed on 6 December 2023.

Mediterranean and Libya, among other issues, and the reinforcement of economic ties have influenced the normalization's trajectory".⁷ Both countries appointed ambassadors to the other capitals to complement the normalization.⁸ The Gaza issue, despite its humanitarian catastrophe, augmented the shared understanding of Egypt and Türkiye, acting together to resolve the deadlock.

The Eastern Mediterranean includes **the Cyprus issue**, which is away from a resolution after the Greek Cypriots rejected the 2004 Annan Plan. The basic arguments of both Turkish and Greek Cypriots are polarized. Greek Cypriots put forward Turks as 'invaders' and rejected all proposals while Turkish Cypriots and Türkiye circulated the idea of a two-state solution since Greek Cypriots had rejected a unified island by their 2004 referendum rejection or a (con)federation. Under these circumstances, the new President of the Greek Cypriots, Nikos Christodoulides, stated "trying to end the impasse and create circumstances that will allow for the resumption of Cyprus talks".⁹ Nevertheless, there was no significant improvement during 2023. Contrary to the expectations, Greek Cypriots boldly conditioned the progress in Turkish-EU relations.

Despite the Cyprus issue, **Turkish-Greek Relations** positively resonated fast. The concept of 'positive dialogue' between Greece and Türkiye occupied the bulk of the agenda through the technical level meetings and track 1.5 or 2 dialogues.¹⁰ The Foreign Ministers of both countries agreed to build new approaches¹¹ and announced jointly that "the two sides agreed to build on the already existing positive atmosphere to identify areas of agreement and cooperation at the bilateral and international level".¹² In this context, the Deputy Foreign Ministers of both countries, Burak Akçapar and Konstantinos Frangogiannis, agreed on a joint action plan to further the positive agenda.¹³ Finally, Erdoğan's visit to Greece on Dec. 7 and signature of a series of agreements deepened the normalization. The principal of the process was set to start with the areas of shared interests.

7 <https://www.aa.com.tr/en/analysis/opinion-the-tantalizing-reconciliation-between-turkiye-and-egypt/2888186>, accessed on 6 December 2023.

8 <https://www.arabnews.com/node/2332141/middle-east>, accessed on 6 December 2023.

9 Cyprus Mail, "Christodoulides focused on ending Cyprus talks' impasse ", 30 April 2023, <https://cyprus-mail.com/2023/04/30/christodoulides-focused-on-ending-cyprus-talks-impasse/>, accessed on 6 December 2023.

10 <https://moderndiplomacy.eu/2023/09/12/high-time-for-multi-track-dialogues-between-greece-and-turkey/>, accessed on 6 December 2023.

11 <https://www.ekathimerini.com/news/1219244/turkish-and-greek-foreign-ministers-discuss-troubled-ties-in-a-more-friendly-climate/>, accessed on 6 December 2023.

12 Daily Sabah, "Türkiye-Greece ties to advance on positive atmosphere", 18 October 2023, <https://www.dailysabah.com/politics/diplomacy/turkiye-greece-ties-to-advance-on-positive-atmosphere>, accessed on 6 December 2023.

13 Kathimerini, "Turkish and Greek foreign ministers agree to revive talks and seek 'new approaches'", 5 September 2023,

ENERGY RELATED DEVELOPMENTS

The energy is both a matter of competition and cooperation in the Eastern Mediterranean. The year 2023 witnessed and favored cooperation on energy with concretized projects and outcomes. The Gazza issue has impeded the economy of energy, though; the doors are still open for furthering regional projects and cohesion despite differences on how to proceed with the process.

Greek Cypriots prioritized licensing the multinational companies and extracting concrete profits after years of energy-related quest. The Greek Cypriots intended to include the other countries' energy giants to obtain a political advantage against the Turkish Cypriots in the way of excluding them from the desired profits. Nevertheless, Greek Cypriots were also insistent on making the southern shores of the island the hub of processing gas, which was not cost-effective for the companies. Hence, the dispute was on how to transfer the output to the global markets, and the U.S. Government, for instance, backed the energy companies against the demands of the Greek Cypriots.¹⁴ Regarding the transfer of gas, Italian ENI signaled a proposal to Greek Cypriots to build a pipeline to Israel, which favored either liquidification in Egypt or transferring to Türkiye.¹⁵

There was an assessment in the Greek Cypriot media that Christodoulides prefers the same policy as his predecessor, “who was under the illusion that by building strong relations with countries at odds with Türkiye, the Republic would gain some sort of advantage, strategic or otherwise”.¹⁶ The American opposition to Greek Cypriot demand and local media's coverage questioned the relevance of energy-related politics, favored by Christodoulides, in between reviewing another political process to resolve the Cyprus issue and energy agenda. On the other hand, the delay in realizing the gas projects has been a point of concern.¹⁷ Energy Minister of Greek Cypriots, George Papanastasiou, announced that “natural gas should start being extracted by approximately 2027 or 2028” after delineating his optimism on disputes with Chevron Energy Co.¹⁸

Israel has been much more stable in processing the energy program and turned it into a concrete benefit. The strategy was to integrate the capacities and ca-

14 Ron Bousso, Timothy Gardner and Michele Kambas, “US backs Chevron in dispute with Cyprus over giant gas field”, 1 September 2023, Reuters, <https://www.reuters.com/business/energy/us-backs-chevron-dispute-with-cyprus-over-giant-gas-field-2023-09-01/>, accessed on 8 December 2023.

15 Financial Mirror, “ENI positive on Cyprus-Israel pipeline”, 28 June 2023, <https://www.financial-mirror.com/2023/06/28/eni-positive-on-cyprus-israel-pipeline/>, accessed on 6 December 2023.

16 Cyprus Mail, “Our View: Energy can open way for Cyprus talks”, 9 April 2023, <https://cyprus-mail.com/2023/04/09/our-view-energy-can-open-way-for-cyprus-talks/>, accessed on 6 December 2023.

17 <https://cyprus-mail.com/2023/10/31/long-term-conflict-in-the-region-could-hit-cyprus-energy/>, accessed on 6 December 2023.

18 <https://cyprus-mail.com/2023/11/25/energy-minister-optimistic-over-chevron-talks/>, accessed on 6 December 2023.

pabilities of Israel, Egypt, and Greek Cypriots specifically after the agreement with Lebanon to share the delimited maritime zone.¹⁹ The European quest to have access to energy resources has been the motivating factor after the outbreak of Russian aggression on Ukraine. Hence Israel's short-term solution was to liquidify gas in Egypt and market it to the EU while building pipeline networks in the long run. The Cyprus – Crete – Greece pipeline would have a high cost, which is essentially not acceptable by the energy companies but the Anatolian route would have been cost-effective. The normalization with Türkiye facilitated this idea, though; the Gaza issue halted the energy-related projects. Hence Israel has been more focused on short-term solutions, like relying on Egypt to market gas that hit the Israeli export records in 2023.²⁰ Besides Israel shipped the first oil export from the once- disputed Israeli – Lebanese EEZ as a promising development.²¹ Moreover, military escalation in Gaza did not halt the energy efforts and Israel granted 12 licenses to BP and ENI.²²

Egypt continued to process gas and market it. On the other hand, economic escalations in the country impeded the renewal and maintenance of the infrastructure. The exploration of new oil and gas fields was promising for the Egyptian energy sector. The promising hope was the discovered gas at the Nargis-1 exploration well in the Nargis Offshore Area Concession, Eastern Mediterranean Sea, offshore Egypt.²³ Egypt announced another oil discovery in August Egypt in the Gulf of Suez.²⁴ Meanwhile, Egypt expanded its gas infrastructure transferring gas through Jordan to increase the efficiency.²⁵ One specific issue in question was the Egyptian unilateral demarcation of the mari-

19 <https://www.al-monitor.com/originals/2022/12/israel-expected-increase-natural-gas-drilling-2023>, accessed on 6 December 2023.

20 Israel Gas Exports To Egypt Hit New Heights As Output Continues To Climb – MEES - Israel gas output rose 12% to a new quarterly record of 2.358bn cfd for Q1, 7% above the previous record posted in Q3 last year. The 23tcf Leviathan field remains the country's top producer with 1.122bn cfd, up 2% on Q4 but slightly below the record 1.163bn cfd hit in Q3 last year. MEES, "Israel Gas Exports To Egypt Hit New Heights As Output Continues To Climb", 26 May 2023, <https://www.mees.com/2023/5/26/oil-gas/israel-gas-exports-to-egypt-hit-new-heights-as-output-continues-to-climb/9a099f70-fbb1-11ed-bd86-35eac60e974c>, accessed on 6 December 2023.

21 <https://www.ft.com/content/48fd85f5-9730-4339-b532-b91057ce533d>, accessed at 6 December 2023.

22 <https://www.timesofisrael.com/amid-ongoing-war-bp-and-eni-among-firms-awarded-gas-exploration-licenses-in-israel/>, accessed on 6 December 2023.

23 Alex Proyck, "Chevron discovers gas offshore Egypt", Oil and Gas Journal, 17 January 2023, <https://www.ogj.com/exploration-development/discoveries/article/14288363/chevron-discovers-gas-offshore-egypt>, accessed on 6 December 2023.

24 Reuters, "Egypt announces new oil discovery in Gulf of Suez", 22 August, 2023, <https://www.reuters.com/business/energy/egypt-announces-new-oil-discovery-gulf-suez-2023-08-22/>, accessed on 6 December 2023.

25 Arab News, "Egypt, Jordan partner to optimize natural gas infrastructure", 11 June 2023, <https://www.arabnews.com/node/2319616/business-economy>, accessed on 6 December 2023.

time border with Libya at the very end of 2022.²⁶ There was a Libyan reaction to the decision, though; the problem was marginalized and remained manageable. Libyan Unity Government expanded the 12-mile territorial waters to 24 miles, but the demarcation of the adjacent waters was left to oblivion for a while.²⁷

Lebanon has been another active state actor in the region. The – U.S.-mediated maritime limitation with Israel was a success story. Nevertheless, the dispute on the land border has emerged as another issue that requires another mediation. The outbreak of the Gaza War halted this effort.²⁸ The off-shore gas drilling, on the other hand, was tendered to a Total-led consortium.²⁹

Finally, the media informed the audience about secret talks between the Palestinian Authority and Israel on extracting gas across the Gaza shore 36 km away from the Gaza coast.³⁰

DYNAMICS OF TÜRKİYE'S EASTERN MEDITERRANEAN POLICY

Türkiye has been committed to a normalization process with Israel, Egypt, and finally Greece. This preference has the potential to ease political tensions and promote energy-relevant diplomacy for maximum mutual gain. The outbreak of the Gaza War has become the priority two-fold. The Gaza issue fastened the normalization with Egypt and did not impede the Turkish–Greek rapprochement. On the other hand, Turkish-Israel relations deteriorated after the civilian casualties have been a point of critique. President Erdoğan was so focused on objective assessment on Oct. 7, though, the children and women losses with indiscriminate Israeli targeting increased the emotional narratives calling Israel to calm the conflict and realize a permanent ceasefire. In this sense, Türkiye proposed assuming responsibility for humanitarian assistance, mediation, and guarantee to ease the escalation. The official statement leans on a “two-state solution, based on 1967 borders”.

26 Ahmed Aleiba, “Preventive Measure: Egypt’s unilateral demarcation of maritime border with Libya”, <https://english.ahram.org.eg/News/483029.aspx>, accessed on 6 December 2023.

27 Middle East Monitor, “Libya expands its maritime border”, 27 October 2023, <https://www.middleeastmonitor.com/20231027-libya-expands-its-maritime-borders/>, accessed on 6 December 2023.

28 Naharnet, “Hochstein discusses land border, gas and stability in Lebanon talks”, 31 August 2023, <https://www.naharnet.com/stories/en/299983-hochstein-discusses-land-border-gas-and-stability-in-lebanon-talks>, accessed on 6 December 2023.

29 Reuters, <https://www.reuters.com/business/energy/lebanon-energy-minister-hopeful-oil-gas-exploration-off-coast-2023-05-09/>, accessed on 6 December 2023.

30 Mohammad Najip, “Israel in ‘secret talks’ with Palestinian Authority to extract gas from off Gaza coast”, 5 May 2023, <https://www.arabnews.com/node/2298436/middle-east>, accessed on 6 December 2023.

The energy-related Turkish foreign policy is still on the same page. Türkiye wants to resolve the incompatibilities with the states of the region, first, through concluding normalization, and, then, by joint projects either to explore, drill, or transfer energy resources. This policy is beneficial for all actors in the region and the EU as well. The Gaza war delayed the process with Israel, though; President Erdoğan is pointing out Israeli Prime Minister Netanyahu rather than Israel responsible for the disaster. Hence, Türkiye will keep the position if the Gaza issue is resolved peacefully.

HOW COULD THE CURRENT DYNAMICS EVOLVE IN 2024?

The Middle East and Eastern Mediterranean have never been an easygoing geography in projecting the future. The numerous competition potentials bear risks for planned political, economic, or military acts. If the developments of 2023 are taken as a referent and assume the repetition of the attitudes of the included actors, politics can be erected on ambiguity whilst energy-relevant folders will be multiplier for cooperation. The state actors and their multinational energy giants demand peace and stability to process the energy resources especially to find an alternative to Russian gas and oil.

Cost-effectiveness will be the essential parameter to assess the course of energy and relevant political undertakings. In this sense, the Gaza War will be a concern in 2024 in a way to positively resonates with Israel. Once there is a government change in Israel and a wise leader handles the Israeli relations with the other countries, another normalization would start. On the other hand, Israel may face isolation in the region if the Gaza War escalates more with humanitarian collapse.

The Cyprus issue signals mixed and complicated beams in the region. Greek Cypriots have no patience seeing the increase in national income due to gas marketing in the year 2024. But marketing gas is not only about drilling, extracting, and marketing. If the political stalemate continues in Cyprus, the energy projects will be fragile, insurance costs will be higher, and transferring the gas will be vulnerable to any negative impact. The optimum course is to have the Turkish Cypriots be treated just and satisfy the expectations of Türkiye through well-designed diplomacy within *bona fides*. Turkish-Egyptian cooperation, which is fast and promising, could be a modal. Besides, the positive agenda of Türkiye and Greece may charm the Greek Cypriots to review their policies toward Turkish Cypriots and Türkiye.

PROSPECTS OF THE EASTERN MEDITERRANEAN REGION			
ISSUE	COUNTRY	TÜRKİYE	POTENTIAL OUTCOME
Gazza War	Israel may escalate more with humanitarian collapse.	Türkiye may continue to propose guaranturship and mediation. The relations with Israel depend on how Israel continues with Palestinians.	There may be delays in previously planned projects. The removal of Netanyahu from the PM position may be a positive development. The normalization may be left to the discovery by time.
Relations with Egypt	Egypt is on the same page as Türkiye. Further collaboration efforts will be on the agenda.	Türkiye may contribute to Egypt through joint energy projects and marketing. Both countries may deepen their relations with Libya by the inclusion of Libyans.	Both countries may align their foreign policies.
Cyprus	Greek Cypriots may continue to marginalize the Turkish Cypriots. A change in this policy may promote a positive agenda.	Türkiye will not accept any Greek Cypriot attempt to dominate Cyprus. Once Greek Cypriots start a positive agenda, like Greece, there may be a hope to start another wave of positive diplomacy.	The Cyprus issue may either be persistent or resolved gradually per the attitude of the Greek Cypriots.
Greece	Greece is prone to proceed through a positive agenda to calm the sense of threat.	Türkiye responds positively and constructively. The issues of sovereignty may be left to oblivion. International Court of Justice is a door to open whilst it is not an easygoing process.	The spillover effect of resolving minor issues may augment the base for long-term stability. A cooperative attitude may reflect itself in handling the Cyprus issue.

TÜRKİYE-RUSSIA RELATIONS: Fostering Resilience in Cooperation Despite Geopolitical Uncertainty



Mehmet Çağatay Güler

08

SUMMARY OF 2023

- 1 The highlights of the face-to-face and telephone conversations between the two leaders and foreign ministers are as follows:
 - Regional developments centered in Ukraine
 - The further development of bilateral relations, especially in energy and trade.
- 2 The Azov battalion commanders, who stood out on the defense front of Ukraine's Mariupol city, were released by Türkiye.¹
- 3 The Black Sea Grain Initiative, which was implemented in July 2022, was extended twice in 2023 with the outstanding efforts of the Türkiye. Yet, it was terminated in July 2023 due to the firm opposition of the Russian Federation.²

¹ Mehmet Sah Yilmaz, "5 Azov Battalion commanders return to Ukraine in prisoner exchange", *Anadolu Ajansı*, 09 July 2023.

² "Что известно о прекращении зерновой сделки", *TACC*, 17 July 2023; "Tahıl anlaşmasından çekilen Rusya'dan yeni karar! Putin: Batı, siyasi şantaj olarak kullandı", *Hürriyet*, 19 July 2023.

Türkiye, despite being a NATO country that strongly opposes Russia's illegal occupation of Ukraine, was able to broker a significant deal between the warring states called "The Black Sea Grain Initiative." Through this deal, 32.8 million tons of grain and foodstuffs have been exported; in this context, Ankara has made an extraordinary contribution to global food security.¹

Around the extermination time of the Grain Initiative, the extradition of the Azov Battalion commanders to Ukraine following President Erdoğan's meeting with Ukrainian leader Zelensky had serious repercussions in Moscow. Subsequently, Türkiye's lifting of the veto on Sweden's NATO membership² created a cold shower effect in Türkiye-Russia relations. As a result of this development, heavy criticism of Türkiye began to appear in the Russian press. Russian state media even used expressions that amounted to insults to the Turkish State and its representatives.³

Afterward, almost all headlines began to write that Russia would withdraw from the Black Sea initiative in response to Türkiye's steps; hence, the initiative would not be extended anymore. Just as was threatened by Russia, Moscow ultimately withdrew from the agreement. Even though the official position says otherwise, Russia retaliated against Türkiye's actions taken before the renewal date of the initiative. From that moment, Russian media started to discuss whether Türkiye pivoted once again to the West while distancing itself from the East.

1 "Update from the Office of the UN Coordinator for the Black Sea Grain Initiative", United Nations Black Sea Grain Initiative Joint Coordination Centre, 15 July 2023, <https://www.un.org/en/black-sea-grain-initiative/update-15-july-2023#:~:text=Almost%20one%20year%20into%20the,been%20stranded%20since%20February%202022>. (Accessed Date: 05 December 2023).

2 Patrick Wintour, "Türkiye agrees to support Sweden's Nato application", *The Guardian*, 10 July 2023.

3 "Press review: Erdogan whirls like dervish on Swede NATO bid and Gulf Arabs push for peace", *TASS*, 11 July 2023.

Until the face-to-face meeting between Putin and Erdogan in Sochi, held on Sept. 4, 2023, the discussions revolving around Türkiye's changing foreign policy directions kept going in the Russian media. However, the emphasis on cooperation that emerged following leader-level meetings and the increased commercial activities in the subsequent period once again rendered these discussions futile. Such emphasis does not remain solely on paper, on the contrary, Russia stands out as Türkiye's most important import and also foreign trade partner. As of November, Russia ranks second in total imports and first in trade volume.⁴ Despite the war conditions and sanctions imposed against Russia, bilateral trade volume will once again exceed 65 billion dollars in 2023.⁵ In a nutshell, it was neither a shift in Türkiye's foreign policy axis nor a pivoting act; Türkiye rather aimed to achieve what it believed served in its best interest. It is possible to argue that this year, as in previous years, both conflict and cooperation areas have been preserved, regardless of the size, depth, context and effects of the conflictual issues.

HISTORICAL CONTINUATION OF SIMULTANEOUS CONFLICT AND COOPERATION

Examining the centuries-old relations between the two countries and the dynamics that form the building blocks of bilateral relations, the concepts of conflict and cooperation seem to be preserved and realized together for a hundred years.⁶

Not only in the past but also in the present, the two countries have direct conflicts and/or clashes of interests on various geopolitical issues, nevertheless, they can simultaneously maintain cooperation.⁷ Here, several subjects come to the fore: Syria, Karabakh, and Ukraine. In Karabakh, the support has been splitting into the opposing camps. On the one hand, Ankara supports the country that is its kin and brother, Azerbaijan; on the other hand, Russia takes advantage of the conflict and instability in the region and protects its ally,

4 "Ülkelere Göre Dış Ticaret", *Türkiye İstatistik Kurumu (TÜİK)*, <https://data.tuik.gov.tr/Kategori/GetKategori?p=dis-ticaret-104&dil=1> (Accessed Date: 13 December 2023).

5 Gokhan Yildiz, "Türkiye-Russia trade volume to exceed \$65B in 2023", *Anadolu Agency*, 23 November 2023.

6 Samuel J. Hirst and Onur Isci, "Smokestacks and pipelines: Russian-Turkish relations and the persistence of economic development", *Diplomatic History*, Vol. 44, No. 5, 2020, pp: 834-859; William Hale, "The Turkey-Russia Relationship in Historical Perspective: Patterns, Change and Contrast", *Uluslararası İlişkiler*, Vol. 20, No 78, 2023, pp. 43-58.

7 Cemil D. İpek and Mehmet Ç. Güler, "Turkey and Russia in Syrian war: Hostile friendship", *Security and Defence Quarterly*, Vol. 35, No. 3, 2021, pp: 77-92. Doi:10.35467/sdq/138949; Seçkin Köstem, "Russian-Turkish cooperation in Syria: Geopolitical Alignment with Limits", *Cambridge Review of International Affairs*, Vol. 34, No. 6, 2021, pp: 795-817.

Armenia. Yet, the two have managed to cooperate under the “Turkish-Russian Joint Observation Center” in the Aghdam district, Karabakh.⁸

In Ukraine, Türkiye strongly opposes Russia's illegal occupation of Ukraine -both in 2014 and in 2022. Besides, Ankara gives utmost support to Kyiv which does not solely remain in rhetoric but realizes through concrete steps such as the deliveries of armored vehicles and unmanned aerial vehicles (UAV). Nonetheless, it was Türkiye who achieved a historic deal between such warring states -Russia and Ukraine- which is known as the Black Sea Grain Initiative. They even can create opportunities for cooperation on issues where confrontation occurs.⁹ Since the very beginning of the Syrian War, Moscow and Ankara have followed extremely opposite strategies while supporting fundamentally clashing actors. The national interests have been clashing in Syria since day one. There were times when both sides confronted each other and had a direct conflict. In the absence of direct conflicts, indirect conflicts have occurred through the proxy actors in the field. Even under such circumstances, they managed to create mechanisms and agreed to dialogue, cooperation, and stability in Syria.¹⁰

Hereby, I argue that such conflict and cooperation concepts, which have been going on for years in Türkiye-Russia relations, are deeply coded into the genetics of the relations. Moreover, interdependence is so deeply ingrained that, despite various geopolitical conflicts, cooperation can be achieved. In this context, a historical continuation of simultaneous conflict and cooperation is observed in Türkiye-Russia relations. The past 100 years show that the two countries can neither be permanent allies nor constant enemies. While Türkiye pursues the policy, which has been there for a century, it does not seek any balance or follow a balancing strategy, nor prefers one country as an alternative to another. Therefore, neither clashes experienced in 2023 nor the years before caused an axis shift nor did the ongoing cooperation which gets deeper year by year bring Türkiye closer to Russia.

Considering the historical continuity, clashes, and cooperation in 2023 was not surprising; therefore, it seems quite reasonable to expect geopolitical conflicts to continue with deepening cooperation in 2024. Henceforth, I claim

8 “Dağlık Karabağ'da Ateşkesin Gözlemlenmesi İçin Kurulan Türkiye-Rusya Ortak Merkezi Faaliyetlerine Başladı”, *Türkiye Cumhuriyeti Millî Savunma Bakanlığı*, 30 January 2021, (Accessed Date: 15 December 2023); “Türkiye-Rusya Ortak Merkezi, Ateşkes İhlallerini Önlemeye Yönelik Tedbirler Alıyor”, *Türkiye Cumhuriyeti Millî Savunma Bakanlığı*, 05 February 2021, (Accessed Date: 15 December 2023).

9 İpek and Güler, “Turkey and Russia in Syrian war: Hostile friendship”.

10 İpek and Güler, “Turkey and Russia in Syrian war: Hostile friendship”; Köstem, “Russian-Turkish cooperation in Syria: Geopolitical Alignment with Limits”.

that the two countries, despite the ongoing geopolitical uncertainty triggered by the Russia-Ukraine War and the Israel-Hamas Conflict, will foster resilience in cooperation and such resilience further be strengthened as days pass.

PROSPECTS FOR 2024

Considering the dynamics creating the bilateral relations and the developments that happened in 2023, I would like to categorize the set of possibilities that we may expect to see in Türkiye-Russia relations in the year 2024 (See Table 1. Prospects of Türkiye-Russia Relations in 2024). In this context, this study argues that deeper economic cooperation could happen considering the hundred-year-old trend and the trade volume realized in 2023. Trade volumes of such size are maintained despite the geopolitical uncertainty caused by the war in Ukraine. In addition, the Israel-Hamas conflict was added. Yet, the two countries despite such uncertainty (caused by the Russia-Ukraine War and the Israel-Hamas Conflict), have achieved resilience in cooperation which will be further fostered in the next year. Furthermore, the mutual discourse revolves around reinforcing Türkiye's energy hub position, making related developments in this direction very likely to happen. On the contrary, it would be best for Türkiye's energy supply security to see a decrease in Türkiye's dependency on Russian energy resources.

Moreover, it would be fair to expect the continuation of the Joint Observation Center created between Türkiye-Russia in the Aghdam district. The center in question has proven its function and importance in recent years, so that, it could continue its activities in the coming years. Despite the existence of observation centers and mechanisms looking for peace and stability in the region, Armenia continues its harassment and attacks. The structure and content of the 2020 ceasefire agreement, as well as Russian peacekeepers in the region, do not protect against relevant attacks and harassment but rather provide convenience and space for Yerevan. This is the reason why, Azerbaijan carried out an anti-terrorist operation in 2023 and why similar developments might also happen in 2024. During such an operation, Russia did not bear a hand to Armenia as expected; in fact, it could not do so due to the war conditions it was and still is in. Moscow even took a position in favor of Baku. In a similar recurring conflict that may occur in 2024, which may be around the Lachin corridor or in Khankendi, a new mechanism seems likely to be established for de-escalation between Türkiye and Russia. But, the most important issue that must be realized is the determination and finalization of the road-map for the Zangezur corridor. The distractions of Armenia and Russia should be prevented as soon as possible, and when, how and under what conditions the corridor will be opened should be determined as soon as possible.

Furthermore, the war in Ukraine has worn out both Russia and Ukraine and it indeed continues to do so. Both sides are having problems in terms of ammunition supply and manpower. Neither side can get what they strive to achieve in counter-offensives. In 2024, just as in the war itself, the status quo regarding the Ukraine issue could be maintained in Türkiye-Russia relations and no fundamental change is expected to occur. However, since the fog of war still exists and the situation on the battlefield is uncertain and unpredictable, an unexpected is to be expected. Therefore, depending on the course of the war, an indirect confrontation between Türkiye and Russia in Ukraine seems likely to happen just like it happened after Türkiye released Azov Battalion commanders. Beyond all, even though the probability is very low, the re-extension of “The Black Sea Grain Initiative” is what should be achieved in 2024 for the sake of global food security.

Last but not least, the Astana Format since its inception, has reaffirmed how important and remarkable is for the de-escalation zones, peace process, and the lasting settlement of the Syrian crisis. Even though Kazakh authorities declared that Astana will not be hosting the meetings from now on, the mechanism could continue in a new format as Astana 2.0 and it is fair to expect that the mechanism is going to strengthen its place and effectiveness in 2024. Yet, when it comes to Russia’s and Türkiye’s Syria policies, the likelihood of a direct or indirect confrontation cannot be ignored. Specifically, in the areas whose security is ensured by Türkiye or in surrounding territory, the two countries are likely to confront most probably through proxies. Above all, to achieve lasting settlement and peace in the region, a new inclusive constitution should be constructed together with fair elections in which all parties are equally represented. Though the odds say improbable, establishing such a constitution and holding fair elections are of paramount importance for the future of Syria as well as for the national security of Türkiye.

Plausible Outcome	Probable Outcome	Preferable Outcome
Deeper Economic Cooperation	Developments Centered Around Türkiye's Energy Hub Position	Less Dependency on Russian Energy Resources
Continuation of the Türkiye-Russia Joint Observation Center in the Aghdam district.	Mechanism for De-escalation Around Lachin Corridor or Khankendi	Determination of the Roadmap for the Zangezur Corridor
Preservation of the Status Quo in Ukraine	Indirect Confrontation in Ukraine	Extension of The Black Sea Grain Initiative
Establishment and Strengthening of Astana 2.0 Format	Direct/Indirect Confrontation in Syria	Establishing a Constitution and Holding Elections

2024 PROJECTION OF TÜRKİYE-AFRICAN RELATIONS WITH RISKS AND OPPORTUNITIES



Tunç Demirtaş

09

SUMMARY OF 2023

1

Somali President Hasan Şeyh Mahmud visited Erdoğan in Istanbul.

2

African Culture House signed a memorandum of understanding with the African Union.

3

African countries showed excellent pasta fidelity after the Kahramanmaraş-centered earthquakes in Türkiye on February 6. They assisted Türkiye in response to the helping hand that Türkiye has sincerely extended to Africa for many years.

SUMMARY OF 2023

In light of Türkiye's dynamism in foreign policy, relations with Africa continued to be built in 2023. Within the scope of the Türkiye Century vision, relations with African countries have been balanced, despite all the negativities experienced in 2023, based on strategic goals. In 2023, Africa has frequently been on the global agenda due to events such as the developments in the international system resulting from the Ukraine-Russia War, the death of Wagner's leader in a plane crash¹, the developments as a result of military interventions in the Sahel Belt², energy, counterterrorism, trade, conflicts, elections, climate change, and natural disasters. It has frequently appeared on the global agenda due to events. Relations with Türkiye were also shaped in this context.

Türkiye has maintained its relations with Africa in education, culture, humanitarian aid, diplomacy, economics, politics, military, and security issues. In this context, among the critical issues that come to the fore in Türkiye-Africa relations in 2023, in the education dimension, the opening of the first "Maarif Türkiye Studies Center" at the University of Pretoria in the Republic of South Africa and supporting the education of students studying in Türkiye with Türkiye Scholarships from African countries³, culturally, the African Culture House signed a Memorandum of Understanding with

1 Michael Hernandez, "Pentagon says reports 'inaccurate' that Prigozhin's plane brought down by missile", Anadolu Ajansı, 25.08.2023, <https://www.aa.com.tr/en/americas/pentagon-says-reports-inaccurate-that-prigozhin-s-plane-brought-down-by-missile/2975827>, (Accessed: 19 December 2023).

2 Nosmot Gbadamosi, "Will Intervention Stabilize the Sahel?", Foreign Policy, October 4, 2023, <https://foreignpolicy.com/2023/10/04/niger-mali-burkina-faso-intervention-stabilize-sahel/>, (Accessed: 19 December 2023).

3 "Türkiye Maarif Vakfı Güney Afrika'da Faaliyet Alanlarını Genişletiyor", Türkiye Maarif Vakfı, <https://turkiyemaarif.org/news/turkiye-maarif-vakfi-guney-afrikada-faaliyet-alanlarini-genisletiyor> (Accessed: 19 December 2023).

the African Union⁴, in terms of humanitarian aid, one thousand tent aids were provided to refugees who were affected by the conflicts in Sudan and took refuge in Chad⁵, diplomatically, the active activities of the Ambassadors and diplomats working in the Ministry of Foreign Affairs on various platforms; economically, Africa has a 5 percent place in Türkiye's foreign trade and the Ziraat Katılım Bank started operating in Somalia⁶; politically, President Recep Tayyip Erdoğan hosted Somali President Hasan Şeyh Mahmud and the Sudanese Sovereignty Council. He held various meetings such as telephone conversations with the President of the Republic, General Abdulfettah al-Burhan, and the Commander of the Rapid Support Forces, Muhammed Hamdan Dagalo, and finally, activities such as Türkiye's support and assistance in the fight against terrorism in Somalia on military and security issues and the transfer of defense industry products to various African countries have been realized.

In addition, the fight between the Chairman of the Sovereignty Council, General Abdulfettah al-Burhan, and the Commander of the Rapid Support Forces, Muhammed Hamdan Dagalo, in Africa, especially in Sudan, in 2023, cooperation support with Somalia in the fight against terrorism and the integration of Somalia into the regional and global system, Sahel Developments in the region have an essential place in relations for Türkiye. In addition, the year 2023 has caused a significant development in terms of Türkiye-Africa relations. After the devastating earthquakes in Türkiye on February 6, helping hands were extended to Türkiye from African countries. Ambassadors from African countries visited AFAD on behalf of the African diplomatic corps in Türkiye. In addition, the same ambassadors donated symbolic amounts from their salaries to the earthquake victims. Therefore, in response to the helping hand that Türkiye has sincerely extended to Africa for many years, after February 6, African countries showed a significant commitment to the covenant.

MAIN DYNAMICS

In 2024, relations with Türkiye are expected to be maintained within the framework of fundamental issues and dynamics related to Africa, geopolitics,

4 "African Union Signs Memorandum of Understanding with the African Culture House", September 19, 2023, <https://au.int/en/pressreleases/20230919/african-union-signs-memorandum-understanding-african-culture-house>, (Accessed: 19 December 2023).

5 "Afet ve Acil Durum Yönetimi Başkanlığı, Sudan'daki iç savaş nedeniyle Çad'a sığınan ailelere 1000 çadır ulaştırdı", İletişim Başkanlığı, https://www.iletisim.gov.tr/turkce/yerel_basin/detay/afet-ve-acil-durum-yonetimi-baskanligi-sudandaki-ic-savas-nedeniyle-cada-siginan-ailelere-1000-cadir-ulastirdi, (Accessed: 19 December 2023).

6 Tunç Demirtaş, "Tunç Demirtaş, Ziraat Katılım ve Afrika ilişkilerini Merhaba Afrika için değerlendirdi", Merhaba Afrika, 10 Kasım 2023, <https://merhabaafrika.com/tunc-demirtas-ziraat-katilim-ve-afrika-iliskilerini-merhaba-afrika-icin-degerlendirdi/>, (Accessed: 19 December 2023).

food security, defense and security, development, energy, economy, banking, and stability. Africa's increasing importance in the global system's transformation process is likely to continue in 2024. However, despite the global economic slowdown in 2023, African countries' resilient stance maintained positive economic relations with Türkiye. Therefore, due to the positive economic momentum in Africa in 2024, it is likely that this development will have a positive impact on Türkiye-Africa economic relations. In addition, after Ziraat Development Bank opened a new branch in Somalia last year, it is expected to start operating in different countries on the continent in 2024. This will inevitably have a positive impact on economic relations.

On the other hand, the Grain Corridor, created against food insecurity in Africa due to the Russia-Ukraine War, is among the most likely issues to be brought back to the agenda in 2024. Türkiye's important role in the Grain Corridor Agreement will come to the fore again in relations with the continent. Because the grain corridor agreement was suspended⁷, international commodity prices were likely to remain high last year. This situation made imports difficult for African countries. On the other hand, almost half of the world will have elections in 2024.⁸ In this context, elections will be held in 18 African countries. Therefore, events during or after the election processes can affect countries' national, regional, and continental security. This situation could affect bilateral relations through the instabilities and uncertainties that may arise. In addition to all these, the regional repercussions of the war in Sudan may affect Türkiye's relations with Sudan's surrounding countries. In addition, Türkiye's conciliatory attitude towards the war in Sudan allows the positive perception to continue in Sudan and the countries in the region. Therefore, Türkiye's moderate and peacekeeping approaches on such issues will be one of the main determinants of its relations with African countries in 2024.

2024 PROJECTION: RISKS AND OPPORTUNITIES

With the expansion of BRICS last year, it exists as an alternative organization under Chinese leadership. The membership of South Africa, Egypt, and Ethiopia⁹ to this organization from Africa may cause the continent to gain more momentum in its relations with BRICS in the coming year.

7 Burc Eruygur, "Russia suspends Black Sea grain deal", Anadolu Ajansı, 17 July 2023, <https://www.aa.com.tr/en/europe/russia-suspends-black-sea-grain-deal/2947682>, (Accessed: 19 December 2023).

8 "Election Calendar", Electoral Institute for Sustainable Democracy in Africa, <https://www.eisa.org/election-calendar/>, (Accessed: 19 December 2023).

9 Nsmot Gbadamosi, "BRICS Expansion Could Help Egypt's Ailing Economy", August 30, 2023, <https://foreignpolicy.com/2023/08/30/brics-expansion-egypt-economy-ethiopia-investment-dollar-china-russia/>, (Accessed: 19 December 2023).

Especially considering that the importance of Red Sea geopolitics will increase in 2024, the inclusion of Ethiopia and Egypt in BRICS stands out in terms of their ability to affect the population and dynamics in the regional countries in the developments that may occur regionally in the Red Sea and Nile Basin. In this process, Türkiye is expected to establish a partnership for more economic cooperation based on its normalized relations with Egypt and its ongoing good relations with Ethiopia regarding its trade with the continent. After the Ziraat Development Bank was established in Somalia in 2023¹⁰, it is expected that such activities, which are an element of trust in economic and commercial activities, will start operating in new African countries.

Regarding security, Türkiye's balanced stance in the insecurity environment in the region was critical, especially after the developments in the Sahel. Military interventions will likely be seen in the elections and subsequent processes that will take place on the continent in 2024. Türkiye, which stands by democracy, will continue to share its experiences with African countries and contribute to ensuring democracy, peace, and security. However, some risks may arise in this process.

For example, after past military interventions in the Sahel region¹¹, an alternative bloc was formed against ECOWAS, with Burkina Faso, Mali and Niger as the main actors. Likely, the transfers between the members of these two different blocs and the atmosphere of instability in the region will benefit terrorist organizations. Therefore, security problems and instability in the region pose the risk of damaging Türkiye's economic and commercial cooperation. However, in this process, within the scope of the fight against terrorism, there are opportunities for cooperation between Türkiye and the countries in the Sahel and surrounding regions in the fight against terrorism, as well as risks. In this context, France's complete withdrawal of its troops from Niger by the end of 2023¹² may have a positive impact on the activities of radical groups and terrorist organizations in the region at some point. In the face of this situation, Türkiye's sharing of experience in the fight against terrorism is seen as necessary for African countries and a significant opportunity to take bilateral relations to the next level.

10 Demirtaş, "Tunç Demirtaş, Ziraat Katılım ve Afrika..."

11 Alexander Hudson, David Towriss, "Two more coups in Africa: similarities, differences, and what comes next", International IDEA, <https://www.idea.int/blog/two-more-coups-africa-similarities-differences-and-what-comes-next>, (Accessed: 19 December 2023).

12 "Niger: la France va fermer son ambassade pour une durée indéterminée", RFI, December 22, 2023, <https://www.rfi.fr/fr/afrique/20231222-niger-la-france-va-fermer-son-ambassade-pour-une-duree-indeterminee>, (Accessed: 23 December 2023).

The increase in the operation areas, number of attacks, and access to weapons of terrorist groups in the Sahel in 2024 are among the risks. It also seems possible to see an increase in the activities of JNIM, a faction of al-Qaeda, in 2024. On the other hand, the Islamic State of the Greater Sahel (ISGS) could become decisive in southeastern Burkina Faso and southwestern Niger, posing significant threats to regional security. In this context, it seems possible to expect military interventions, counter-coups, or controlled interventions in countries such as Chad, Cameroon, Sierra Leone, and Ivory Coast. Again, trade in the Lake Chad Basin, which covers the borders of Nigeria, Cameroon, Chad, and Niger, and in the Niger, Togo, and Benin regions, is interrupted due to terrorism. This situation poses significant risks for trade. When we go beyond the Sahel region, economies in different countries and regions such as Mali-Ivory Coast, Somalia-Kenya, Algeria-Mali, and the Democratic Republic of Congo are also threatened by terrorism. In short, the fight against terrorism will be among the most critical issues in 2024. In this context, terrorist organizations in Tanzania and Mozambique and the fact that these organizations threaten the border and economic security between the two countries are important risk factors. Launching an initiative led by Türkiye with international partners in both the East and West to fight against increasing terrorism in Africa in 2023 will positively reflect on Türkiye's role in the global system.

The refugee crisis in the Sahel is likely to worsen further due to the war in Sudan. With more than 7 million civilians currently displaced within the country and 25 million people in need of assistance in Sudan¹³, the already alarming situation seems likely to worsen. This situation also brings various risks for the region's officials, who need assistance. Türkiye must also be more careful during its humanitarian aid activities in the region, which has a high potential for deterioration because the support given to different groups by non-regional actors with different goals and interests in the region brings various risks.

Türkiye's efforts regarding Somalia will not decrease in 2024. The developments in the global system affect fundamental security issues such as the fight against terrorism in East Africa, Red Sea geopolitics, and the security of international trade routes. If the necessary precautions are not taken, Somalia, located at a critical crossroads, will likely cause risks related to the mentioned issues. However, in addition to Somali security, Türkiye's role in resolving regional crises also contributes to global security. Therefore,

13 Ömer Erdem, "Sudan'daki iç savaş batıdan doğuya yayılıyor", Anadolu Ajansı, December 22, 2023, <https://www.aa.com.tr/tr/dunya/sudandaki-ic-savas-batidan-doguya-yayiliyor/3089794>, (Accessed: 23 December 2023).

in addition to support for the fight against al-Shabaab, Türkiye is expected to make significant contributions to the negotiations between Somalia and Somaliland in 2024.

TÜRKİYE'S COUNTER- TERRORISM OPERATIONS: Unfolding Developments and Regional Security Responses



Sibel Düz

10

SUMMARY OF 2023

- 1 March 15 - Eurocopter AS350 helicopter carrying members of YAT affiliated with the SDF crashed in the Choman district of Duhok.
- 2 April 7 - During a UAV attack near Sulaymaniyah International Airport, the so-called General Commander of the SDF "Mazlum Abdi" was claimed to be targeted.
- 3 Sept. 18 - For the first time, a UAV attack targeted a military zone affiliated with the PUK in the Arbat region of Sulaymaniyah.
- 4 Oct. 1 - Two terrorists carried out a bomb attack in front of the entrance gate of the Ministry of Interior General Directorate in Ankara.
- 5 Oct. 6 - A U.S. F-16 fighter jet has shot down a Turkish unmanned aerial vehicle in Syria.

INTRODUCTION

Türkiye's three priorities – extending the scope of military operations, strengthening defense industry-empowered counterterrorism (CT) efforts, and pursuing leadership decapitation¹ - from the previous years have persisted in 2023. However, the sustained efficacy of counterterrorism remains paramount within the framework of Türkiye's regional policies. In the year 2023, it is imperative to contextualize Türkiye's CT efforts within the intricate web of international and regional interactions with Iraq and Syria, positing that they will intricately mold Türkiye's CT strategy and potentially emerge as primary determinants in the forthcoming years.

SUMMARY OF MAIN DYNAMICS AND EVENTS

IRAQ: Intricate Relations between the PKK/YPG and the PUK

In March, the Anti-Terrorism Unit of the Kurdistan Regional Government (KRG) disclosed the crash of a Eurocopter AS350 helicopter, carrying the PKK/YPG members, in the Choman district of Duhok.² Subsequently, the Syrian Democratic Forces (SDF) confirmed the loss of nine members belonging to the Counter-Terrorism Forces (YAT).³

This incident holds significant importance in shedding light on the intricate relations between the PKK/YPG and the Patriotic Union of Kurdistan (PUK).

1 For further inquiry please check Sibel Düz and Muhammet İsmail Üzen, "Remote Control: Aerial Elimination of the PKK's Terrorist Leaders and Operatives", SETA, 14 August 2023, <https://www.setav.org/en/remote-control-aerial-elimination-of-the-pkks-terrorist-leaders-and-operatives/>

2 "İrak'ta düşmüştü: O helikopterin pilotu YPG'li çıktı!", CNN Türk, 18 March 2023, <https://www.cnnturk.com/turkiye/irakta-dusmustu-o-helikopterin-pilotu-ypgli-cikti>

3 "SDG Kuzey Irak'ta İki Helikopterin Düşüğünü Açıkladı", Voice of America, 17 March 2023, <https://www.voaturkce.com/a/sdg-kuzey-irak-helikopterin-dustugunu-acikladi/7010142.html>

Allegations suggest that one of the helicopters involved in the crash was procured from Canada and allocated for use by the anti-terrorism unit established under the Ministry of Interior of the KRG, spearheaded by Lahur Talabani. Moreover, contentions are positing that PKK/YPG members underwent pilotage and technical training in Sulaymaniyah, purportedly under the cognizance of the U.S. Central Command (CENTCOM).⁴

After this incident, it was announced that Turkish airspace was closed for the use of aircraft traveling to and from Sulaymaniyah International Airport (ISU) as of April 3rd within the framework of “the intensification of PKK’s activities, the infiltration of the terrorist organization into the airport, and thus the threat to flight safety.”⁵ Shortly after this announcement, during a drone attack near ISU, the so-called General Commander of the SDF “Mazlum Abdi,” was claimed to be targeted along with three American military personnel in the convoy.⁶

Following the drone attack that strained relations with the U.S., in a meeting, where a delegation from the PUK reportedly met with the Deputy Head of MÎT in Baghdad, the opening of Turkish airspace to aircraft using ISU was discussed. Subsequently, the Deputy Prime Minister of the KRG Kubad Talabani and the accompanying PUK delegation were claimed to have met with the head of the National Intelligence Organization (MÎT) Hakan Fidan in Ankara where Fidan allegedly expressed Türkiye’s discomfort with “the PUK’s relations with the SDF and the PKK”.⁷

Another noteworthy development was the visit of Foreign Minister Hakan Fidan in August at which the issue of designating the PKK as a terrorist organization came to the forefront.⁸ As part of his engagements in Iraq, discussions reportedly revolved around persistent issues such as the unresolved fight against the PKK, water-related concerns, and the international export of Iraqi oil. The establishment of Border Guard Forces along Iraq’s borders with

4 Necdet Özçelik, “Helikopter vakası ve PKK tehdidindeki gerçeklik”, Star Açık Görüş, 25 March 2023, <https://www.star.com.tr/acik-gorus/helikopter-vakasi-ve-pkk-tehdidindeki-gerceklik-haber-1775293/?ysclid=lpstaqdu3579523713>

5 “Türk hava sahası Süleymaniye uçuşları için kapatıldı”, Anadolu Ajansı, 5 April 2023, <https://www.aa.com.tr/tr/gundem/turk-hava-sahasi-suleymaniye-ucuslari-icin-kapatildi/2864385>

6 “Drone Strike in Iraq Targets Syrian Kurdish Leader, a U.S. Ally”, The Wall Street Journal, 7 April 2023, <https://www.wsj.com/articles/drone-strike-in-iraq-targets-syrian-kurdish-leader-a-u-s-ally-a567055a>; “Pentagon’dan Süleymaniye Açıklaması”, Voice of America, 14 April 2023, <https://www.voaturkce.com/a/pentagon-suleymaniye-aciklamasi/7049619.html>

7 “Kubad Talabani, MÎT Başkanı Hakan Fidan ile görüştü!”, Rudaw, 11 April 2023, <https://www.rudaw.net/turkish/middleeast/110420231>

8 “Dışişleri Bakanı Fidan, İKBY Başbakan Yardımcısı Talabani ile görüştü”, Anadolu Ajansı, 24 August 2023, <https://www.aa.com.tr/tr/gundem/disisleri-bakani-fidan-ikby-basbakan-yardimcisi-talabani-ile-gorustu/2975600>

Türkiye and Iran, efforts to bring the Makhmur camp under control, which has served as a quasi-military training and recruitment ground for the PKK, and attempts to curtail the activities of PKK-affiliated groups in Sinjar, may be seen as indicators of at least some shift in the central government's stance towards the terrorist organization. However, Türkiye is urging for more substantial and concrete steps from the central government, beyond its current position of not officially recognizing the PKK as a terrorist organization.⁹

In September, despite sustained diplomatic engagements, a notable incident transpired as a cautionary measure aimed at the PUK, which persists in fostering close ties with the PKK. A paradigm shift unfolded as a UAV attack, for the first time, targeted a military zone affiliated with the PUK in the Arbat region of Sulaymaniyah. It was unveiled that within the same facility, members of the PUK's "Counter-Terrorism Group" (CTG) were undergoing training alongside the PKK and YPG members.¹⁰ The training facility in Arbat has recently come under scrutiny, particularly with the visits of Bafel Talabani, the leader of the PUK.

SYRIA: The Decisive Role of Demographic Dynamics in Perpetuating Active Conflict

Furthermore, unfolding events in the Deir ez-Zor region of Syria have exerted an indirect yet potentially influential impact on Türkiye's regional CT policy. These developments underscore the decisive role of demographic dynamics in perpetuating active conflict in the area. Long-standing tensions between the PKK/YPG and the Deir ez-Zor Military Council, predominantly comprises Arabs affiliated with the Akidat, Busairiya, and Baggara tribes, escalated into open conflict following the terrorist organization's detention of the so-called group commander Ahmad Abu Khawla. The hostilities extended to Raqqa, Hasakah, and the town of Manbij in Aleppo, drawing the participation of additional Arab tribes.¹¹

During operations conducted between Aug. 27 and Sept. 13, Arab tribes successfully liberated a total of 33 villages from terrorist control. However, in the

9 Bilgay Duman, "Fidan Irak'a neden gitti?", Fikir Turu, 23 August 2023, <https://fikirтуру.com/jeo-strateji/fidan-iraka-neden-gitti/?ysclid=lq0phicnrx143104691>; Sibel Düz, "Uzmanlar Cevaplıyor: Dışişleri Bakanı Hakan Fidan'ın Kapsamlı Irak Ziyareti", SETA, 25 August 2023, <https://www.setav.org/uzmanlar-cevapliyor-disisleri-bakani-hakan-fidanin-kapsamli-irak-ziyareti/>

10 "Dışişleri Bakanlığında, Süleymaniyede Arbat Havalimanı'na yapılan İHA saldırısına ilişkin açıklama", Anadolu Ajansı, 19 September 2023, <https://www.aa.com.tr/tr/politika/disisleri-bakanligindan-suleymaniyedeki-arbat-havalimanina-yapilan-ih-saldirisina-iliskin-aciklama/2996228>

11 "Deyrizor'da terör örgütü PKK/YPG ile Araplar arasında çatışmalar sürüyor", Anadolu Ajansı, 29 August 2023, <https://www.aa.com.tr/tr/dunya/deyrizorda-teror-orgutu-pkk-ypg-ile-araplar-arasinda-catismalar-suruyor-/2978486>; "Deyrizor'da PKK/YPG baskısı altındaki Arap aşiretleriyle terör örgütü 12 gündür çatışıyor", Anadolu Ajansı, 7 September 2023, <https://www.aa.com.tr/tr/dunya/deyrizorda-pkk-ypg-baskisi-altındaki-arap-asiretleriyle-teror-orgutu-12-gundur-catisiyor/2985851>

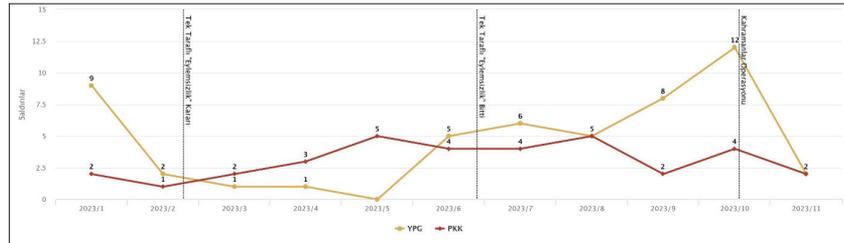
face of retaliatory attacks by the terrorist organization, these tribes regrettably withdrew from the reclaimed villages and initiated negotiations with the U.S.¹²

These developments may prompt the U.S. to reconsider its strategy of supporting a single ethnic or sectarian group in Syria and may push the U.S. to counterbalance the SDF, as the Defense Intelligence Agency had previously noted concerns regarding the YPG's actions to minimize Arab influence within the SDF.¹³ Türkiye may benefit from a decreased influence of YPG within the SDF formation, consequently.

TÜRKİYE: The Strategic Decision to Diversify Operational Targets

In the Turkish context, the PKK terrorist organization announced a 'non-aggression' decision from February 9 to June 13.¹⁴ Throughout this period, the PKK sophisticatedly heightened its political propaganda activities, with its so-called leaders delivering statements almost daily through media outlets associated with the terrorist organization, addressing the presidential elections and the political process in Türkiye and the PKK continued its attacks, particularly in the Iraqi and Syrian territories.

Graphic: PKK/YPG Attacks in Türkiye, Syria and Iraq in 2023



Source: www.tap-data.com

Moreover, the terrorist organization executed a bomb attack in front of the entrance of the Directorate General of Security of the Ministry of Interior in Ankara.¹⁵ This orchestrated attack by the terrorist organiza-

12 "Deyrizor'da Arap aşiretleri ile terör örgütü PKK/YPG birçok noktada çatıştı", Anadolu Ajansı, 28 November 2023, <https://www.aa.com.tr/tr/dunya/deyrizorda-arap-asiretleri-ile-teror-orgutu-pkk-ypg-bircok-noktada-catisti/3066803>

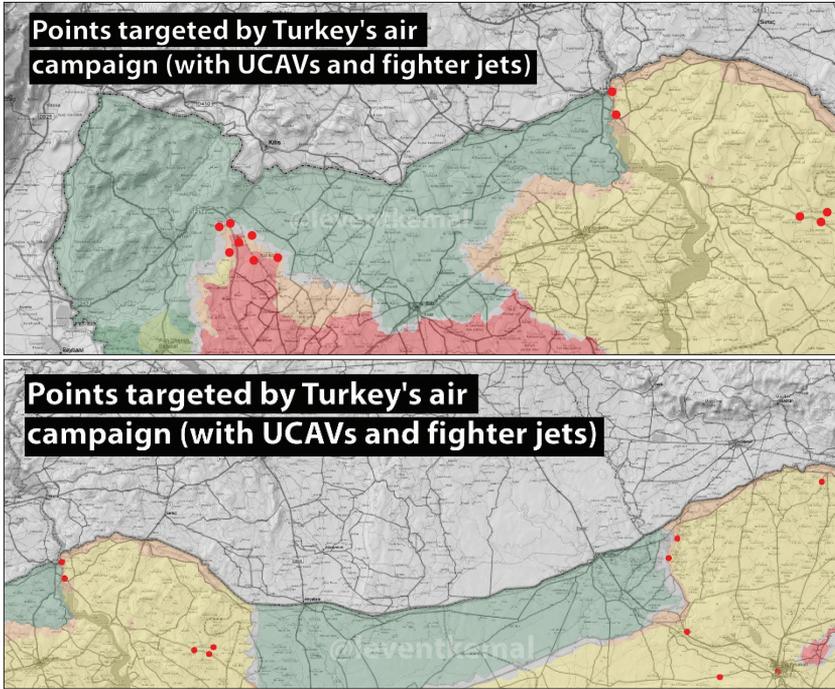
13 "Operation Inherent Resolve Lead Inspector General Report to the United States Congress", Department of Defense Office of Inspector General, 13 May 2020, https://media.defense.gov/2020/May/13/2002298979/-1/-1/1/LIG_OIR_Q2_MAR2020_GOLD_508_0513.PDF

14 "PKK'den seçim sürecine ilişkin yeni karar", Rudaw, 28 March 2023, <https://www.rudaw.net/turkish/kurdistan/28032023>; "PKK, 'eylemsizlik' kararını sona erdirdi", Euronews, 14 June 2023, <https://tr.euronews.com/2023/06/14/pkk-eylemsizlik-kararini-sona-erdirdi>

15 "Ankara'da bombalı terör saldırısı", Anadolu Ajansı, 1 October 2023, <https://www.aa.com.tr/tr/gundem/ankarada-bombali-teror-saldirisi/3004902>; Sibel Düz, "The PKK's Ankara Terror Attack Reveals a Larger Plan", Politics Today, 4 October 2023, <https://politicstoday.org/the-pkk-ankara-terror-attack-national-assembly/>

tion - appears to be an effort to re-channel the direction of violence to Türkiye - seemingly aimed not only to convey a message to the demoralized human resources of the PKK within Türkiye but also to project a sense of sustained attack capability against strategic targets within the Turkish territory.¹⁶

Map 1 Places targeted by Turkish aerial operations



Source: <https://x.com/levantkema/status/1710257768421007816?s=20>

After the attack, coupled with Foreign Minister Hakan Fidan's statement¹⁷ that "all infrastructure, superstructure, and energy facilities belonging to PKK/YPG in Iraq and Syria are the legitimate targets of our security forces," a series of aerial operations were executed against terrorist targets in Tall Rifat, Jazira, and al-Malikiyah regions in northern Syria, including oil-well and storage facilities utilized by the terrorist organization. In parallel, air operations were carried out in the Metina, Gara, Hakurk, Qandil, and Asos regions of northern Iraq. Furthermore, upon the revelation that the assailants infiltrating Türkiye from Syria, MİT launched precision opera-

¹⁶ Sibel Düç, "Ankara Saldırısının Gösterdikleri", SETA, 3 October 2023, <https://www.setav.org/odak-ankara-saldirisinin-gosterdikleri/>

¹⁷ "Bakan Fidan: (Ankara'daki terör saldırısı) İki teröristin Suriye'den geldiği açıklığa kavuşmuşur", Anadolu Ajansı, 4 October 2023, <https://www.aa.com.tr/tr/gundem/bakan-fidan-ankaradaki-teror-saldirisi-iki-teroristin-suriyeden-geldigi-acikliga-kavusmustur/3007659>

tions using UAVs.¹⁸ Despite a brief tension arising from a Turkish UAV being downed by a U.S. F-16 in Syria during ongoing aerial and intelligence operations, Türkiye did not suspend its ongoing punitive operations.¹⁹ In parallel with airstrikes and intelligence operations, Interior Minister Ali Yerlikaya launched “Operation Heroes”, targeting the PKK/YPG’s clandestine intelligence network throughout Türkiye.²⁰

TÜRKİYE’S CT POLICY IN 2024

The “Development Road Project,” encompassing the establishment of road and railway connections from the strategic Port of Basra to Türkiye, holds the potential to evolve into an economic catalyst or even an opportunity and may serve as a nuanced instrument for applying diplomatic pressure on Iraq, particularly within Sulaymaniyah and its environs under the control of the PUK, where the central government may intensify efforts to mitigate the recent upswing in PKK activities.²¹

As the Arbat incident illustrated, Türkiye should keep an eye on Bafel Talabani who has become a noteworthy figure, drawing attention through his close interactions with Iran-backed Shiite groups and collaboration with the SDF. There are even assertions that Bafel Talabani not only strategically utilized the infrastructure and resources of the PUK to carve out a sphere of control and influence for the PKK in Sulaymaniyah but also has been perceived as assuming a leadership role within the “Kurdish movement” who may insert influence on Türkiye’s Kurdish population shortly.²²

The PKK seems to exploit the ongoing power dynamics between the Kurdistan Democratic Party (KDP) and the PUK, capitalizing on internal leadership disputes within the Talabani faction of the PUK, while strategically leveraging the infrastructure and resources of the latter, which

18 “Suriye’nin kuzeyine hava harekati: 30 hedef imha edildi”, TRT Haber, 6 October 2023, <https://www.trthaber.com/haber/gundem/suriyenin-kuzeyine-hava-harekati-30-hedef-imha-edildi-801011.html>; “Irak’ın kuzeyine yapılan 3 hava harekatinde 58 hedef vuruldu”, TRT Haber, 5 October 2023, <https://www.trthaber.com/haber/gundem/irakin-kuzeyine-yapilan-3-hava-harekatinda-58-hedef-vuruldu-800783.html>; “MİT, PKK/YPG hedeflerini vurdu”, TRT Haber, 5 October 2023, <https://www.trthaber.com/haber/gundem/mit-pkkyg-hedeflerini-vurdu-800961.html>

19 “ABD F-16’ları Türk İHA’sını düşürdü”, NTV, 6 October 2023, <https://www.ntv.com.tr/turkiye/son-dakika-haberiahd-f-16lari-turk-ihasin-dusurdu,UzKuZ6v5WUWDH-Y4TAsLCg>

20 “Türkiye genelinde PKK’ya yönelik Kahramanlar Operasyonu”, NTV, 3 October 2023, https://www.ntv.com.tr/turkiye/turkiye-genelindepkkya-yonelik-kahramanlar-operasyonu,Q2-sCVdiQU6T-nOH_ZRAaKA

21 Bilgay Duman, “Fidan Irak’a neden gitti?”, Fikir Turu, 23 August 2023, <https://fikirturu.com/jeo-strateji/fidan-iraka-neden-gitti/?ysclid=lq0phicnrxr143104691>

22 Bilgay Duman, “Arbat’ta KYB ve terör örgütü PKK ittifaki”, Anadolu Ajansı, 27 September 2023, <https://www.aa.com.tr/tr/analiz/gorus-arbatta-kyb-ve-teror-orgutu-pkk-ittifaki/3002107>

consequently may frustrate Türkiye's efforts of minimizing the PKK's capacity and capabilities.

The helicopter crash in Duhok, the subsequent closure of Turkish airspace for flights to Sulaymaniyah, the targeting of a convoy near Sulaymaniyah Airport involving the so-called General Commander of the SDF "Mazlum Abdi" along with U.S. soldiers, and the recent attack in Arbat constitute developments signaling significant warnings for the PUK. If the PUK chooses to overlook these warnings and persists in its current policy, it is conceivable that Türkiye may adopt more stringent rhetoric, potentially bringing an end to the ongoing dialogue attempts.²³

Regarding Syria, several contributing factors notably, the YPG's coercive conscription and indoctrination of Arabs, its control over oil revenues, and its exertion of dominance in regional administration introduce multifaceted economic, political, and military considerations.²⁴ Nonetheless, the tribes' endeavor has reignited discussions surrounding the proposition of alternative military groups and mechanisms to the YPG in the region which would be particularly gratifying to Türkiye. Various stakeholders posit that an alternative military formation could terminate the discord between the YPG, which refrains from confrontation with Iran-backed groups, and the United States, which seeks to counter the escalating Iranian threat in the region.

As mentioned earlier, if the clashes re-emerge in consecutive years, it may prompt the U.S. to reconsider its strategy of supporting a single ethnic or sectarian group in Syria and may push the U.S. to counterbalance the SDF in the near future. Türkiye may benefit from a decreased influence of YPG within the SDF formation, consequently.

Türkiye's strategic decision to diversify operational targets, initiated with Operation Claw-Sword and endured the post-Ankara attack, will persist with an emphasis on oil and gas facilities in the forthcoming years. On the other hand, the PKK is poised to engage in novel domains of warfare. Murat Karayılan, the so-called senior leader of the PKK, says they will combine tunnel warfare with combat team tactics. The operational strategies of the PKK are poised to evolve into a more refined and nuanced approach known as flea-bite tactics. Their operations will predominantly involve small, isolat-

23 Bilgay Duman, "Arbat'ta KYB ve terör örgütü PKK ittifakı", Anadolu Ajansı, 27 September 2023, <https://www.aa.com.tr/tr/analiz/gorus-arbatta-kyb-ve-teror-orgutu-pkk-ittifaki/3002107>

24 Serhat Erkmen, "YPG ve Arap aşiretlerinin çatışması ne anlama geliyor?", Fikir Turu, 7 September 2023, <https://fikirturu.com/jeo-strateji/ypg-ve-arap-asiretlerinin-catismasi/?ysclid=lq0x5v-l0o600125568>

ed groups employing raids and executing surprise hit-and-run attacks, often likened to coordinated “bee swarms.” The prospect of the PKK effectively countering Türkiye’s air power remains implausible. Consequently, the tunnels are poised to transform fortified command centers, providing strategic shelter against Türkiye’s aerial operations.²⁵

25 “Karayılan: Bizim savaşımız bir gelecek yaratma savaşdır”, ANF News, 25 November 2023, <https://firatnews.com/kurdistan/karayilan-savasimiz-bir-var-olma-ve-gelecek-yaratma-savasidir-190845>

TÜRKİYE'S DEFENSE INDUSTRY AND DEFENSE PROCUREMENT



Rifat Öncel

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SUMMARY OF 2023

- 1 Although the Biden Administration declared its support, Türkiye's F-16 procurement process has continued to suffer significant delays.
- 2 Türkiye officially declared its intention to procure Eurofighter Typhoon aircraft yet it was stated that Germany is blocking it.
- 3 Various components of the Turkish Armed Forces have received significant platforms through the years as the indigenous defense industry production continues.
- 4 Türkiye continued to expand defense industry cooperation in its foreign relations which contributed to deepening existing partnerships and helping to mend ties.

INTRODUCTION

The defense policy agenda has mostly been dominated by certain issues this year such as addressing the problem of the stop-gap solution for the Turkish Air Force, important deliveries for the Turkish Navy, the increasing footprint of the defense industry on foreign affairs, and the evolving regional balance of power, particularly vis a vis Greece.

While making real progress on Türkiye's F-16 Block-70/72 request from the United States has once again proved to be a daunting task, Turkish decision-makers officially declared that the country has the intent to purchase Eurofighter Typhoon, a European consortium initiative 4.5th generation multirole aircraft.

Turkish Navy received vital platforms into its inventory throughout the year, including the country's flagship TCG Anadolu multi-role amphibious assault ship, reinforcing its already robust fleet.

The role of the defense industry has continued to increase on foreign policy agenda which became a salient trend now in conducting the country's foreign relations. Several weapon systems and defense technologies ranging from drones to submarines and armored vehicles to electronics & communications, have become parts of bilateral deals signed between Türkiye and its counterparts either to deepen existing partnerships or to mend ties.

MAIN DYNAMICS

Addressing the Stop-Gap 4.5th Gen Aircraft Need

A major concern for Türkiye's defense policy is to modernize its aging F-16 fleet which the Turkish Air Force needs to operate until the National Combat Aircraft KAAN enters into inventory. Türkiye has one of the largest F-16 fleets

in the world and operates the aircraft as early as the late 1980s. A significant part of the fleet is aged as 160 aircraft in Block 30 and Block 40 variants entered into service between 1987 and 1995, in the meantime becoming technologically outdated with the substantial improvements in radar and sensor technology in recent decades.

Türkiye sent a letter of request to the United States in October 2021 to purchase 40 F-16 Block 70 aircraft as well as 79 modernization kits to upgrade a part of its existing inventory to Block 70 configuration. After a lengthy period, the Biden Administration made an unofficial notification for the sale to Congress in January this year, arguing that Türkiye has been a key NATO ally and an important factor in contributing to regional stability under the shadow of the Russia aggression on Ukraine. Yet, the opponents to the sale in Congress increased their tone in this period, reiterating their long-standing vocal criticism of Türkiye and underlining once again that they would block the sale unless Türkiye met specific conditions they imposed. This prevented the State Department from making a formal notification, leaving the proposed sale in the tiered review process.

Dissatisfied with the delay in the F-16 process, it was often discussed in public opinion circles that Türkiye would buy Eurofighter Typhoon aircraft, ensuring that the Turkish Air Force would operate NATO aircraft. It was known that Türkiye has indeed an interest in the Eurofighter Typhon as bilateral visits by the senior military commanders demonstrated. However, for the first time this November, Türkiye officially stated its intent to purchase the aircraft. While it was not revealed whether Türkiye wants to procure the latest configuration (Tranche4) or the second-hand jets from the United Kingdom, it is plausible to suggest that both options are being discussed within the negotiations.

Defense Cooperation and Defense Exports

The rise of Türkiye's national defense industry has increasingly reverberated in the foreign policy area. In recent years, the export of Turkish weapon systems and technologies has become one of the main themes within diplomatic negotiations as Türkiye wants to increase its defense exports for the sake of industrial sustainability as well as the foreign interest in Turkish products consistently grows due to the demonstration of combat-effectiveness. Against this backdrop, now the salient relationship between the defense industry and foreign policy has become stronger this year. For instance, STM delivered the second modernized Agosta 90B submarine to Pakistan after the first delivery in 2021. In the unmanned platforms area, Türkiye and Saudi Arabia signed a contract under which Baykar will produce UAV platforms in Saudi territory. Türkiye also signed a contract with Malaysia where Tusaş/TAI (Turkish Aerospace Industries)

will produce ANKA UAVs in a factory that will be established on Malaysian soil. In terms of land platforms, Nurof Makina will produce Ejder Yalçın armored vehicles in a factory on Hungarian soil. Several similar examples indicate that Türkiye is willing not only to export its defense products but also is open to sharing its technological edge to some extent with allies and friendly countries.

PROJECTING THE FUTURE

Addressing the Stop-Gap 4.5th Gen Aircraft Need

In the past, there were several examples that the United States refrained from selling important weapon systems to Türkiye due to disagreements over specific political matters. Under President Clinton, the United States did not approve the sale of AH-1W Super Cobra helicopters which TAF importantly needed to fight against terrorism. Similarly, during the Obama Presidency, the United States did not approve the sale of Predator and Reaper drones which were also key weapon systems in Türkiye's fight against the PKK. In all these cases, opposition in Congress due to varying political matters was a major factor. The experience indicates that Congress is unlikely to back down when it launches significant opposition to a sale, making it harder to overcome the current stalemate. Therefore, Türkiye will need to further push the Biden Administration to put pressure on the Congress next year.

A fundamental consideration among the circles of the American Congress regarding the F-16 sale has been Türkiye's approval of Sweden into NATO which had bipartisan support in the Congress from the beginning. Although Turkish President Erdoğan during NATO's Vilnius Summit this year declared that he would support Sweden's membership, the Turkish Parliament has not approved it yet. However, even if Türkiye would approve Sweden's membership, it is most likely that it will not suffice to grant Congress's approval of the sale of F-16 aircraft. Besides others, the deep policy divergence emerged between the United States and Türkiye after Hamas attacked Israel on Oct. 7 and the following Israeli response, it became much more than to make progress on this sale. For this reason, the likelihood of the realization of Türkiye's F-16 procurement next year is significantly decreased.

Türkiye will likely continue its efforts towards getting new F-16s even if it would ensure a deal regarding Eurofighters. The German opposition to the sale of the aircraft will likely draw growing pressure from other consortium members who have already been dissatisfied with German obstacles to the sale of the aircraft to Saudi Arabia. The sustainability of the European defense industry desperately needs major weapon exports which is a key concern that manifests itself in France's aggressive defense export policy. Nevertheless, Germany's previous

stance on weapon exports makes the case problematic. One should also note that Turkish and German positions on the Israeli-Hamas conflict are significantly different which will likely negatively impact a possible German approval. One positive factor could be Türkiye's solid defense and political relations with the United Kingdom and Spain which could invigorate the process. Another major issue regarding the Eurofighter will be the configuration of the aircraft that Türkiye would purchase. As the Turkish Air Force needs 4.5th generation aircraft, it is most preferable to procure new Tranche 4 Eurofighters, with the option of additional second-hand jets if the General Staff sees an operational exigency.

Defense Cooperation and Defense Exports

Past years have demonstrated that Turkish decision-makers and senior defense leaders attach utmost importance to defense exports as it is one of the major drivers of defense industrial sustainability and growth. This objective has led to a rapid synergy between the defense industry and foreign policy where Türkiye has increasingly pursued defense diplomacy in its foreign policy conduct. It is most likely that Turkish defense diplomacy will keep its pace in the coming years when the sale of Türkiye's national defense products will increasingly be included in the foreign policy agenda. Along with Turkish drones, there are several areas in which strong foreign interest exists in the Turkish defense industry such as armored personnel carriers, or electronics and communication systems. The gradual integration of all these systems nationally would further facilitate this interest. One would expect more exports in these areas next year while the Turkish success in UAVs would also promote interest in flourishing Turkish unmanned naval platforms.

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SETA SECURITY RADAR

TÜRKİYE'S GEOPOLITICAL LANDSCAPE IN 2024

Edited by Murat Yeşiltaş, Bilgehan Öztürk

Türkiye's strategic environment will be characterized by dynamism and diversity, culminating in a somewhat constraining regional atmosphere that ultimately poses challenges to Türkiye's new regional and international orientation. There are crises surrounding Türkiye's vicinity geographically, but the geopolitical implications and meaning of each varies.

In this latest edition of SETA Security Radar, we delve into the significant events that have molded Turkish foreign, security, and defense policies throughout 2023. Our analysis centers on the interactive aspects of Türkiye's evolving strategic environment. By closely examining the key dynamics of 2023, we aim to forecast the trajectory of Türkiye's foreign policy in 2024.

