



SETA SECURITY RADAR

TURKEY'S SECURITY LANDSCAPE IN 2019

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LANDSCAPE IN 2019

SETA

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FOREWORD

Turkey, which is geographically positioned at the intersection of several disputes, has always been a major player in the international security debate. From terrorism and energy crises to civil wars and naval disagreements, Turkey's geographic location encompasses various persistent hotspots. These security challenges have only intensified in recent years due to the increased uncertainty, particularly in the Middle East. More and more countries are now eager to use military means to resolve rivalries, differences, or even disputes in the Middle East which has triggered proxy wars and exacerbated the ongoing conflicts. Within this turmoil, the military and strategic actions that are available to Turkey in order to minimize regional threats constitute a significant question.

The SETA Security Radar – 2019, aims to engage with Turkey's critical national security issues by elaborating on their underlying causes and future prospects. In light of this, it discusses a selective range of important issues from the conflict in Syria to the dispute in the Eastern Mediterranean and from the fight against the PKK to national defense procurement. The study also draws attention to Turkey's fluctuating bilateral relations with the U.S. and Russia. The course of these relations will significantly affect Turkish security deliberations this year. Our team concluded that a multitude of political, military, and economic considerations influence

Turkey's security and defense policies and that these are likely to persist in the coming term.

The SETA Security Radar hopes to provide a timely assessment of the major hotspots which are likely to affect Turkey's national security significantly. By revealing the main determinants of these hotspots, the study also proposes some predictions for the future course of Turkey's security policies. *The SETA Security Radar* aspires to promote an understanding and awareness among the decision-making circles and those who are interested in major security issues in the Middle East. By doing so, the study also intends to fill the gap in policy-relevant analysis which in general suffers from the prevalence of inadequate daily media reports and observations. We believe that our study will help establish a bridge between decision-makers and the Security Studies community, which in turn may lead to the discussion of more relevant and sound security strategies to address the sophisticated challenges of the volatile Middle East.

Professor Burhanettin Duran
SETA General Coordinator

INTRODUCTION

In 2018, Turkey encountered a complex security environment and endured a wide range of challenging situations ranging from cross-border counter-terrorism operations to multidimensional conflicts involving various influential state actors. In this regard, as the SETA Security team, we concluded that an accurate forecast of short-term future security threats should lie at the heart of our agenda for 2019. Hence, we compiled the *SETA Security Radar - 2019* in line with the critical developments that took place in 2018.

If we were to outline the *SETA Security Radar - 2019* succinctly, it pertains to the following topics: Turkey's role in Syria, Turkey's counter-terrorism strategy, Turkey's military activism, the Turkish defense agenda, Turkish national interests in the Mediterranean, and Turkey's bilateral relations with the United States and Russia. As the scope of our research yields outcomes along these lines, we intentionally limited our discussion in this work to the above topics.

In formulating our forecasts, we implemented a selective three-step method based on a comprehensive research involving sources from the media, think-tanks, multiple governments and academic channels. In order to provide a sound analysis on the selected topics, we preferred to divide each one into three parts consisting of

a summary of 2018, an elaboration of the dynamics in 2019, and an account of the prospects for the year under consideration.

Initially, to determine the most critical developments of 2018, we conducted a comprehensive media search and then summarized the most prominent topics according to the order of Turkish security priorities. Following this step, based on the identified developments of 2018, we conceptualized specific dynamics that would prevail in 2019. Finally, in light of the dynamics put forth, we analyzed and projected our expectations for the year.

It is important to note that short-term security projections can easily be affected by game-changing decisions and unexpected events. With this work, aimed at informing our audience, we do not claim to have mapped out Turkey's entire 2019 security landscape. As the SETA Security team, we hope to provide an accessible and timely evaluation for Turkish decision-makers and those who are interested in the major security issues faced by Turkey. We also hope to fill the gap in policy-relevant analysis in Turkish security studies by providing an assessment of what we believe awaits Turkey this year.

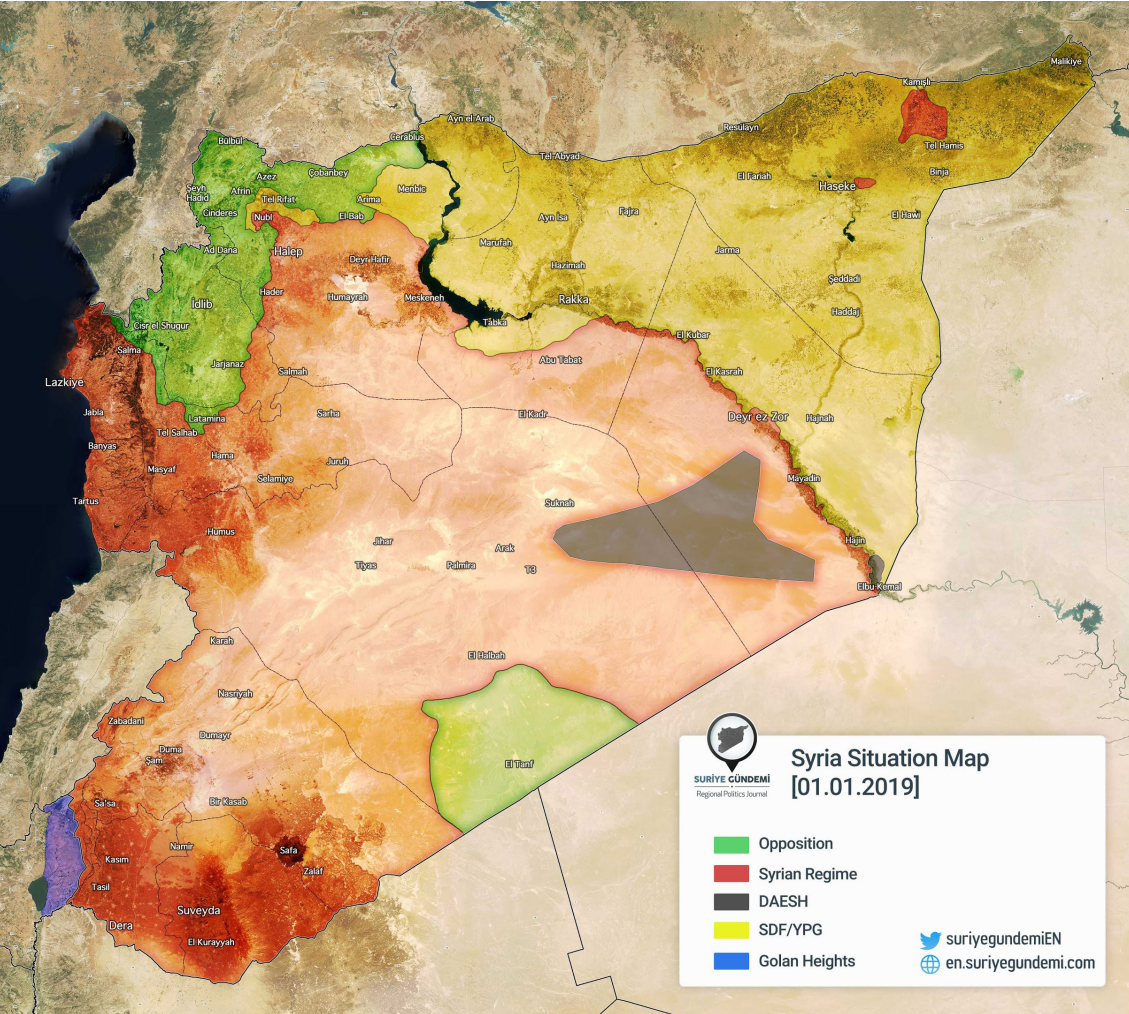
TURKEY AND THE SYRIAN CONFLICT

Summary of 2018

- Turkey conducted Operation Olive Branch to remove the PKK/YPG from Afrin.
- Turkey and the United States agreed on the Manbij Roadmap; in the end of the year, the U.S. declared its withdrawal from Syria.
- The Assad regime captured three de-escalation zones; only the Idlib de-escalation zone could be maintained after the Sochi agreement between Russia and Turkey.
- Russia, Iran, and Turkey agreed on the formation of a constitutional committee to accelerate the political transition process.

Through 2018, Turkey was involved on four levels in Syria, which posed a serious security threat for Turkey. First, Operation Olive Branch in Afrin shaped Turkey's Syrian policy and significantly influenced its counter-terrorism strategy. With the start of the operation at the beginning of the year, Turkey secured its borders in the vicinity of Hatay from YPG militants and achieved a strategic gain by averting the terrorist group's goal of reaching the Mediterranean. As part of the operation,

Turkey and the Turkish-trained National Army, which is linked to the Syrian Interim Government, eliminated over 4,000 YPG militants.¹



Second, after the operation to cleanse Afrin from terrorists, Turkey and the Syrian opposition intended to cleanse the Manbij region controlled by U.S. forces and the so-called Syrian Democratic Forces, which is dominated by the YPG/PKK. Upcoming tensions were eased by an agreement,² the Manbij Roadmap, between both NATO partners, but the employment of the roadmap was slowed down by the U.S. Nevertheless,

1. Necdet Özçelik and Can Acun, “Terörle Mücadelede Yeni Safha: Zeytin Dalı Harekatı”, SETA, April 2, 2018, https://setav.org/assets/uploads/2018/04/Rapor_TEM.pdf.

2. Tuvan Gumrukcu and Ece Toksabay, “Turkey, U.S. Agree Roadmap to Avert Crisis in Syria’s Manbij, Few Details”, Reuters, June 4, 2018, <https://www.reuters.com/article/us-usa-turkey/turkey-us-agree-roadmap-to-avert-crisis-in-syrias-manbij-few-details-idUSKCN1J01ZC>.

the Turkish Armed Forces and U.S. forces conducted their first joint patrol after over 60 independent coordinated patrols; this was the roadmap's first step. Other aspects of the roadmap, such as the full withdrawal of YPG elements from Manbij and the joint vetting of local candidates in governance and security, could not be achieved. At the end of the year, the Trump administration declared the withdrawal of U.S. troops from Syria in cooperation with Turkey.³ This could lead to the full implementation of the roadmap and the expansion of Turkey's role to the east of the Euphrates River.

The third point was the Astana process and the agreed four de-escalation zones. Despite the agreement, the Assad regime started military operations towards the de-escalation zones in Ghouta, Homs, and Daraa with the backing of Iran and Russia.⁴ Many of the residents in these areas and opposition fighters were evacuated to northern Aleppo and Afrin.⁵ The last de-escalation zone in Idlib, directly linked to Turkey, evolved differently as Turkey, Russia, and Iran established observation posts along the frontlines.⁶ However, an imminent assault on Idlib was on the agenda, and the guarantors of the Astana process couldn't agree on a ceasefire in Tehran as Iran and Russia rejected Turkey's demands, thus risking a new humanitarian disaster.⁷ Later, Turkey's decisiveness in Idlib opened the way for a new ceasefire agreement, which was signed by Turkey and Russia in Sochi. According to the latter, a demilitarized zone was established along the frontlines in Idlib.⁸

After the agreement in Sochi, Turkey, Russia, France, and Germany met at the Istanbul summit to discuss Syria's reconstruction and the political transition process. At the summit, the parties agreed that a constitutional committee has to be formed soon and that the ceasefire in Idlib has to be maintained.⁹ At the summit of affiliated

3. Dion Nissenbaum, Nancy A. Youssef and Vivian Salama, "In Shift, Trump Orders U.S. Troops out of Syria", *The Wall Street Journal*, December 19, 2018, <https://www.wsj.com/articles/u-s-military-preparing-for-a-full-withdrawal-of-its-forces-from-northeastern-syria-11545225641>.

4. "Russian Treason in Syria. Deadly Effective Strategy", *Warsaw Institute*, August 16, 2018, <https://warsawinstitute.org/de-escalation-zones-russian-treason-syria-deadly-effective-strategy/>.

5. "Syrian Rebels Evacuated from Douma Reach Northwest: Monitor", Reuters, April 10, 2018, <https://www.reuters.com/article/us-mideast-crisis-syria-ghouta/syrian-rebels-evacuated-from-douma-reach-northwest-monitor-idUSKBN1HH19M>.

6. "Astana Süreci Kapsamında İdlib ve Çevresinde Oluşturulan Türk, Rus ve İran'a Ait Askeri Kontrol Noktaları", *Suriye Gündemi*, May 25, 2018, <http://www.suriyegundemi.com/2018/05/25/astana-sureci-kapsaminda-idlib-cevresinde-olusturulan-turk-rus-irana-ait-askeri-kontrol-noktalari/>.

7. Denis Pinchuk, "Russia, Turkey, Iran Fail to Agree on Ceasefire for Syria's Idlib", *Reuters*, September 7, 2018, <https://www.reuters.com/article/us-mideast-crisis-syria/russia-turkey-iran-fail-to-agree-on-ceasefire-for-syrias-idlib-idUSKCN1LN0ZD>.

8. Maria Tsvetkova, "Russia and Turkey Agree to Create Buffer Zone in Syria's Idlib", Reuters, September 17, 2018, <https://www.reuters.com/article/us-mideast-crisis-putin-erdogan-hope/russia-and-turkey-agree-to-create-buffer-zone-in-syrias-idlib-idUSKCN1LX1BU>.

9. "Istanbul Summit Calls for Syrian Constitutional Committee by Year-End", *Daily Sabah*, October 27, 2018, <https://www.dailysabah.com/diplomacy/2018/10/27/istanbul-summit-calls-for-syrian-constitutional-committee-by-year-end>.

states party to the Astana process, the so-called Small Group, the political transition process was declared a prerequisite for any reconstruction aid to Syria. States expressed the need for better conditions inside Syria to accelerate the voluntary return of Syrian refugees. In Geneva, Russia, Iran, and Turkey declared that the constitutional committee will start its work at the beginning of 2019.¹⁰

DYNAMICS OF TURKEY'S SYRIA POLICY

The PKK/YPG Threat and the U.S. Withdrawal

The presence of the PKK/YPG in northeastern Syria is a significant national security threat for Turkey. Weapon supplies by the U.S.¹¹ to the YPG-dominated Syrian Democratic Forces increased these concerns, which led to the declaration of a military operation against the PKK/YPG in cooperation with the Turkey-trained National Army linked to the Syrian Interim Government. However, the U.S. decision to withdraw from Syria after a phone call between Presidents Erdogan and Trump¹² led to an entirely new era in the conflict, in which Turkey and the U.S. will likely cooperate on the withdrawal process and, according to President Trump's statements, Turkey could take over the responsibility of fighting against DAESH.¹³ Meanwhile, the YPG is reaching out for a possible rapprochement with the Assad regime and has started a new round of negotiations.¹⁴

On January 13, 2019 President Trump suggested the establishment of a 20-mile (32 km) safe-zone, which was welcomed by president Erdoğan; as it was stated that Turkey would take part in the establishment process. A safe-zone would not only secure Turkey's border with Syria against a terrorist threat, but also push the PKK/YPG

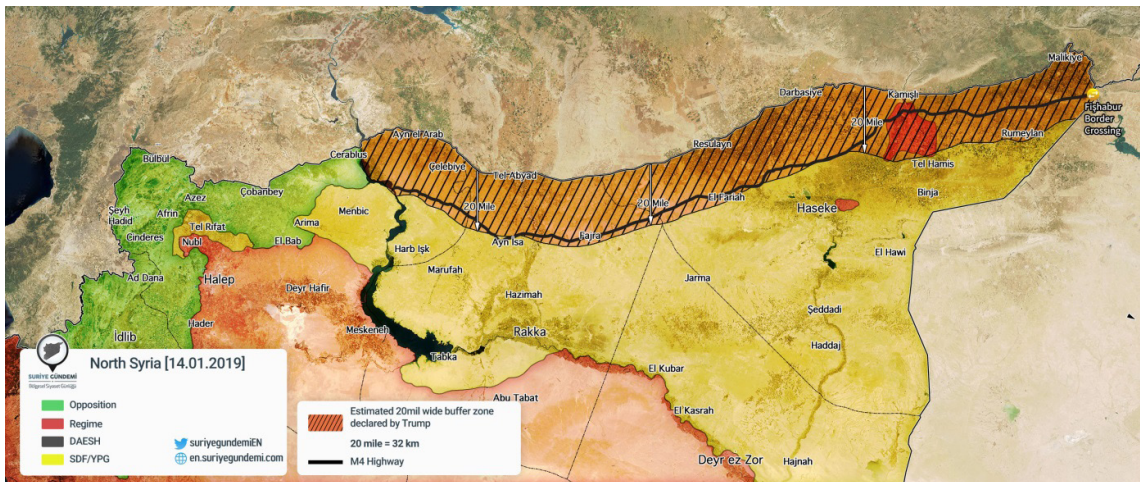
10. Patrick Wintour, "Russia, Turkey and Iran Reach Agreement on Syria Committee", *The Guardian*, December 18, 2018, <https://www.theguardian.com/world/2018/dec/18/russia-turkey-and-iran-reach-agreement-on-syria-committee>.

11. "DEPARTMENT OF DEFENSE BUDGET FISCAL YEAR (FY) 2018", U.S. Secretary of Defense, May 2017, https://csis-prod.s3.amazonaws.com/s3fs-public/publication/170601_Iraq_Syria_train_assist.pdf?5zvup-DtqtLvj_6Wvoh0NxfOyGYNRdtu.

12. Jeremy Diamond and Elise Labott, "Trump Told Turkey's Erdogan in Dec. 14 Call about Syria, 'It's All Yours. We Are done'", CNN, December 24, 2018, <https://edition.cnn.com/2018/12/23/politics/donald-trump-erdogan-turkey/index.html>.

13. Donald Trump, "I just had a long and productive call with President @RT_Erdogan of Turkey. We discussed ISIS, our mutual involvement in Syria, & the slow & highly coordinated pullout of U.S. troops from the area. After many years they are coming home. We also discussed heavily expanded Trade.", Twitter, December 23, 2018, <https://twitter.com/realDonaldTrump/status/1076884984873607169>; Donald Trump, "President @RT_Erdogan of Turkey has very strongly informed me that he will eradicate whatever is left of ISIS in Syria...and he is a man who can do it plus, Turkey is right "next door." Our troops are coming home!", Twitter, December 23, 2018, <https://twitter.com/realDonaldTrump/status/1077064829825966081>.

14. Josie Ensor, "Abandoned by US, Syrian Kurds Request Help from Assad Regime", *The Telegraph*, December 28, 2018, <https://www.telegraph.co.uk/news/2018/12/28/abandoned-us-syrian-kurds-request-help-assad-regime/>.



The Idlib Ceasefire

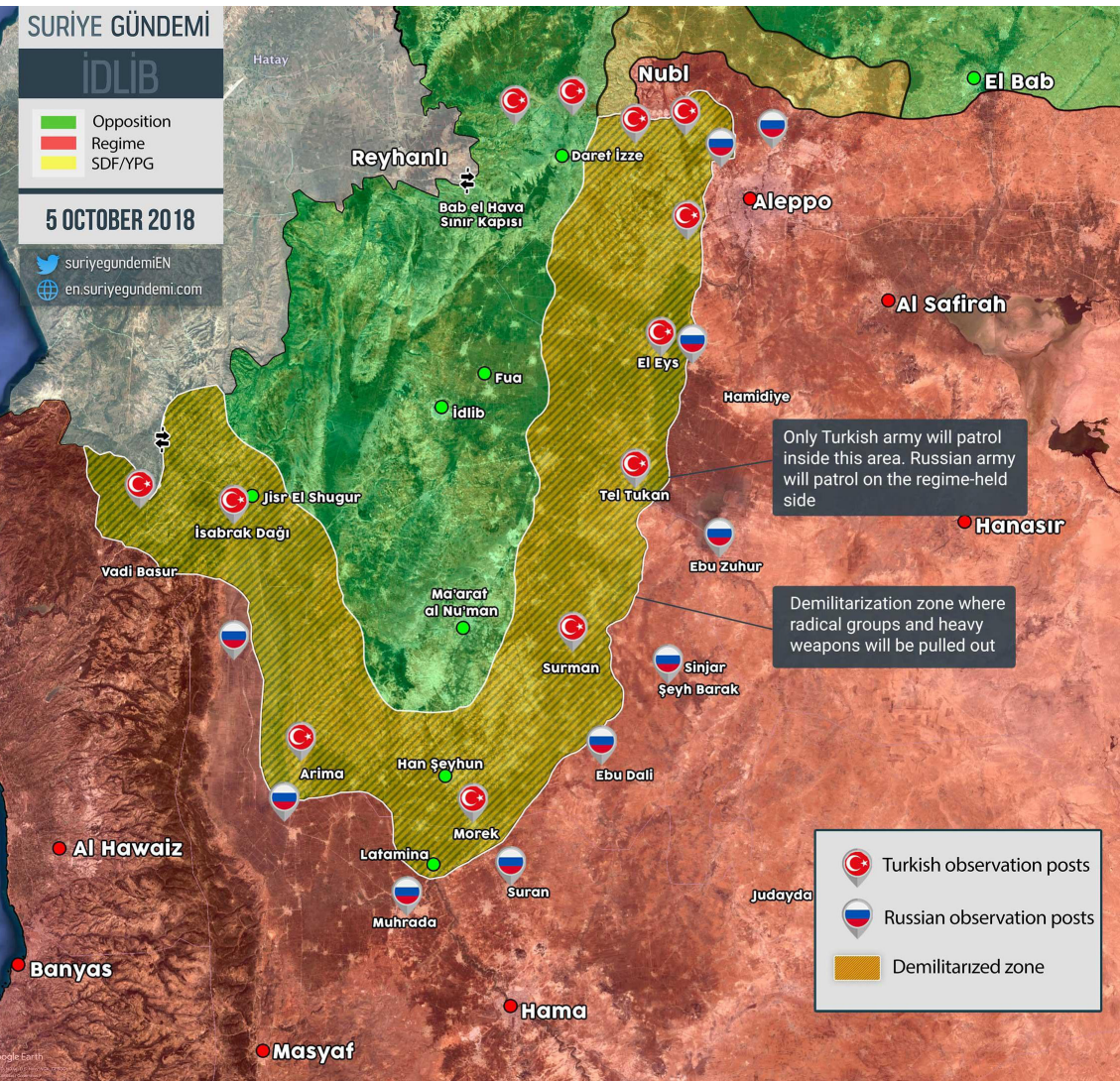
Continuing violations by the Assad regime and allied militias, and radical groups inside Idlib are major risks for a renewed escalation in Idlib and the possibility of a new refugee crisis.¹⁵ Russian, Iranian, and especially Turkish observation points on the frontlines are the main guarantee for the ceasefire. Also the Astana process, the Istanbul summit, and Turkish-Russian bilateral relations have affected the ceasefire in Idlib. The presence of radical groups inside Idlib is also an argument used by Russia and Iran against Turkey taking action against the radical groups or opening the way for a military operation.

Political Transition Process

During the Istanbul summit between Turkey, Russia, France, and Germany, member states of the Small Group declared the establishment of the constitutional committee as a prerequisite for reconstruction aid. While the Assad regime's maximalist attitude in Astana and Geneva is a preventing factor, Russia and Turkey are motivated to succeed. Russia wants to show its capability to resolve the Syrian crisis and to accelerate reconstruction aid, and Turkey desires to secure a constitutional committee without the participation of PKK-affiliated elements. On the other hand, the Small Group is prematurely ready to declare the Astana process as a failed initiative in order to take the establishing process back to Geneva.¹⁶

15. Chloe Cornish, Asser Khattab and Laura Pitel, "Turkey-Russia Deal Imperilled by Attacks in Syria", November 26, 2018, <https://www.fr.com/content/5c35ac6a-f176-11e8-ae55-df4bf40f9d0d>.

16. "Roundup: U.S. Envoy Blames Syrian Gov't for Failed Astana, Sochi Peace Efforts", Xinhua, December 8, 2018, http://www.xinhuanet.com/english/2018-12/08/c_137659917.htm.



HOW WILL CURRENT DYNAMICS EVOLVE IN 2019?

The Extension of Turkey's Military Presence

As long as the PKK/YPG remains a threat, Turkey will aim to secure its borders by a military operation. After the agreement between Presidents Erdogan and Trump on cooperating on the withdrawal process to avoid a power vacuum and on Turkey taking over the fight against DAESH, Turkey will most likely conduct a military operation against the PKK/YPG and DAESH in coordination with the Syrian opposition. If the transitional process goes through, Turkey will not only take over the U.S. role east of the Euphrates, but there is also a possibility that non-YPG components of the Syrian Democratic Forces might join the banner of the National Army. With such a

development, the Syrian opposition would control half of the country, and the main water and energy resources. Turkish aid would have to increase heavily to areas east of the Euphrates.

However, the game-changing decision by the Trump administration to withdraw from Syria will lead to new dynamics for the Syrian conflict whereby many unforeseeable variables can come into play. A development such as a rapprochement between the Assad regime and the PKK/YPG with the blessings of Russia and Iran might become a preventive factor for Turkey. These circumstances would have the potential to reshape the Sochi agreement and the constitutional committee process. Like previous negotiations which failed due to disagreements over the autonomy of YPG-held regions, these negotiations might fail as well. While the Assad regime will make maximalist demands, the YPG will likely choose to fight against Turkey instead of surrendering to the regime. Furthermore, the regime's capacity and capability are questionable.

Turkey-Russia Cooperation

If the Russian – Turkish understanding and the Astana process continue, the ceasefire in Idlib is expected to hold on, and the agreement will endure. Meanwhile, if the parties cannot restrain the Assad regime and allied militias, and fail to eliminate radical groups inside and around Idlib, the ceasefire will be under constant risk. If the ceasefire holds, Turkey and the Syrian opposition might act against those radical groups in order to implement terms of the Sochi agreement like the opening of M4 and M5 highways to free trade. If Turkey and the Syrian opposition fail or Russia loses its patience or can't restrain the regime any longer, Russia might give a green light to a military operation in Idlib.

Political Transition Process

The constitutional committee may lay down the basis for a political transition process in Syria, but if the process can't be accelerated and the regime continues to reject the demands of the Syrian opposition, a new constitution shouldn't be expected in 2019. A free election process in 2019, which would include all Syrians, seems impossible under the current circumstances.

TURKEY'S COUNTER-TERRORISM STRATEGY

Summary of 2018

- Turkey launched a counter-terrorism operation against the PKK in Afrin, Syria. It was the first comprehensive extraterritorial military operation with local proxies.
- Turkey carried out 87,838 military operations against the PKK in Turkey, Syria, and northern Iraq.
- 1,289 terrorists were neutralized as a result of the counter-terrorism operations.
- The PKK started using low-tech armed unmanned aerial vehicles to carry out more effective terrorist attacks.

The recent change in Ankara's strategy towards certain terrorist organizations has been a game-changer in Turkey's counter-terrorism strategy. Since 2016, Turkey has been eliminating FETÖ and DAESH threats. So far, the policy shift and the effectiveness of the fight against the PKK threat have been significant. Handling terrorism remains one of Turkey's top priorities and 2018 saw a series of effective outcomes in counter-terrorism. The success of Turkey's counter-terrorism strategy was shaped by three revolutionary steps: adjustments to the counter-terrorism strategy; the security sector reform following the failed military coup; and the changes in

the military strategy against the PKK on both the tactical and operational levels on the ground. Apart from these steps, the most important driving factors behind this success were the political decisiveness and the advances in locally produced defense systems that provide security forces surveillance superiority.¹⁷

Preventing the PKK's terrorist attacks and blocking the main resources that allow the group to maintain its terrorism campaign were the centerpieces of Turkey's security policies in 2018. Turkey's security operations increased 173 percent in 2018. In this context, Turkish security forces launched 87,838 operations against the PKK, while 1,289 PKK terrorists were neutralized in these operations.¹⁸ In addition, Turkey launched a new cross-border operation, "Operation Decisiveness," in northern Iraq's Qandil mountain region, Avasin/Basyan, and Gara - all locations that harbor the PKK leadership cadre. Turkish Air Forces conducted 91 air strikes against the terrorists in these regions.¹⁹

Turkey's counter-terrorism operations have led to major decreases in the PKK's activities such as violent attacks, terrorist mobilization in the rural areas, and recruitment. Turkey also prevented 347 terrorist acts in 2018,²⁰ while the PKK conducted 194 terrorist attacks in 2017. However, as a result of the successful counter-terrorism operations in Turkey and Iraq, this number decreased to 78 in 2018.²¹ While 95 people joined the PKK - the lowest number in the last three decades -²², 150 people were persuaded to leave the terrorist organization.²³ One of the most serious results of the counter-terrorism operations is that 100 senior terrorists, who were named in Turkey's "Most Wanted Terrorists" list, were neutralized by Turkish security forces.²⁴

17. Murat Yeşiltaş, "Making Sense of Turkey's New Counter-Terrorism Strategy", *The New Turkey*, <https://thenew-turkey.org/making-sense-of-turkeys-new-counter-terrorism-strategy>.

18. "Bakan Soylu: Örgüte katılım son 30 yılın en düşük seviyesinde", *TRT Haber*, November 15, 2018. Available at <https://www.trthaber.com/haber/gundem/bakan-soylu-bin-289-terorist-etkisiz-hale-getirildi-393993.html> (Accessed: December 26, 2018).

19. SETA Terrorism Analysis Platform (TAP).

20. "Turkey Prevented 347 Terror Acts in 2018: Interior Minister", *Hurriyet*, December 19, 2018. Available at <http://www.hurriyetdailynews.com/turkey-prevented-347-terror-acts-in-2018-interior-minister-139854> (Accessed: December 26, 2018).

21. SETA TAP.

22. "Bakan Soylu: Örgüte katılım son 30 yılın en düşük seviyesinde", *TRT Haber*, November 15, 2018. Available at <https://www.trthaber.com/haber/gundem/bakan-soylu-bin-289-terorist-etkisiz-hale-getirildi-393993.html> (Accessed: December 26, 2018).

23. "Effective Policies Substantially Cut PKK Recruitment", *Daily Sabah*, December 3, 2018. Available at <https://www.dailysabah.com/war-on-terror/2018/12/04/effective-policies-substantially-cut-pkk-recruitment> (Accessed: December 26, 2018).

24. "100 Senior Terrorists Neutralized in 2018: Turkish Min.", *Anadolu Agency*, November 15, 2018. Available at <https://www.aa.com.tr/en/culture-and-art/100-senior-terrorists-neutralized-in-2018-turkish-min/1312022> (Accessed: December 27, 2018).

In 2018, Turkey pursued more inclusive counter-terrorism operations against the PKK in Turkey and Iraq. The effective results of these operations have highlighted Turkey's changing counter-terrorism strategy that is built on new dynamics including Turkey's decisiveness in fighting against the PKK, the security sector reform after the July 15 failed coup, and its changing military strategy.²⁵ In addition to the operational tempo and the longevity of the military presence of Turkish military forces in extra-territorial regions such as Syria and Iraq, Turkey's enhanced border security policy became a core element of Turkey's counter-terrorism strategy.

THE DYNAMICS OF TURKEY'S COUNTER-TERRORISM STRATEGY

Security Sector Reform

The security sector reform is a dynamic process which Turkey has been implementing since 2001. The security sector reform process adopted following the July 15 failed military coup attempt is the main driving factor behind Turkey's counter-terrorism strategy. While the relocation of the Gendarmerie under the Ministry of the Interior was an act strengthening the effectiveness of the internal counter-terrorism operations, the Turkish Armed Forces found a great opportunity to focus on extra-territorial counter-terrorism operations against the PKK, particularly in Iraq, which operationally prevented the terrorist organization from finding extra space for maneuver in their efforts to infiltrate Turkey. More importantly, the institutional reformulation of the Village Guards (VG) in counter-terrorism operations facilitated the effectiveness of internal counter-terrorism operations in rural areas. The numbers demonstrate the increasing effectiveness of the VG in fighting against the PKK. While the number of VG reached 52,395 (plus 19,912 volunteers) in 2018, the average age among the VG decreased to 32. Yet, the success of the operations cannot be exclusively attributed to the increase in the number of Village Guards. The technological capacity and training programs were also reformulated and improved following the new requirements of the PKK's threat.²⁶

25. Murat Yesiltas, "Making Sense of Turkey's New Counter-Terrorism Strategy", *The New Turkey*, November 23, 2018. Available at <https://thenewturkey.org/opinion/making-sense-of-turkeys-new-counter-terrorism-strategy> (Accessed: December 26, 2018).

26. Murat Yesiltas, "Making Sense of Turkey's New Counter-Terrorism Strategy", *The New Turkey*, November 23, 2018. Available at <https://thenewturkey.org/opinion/making-sense-of-turkeys-new-counter-terrorism-strategy> (Accessed: December 26, 2018).

Preemptive Operational Model

The changing understanding regarding the reformulation of the military operation's modus operandi is another new step in containing the PKK threat. Until recently, Turkey's counter-terrorism strategy had been based on a one-dimensional strategic calculation aimed at preventing the terrorist attacks conducted by the PKK against the military and security units, especially in the southeast of Turkey, where the PKK's main terrorist campaign takes place. This one-dimensional counter-terrorism strategy is based on the action-reaction operational model in which security forces usually launch a reactionary military operation following a terrorist attack against any target in a specific geographical zone. The new counter-terrorism strategy, however, is based on non-stop anti-terrorist security and military operations not only in city centers, where the PKK-affiliated persons might live, but also in rural areas. More importantly, the preemptive operational model that aims to neutralize the PKK threat in its base has become Turkey's counter-terrorism strategy's central operational mentality.

For instance, 1,666 shelters belonging to the PKK in Turkey's provinces such as Diyarbakır, Tunceli, Bitlis, and Sirnak were eliminated by Turkish security forces. In northern Iraq, TAF launched Operation Decisiveness against the PKK's "safe bases" or shelters. More than 20 checkpoints were set and some 400 terrorists were neutralized by TAF between March and December 2018.²⁷

TURKEY'S 2018 COUNTER-TERRORISM LANDSCAPE IN NUMBERS	
PKK shelters or "safe bases" eliminated by Turkey	1,666
Neutralized PKK militants between March and December 2018	400
Neutralized senior terrorists	100
PKK recruits	95
Unmanned aerial vehicles	37
Turkey's checkpoints in northern Iraq	20
PKK armed unmanned aerial vehicle attacks	10

27.Erol Başaran Bural, "Türkiye'nin 2018 Yılında Terörle Mücadelesi", 21yyte, <https://21yyte.org/tr/merkezler/islevsel-arastirma-merkezleri/terorizm-ve-terorizmle-mucadele/turkiye-nin-2018-yilinda-terorle-mucadelesi> | (Accessed: December 27, 2018).

The Role of Intelligence and Counter-Terrorism Technology

Turkey's superiority in intelligence and technology increased in 2018. In this regard, Turkey increased drone capacity by 50 percent compared to the previous year. For example, in 2017, domestic security forces used 6 unmanned aerial vehicles, while in 2018 this number reached 37.²⁸ New recruits to the PKK decreased to 95 in 2018. One hundred senior terrorists belonging to the red, blue, and grey categories of the "Most Wanted Terrorist" list were neutralized thanks to Turkey's increasing surveillance capacity.²⁹ On the other hand, Turkey prevented 10 PKK terrorist attacks by armed unmanned aerial vehicles in its homeland.³⁰

HOW WILL CURRENT DYNAMICS EVOLVE IN 2019?

Continuation of Cross-Border Counter-Terrorism

The presence of the PKK in Turkey, Syria, and northern Iraq will remain the centerpiece of Turkey's threat perception. Turkey's main security concern in Iraq and Syria is to de-territorialize and delegitimize the PKK and its regional extensions. Turkey will undoubtedly focus on securing its southern borders and eliminating terrorist mobilization to prevent possible terrorist attacks against the country. Turkey will most likely continue its cross-border preemptive military operations against the PKK in northern Iraq in order to contain the PKK's strongholds such as Khakurk and Qandil. In 2019, Turkey's comprehensive military operation against the extensions of the PKK in northern Syrian will bring about a new reality for Turkey's counter-terrorism strategy.

The PKK's Potential Reaction

While Turkey is transforming its counter-terrorism strategy, the PKK is also trying to react to Turkey's new strategy by using new tactics and technological tools. The new adaptation process is formulized by the PKK as the recodification of the "guerrilla model" and an increase in its technological capacity. In 2019, the PKK will most likely further invest on tactical evolution which will not only improve the military

28. "Bakan Soylu: Örgüte katılım son 30 yılın en düşük seviyesinde", TRT Haber, November 15, 2018. Available at <https://www.trthaber.com/haber/gundem/bakan-soylu-bin-289-terorist-etkisiz-hale-getirildi-393993.html> (Accessed: December 26, 2018).

29. "Bakan Soylu: Örgüte katılım son 30 yılın en düşük seviyesinde", TRT Haber, November 15, 2018. Available at <https://www.trthaber.com/haber/gundem/bakan-soylu-bin-289-terorist-etkisiz-hale-getirildi-393993.html> (Accessed: December 26, 2018).

30. Arda Mevlütöğlü, "10 Kasım Bombalı İHA Saldırıları Üzerine Bazı Notlar", Siyahgribeyaz, November 10, 2018. Available at <https://www.siyahgribeyaz.com/2018/11/10-kasm-bombal-ih-saldirilar-uzerine-baz.html> (Accessed: December 28, 2018).

performance of its militants but also improve the organization's technological capacity.³¹ It should be expected that the PKK will most likely take tactical initiative in order to escalate large scale violent campaigns and specific attacks against the Turkish security forces.

The PKK's Tactical Transformation

In 2018, it was observed that changes in the PKK's attack patterns to a great extent involved along the technological dimension. For instance, the group carried out 10 terrorist attacks through low-tech armed unmanned aerial vehicles.³²

When the last two attacks carried out by PKK are examined, the following is observed:

1. X-UAV Talon-type drones were used in both assaults and parts of the drones were inscribed with numbers.
2. Both attacks targeted military points and government buildings.
3. Nail-reinforced C4 plastic explosives were used in both attacks.
4. A special day was selected for the attacks.

These common points in the last two attacks suggest that the drones used in the attacks were prepared in the same compound and indicate that the PKK will try to use drone attacks against Turkish military posts in Turkey, Iraq, and Syria. It is highly possible that the group will perpetuate more attacks by aerial vehicles. The PKK might also use the Internet for cyber-attacks.³³

The PKK's Strategic Retrenchment

Turkey has built a comprehensive intelligence mechanism to counter terrorist threats. Threats involving unknown terrorist tactics can be detected by Turkey's surveillance and as a result of its technological superiority. In this regard, the PKK understood that launching terrorist attacks in urban centers leads to a survival problem for the group; a problem that the PKK experienced in its urban terrorist campaign in mid-2015.³⁴ Thus, according to PKK sources, the terrorist group will

31. "New Guerilla Model to Be Created in 2019", ANF English, December 31, 2018. Available at <https://anfenglishmobile.com/kurdistan/new-guerilla-model-to-be-created-in-2019-31805> (Accessed: January 6, 2019).

32. Arda Mevlütoğlu, "10 Kasım Bombalı İHA Saldırıları Üzerine Bazı Notlar", Siyahgribeyaz, November 10, 2018. Available at <https://www.siyahgribeyaz.com/2018/11/10-kasm-bombal-ih-saldirilar-uzerine-baz.html> (Accessed: December 28, 2018).

33. "PKK's Karayılan: We Enter 2019 with Resistance", ANF English, January 1, 2019. Available at <https://anfenglishmobile.com/kurdistan/pkk-s-karayilan-we-enter-2019-with-resistance-31821> (Accessed: January 6, 2019).

34. Murat Yesiltas and Necdet Özcelik, *When Strategy Collapses: PKK's Urban Terrorist Campaign*, SETA, 2018, p. 117.

withdraw its elements from Turkey's urban areas and will aim to maintain its regional presence.³⁵ It is predicted that the PKK might start an "immobility" strategy in which terrorists will focus on technological terrorist plots in the period leading up to local elections. Although the PKK has halted its terrorist attacks in Turkey in order to secure its branches in the region, it will most likely send its armed elements from Turkey to northeast Syria in order to respond to Turkey's possible military operations against the YPG/PKK.

35. "41. yılda yeni dönem gerillası", ANF, November 28, 2018. Available at <https://anfturkce.com/kurdistan/41-yilda-yeni-doenum-gerillasi-116538> (Accessed: January 6, 2019).

TURKEY'S MILITARY ACTIVISM

Summary of 2018

- Developed as a Light Aircraft Carrier Project and Turkey's "first indigenously built multipurpose amphibious assault ship," the construction of *TCG Anadolu* is expected to be completed in 2019.
- In the end of 2018 it was reported that the Turkish Naval Forces have decided to construct a naval base in the province of Trabzon in the Black Sea.
- In March, Turkey and Qatar agreed to establish a naval base as part of a preplanned joint task force military posture in Qatar.
- The Turkish and Sudanese administrations agreed on the restoration of a Sudanese Red Sea port and the construction of a naval dock.

In line with Turkey's *military activism*³⁶, the transformation in Turkey's future naval power projection capabilities has been persistent in 2018. Turkey's "first indig-

36. The concept of military activism underlines the rise of Turkey's extra-territorial military presence, power projection capabilities, and its contribution to international peace operations. However, in the context of this paper, Turkey's military activities have been evaluated under the limitation of recent developments between 2017 and 2018. Additionally, this prospect does not include the Turkish military engagement in Syria or Iraq in the Eastern Mediterranean since they involve other prospects. Murat Yeşiltaş, "The Rise of Turkey's Military Activism: Causes, Context and Implications", (Forthcoming, 2019).

enously built multipurpose amphibious assault ship” may shape the navy’s combat role, Turkey’s defense economics, and Turkish naval diplomacy.³⁷ It was reported that 400 soldiers and 200 civil servants will be deployed to the base which covers a 55,000 square meter area in the Surmene District across from Sochi in Russia. This will enable logistical support to frigates, assault boats, and submarines.³⁸ This decision is in line with Turkey’s policy of strengthening its military posture in the Mediterranean and the Black Sea regions.

The shift in Turkey’s forward military presence has been another aspect of Turkey’s military activism. In this context, Turkey decided to establish a military facility in Qatar as a consequence of a military deal between the two countries in 2014.³⁹ While the agreement symbolizes an emerging mutual defense culture with the Qatari military, Turkey may also have the opportunity to operate in a hub of military postures, where the U.S. has a strong air and naval presence.⁴⁰ Furthermore, Turkey has assumed responsibility in the Horn of Africa in accordance with its historical legacy by the consolidation of bilateral relations with Sudan. In this sense, it has been proposed that Suakin, a former Ottoman island, be reconstructed to serve as a port while preserving its historical architecture.

DYNAMICS OF TURKEY’S MILITARY ACTIVISM

Transformation of the Turkish Naval Power Projection

To begin with, the forthcoming Landing Helicopter Dock (LHD) project will provide Turkey with flexibility in conducting military and humanitarian relief operations overseas by extending the reach of its naval operations. Moreover, the deployment of such a “floating air base” will relieve Turkey of the burden of bilateral or multilateral diplomatic calculations when sustaining continuous operations.⁴¹ However, the modification of the LHD to accommodate light aircraft carriers may be costly and necessitate the acquisition of F-35B variants, which would be

37. Can Kasapoğlu, “Turkey’s Forward-Basing Posture”, *EDAM*, July 2017.

38. “Turkey to Set up Naval Base on Eastern Black Sea Coast”, *Hürriyet Daily News*, December 11, 2018, http://www.hurriyetaidailynews.com/photo-turkey-to-set-up-naval-base-on-eastern-black-sea-coast-139658?utm_source=Facebook&utm_medium=post&utm_campaign=photo-turkey-to-set-up-naval-base-on-eastern-black-sea-coast-139658&utm_term=post.

39. Birce Bora, “Analysis: Why Is Turkey Deploying Troops to Qatar?”, *Al Jazeera*, June 11, 2017, <https://www.aljazeera.com/indepth/features/2017/06/analysis-turkey-deploying-troops-qatar-170607174911372.html>, (Accessed: March 18, 2018).

40. Can Kasapoğlu, “Turkey’s Forward-Basing Posture”, *EDAM*, July 2017.

41. *Ibid.*

an extra burden on the Turkish defense finances.⁴² However, Turkey is planning to purchase 100 F-35As, the conventional take-off and landing variant (CTOL) of the JSF.⁴³

Moreover, in November, Russia blocked the entry of the Ukrainian Navy into the Sea of Azov⁴⁴ and banned Ukraine from its activities at that region. This confiscation in the Kerch Strait can be considered a reflection of the A2/AD (Anti-Access/Area Denial) strategy⁴⁵ that Russia is following in the Black Sea region and which primarily focuses on Crimea.⁴⁶ In such a complex security environment, Turkey's construction of its first naval base will ensure the readiness of its naval forces in the instances of probable escalations and the conventional or unconventional threats emanating in the Black Sea region.

The Shift in Turkey's Forward Military Presence

Turkey and Qatar's agreement on the construction of a naval base will provide Turkey with a share in the defense of the Gulf. Qatar has already ordered various land, naval, and air military equipment and systems manufactured by Turkey such as Bayraktar TB-2 armed UAV, Ares 150 Hercules, training warships, armored combat vehicles, and multi-radar and electro-optic camera systems for border security.⁴⁷

42. It is reported that Turkey has a plan to procure 20 F-35Bs in addition to 100 F-35As. Sevil Erkuş, "Turkey Mulls Purchase of US's F35-B for Future Airplane Carrier", *Hurriyet Daily News*, <http://www.hurriyetdailynews.com/turkey-mulls-purchase-of-uss-f35-b-for-future-airplane-carrier-127923>, February 27, 2018 (Accessed: December 31, 2018).

43. Can Kasapoğlu, "Turkey's Forward-Basing Posture", *EDAM*, July 2017.

44. "Russia Blocks Ukrainian Azov Sea Ports: Minister", Reuters, November 29, 2018, <https://www.reuters.com/article/us-ukraine-crisis-azov-blockade/russia-blocks-ukrainian-azov-sea-ports-minister-idUSKCN1NY0NO>

45. Anti-Access and Area-Denial, abbreviated as "A2/AD," has been used to refer to war-fighting strategies focused on preventing an opponent from operating military forces near, into, or within a contested region. The A2 capabilities are used to prevent or constrain the deployment of opposing forces into an area of operations. The AD capabilities are used to reduce freedom of maneuver once in the area of operations. Today, A2/AD are strategies designated as primary strategic challenges to the international security objectives of the U.S. and its allies and partners. "What is Anti Access Area Denial?", *Defence Matters*, October 11, 2016, https://www.youtube.com/watch?time_continue=66&v=JMU8W2oHxiM.

46. Arda Mevlütoğlu, "Kerç Boğazı Müsademesi ve Karadeniz'de A2/AD", *Siyah Gri Beyaz*, November 30, 2018, <https://www.siyahgribeyaz.com/2018/11/kerc-bogaz-musademesi-ve-karadenizde.html>.

47. Dylan Maylasov, "Qatar Received Batch of New Ejder Yalcin Armoured Vehicles from Turkey", *Defence Blog*, December 18, 2017. <http://defence-blog.com/army/qatar-received-batch-of-new-ejder-yalcin-armoured-vehicles-from-turkey.html>, (Accessed: March 18, 2018); "Exportation de 85 blindés turcs vers le qatar", *TRT Français*, March 13, 2018, <http://www.trt.net.tr/francais/moyen-orient/2018/03/13/exportation-de-85-blindes-turcs-vers-le-qatar-928843>, (Accessed: March 18, 2018); "Turkey to Build 2 Training Warships for Qatar Navy", *Anadolu Agency*, March 14, 2018. <https://aa.com.tr/en/energy/energy-security/turkey-to-build-2-training-warships-for-qatar-navy/19215>, (Accessed: March 18, 2018); Mohammed Najib, "DIMDEX 2018: Qatar Coast Guard Orders More Ares Vessels", *Jane's 360*, March 13, 2018, <http://www.janes.com/article/78532/dimdex-2018-qatar-coast-guard-orders-more-ares-vessel>, (Accessed: March 18, 2018); "Milli SİHA İlk Kez İhraç Edildi: 6'sı Katar'a Satıldı", *Yeni Şafak*, March 14, 2018. <https://www.yenisafak.com/ekonomi/milli-siha-ilk-kez-ihrac-edildi-6si-katar-satildi-3177879>, (Accessed: March 18, 2018).

At the same time, the ‘Suakin deal’ may be considered as the continuation of Turkey’s increasing influence in Africa. The agreement has caught the attention of Saudi Arabia and Egypt, countries with which Turkey’s diplomatic relations are at a historical low.⁴⁸ Suakin is at the crossroads of Aden Gulf and the Red Sea where competition for military presence between Saudi Arabia, the United Arab Emirates (UAE), and Turkey is underway. So much so that recently Saudi Arabia closed a deal to construct a naval base in Djibouti. The UAE has also established major naval and air facilities at Assab in nearby Eritrea.⁴⁹

HOW WILL CURRENT DYNAMICS EVOLVE IN 2019?

The Transformation of Turkish Naval Power Projection

Turkey should be expected to improve its naval capacity in order to project expeditionary forces to remote areas beyond the vicinity of Turkey. The aforementioned naval assets need to include joint air, sea, and land forces along with civilian units for humanitarian relief operations. Considering the geopolitical competition in the Gulf and the Eastern Mediterranean regions along with the humanitarian crises in the Middle East and the Arabian Peninsula, Turkey may need to develop more assertive naval combat capabilities and pro-active naval diplomacy with its partners. In such a complex security environment, developing projects to modify the naval capabilities of the Turkish Navy will play a constitutive role in Turkey’s forward military presence.⁵⁰

The Black Sea region appeared to be a concern for the international community in 2018. Frequent naval expeditions by Western actors attempted to deter Russia from escalating the crisis in the region. In this sense, Turkey has chosen its northeastern city of Trabzon as the location of a potential new naval base to monitor the developments in the Black Sea and also to observe the military activities of all involved actors. The year 2019 may signify the beginning of an era when Turkey will increase its naval presence in the Black Sea to protect its interests and to further stability.

The Shift in Turkey’s Forward Military Presence

The year 2018 witnessed tension in the Gulf region that saw Saudi Arabia, the UAE, and Qatar challenge one another. Turkey had initially treated the crisis bilaterally; the unjust demands that the Turkish military base in Qatar be dissolved by the Saudi-led

48. Ali Topchi, “Why Is Sudan’s Suakin Island Important for Turkey?” TRT World, December 26, 2017, <https://www.trtworld.com/turkey/why-is-sudan-s-suakin-island-important-for-turkey--13630>.

49. David Brewster, “Base Race in the Horn of Africa”, *The Interpreter*, February 7, 2018, <https://www.lowyinstitute.org/the-interpreter/base-race-horn-africa>.

50. Can Kasapoğlu, “Turkey’s Forward-Basing Posture”, *EDAM*, July 2017.

block were perceived as unethical and contrary to Turkish interests. Hence, Turkey started to enhance and widen relations with Qatar to prevent revisionism in the Gulf and further protect Turkish interests by a military posture. This policy can be expected to persist in 2019.

The Red Sea has become a prominent transit waterway for Turkey, as was witnessed in the last three decades. The historical affiliation of the Red Sea states with Turkey urged Turkey to pursue wider diplomatic relations. In this context, Turkey turned its attention to Sudan and established a bridge by restoring Suakin Island, a former Ottoman territory. In this way, Turkey hopes to contribute to Sudan's military capacity in countering risks and potential threats. This military activism may refresh the collaboration efforts of Turkey and Sudan to improve stability in the Red Sea.

TURKEY'S FOREIGN DEPLOYMENT ⁵¹			
REGION	COOPERATION	OPERATION	DEPLOYMENT
AFGHANISTAN	NATO	Operation Resolute Support	659 military personnel; 1 motorized infantry battalion
ARABIAN SEA & GULF OF ADEN	Combined Maritime Forces	CTF-151 (Combined Task Force 151)	1 FFGHM (fighting frigate)
BLACK SEA	NATO	SNMCMG 2 (Standing NATO Mine Countermeasures Group 2)	1 MHO (mine hunter)
BOSNIA-HERZEGOVINA	EU	EUFOR (European Union Force) Operation Althea	199 military personnel; 1 infantry company
CYPRUS (NORTHERN)			43,000 military personnel; 1 army corps HQ; 1 armored brigade; 2 mechanized infantry division; 1 Aviation command; 8 M48A2 (training); 340 M48A5T1/T2; 361 AAPC (incl. variants); 266 M113 (incl. variants); 72 M101A1; 18 M114A2; 12 M115; 90 M44T; 6 T-122; 175 81mm mortar; 148 M30; 127 HY-12; 66 Milan; 48 TOW; 192 M40A1; Rh 202; 16 GDF-003; 48 M1; 3 Cessna 185 (U-17); 1 AS532UL Cougar; 3 UH-1H Iroquois; 1 PB
IRAQ			2,000 military personnel; 1 armored battle group
LEBANON	UN	UNIFIL (United Nations Interim Force in Lebanon)	49 military personnel; 1 PCFG (patrol craft)
MEDITERRANEAN SEA	NATO	SNMG 2 (Standing NATO Maritime Group 2)	1 FFGHM (fighting frigate)
QATAR			200 (training team); 1 mechanized infantry company; 1 artillery unit; 12+ ACV AIFV/AAPC; 2 T-155 Firtina
KOSOVO	NATO UN	KFOR (Kosovo Force) UNMIK (United Nations Mission in Kosovo)	307 military personnel; 1 infantry company 1 observer
SOMALIA	UN	UNSOM (United Nations Assistance Mission in Somalia)	1 observer
SYRIA			500+ military personnel; 1 Special Forces company; 1 armored company(+); 1 artillery unit
UKRAINE	OSCE		11 military personnel

51. The Military Balance 2018.

TURKEY'S DEFENSE AGENDA

Summary of 2018

- Turkey's purchase of S-400 systems from Russia remained the main controversial topic between Turkey and its NATO allies in 2018.
- In January 2018, Turkish ROKETSAN and ASELSAN are partnered in the joint French and Italian initiative EUROSAM that envisions technology transfer to Turkey.
- Turkish defense firms take their places in international showcases where increasingly more countries begin to show interests in Turkish products.
- According to SIPRI data on trends in international arms transfers, Saudi Arabia, Egypt, and the United Arab Emirates (UAE) are among the first five countries in the world in terms of major arms import in the period 2013-2017.

Turkey's air defense system procurement remained the most controversial topic in the country's defense policy last year. Turkey and Russia had agreed on a deal in September 2017. The agreement envisions that Russia will deliver two S-400 systems, consisting of four batteries, for a cost of approximately 2.5 billion USD. It is expected that Russia will start to deploy the systems onto Turkish soil in October

2019. Turkey started another project with Italy and France to produce an air defense system for its long-term needs. The three countries inked an agreement on January 2018 to establish a consortium indicating the equal partnership of all three. The project is designed to produce the air defense systems after 2020 with the partnering of ROKETSAN and ASELSAN, two Turkish defense giants.⁵² Apart from foreign procurement and production programs, Turkey also started air defense programs utilizing its national capabilities.⁵³



Turkey's foremost objective in the defense sector remains achieving increased independence in defense procurement; this extends to the expectation of full independence in the longer term. On December 10, 2018 SIPRI stated that the arms sales of Turkish companies rose by 24 percent in 2017. Analysts have now begun to describe Turkey as one of the emerging strong players in the sector.⁵⁴

52. "EUROSAM, Together with ASELSAN and ROKETSAN, Lay the Foundation of Strategic Cooperation in Air and Missile Defence," *MBDA Missile Systems*, July 20, 2017, available at <https://www.mbda-systems.com/2017/07/20/eurosam-together-aselsan-roketsan-lay-foundation-strategic-cooperation-air-missile-defence/>, (Accessed: December 2018).

53. Merve Seren, "Türkiye'nin Hava Savunma Sistemi İhtiyacı," *SETA*, available at <https://www.setav.org/turkiyenin-hava-savunma-sistemi-ihciyacii/>, November 28, 2015 (Accessed: December 24, 2018).

54. For instance, see Murielle Delaporte, "Eurosatory 2018: Innovating Today to Conquer Tomorrow," *Breaking Defense*, June 26, 2018, available at <https://breakingdefense.com/2018/06/eurosatory-2018-innovating-to-day-to-conquer-tomorrow/> (Accessed: December 25, 2018).

Turkish national defense products particularly draw attention for their cost-friendly and combat-proven features. Turkey's practical use of its own defense products in counter-terrorism and military operations facilitated both their effectiveness and their brand value in international markets.

In comparison with the period 2008-2012, the major arms imports of Saudi Arabia, Egypt, and the UAE have increased dramatically, by 225, 215, and 51 percent respectively. Among the systems being purchased are jet fighters, helicopters, drones, missiles, and armored vehicles. It is not a coincidence that Saudi Arabia, the UAE, and Egypt are increasingly involved in regional conflicts and desire to expand their diplomatic influence particularly in the West.⁵⁵

DYNAMICS OF TURKEY'S DEFENSE POLICIES

Air Defense System Procurement

Turkey's determination to procure S-400 systems is essentially derived from the country's urgent need for protection against air and missile threats. The potentially explosive situation in Syria aggravated Turkey's vulnerability against air and missile threats, which the country has traditionally countered with fighter aircrafts. For instance, the seizure of sophisticated rocket systems by terrorist groups like the YPG or DAESH has posed an imminent threat to Turkey's national security in recent years. Furthermore, Turkey's neighbors in the Middle East, particularly Iran, have vast amounts of missiles at their disposal which for years has created a security dilemma for Turkey. National security considerations dictated that Turkey close this security gap by immediately procuring an effective air defense system. Beside the military necessities, political and financial factors have also significantly influenced Turkey's decision to purchase S-400 systems from Russia. Turkey's strained relations with the United States and NATO, and the expensive cost of Patriot batteries were major considerations that steered Turkey towards Russia.

The Turkish National Defense Industry

Turkey's long-term aim is to achieve a "fully independent defense industry" according to the Minister of Industry and Technology.⁵⁶ While this objective is highly am-

55. Peter D. Wezeman, Aude Fleurant, Alexandra Kuimova, Nan Tian, and Siemon T. Wezeman, *Trends in International Arms Transfers*, 2017, SIPRI Fact Sheet, March 2018, p. 6.

56. "Turkey Aims to Establish Independent Defense Industry Says Minister," *Hurriyet Daily News*, December 13, 2018, available at <http://www.hurriyetdailynews.com/turkey-aims-to-establish-independent-defense-industry-says-minister-139697> (Accessed: January 7, 2019).

bitious, Turkey could also assess its options and revise its policies. Contemplating, developing, and implementing a substantial long-term defense industrialization policy would pave the way for Turkey to increase its autarky in the defense sector. Similarly, competition in domestic and international markets is a key prerequisite for achieving an advanced national defense industry while managing the delicate supply chain is an important component of sustainability. Furthermore, the ability to perform on key contracts by leading Turkish defense firms will be another significant component.

On the other hand, the capacity to innovate remains the defense industry's most decisive determinant of growth in the longer term. All these factors are inexorably linked to the effectiveness of the Turkish indigenous production efforts. It seems that Turkish decision-makers and defense companies are aware of the significance of these issues. This can be seen by an examination of the major themes of the Turkish Defense Industry Summit, which took place in December 12-13, 2018. The key topics underlined at the summit were "Defense Industry in Venture-Investment-Export Chain", "Qualified Human Resources for National Industrial Movement", and "Technology-Innovation-Production Trilogy."⁵⁷

Armament in the Middle East

After steady decreases between 2011 and 2015, the global defense spending has been increasing since 2015. Similarly, defense spending in the Middle East has followed suit. The increased uncertainty in the international system due to the changing character of terrorism is said to be the main determinant of this trend. In recent years, particular Middle Eastern states consistently boosted their military spending. Indeed, the nature of arms buying reached an aggressive level, particularly for Gulf countries. Turkey's security and defense policies are shaped by the changing nature of Middle Eastern geopolitical developments and competition. While regional countries such as Saudi Arabia, Egypt, and the UAE invest considerable amount of money in their armies because of their heightened threat perception and their desires to project more power abroad, Turkey invests in its defense industry not only to maximize its security but also to prevent any regional actor from reaching an unchecked power status.

57. "New Projects, Human Resources to be Discussed at Defense Summit Next Week," *Daily Sabah*, December 4, 2018, available at <https://www.dailysabah.com/defense/2018/12/05/new-projects-human-resources-to-be-discussed-at-defense-summit-next-week> (Accessed: January 7, 2018).

HOW WILL CURRENT DYNAMICS EVOLVE IN 2019?

Turkey's Air Defense Procurement

It's highly likely that Turkey will increasingly feel more pressure on its borders until the first deployment of S-400 systems in October 2019. The concerns regarding the interoperability across NATO systems, and Russian counter-intelligence are likely to remain the key problems within Turkey's air defense procurement and its relations with its NATO allies. On the other hand, the EUROSAM project envisions providing Turkey with technology transfer to an extent that Turkey can ensure that the project will contribute to the development of its national air defense system. EURO-SAM can also be utilized by Turkey to balance the American and Russian weight in Turkey's defense procurement.

Another important development could be the decision by Turkish decision-makers to purchase Patriot systems from the United States. If this is the case, it will likely be a political decision which aims at a rapprochement between Turkey and the U.S. Nonetheless, as systems that are interoperable with other NATO components and that could alleviate the concerns of NATO countries, Patriot systems will also remain an important option that cannot be ignored by Turkish decision-makers. Finally, Turkey will maintain its efforts to build the prerequisite capabilities to develop its own indigenous air defense system in the longer term. The country's investments in national projects such as SİPER, HİSAR-A, and HİSAR-O will likely remain resolute. The contractor companies to develop the air defense system, the ASELSAN-ROKETSAN-TÜBİTAK SAGE partnership, will deliver the first long-range air defense system, designated as "SİPER," to the Turkish Armed Forces in 2021.⁵⁸ Meanwhile, ROKETSAN has developed and tested the long- and medium-range air defense systems HİSAR-A and HİSAR-O that will be delivered in 2020.⁵⁹ At the same time, Turkey will ensure that its participation in the EUROSAM project leads to technological advancements and improves human resources in line with the country's longer term goal of developing its own air missile defense.

The Turkish National Defense Industry

Turkey will need to manage, preserve, and develop its human resources capability within the defense sector in the coming year. It can be argued that the defense em-

58. "SİPER Hava Füze Savunma Sistemi Nedir?," *Hürriyet*, October 31, 2018, available at <http://www.hurriyet.com.tr/gundem/siper-hava-fuze-savunma-sistemi-nedir-41004403> (Accessed: December 24, 2018).

59. "ASELSAN, Milli Hava Savunma Projeleri HİSAR-A ve HİSAR-O'nun Güncel Durumunu Anlattı," *MSI*, available at <http://www.milscint.com/tr/hisar-projeleri-hiz-kesmiyor/>, January 8, 2018 (Accessed: December 24, 2018).

ployment in Turkey needs to raise if the country desires to further enhance self-sufficiency in 2019. However, investing solely on the number of personnel will not resolve the issue. Engineers working in Turkey's defense sector have generally been busy working simultaneously on numerous projects which dampens specialization and accumulation of knowledge in specific areas.⁶⁰ This problem will need to be addressed this year. Turkey will also need to conduct prudent cost-benefit calculations in order to achieve maximum effectiveness and sustainability in 2019. Indigenous production of advanced weaponry with up-to-date technology requires considerable amount of investment which unavoidably carries the risk of becoming dead money. Furthermore, choosing which missile defense system Turkey will deploy (S-400, Patriot, or both) is also going to be closely related with managing the delicate defense budget. Thereby, the year 2019 will also be a test of endurance and strength for the Turkish defense industry.

Armament in the Middle East

Declining oil prices will likely constrain the high defense budgets of some Middle Eastern states such as Saudi Arabia, Egypt, and the UAE; in 2016, Saudi military spending fell by 29 percent.⁶¹ The fall in oil prices could also induce these states to exhibit restraint in their regional policies rather than escalating the existing conflicts. While oil-rich states have more incentives to do so, Turkey may seize some opportunities to fill power vacuums in the region by being more assertive where its interests are vital. Nevertheless, it would be overly optimistic to expect this contingent as these countries will most probably not remain unresponsive to the changes in the region due to their regional and international ambitions. This, in turn, would ripen the ground for an arms race in the Middle East, which, in part, is already at play. Consequently, in 2019, we may see an escalation of the current proxy wars and embittered regional rivalries as a result of the increased uncertainty in the region.

60. Arda Mevlütoğlu, "Commentary on Assessing the Turkish Defense Industry: Structural Issues and Major Challenges," *Defence Studies*, 17 (3), pp. 286-291.

61. For a detailed analysis on the defense spending of Saudi Arabia and the general trend throughout the Middle East, see Pieter D. Wezeman, "Saudi Arabia, Armaments, and the Conflict in the Middle East," *SIPRI*, December 14, 2018, available at <https://www.sipri.org/commentary/topical-background/2018/saudi-arabia-armaments-and-conflict-middle-east> (Accessed: December 26, 2018).

TURKEY AND THE EASTERN MEDITERRANEAN

Summary of 2018

- The newly discovered energy resources in the Eastern Mediterranean enabled regional actors the Turkish Republic of North Cyprus (TRNC) and Turkey, to gain advantage over others, and encouraged the appetite of global energy players.
- The competition between the USA and Russia in the Eastern Mediterranean Sea culminated in tensions and challenges.
- Greece and Greek Cypriots have exploited the regional politics at the expense of the TRNC and Turkey in order to gain ground on the Cyprus issue.
- Greece, Israel, Egypt, and the Greek Cypriot Administration conducted joint military exercises around Cyprus in order to increase their readiness.

The energy resources in the Eastern Mediterranean attracted affiliated states and multinational oil companies to discover, drill, and market oil and gas. This fact led BP, ENI, and ExxonMobil to enter the region following the invitation of the relevant states disregarding the rights and expectations of others. Hence, the undertakings of these state actors caused frictions regarding fair distribution. In early 2018, Turkey prevented entry to the Eastern Mediterranean of a drill vessel

belonging to the Italian energy company, ENI, at the Eastern Mediterranean. Turkey has been determined to protect the rights of the TRNC by demanding a fair share of the resources in the region.⁶² President Recep Tayyip Erdoğan said that the Greek Cypriot Administration would not be allowed to usurp the rights of Turkish Cypriots in the Eastern Mediterranean.⁶³

Affiliated with the aforementioned issue of energy resources in the region, the Exclusive Economic Zone (EEZ) appears to be a hot point for the involved parties. The EEZ restriction agreements were signed by the Greek Cypriot Administration unilaterally with Egypt in 2003, with Lebanon in 2007, and with Israel in 2011. It constitutes the basis of a great debate on the distribution of the natural resources and causes tension in the region. However, regional political uncertainties and geopolitical problems can be solved by an agreement among all parties in the regions; namely Turkey, Syria, Lebanon, Israel, Egypt, Greece, Britain, Palestine, the TRNC, and the Greek Cypriot Administration. There has been a trend in the region whereby certain littoral states have gradually formed an informal alliance against Turkey. The increasing cooperation among Israelis, Egyptians, Greeks, and Greek Cypriots stems from the need to balance Turkey's military capabilities in the area. It poses a challenge leveled against the primacy of the Turkish Navy. The fact that the cooperation mechanism includes key areas from gas exploration to counter-terrorism reflects the exploitation of international pressure on Turkey over the Cyprus issue by these countries.

Other than the tension over energy politics, another theme of the affiliated state actors and the Greek Cypriot Administration has been the transfer of natural gas and oil that could have been brought to the earth's surface. Various projects have been developed to transfer the reserves to the demanding markets. For this purpose, Anastasiadis, Tsipras, and Netanyahu agreed on the East-Med project in 2018. This project is designed to transfer natural gas from Israel and the Greek Cypriot Administration to Europe via a pipeline through Greece and Italy.⁶⁴ Another development that increased tension in the region towards the end of 2018 took place between Greece and Turkey. Turkey's *Barbaros Hayrettin Pasha* research vessel was disturbed

62. "Eni's Saipem 12000: Turkish Side 'Can't Remain Patient Forever'", ASMAA, February 21, 2018, <http://www.asmaa-algarve.org/en/news/what-s-new/eni-s-saipem-12000-turkish-side-can-t-remain-patient-forever>.

63. "Erdoğan'dan Doğu Akdeniz ve Ege Açıklaması: Denizlerdeki Haydutlara Meydanı Bırakmayacağız", Euro News, November 4, 2018, <https://tr.euronews.com/2018/11/04/erdogan-dan-dogu-akdeniz-ve-ege-aciklamasi-denizlerdeki-haydutlara-meydani-birakmayacagiz>.

64. "Israel, Cyprus, and Greece Push East Med Gas Pipeline to Europe", *Times of Israel*, May 8, 2018, <https://www.timesofisrael.com/israel-cyprus-and-greece-push-east-med-gas-pipeline-to-europe/>.

by the Greek Navy. The Turkish Navy responded to the hostile engagement of the Greek vessel, which had violated international law.⁶⁵

Russia has been active in Syria since 2013 in order to protect its interests by supporting the Assad regime. Other than Russia's intense involvement in Syria, Russia has been constructing a nuclear power plant in the Mersin Province of Turkey, located along the Mediterranean coast. Meanwhile, Russia has been printing Libya's currency, yet treats Khalifa Haftar as a potential ally at the expense of the internationally recognized Libyan government. Russia's bold stance in the Mediterranean Sea has been compounded by frequent naval expeditions of the Russian Navy, which usually sails through the Bosphorus from the Black sea. On the other hand, the USA has poured its navy into the Mediterranean Sea to balance Russia in the Black and Mediterranean Seas.

The rejection of the Annan Plan in 2004 by the Greek Cypriots has caused the issue to remain a significant problem to this day. As Turkey turns its attention to countering terrorism in Syria, both entities exploited the decades-old problems of sovereignty rights in the Aegean and Mediterranean Seas. The Greek Ministry of Defense threatened Turkey by stating, "If they make the slightest move, we will crush them."⁶⁶ Similarly, the president of the Greek Cypriot Administration escalated tension in Cyprus by stating that Turkey's actions violate international law.⁶⁷

Israel, another important party in the disagreements in the Eastern Mediterranean, is turbulent in terms of internal politics. Israeli authorities consistently attempted to blame either Turkey or the Palestinians. Meanwhile, Israel together with the Trump administration have put a 'divine' plan in action with the transfer of the U.S. embassy to the claimed capital Jerusalem in May 2018.⁶⁸ As part of this revisionism, Israel has continuously breached the fundamental rights of Palestine and Palestinians in Israel. With the intervention of the Israeli Security Forces, 60 demonstrators on the Gaza border lost their lives and 2,770 were injured.⁶⁹ The numbers are still rising in the ongoing conflict.

65. "Turkish Navy Stops Greek Frigate 'Harassment' in Mediterranean: Anadolu", Reuters, October 18, 2018, <https://www.reuters.com/article/us-turkey-greece-mediterranean/turkish-navy-stops-greek-frigate-harassment-in-mediterranean-anadolu-idUSKCN1MS2AP>.

66. "Greece Warns Turkey: 'If They Make the Slightest Move, We Will Crush Them'", Voice of Europe, December 21, 2018, <https://voiceofeurope.com/2018/12/greece-warns-turkey-if-they-make-the-slightest-move-we-will-crush-them/>.

67. "EU Warns Turkey Over 'Threat' to Cyprus", EU Observer, February 12, 2018, <https://euobserver.com/foreign/140954>.

68. "ABD İsrail Büyükelçiliği'ni Kudüs'e Taşdı, Gazze'de Katliam", CNN Türk, May 14, 2018, <https://www.cnn-turk.com/dunya/abd-kuduse-tasidigi-tartismali-israil-buyukelciligini-acmaya-hazirlaniyor>

69. "ABD İsrail Büyükelçiliği'ni Kudüs'e Taşdı, Gazze'de Katliam".

DYNAMICS REGARDING REGIONAL SECURITY IN THE EASTERN MEDITERRANEAN

The United States' and Russia's Conflicts of Interest

Looking at the energy-driven power struggle in the region, Russia and the United States are two important actors. The U.S. follows a strategy of dominating the Eastern Mediterranean in order to protect its interests and provide security to Israel. At the same time, Russia wants to realize its historic aspiration to be in the “warm waters” of the Mediterranean by obtaining rights for military bases in Syria along with political and economic expansion at the expense of the West's interests. Moreover, Russia sells most of its natural gas to EU countries - an alternative energy resource in the Eastern Mediterranean Sea will downgrade Europe's dependency on Russian energy. Hence, Russia wants to be in the Mediterranean Sea to observe, check, and balance the developments. In line with these goals, Russia has greatly increased its military presence in the Eastern Mediterranean in recent years by using Syria as a leverage and opportunity for the Russian strategic vision of the Mediterranean Sea. Considering especially the exercises performed in the Eastern Mediterranean by Russia this year, Russia will not remain silent to any developments in the region.⁷⁰

The Cyprus Issue and Turkish – Greek Relations

The Greek Cypriot Administration benefits from tensions between other regional actors and Turkey in terms of gaining an advantage in the region. For example, after Turkey's problems with Israel and Egypt in recent years, the Greek Cypriot Administration signed exclusive economic zone agreements with these countries. This fact is one of the biggest indicators of a potential crisis as Greeks want to ignore the TRNC. The ongoing civil war in Syria, which created important security issues for Turkey, encouraged Greek Cypriots to declare the exclusive economic zone and permitted the international oil companies to drill in the illegally announced EEZ. Meanwhile, the transport or transfer of the extracted energy resources will be a potential issue in the region since it will be perceived by Turkey as a theft of the rights of the TRNC. Under the clout of these developments, there was no development towards a just termination of the Cyprus issue, compromising both communities on the island.

The Cyprus issue has potential to be a challenge for the security of the Mediterranean as the Aegean Sea and Turkish-Greek relations have the capacity to challenge the status quo. In this sense, the Turkish-Greek relations are strained due to

70. “Russia to Hold Major Drills in Mediterranean Off Syria as UN Warns of ‘Perfect Storm’”, *The Telegraph*, August 30, 2018, <https://www.telegraph.co.uk/news/2018/08/30/russia-hold-major-drills-mediterranean-syria-un-warns-perfect/>.

Greek sovereignty claims over rocky islets and inhabited islands that could affect continental shelf and FIR authority above the Mediterranean and Aegean Seas. Greece attempts to claim that its continental shelf in the AS extends up to 12 miles, which if applied would breach Turkey's sovereignty rights. Hence, Turkey recognizes such an attempt as a *casus belli*. Other than the experienced problems in the Aegean Sea, 2018 witnessed hostile Greek undertakings, which were reflected in Turkish media, such as racist demonstrations against Turkey where the Turkish flag was desecrated,⁷¹ and the violation of the Turkish border by two Greek soldiers with the intention of spying on the Turkish military establishment.⁷² The negative impacts of such events may escalate the tension in both the Aegean and the Eastern Mediterranean Seas.

In light of the witnessed escalation of tension in 2018, the advance of Turkey's defense industry in recent years has alarmed Greece. Greece is concerned about Turkey's national production of critical defense products such as new-generation aerial assets, its enhanced naval capabilities, and its army's new weapon systems and equipment. According to reports in the Greek media, Greece is concerned since due to Turkey's defense superiority, its army has fallen behind in the competition with Turkey.⁷³ As a result, Greece is in search of military technologies with security assistance from the USA, Russia, and Europe.⁷⁴

Israel

Israel seems to have taken a serious initiative regarding the energy production activities in the region. It began to work on exploring and extracting energy resources after 2013. In a short time, it plans to market its reserves to European countries.⁷⁵ Furthermore, it has announced that it will build a new military structure to protect the natural gas and oil production facilities in the Mediterranean. This new military structure is planned to have advanced technological elements such as new battleships, unmanned aerial vehicles, and radar systems. Moreover, to this day,

71. "Turkey Condemns Burning of Its Flag in Athens", Anadolu Agency, March 7, 2018, <https://www.aa.com.tr/en/europe/turkey-condemns-burning-of-its-flag-in-athens-/1081845>.

72. "Two Greek Soldiers Return Home After Turkey Release", *Hürriyet Daily News*, August 14, 2018, <http://www.hurriyetdailynews.com/turkish-court-releases-two-greek-soldiers-135803>.

73. "Yunan Basınında Türk Savunma Sanayi Endişesi", Donanım Haber, December 18, 2017, <https://www.donanimhaber.com/Yunan-basininda-Turk-Savunma-Sanayi-endisesi--95990>.

74. "Greece's Defense Minister Panos Kammenos Has Described Turkey As an Enemy", Pakistan Defense, April 5, 2018, <https://defence.pk/pdf/threads/greeces-defense-minister-panos-kammenos-has-described-turkey-as-an-enemy.552118/page-2>.

75. "İsrail'in Doğu Akdeniz'deki Alternatif Politikaları", Bilgesam, December 6, 2012, http://www.bilgesam.org/incele/1105/-israil%E2%80%99in-dogu-akdeniz%E2%80%99deki-alternatif-politikalari/#.XCy_lIdzYdU.

Israel has been continuously increasing the number of its submarines in order to strengthen its naval forces.

HOW WILL THE CURRENT DYNAMICS EVOLVE IN 2019?

Turkey's Response to Threats

As a response to the illegal efforts by the bloc of Israel, Greece, the Greek Cypriot Administration, and Egypt, Turkey may be expected to remain active in the Mediterranean Sea on three different levels. Initially, Turkey is expected to start diplomatic engagements with third parties in order to present its thesis on energy resources and 'just' sharing in accordance with the rights of the TRNC and all regional actors. The second is to continue to drill in the Eastern Mediterranean with vessels of high exploring and drilling technology, which have been recently procured. This attempt may escalate tension with the mentioned bloc pending the area designated to be explored. Finally, Turkey, using a low profile, may disturb the activities of Greek Cypriots in order to ascertain the rights of the TRNC.

Turkey may respond to the escalation of the regional bloc and their supporters by balancing the military presence in the Aegean and Mediterranean Seas so as to be prepared for unexpected events. In this context, Turkey has increased its naval assets in the wider seas, mainly in the Eastern Mediterranean Sea. This trend will continue until a compromise has been reached by the relevant actors. Turkey will need to counter the increasingly evident alliance against it embodied in Israel, Egypt, Greece, and Greek Cypriots. Although Turkey's naval capabilities in the area have no match,⁷⁶ the diplomatic table demonstrates a completely different picture. Turkey is likely to face more diplomatic pressure in 2019 because of the growing animosity against it by a group of littoral states. The dissolution of this alliance seems to be a distant possibility given the fact that it can only be realized by ameliorating Turkey's currently strained relations with Israel and Egypt. Hence, Turkey will need to find other ways to enhance its diplomatic influence on the Cyprus issue, which will be a key requirement for Turkey in 2019 and which might require Turkey to take bolder steps.

The U.S. and Russian Policies in the Region

It should be expected that Russia will continue to be the largest natural gas exporter in 2019. Therefore, it will be possible to increase its influence in the Eastern Mediter-

76. Interview with Can Kasapoğlu, SETA Ankara, December 27, 2018.

ranean to check and balance the undertakings of the Western energy club to control the reserves. On the other hand, the U.S. needs to be vigilant to counter the Russian attempts in the region. The U.S. policy will be based on protecting U.S. interests - in the guise of American energy giants – regarding the distribution of energy resources and on observing Israel’s security. As a balancing attempt, Russia will lean on having Syria under the Assad regime to guarantee its military presence in the so-called warm waters and will mobilize this capacity in case Russian energy interests are jeopardized.

The Israel- Greece-Egypt-Greek Cypriot Bloc

It is obvious that four countries of the Eastern Mediterranean collaborate with one other to protect their common interests against their common challenger, Turkey. Meanwhile, these countries and Greek Cypriots do not count the sovereign rights of Lebanon, Syria, the TRNC, and Turkey to explore, drill, extract, and transfer energy resources. The unbalanced share of the resources in the disputed continental shelves, while overriding the rights of the TRNC, could escalate a region-wide tension any time. The policies and choices of the aforementioned bloc, both with regards to energy resources and other regional issues, will be determinative in predicting such crises in the “warm waters.”

Israel has started an offensive strategy to gain superiority in energy politics and regional issues, especially after Trump’s presidency. The U.S. withdrawal from the Syrian theater may force Israel to intervene in the Syrian conflict by isolated military applications with at least passive permission by Russia. On the other hand, Israel, with its quest to reach economic resources, may be more aggressive and demanding in extracting and transferring energy resources that could lead to a potential confrontation with Turkey. In this case, Israel will be expected to have the U.S. military assets positioned in the Eastern Mediterranean to respond to any risks.

Greece has experienced a devastating economic crisis due to its unnecessary threat perception of Turkey. The energy resources in the two seas may be an opening for the economic recession and an opportunity to balance the military and economic dominance of Turkey. Besides, internal political turmoil has challenged the existing government. In this context, Greece may be expected to be revisionist in the Aegean and Mediterranean Seas depending on the economic aspirations and internal political developments. The issue of sovereignty, manifested among others in the 12-mile territorial water claim, can be a point of potential crisis in the Aegean Sea, while the Eastern Mediterranean Sea would be the extension of this potential crisis. The Cyprus issue and the potential events in the Eastern Mediterranean Sea present Greece

with the opportunity to deal with such crises away from its motherland and, thus, to feel safer. Greek Cypriots, as an extension of the Greek policies and options, may exploit EU membership to propagate their national interests as the ordinary rights of a state actor and to deter Turkey's counter measures. Current negotiation between the Turkish and Greek communities of Cyprus may be exposed to conditionality or stalled by Greek Cypriots to gain advantage over the TNRC.

Egypt has rich resources in its continental shelf and desires to obtain benefits from the resources in international waters either by extracting or transferring the resources to energy markets. Meanwhile Egypt, suffering from economic constraints, is dependent on the pledges of Saudi Arabia and the United Arab Emirates. These two countries may add to the already escalated tension by encouraging Egypt to challenge Turkey and the TRNC. Moreover, Egyptian President Sisi, who toppled the legitimate government of Egypt on July 3, 2013, perceives Turkey as a potential threat to his coup d'état since President Erdoğan has frequently criticized the Egyptian military intervention and denounced the harsh measures to suppress the Egyptian public.

TURKISH-AMERICAN RELATIONS

Summary of 2018

- The U.S. made a Patriot sale offer to Turkey on the condition that Ankara give up on the S-400 deal with Russia.⁷⁷
- Washington imposed extra tariffs and sanctions on Turkey over the Pastor Brunson case⁷⁸ and to discourage further Turkey-Russia rapprochement.
- Turkey released Andrew Brunson,⁷⁹ an American evangelist who was imprisoned for about 2 years due to alleged links to the FETÖ terrorist organization.
- President Trump declared victory over DAESH in Syria and ordered American troops to withdraw,⁸⁰ taking a step towards strengthening cooperation with Turkey.

77. "Turkey Cleared by US for \$3.5 billion Patriot Missile Deal, Despite S-400 Row", Defense News, December 18, 2018 <https://www.defensenews.com/global/europe/2018/12/19/turkey-cleared-by-us-for-35-billion-patriot-missile-deal-despite-s-400-row/>(Accessed: January 4, 2018).

78. U.S. 'Hopeful' on Pastor's Release, Unaware of a Deal with Turkey", Reuters, October 12, 2018, <https://www.reuters.com/article/us-turkey-security-usa-deal/u-s-hopeful-on-pastors-release-unaware-of-a-deal-with-turkey-idUSKCN1ML2WU>(Accessed: January 4, 2018).

79. "Turkish Court Rules to Release American Evangelical Pastor Brunson", *Daily Sabah*, October 12, 2018, <https://www.dailysabah.com/investigations/2018/10/12/turkish-court-rules-to-release-american-evangelical-pastor-brunson>(Accessed: January 4, 2018).

80. "Trump Orders Full and Immediate Withdrawal of US Troops from Syria", *The Independent*, December 19, 2018, <https://www.independent.co.uk/news/world/middle-east/trump-syria-us-troops-withdrawal-isis-end-islamic-state-a8690871.html> (Accessed: January 4, 2018).

It can safely be argued that Turkish-American bilateral ties experienced historic lows in 2018. The deteriorated foreign policy gap between Ankara and Washington that initially emerged due to the policy framework toward DAESH in Syria, under which the Obama administration operated, further expanded during the Trump presidency. Recently, however, Trump's changing approach toward the PYD and his willingness to cooperate against FETÖ, have paved the way for a possible rapprochement between the two NATO allies. In order to make a comprehensive evaluation of the Turkish-American bilateral relations in 2018, it might be useful to categorize the major tension points that took place within the past year.

Syria and the PYD/YPG

In 2018, the U.S.-PYD cooperation in Syria continued to violate Turkish-American strategic partnership in the Middle East and put long-term Turkish national security measures against the PKK at risk. Hence, throughout the year, Ankara had to take bold steps to implement counter-measures for its national security and protect Syrian territorial integrity, which led to the launch of Operation Olive Branch against the PYD's ground forces (YPG). Surprisingly, following President Erdogan's recent announcement of an upcoming military operation in northeastern Syria on December 12, a promising shift in the name of retrieving the strategic partnership occurred: President Trump publicly affirmed his decision to withdraw American troops from the region, and stressed his faith in Turkey in continuing the fight against DAESH via Twitter. This development was quickly translated into an intention to cut American support for the PYD and received serious opposition from both conservative and liberal circles in the U.S.

Anti-Turkish Legislation and Lobbying Efforts

The U.S. Congress witnessed quite a few numbers of anti-Turkish lobbying efforts and introduced bills in 2018 ranging from preventing the transfer of F-35 aircrafts and other arms⁸¹ to restricting financial and technical assistance⁸² to Turkey. The content of the anti-Turkish bills introduced to Congress mainly concerned the detention of American citizens, especially Pastor Brunson, the Turkey-Russian rapprochement, and Ankara's S-400 acquisition. However, regarding defense politics and Turkish-Russian relations, the U.S. Department also approved a \$3.5 billion Patriot air and missile system sale for Ankara upon the request submitted through the FY 2019 National Defense Authorization Act. This pushed the Secretary of Defense to come up with a

81. S.2987 National Defense Authorization Act and H.R.5863 To Limit the Transfer of F-35 Aircraft to Turkey.

82. H.R. 6633 Turkey International Financial Institutions Act.

situation report on Turkey that involved alternative air and missile defense systems that could be purchased by the Turkish government instead of Russian S-400 systems.

S-400 Acquisition

Due to the allegations regarding the Russian involvement in the 2016 Presidential Elections and increased Russian involvement in Syria and the northern Black Sea, the U.S. Congress has been strictly against both domestic and international cooperation with Moscow and enacted the Countering America's Adversaries Through Sanctions Act (CAATSA) in 2017. Turkey's intentions to purchase Russian S-400 systems were, primarily, a deal-breaker in American foreign policy toward Ankara in 2018. It was heavily opposed and criticized within the framework of CAATSA, which targets companies that conduct business with Russia. Furthermore, bills introduced⁸³ in Congress against Turkey's S-400 acquisition accumulated arguments that this purchase would undermine NATO collective security structures and interoperability.

Tariffs and Sanctions

In August 2018, the Trump administration authorized a doubling of tariffs on steel and aluminum concerning Turkey, which partially contributed to the depreciation of the already declining value of the Turkish Lira. Furthermore, Washington levied sanctions on Turkish Justice Minister Abdulhamit Gul and Interior Minister Süleyman Soylu with the aim of pressuring Turkey into releasing Andrew Brunson, an American pastor with alleged links to the FETÖ and PKK terrorist organizations, and discouraging Ankara from obtaining Russian-made S-400 air defense systems. Apart from sanctions targeting Turkey, the U.S. firmly insisted on accelerating sanctions against Iran, which to a great extent limited Turkey's gas transfers. Even though there has been an exception permitting Ankara to continue importing gas from Iran along with 7 other states - on the condition of lowering the trade volume - Turkey strongly opposed such a pressure. Expectedly, Ankara retaliated by imposing its own sanctions: raising tariffs on imports from the U.S., and barring the American Secretary of Homeland Security Kirstjen Nielsen and Attorney General Jeff Sessions from entering Turkey and freezing their assets. Following the release of Pastor Brunson and a phone call between Presidents Trump and Erdogan in early November, both countries simultaneously lifted the sanctions (except the U.S. tariffs on metals and sanctions on Iran), which soothed the course of tensions between Ankara and Washington and opened a window of opportunity to retrieve bilateral ties.

83.H.R..951 - Expressing Concern with Respect to the Government of Turkey's Anticipated Purchase of Russian S-400 surface-to-air Missile Batteries, and for Other Purposes.

Mutual Legal Assistance and Extradition of FETÖ Members

Since the July 15, 2016 military coup attempt, Ankara has been demanding Washington extradite Fethullah Gülen, the person chiefly responsible for the failed coup, and his co-conspirators who performed highly dangerous crimes against the Turkish government. Washington, however, has been reluctant to cooperate with Ankara, due to differences in criminal codes, and was upset about the arrests of American citizens and Turkish employees at American consulates who directly or indirectly had links to the FETÖ terrorist organization in Turkey. The Pastor Brunson case being the main tension point, the bilateral relations experienced significant challenges vis-à-vis the detention of American citizens and consulate workers in 2018. However, Pastor Brunson's release in November created sympathy in Washington towards Ankara's rightful concerns and improved the dialogue between the two capitals.

PREVAILING DYNAMICS OF TURKISH AMERICAN RELATIONS IN 2019

In light of the aforementioned tension points experienced in Turkish-American relations in the past year, specific prevailing dynamics, which will determine the course of bilateral relations in 2019, can be put forth. These can be outlined as follows:

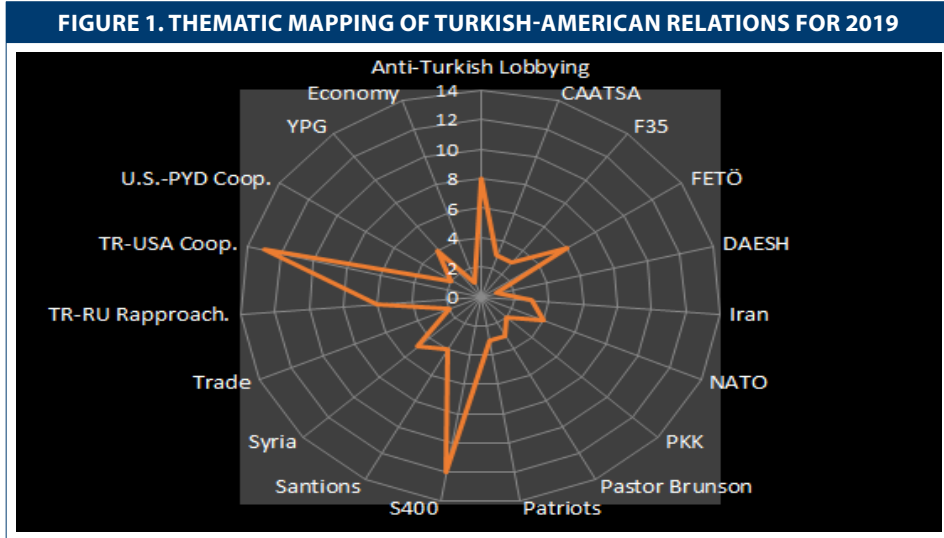
- Turkish-American Defense Cooperation
- The Course of Trump's Renewed Syria Policy
- Mutual Legal Assistance and Extradition of FETÖ Members

Taking into account the recent rapprochement signs between Ankara and Washington, it is possible to argue that the course of Turkish-American bilateral relations is expected to be much more positive in 2019. However, the anti-Turkish legislation restricting Turkey's S-400 acquisition and the sanctions that have direct impacts on the Turkish economy, as well as the challenging process of the American withdrawal from Syria seem to constitute varying degrees of trouble for Ankara.

Given the figure⁸⁴ above, which displays a detailed visual representation of the prevailed dynamics regarding Turkish-American relations, it is possible to argue that the overall picture of Turkey-U.S. bilateral engagement looks much better for 2019. Even though the course of Turkish-American bilateral relations is expected to become ambiguous and challenging from time to time, Ankara and Washington should always

84. This chart is a demonstration of the important dynamics in Turkish-American relations for 2019. It was made possible through systematic coding of significant developments and themes concerning Turkey-U.S. relations on the special research software, Dedoose. For further information, please visit <https://www.dedoose.com/>.

keep in mind that the U.S. and Turkey have been indispensable NATO allies for 67 years and that collectively they can overcome issues through dialogue and cooperation.



FUTURE PROSPECTS AND POLICY SUGGESTIONS FOR 2019

Turkish-American Cooperation

Defense: Turkey's S-400 Acquisition, F-35 Program, and the Patriot Sale. According to Turkish Minister of Defense Hulusi Akar,⁸⁵ Turkey's S-400 purchase remains steady and still, and Russia does not seem disturbed by a potential Patriot purchase. While there seem to be no problems on the Russian side, Turkey's S-400 acquisition is likely to hinder Turkish-American rapprochement mainly due to CAATSA and the anti-Turkish lobby groups' pressure in Congress. In order to overcome a potential crisis, Ankara needs to keep its communication channels wide open with Washington and continue very clearly stating its motivation for buying air defense systems from Russia. Ensuring the careful use of S-400s in case of purchase in line with NATO concerns might help to prevent a potential conflict in 2019.

If S-400 tensions escalate and the U.S. Department insists on the Patriot sale conditions, Turkey might have to deal with a potential F-35 crisis, which will be backed by solid anti-Turkish bills. Turkey's removal from the F-35 program can be

85. "Akar'dan 'Türkiye, ABD'ye S-400'leri inceleme teklifi sundu' iddiasına yanıt: Öyle bir şey yok, S-400 alımı planlandığı gibi devam ediyor," Sputnik, <https://tr.sputniknews.com/turkiye/201812251036794033-hulusi-akar-firatin-dogusu-askeri-harekat/>, (Accessed: January 4, 2018).

quite costly and burdensome; in order to prevent such an anti-Turkish campaign within Congress, Turkey should seek lobby support from the U.S. government and simultaneously work on fostering economic cooperation.

Economy and Trade. Speaking of economic cooperation, it is important to highlight that Turkey is by no means supportive of the Trump administration's pro-sanction policies, which have direct impacts on Turkish trade and the regional security in the Middle East. In 2019, Turkey should bring the trade volume with the U.S. back on track and moderately continue opposing sanctions on Iran in order to stimulate its economy and sustain its vital natural gas importation.

The Trump Administration's Renewed Syria Policy

In 2019, Washington's Syria policy seems to be the most critical factor for U.S.-Turkey relations. Even though Trump seems determined to withdraw American troops from the country, people in his circle of influence, such as Lindsey Graham and Mike Pompeo, will continue pushing for a pro-PYD agenda in Syria. Therefore, it is not difficult to predict that Turkey's upcoming military operation in the eastern Euphrates will create a potential tension in 2019. In that regard, Turkey has to communicate its primary concerns and make it clear that Ankara does not put the PYD and Syrian Kurds in the same basket. In fact, Turkey's sole aim in confronting the YPG forces is to deter terrorism in the region and prevent future conflicts. If the U.S. pulls out of the country, as promised, Turkey will eventually have to undertake the lead in the fight against DAESH. It is also crucial that in the name of closing the foreign policy gap between Washington and Ankara, the U.S. backs Turkey's political transition and stability formulation for Syria.

Mutual Legal Assistance and Extradition of FETÖ Members

The bilateral cooperation regarding FETÖ and the mutual extradition of criminals between Ankara and Washington is expected to gain momentum in 2019, mainly due to the positive developments experienced by the end of 2018. As Turkish Minister of Foreign Affairs Mevlüt Çavuşoğlu indicated on December 17,⁸⁶ the U.S. has already started investigations on FETÖ criminals. Even though such processes take time due to differences in the countries' criminal laws, through increased cooperation, we are set to see serious progress in 2019.

86. "Dışişleri Bakanı Çavuşoğlu: FBI, FETÖ ile İlgili 15 Eyalette Çalışma Başlattı, Tutuklamalar Var", Sputnik, <https://tr.sputniknews.com/turkiye/201812171036673050-cavusoglu-fbi-feto-calisma/>, (Accessed: January 4, 2018).

TURKISH-RUSSIAN RELATIONS

Summary of 2018

- Turkish President Recep Tayyip Erdogan and his Russian counterpart Vladimir Putin agreed on the early delivery of Russian S-400 air defense systems to Turkey on April 3, 2018.⁸⁷
- Russia and Turkey agreed to create a “demilitarized zone” between Syrian rebels and Syrian regime forces in Idlib province.⁸⁸
- The four-way summit on Syria between Turkey, Russia, Germany, and France kicked off in Istanbul on October 27. Following the summit, the leaders agreed that the fragile ceasefire in Idlib should be preserved.⁸⁹
- The leaders of Turkey and Russia participated in an official ceremony marking the completion of the offshore section of the TurkStream natural gas pipeline on November 18.⁹⁰

87. “Turkey, Russia Agree on Early Delivery of S-400 Systems”, Anadolu Agency, April 3, 2018. Retrieved from <https://www.aa.com.tr/en/politics/turkey-russia-agree-on-early-delivery-of-s-400-systems/1107433>.

88. Ensor, J., “Russia and Turkey Agree to ‘Demilitarised Zone’ along Idlib Border”, September 17, 2018. Retrieved from <https://www.telegraph.co.uk/news/2018/09/17/russia-turkey-agree-demilitarised-zone-along-idlib-border/>.

89. “Leaders of Turkey, Russia, France and Germany Hold Syria Talks”, Al Jazeera, October 27, 2018. Retrieved from <https://www.aljazeera.com/news/2018/10/leaders-turkey-syria-france-germany-hold-syria-talks-181027181752402.html>

90. “Erdogan-Putin Mark Completion of Offshore Section of Turkish Stream”, *Hurriyet Daily News*, November 19, 2018. Retrieved from <http://www.hurriyetdailynews.com/erdogan-putin-mark-completion-of-offshore-section-of-turkish-stream-139005>.

The Turkish-Russian relations have witnessed further development in recent years. The relations had a period of tensions in Syria and faced several crises; the most severe being in November 2015 when Turkish fighter jets shot down a Russian Su-24 warplane along Turkey's border with Syria. However, in the end, the two countries' relations overcame these harsh tests and strengthened with every failed provocation - similar to steel after being quenched in water, as Turkish President Recep Tayyip Erdogan mentioned.⁹¹

As part of the process of finding a solution for the Syrian civil war, the two countries have coordinated in Syria and have launched the Astana Process. Both sides often emphasize the importance of a constant implementation of the Astana Agreements reached through the mediation of Russia, Turkey, and Iran. Greater coordination of efforts by the military services of the two countries has succeeded in effectively combating terrorist groups in Syria. The two countries have also set up a demilitarized zone in Syria's Idlib province, potentially preventing a large-scale military operation and a humanitarian disaster in the last rebel stronghold.

As regards energy cooperation, Ankara and Moscow have relaunched energy projects. The TurkStream Pipeline has been going forward and Akkuyu Nuclear Power Plant (NPP), the country's first nuclear power plant project, is under construction. More importantly, the two countries have agreed to Turkey's purchase of Russian S-400 anti-missile defense systems which reflects the most important strategic dynamic between the two countries. It seems that in the last three years, Russia and Turkey managed to upgrade their relations to a strategic partnership. However, there are many geopolitical dynamics on the regional and international levels which the two countries perceive differently.

DYNAMICS OF TURKISH-RUSSIAN RELATIONS

Turkey – Russia Idlib Deal

The year 2018 was a turning point between Turkey and Russia in terms of improving their understanding of the Syrian conflict. Turkey's Operation Olive Branch came about as result of the Turkish-Russian rapprochement. The Idlib deal was also part of this rapprochement. The plan of the Syrian government for Idlib province was to launch a large-scale military offensive and wipe out the local opposition groups. Yet, Idlib and nearby opposition-held areas are also the homes of refugees, some three million civilians displaced from their homes in Syria. A complete offensive military

91. Fraser, S., "Turkey's Erdogan Says Missile Deal with Russia is Final", Defense News, April 3, 2018. Retrieved from <https://www.defensenews.com/global/europe/2018/04/04/turkeys-erdogan-says-missile-deal-with-russia-is-final/>.

operation in the region would result in serious humanitarian consequences. Therefore, the two countries agreed on a roadmap. In accordance with the roadmap, both countries created a demilitarized zone of 15-20 kilometers between the rebels in Idlib and the Syrian regime forces. Most Syrian rebel fighters have pulled the last of their heavy weapons from frontline positions in the Idlib province.

Turkey-Russian Energy Cooperation

Following the Ukrainian crisis, Moscow canceled the South Stream natural gas pipeline, followed by an announcement that they planned to reroute the pipeline to Turkey. The new pipeline named “TurkStream” will directly connect the large gas reserves in Russia to the Turkish gas transportation network, which will provide reliable energy supplies for Turkey. The TurkStream pipeline is composed of two parts that are designed with the potential to supply gas to countries in southern and southeastern Europe. The pipeline is expected to carry 31.4 billion cubic meters of natural gas per year from Russia to Turkey.⁹²

S-400 Anti-Missile Air Defense Systems

The S-400 is Russia’s most advanced long-range anti-aircraft missile system and is able to engage all types of aerial targets including aircrafts, unmanned aerial vehicles (UAV), and ballistic and cruise missiles, at an altitude of up to 27 km.⁹³ Ankara and Moscow have agreed on an early delivery of the missile defense systems to Turkey in 2019, despite raised concerns of NATO allies over the security of allied weaponry and radar systems and the U.S. Department of State’s approval of the sale of a PAC-3 air missile defense system to Turkey.⁹⁴ Turkey’s purchase of the Russian-made air defense system has perpetuated tensions between Ankara and Washington and particularly put strain on Turkey’s relations with the rest of its NATO allies.

HOW WILL CURRENT DYNAMICS EVOLVE IN 2019?

The Future of Idlib Deal

The Russian-Turkish deal on a demilitarized frontline zone is essentially a diplomatic victory, yet the implementation of the deal proved to be difficult. Syrian regime

92. “Erdogan, Putin Celebrate Key Step in Russia-Turkey Gas Pipeline”, i24NEWS, November 19, 2018. Retrieved from <https://www.i24news.tv/en/news/international/189030-181119-erdogan-putin-celebrate-key-step-in-russia-turkey-gas-pipeline>.

93. “Turkey and Russia Agree on Early Delivery for S-400 Missile Systems”, TRTWorld, April 3, 2018. Retrieved from <https://www.trtworld.com/turkey/turkey-and-russia-agree-on-early-delivery-for-s-400-missile-systems-16442>.

94. Ibid.

forces have violated the deal in several areas within the designated buffer zone. Meanwhile, the largest armed group in Idlib, Hayat Tahrir al-Sham, an al-Qaida-linked affiliate, has not completely evacuated the designated buffer zone.

There is no guarantee that those who are involved will not violate the deal and there is no guarantor state to give the green light signaling the beginning of an Idlib offensive. However, both sides have significant reasons for avoiding a major offensive in Idlib province. If the deal is breached by any of its participants, it has the potential to be costly both in terms of financial and humanitarian aspects. An Idlib military offensive operation would be too costly for all sides. Hayat Tahrir al-Sham has several militants from Salafi factions with an extremely high concentration and fighting experience. Idlib is their last stand, which aids them in staying motivated. A massive military attack would provoke a catastrophic amount of casualties, causing more than 3 million people to leave their homes once again. A humanitarian disaster would also isolate Moscow on the international stage.

The Syrian regime seems to be willing to eliminate the last of the rebels, but they are heavily dependent on Russian military support. Without Russian air and ground support, it is not likely that the regime will launch a serious operation in Idlib.

Overall, the possibility of a massive confrontation in Idlib in 2019 is not negligible but is low.

Turkey-Russian Energy Cooperation

Cooperation between Turkey and Russia in the energy sector is likely to continue. TurkStream is one of the pipeline projects that will help satisfy Turkey's rising energy demand; however, other sources are available to Turkey. The Trans-Anatolian Natural Gas Pipeline (TANAP) will bring natural gas produced in Azerbaijan's Shah Deniz and other areas of the Caspian Sea to Turkey and Europe. If gas exploration in the Eastern Mediterranean Sea south of Cyprus is technologically feasible, Turkey may also have another pipeline project serving the Turkish market and potentially re-exporting gas to southeastern Europe. In 2019, it is likely that pipeline abundance will bring about the necessary energy plans including the proposal for the connection of TurkStream to the Trans-Anatolian Natural Gas Pipeline (TANAP) and the delivery of the remaining volume of Russian gas to European customers via TANAP, as mentioned by Cavusoglu.⁹⁵ This proposal serves Russia's aim to sell natural gas to Europe via Turkey and make Turkey an important energy transit state.

95. Abbasova, N., "Ankara Offers to Connect Turkish Stream, TANAP", Azernews, 2016. www.azernews.az/oil_and_gas/100692.html (Accessed: August 4, 2016).

Delivery of Russian S-400 Anti-Missile Defense Systems

The growing missile threats presented by the Syrian crisis pushed Turkey into buying S-400 anti-missile defense systems. Yet, NATO allies have voiced their concerns that the S-400 systems threaten the interoperability of NATO's integrated defense systems. The U.S. offered to sell Patriot systems to Turkey after the Turkish plan to buy the Russian S-400 anti-missile defense system was announced. However, Ankara seems determined to buy the S-400 systems despite American opposition to the deal and in 2019, it is likely that the systems will be delivered to Turkey. The Franco-Italian EUROSAM consortium is already working with Turkish companies, namely ASELSAN and ROKETSAN, to produce an advanced air and missile defense system that can be integrated with NATO's command and control network. Another option for Ankara is to use the new defense system upon its completion along with the S-400 missile systems. It is possible that Turkey might buy further defense systems that could be purchased from the U.S., if it receives guarantees from allies that the sales will not be blocked by the U.S. Congress in 2019.

All in all, in discussing bilateral cooperation issues, Erdogan and Putin often expressed satisfaction with the further implementation of large scale projects and the positive dynamics in the countries' political and economic relations. Putin-Erdogan relations grow into a Russian-Turkish partnership. The two leaders' relations have been robust following the recent normalization of bilateral relations.

CONCLUSION

In this work, the SETA Security team has put forth Turkey's critical security issues, both within and beyond the country's borders, and has elucidated the main developments that shaped these issues in the last year. Our team concluded that a multitude of political, military, and economic considerations have significantly influenced Turkey's security and defense policies in 2018. We expect that the ongoing conflict in Syria and Turkey's fight against the PKK will remain the most important topics this year. Meanwhile, Turkey will likely maintain and further enhance its military activism abroad. It is also likely that the country will continue its considerable investment in the national defense sector as part of its aim to achieve greater autarky in the defense industry.

Furthermore, we expect that Turkey will need to balance the emerging alliance between Greece, Greek Cypriots, Israel, and Egypt in the Eastern Mediterranean and to enhance its subtle influence over the Cyprus issue. Finally, it is not possible to provide a comprehensive picture of Turkey's security issues without taking into consideration the country's bilateral relations with the U.S. and Russia. Our team concluded that potential fluctuations in Turkish-American and Turkish-Russian relations will continue to influence significantly Turkey's strategic security preferences in 2019.

In this work, by carefully examining the underlying dynamics, our team attempted to anticipate the evolution of Turkey's major security issues in 2019. The *SETA Security Radar* has tried to raise awareness among both policy-makers and

interested researchers, to achieve a common understanding of the security prospects that await Turkey in 2019, and to suggest ways in which the latter can be handled. Bearing this in mind, another major objective of *SETA Security Radar* is to establish a bridge between Turkish decision-makers and the Security Studies community. Our team believes that this would pave the way for developing better defined and more relevant security and defense policies.

SETA SECURITY RADAR

TURKEY'S SECURITY LANDSCAPE IN 2019

In 2018, Turkey encountered a complex security environment and endured a wide range of challenging situations ranging from cross-border counterterrorism operations to multidimensional conflicts involving various influential state actors. With this in mind, the SETA Security team compiled *SETA Security Radar: Turkey's Security Landscape in 2019* in line with the critical developments that took place in 2018. This work aims to provide a timely and accessible assessment of the challenges awaiting Turkey in 2019. Hence, *SETA Security Radar: Turkey's Security Landscape in 2019* pertains to the following topics: Turkey's role in Syria, Turkey's counterterrorism strategy, Turkey's military activism, the Turkish defense agenda, Turkey and the Eastern Mediterranean, and Turkey's bilateral relations with the United States and Russia. By creating awareness among policymakers and interested researchers, *SETA Security Radar: Turkey's Security Landscape in 2019* intends to achieve a common understanding of the security prospects awaiting Turkey in 2019.

